PeopleSoft®

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook

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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 HRMS 8.9 Application Fundamentals Preface

This preface discusses:

- PeopleSoft products.
- Additional resources.
- Deferred processing.
- Common elements used in PeopleSoft HRMS.

Note. *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook* provides you with essential information describing the setup and design of your HRMS system. For information about how to implement and process information for specific products, see the individual PeopleBooks for the appropriate HRMS application.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product suite: PeopleSoft Enterprise HRMS.

Deferred Processing

Several pages in PeopleSoft HRMS applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

Common Elements Used in PeopleSoft HRMS

The following common elements appear through PeopleSoft HRMS.

PeopleBooks Standard Page Element Definitions

Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.

Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and background processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID), **Person ID**, and **ID**	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate a person has more than one job data record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee, contingent worker, person of interest, or applicant.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, contingent worker, person of interest, or applicant.

Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on.)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the background process runs. After the background process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the background process runs. Don't Run ignores the request when the background process runs.
Process Monitor	Click this button to access the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Enterprise Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report. Report Manager Click this button 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	A request identification that represents a set of selection criteria for a report or process. Run Click this button to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.

SetID	An identification code that represents a set of control table information. SetIDs enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is *Active* or *Inactive*.
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes, Naming

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

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

Person Name or Current Name

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

Title	Select a title. If you are reporting workforce information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the person's official first name.
Preferred First Name	For The Netherlands, enter the person's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this person.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married people. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.

Middle Enter the person's middle name, if applicable.

Last Name Enter the person's official last name.

Suffix Select a suffix, if applicable.

Second Last Name For Spanish persons, enter the second surname (mother's surname).

Alternate Character Name Use this field to enter the person's name using alternate characters (such as Japanese phonetic characters).

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

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

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

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

Displaying Japanese Names on Pages

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

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

See Chapter 9, "Setting Up and Working with Languages," Working with Double-Byte Characters, page 190.

PeopleBook Standard Group Boxes, Pay Components

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

Amounts Tab

Access the Amounts tab.



Pay Components - Amounts tab

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

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

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

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

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

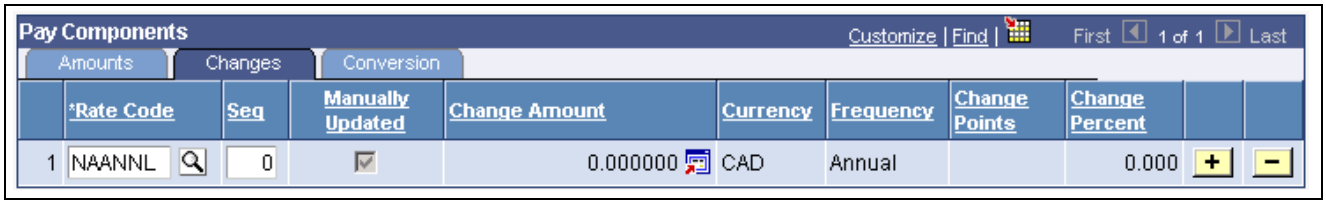
Points The salary points associated with this rate code, if any.

Percent If the rate code rate type is Percent, the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group A rate code group enables you to be more specific when calculating percentages based components as part of your workforce compensation package.

Changes Tab

Access the Changes tab.



Pay Components - Changes tab

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

Manually Updated The system selects this if you have manually updated the pay components.

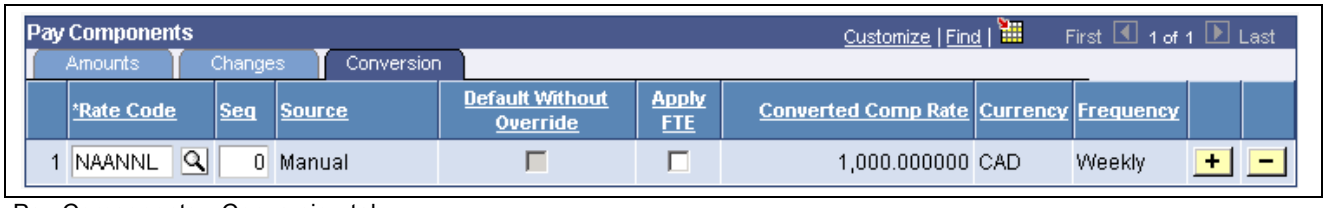
Change Amount The overall change amount to this pay component rate.

Change Points The overall change amount (in points) to this pay component, if applicable.

Change Percent The overall percentage change to this pay component, if applicable.

Conversion Tab

Access the Conversion tab.



Pay Components - Conversion tab

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

Source	The system displays the source of the rate code, such as Absorbing Premium, Seniority Pay, Job Code, or Manual.
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the worker should normally work in the corresponding job. This field isn't available for Percent rate codes.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation

CHAPTER 1

Getting Started with PeopleSoft Enterprise HRMS

This chapter provides an overview of PeopleSoft Enterprise HRMS and discusses:

- PeopleSoft Enterprise HRMS integrations.
- PeopleSoft Enterprise HRMS implementation.

PeopleSoft Enterprise HRMS Overview

PeopleSoft HRMS is an integrated suite of applications and business processes that are based on PeopleSoft's Pure Internet Architecture (PIA) and enterprise portal technologies.

The sophisticated features and collaborative, self-service functionality available in PeopleSoft HRMS enable you to manage your human resources from recruitment to retirement while aligning your workforce initiatives with strategic business goals and objectives.

PeopleSoft Enterprise HRMS Integrations

PeopleSoft HRMS integrates with other PeopleSoft applications, such as PeopleSoft Enterprise Financials, PeopleSoft Enterprise Workforce Analytics, and PeopleSoft Enterprise Learning Management. PeopleSoft HRMS also integrates with other third-party applications. PeopleSoft HRMS uses various integration technologies to send and receive data.

We discuss integration considerations in the implementation chapters in the PeopleBooks. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Enterprise HRMS 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.

PeopleSoft HRMS also provides component interfaces to help you load data from your existing system into PeopleSoft HRMS tables. Use the Excel to Component Interface utility with the component interfaces to populate tables.

This table lists all of the components documented in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook* that have component interfaces:

Component	Component Interface	References
Departments component (DEPARTMENT_TBL)	DEPARTMENT_TBL	See Chapter 12, "Setting Up Organization Foundation Tables," Maintaining Departments, page 277.
Establishment component (ESTABLISHMENT_DATA)	ESTABLISHMENT_DATA	See Chapter 12, "Setting Up Organization Foundation Tables," Defining Establishments, page 255.
Job Code Task Table component (JOBCODE_TASK_TABLE)	JOBCODE_TASK_TABLE	See Chapter 14, "Setting Up Jobs," Defining Job Tasks and Responsibilities, page 328.
Job Code Table component (JOB_CODE_TBL)	CI_JOB_CODE_TBL	See Chapter 14, "Setting Up Jobs," Classifying Jobs, page 312.
Job Profile component (JOB_ PROFILE_TBL	CI_JOB_PROFILE_TBL	See Chapter 14, "Setting Up Jobs," Defining and Cloning Job Profiles, page 304.
Job Task Table component (JOB_TASK_TABLE)	JOB_TASK_TABLE	See Chapter 14, "Setting Up Jobs," Defining Job Tasks and Responsibilities, page 328.
Location component (LOCATION_ TABLE)	LOCATION_TABLE	See Chapter 12, "Setting Up Organization Foundation Tables," Establishing Locations, page 265.
WCB Classifications component (CAN_WCB_CU_RATES)	CAN_WCB_CU_RATES	See Chapter 22, "Setting Up Payroll Tax Tables," (CAN) Defining Canadian WCB Assessment Reporting, page 518.
FLSA Calendar Table (FLSA_ CALENDAR)	FLSA_CALENDAR	See Chapter 21, "Setting Up Pay Calendars," Setting Up FLSA Calendars, page 449.
Pay Run Table (PAY_RUN_TABLE)	PAY_RUN_TABLE	See Chapter 21, "Setting Up Pay Calendars," Creating Pay Run IDs, page 442.
Tax Location Table component (TAX_LOCATION_TBL)	TAX_LOCATION_TBL	See Chapter 22, "Setting Up Payroll Tax Tables," (USA) Defining Tax Locations, page 507.

Component	Component Interface	References
Tax Type Table USA component (TAX_TYPE_TBL)	TAX_TYPE_TABLE	See Chapter 22, "Setting Up Payroll Tax Tables," Establishing Tax Types for PeopleSoft Enterprise Accounts Payable Integration, page 502.
U.S. SOC Table component (US_SOC_TBL)	US_SOC_TABLE	See Chapter 22, "Setting Up Payroll Tax Tables," Setting Up U.S. Standard Occupational Classifications for Alaska, page 513.

See Also

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

Enterprise PeopleTools PeopleBook: Component Interfaces

CHAPTER 2

Understanding HRMS

This chapter discusses:

- Control tables, transaction tables and prompt tables.
- Business units, tablesets and setIDs.
- Effective dates.
- Person or position structure.

Note. This chapter introduces you to some of the basic concepts used through PeopleSoft HRMS.

Control Tables, Transaction Tables and Prompt Tables

PeopleSoft HRMS is a table-based system that stores critical general data, such as companies, work locations, and system specifications in a central location. The system enables users to access the same basic information while maintaining data accuracy and integrity.

Tables that are central to PeopleSoft HRMS include control tables, transaction tables, and prompt tables.

Control Tables

Control tables store information that is used to process and validate the day-to-day business activities (transactions) users perform with PeopleSoft HRMS applications.

The information stored in control tables is common and shared across an organization, for example, master lists of customers, vendors, applications, items, or charts of accounts. By storing this shared information in a central location, control tables help to reduce data redundancy, maintain data integrity, and ensure that users have access to the same basic information.

The information stored in control tables is generally static and is updated only when fundamental changes occur to business policies, organizational structures, or processing rules.

Note. Control tables are tables that include the SETID key field (setID). As you set up control tables, you'll notice that it is the setID that enables control table information to be shared across business units.

Transaction Tables

Transaction tables store information about the day-to-day business activities (transactions) users perform with PeopleSoft HRMS applications.

The information stored in transaction tables often changes and is updated more frequently than the information stored in control tables.

Note. Transaction tables are tables that include the BUSINESS_UNIT field (which may or may not be used as a key field).

Prompt Tables

Prompt tables are tables that are associated with fields on PeopleSoft application pages and which display valid data values for those fields when a user selects a prompt or search option.

The data values stored in prompt tables are retrieved from control tables, transaction tables, or other PeopleSoft tables.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Business Units, Tablesets and SetIDs

PeopleSoft regulates HRMS system data through the use of business units, tablesets, and setIDs.

Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HRMS based on how *your* business is organized.

You must define at least one business unit. The BUSINESS_UNIT field is included on all transaction tables.

Tablesets and SetIDs

Tablesets and setIDs are devices that enable you to share – or restrict – information across business units. For example, with tablesets and setIDs you can centralize redundant information such a country codes while keeping information such as departments and job codes decentralized. The overall goal of tablesets and setIDs is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

You must define at least one tableset/setID. The SETID key field is included on all control tables.

See Also

Chapter 4, “Working with System Data Regulation in HRMS,” page 29

Effective Dates

PeopleSoft HRMS uses effective dates to store historical, current, and future information. Effective dates enable you to:

- Maintain a chronological history of your data. By storing effective-dated information in tables, the system enables you to review past transactions and plan for future events. For example, you can roll back your system to a particular time to perform historical analyses for your company. Or, you can set up tables and data ahead of time without using tickler or pending files.

- Maintain the accuracy of your data. By comparing the effective dates in prompt tables to the effective dates on application pages, the system displays only those values that are valid for the current time period. For example, you create a new department code with an effective date of May 1, 1998. Then, on the Job Data pages, you enter a new data row for an employee with an effective date *before* May 1, 1998. When you select the prompt for the department field, you won't see the new department code because it is not in effect.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Person or Position Structure

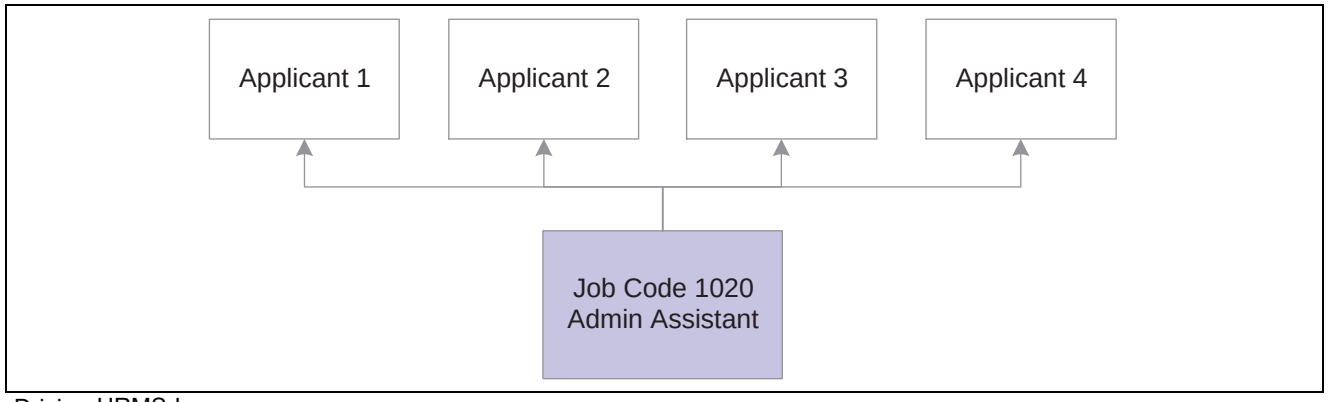
PeopleSoft HRMS enables you to structure or drive your PeopleSoft Enterprise Human Resources system by person or by position. Before you set up information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

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

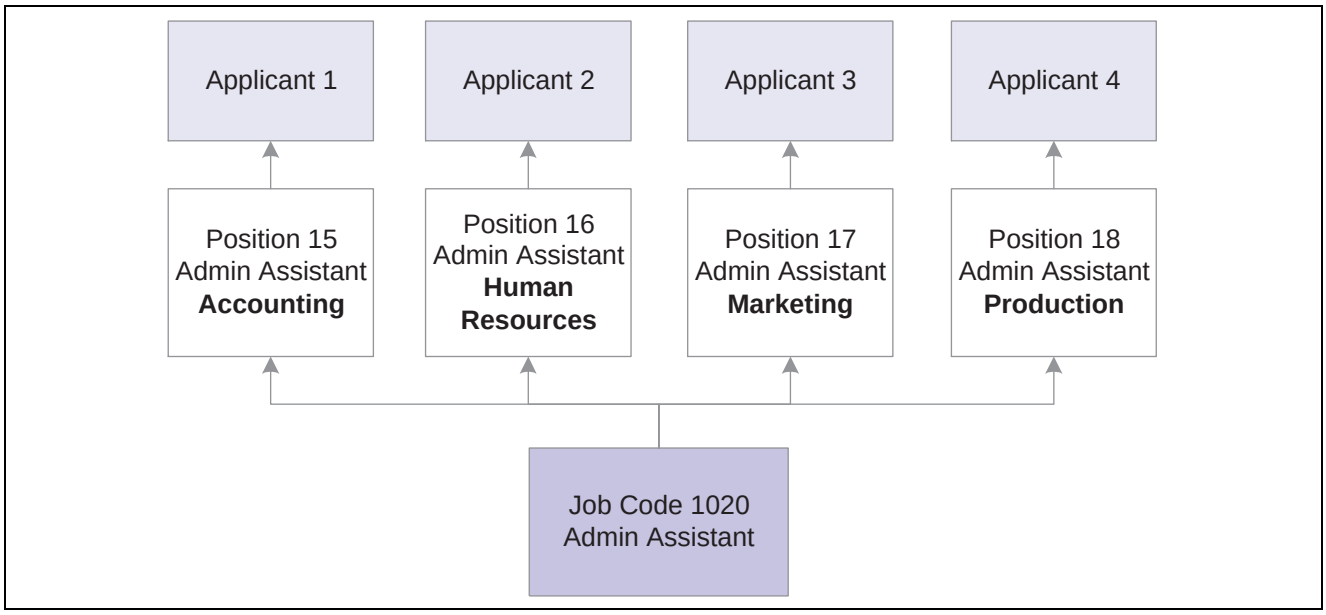
You can have several positions in the same job code; positions track details of a particular job in a specific department or location. For example, in job code 1020, Administrative Assistant, you can define different administrative assistant positions with different position numbers—one in your marketing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

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



Driving HRMS by person

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



Driving HRMS by position

Why Does It Matter?

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

Which Method Should You Use?

To determine whether you should drive your system by person or position, consider the following:

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

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

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

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

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

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

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

Considerations for Pension, Payroll, and Benefits Applications

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions"

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

CHAPTER 3

Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs

This chapter provides an overview of organizational relationships and multiple jobs.

Organizational Relationships

Organizations have relationships with a variety of people for a variety of reasons. PeopleSoft enables you to manage the data of those people with whom you have an organizational relationship. A person can have more than one organizational relationship at any one time or can change relationships over time.

Organizational relationships fall into one of the following categories:

- Employee.

  A person who is hired to provide services to the organization and has a legal employee relationship with the organization.

- Contingent worker.

  A person who provides services to the organization and who does not have a legal employee relationship with the organization.

  Note. PeopleSoft Enterprise Payroll for North America does not process payroll for contingent workers.

- Person of interest (POI).

  A person who is not an employee or contingent worker but is of interest to the organization. POIs can be:

  - COBRA participants.
  - Pension payees.
  - Stock - board members.
  - Stock - non-HR administered employees.
  - Global Payroll payees.
  - Campus Solutions persons.
  - External trainees
  - External instructors
  - Any person who fits within a POI type you've created.
  - Applicants who require payment through Payroll for North America prior to being hired.

Note. Dependents, beneficiaries, emergency contacts, and health and safety physicians are not captured as POIs.

This chapter refers only to those people with organizational relationships.

Personal Information Data for People with Organizational Relationships

The system requires the same personal information regardless of a person's organizational relationship so all people with an organizational relationship are added to the system using the Personal Data component (PERSONAL_DATA). This enables you to simplify data entry and maintenance and to use a single, unique identification code for people as you add new organizational instances for them or as their relationships to the organization change.

The generic Add a Person component is on the Administer Workforce menu, but there are additional components on the menus of other applications enabling you to create records for people of interest specifically for that application. For example, you can add PeopleSoft Enterprise Global Payroll payees on the Add a POI Payee component (PERSONAL_DATA) on the Global Payroll & Absence Mgmt, Payee Data menu.

Note. Enter people whose relationship to the organization does not constitute an organizational relationship, such as emergency contacts or beneficiaries, on specialized components throughout HRMS.

The identification number can be labeled as EmplID, Person ID, or ID. These fields all refer to the same identification number. Do not assume that a field labeled EmplID refers to employees only.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Understanding Identification Assignment.

Organizational Instances

An organizational instance is a single occurrence of an organizational relationship. After you create a personal information record for a person, create an organizational instance to enter and maintain job records. An organizational instance has its own hire date and contains the accumulation of the person's job data records that are associated with that instance.

Use one of the following components to create an organizational instance:

- New Employment Instance (JOB_DATA_EMP).
- New Contingent Worker Instance (JOB_DATA_CWR).
- Add Person of Interest Job (JOB_DATA_POI).

  Note. Access this component from the Administer Workforce menu when you select a POI type that requires a job record. Otherwise, this component is available, under varying names, on the menus of applications that process POIs with jobs.

Note. Hire applicants with data that is in the system by using the Hire component (ER_APP_HIRE_LAUNCH) in PeopleSoft Enterprise Talent Acquisition Manager.

Note. Update and maintain job data for the instances on the Job Data component (JOB_DATA) or Current Job component (JOB_DATA_CURRENT).

Organizational Instances for People of Interest

PeopleSoft delivers a number of different POI types that you can activate and use as needed. The following types require job records:

- COBRA qualified beneficiaries
- Pension Payees
- Stock - board members
- Stock - non-HR employees
- Global Payroll payees
- Student refunds

Some of the POIs you may want to track will not require a job record. If you are tracking POIs without jobs, you will need to use the Add a Person of Interest component (PERS_POI_ADD) to indicate what kind of POI relationship the person has, as well as to enter any necessary security parameters to control access to the person's data.

Example: A Person with Three Organizational Instances

Mario Estevez needs to successfully complete training with a third-party vendor before starting his new position. To reimburse Mario for the cost of the training, he needs a job record. The human resources administrator adds him in the system by using the Add a Person component and assigns him the ID 1234. The administrator then creates a POI job record for him by using the Add Person of Interest Job component.

After Mario completes his training, he joins the company as an employee. The human resources administrator terminates his POI instance (by using the Job Data component) and creates an employment instance by using the Add Employment Instance component.

A little more than a year after joining the company, Mario is given the opportunity to participate in a short-term project. The human resources administrator creates a contingent worker instance for him on the Add Contingent Worker Instance component.

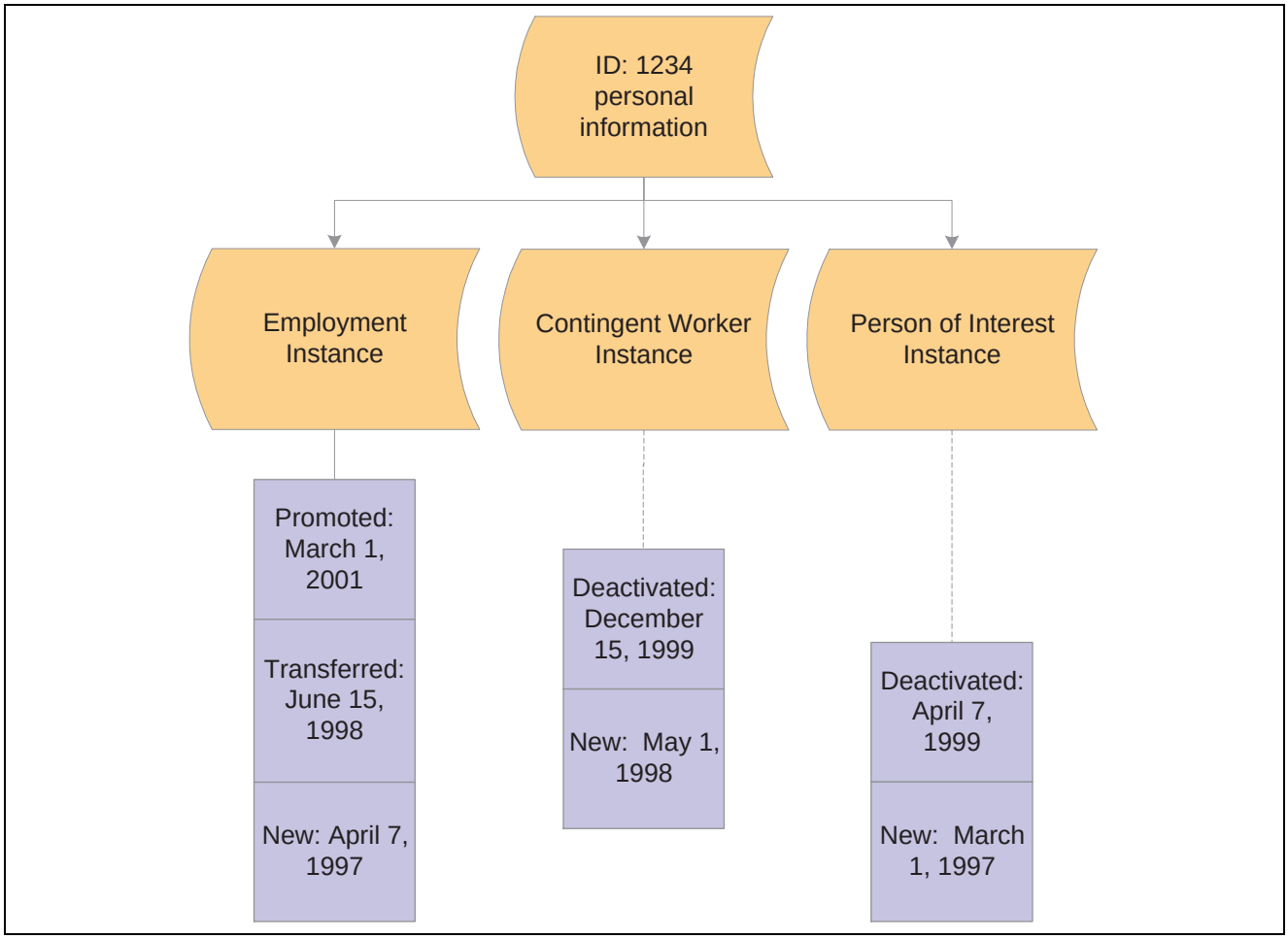
Mario is later transferred and promoted in his employee job, and a new job data row is inserted for each of these changes. The historical job records accumulate under the organizational instance in which they are created. The human resources administrator updates the job records for the employment and contingent worker instances by using the Job Data component.

This table lists the changes to Mario's job records over a four-year period:

Action Date	Employment Instance	Contingent Worker Instance	POI Instance
March 1, 1997			POI instance created.
April 7, 1997			POI instance job record deactivated.
April 7, 1997	Employment instance created with this date as the hire date.		

Action Date	Employment Instance	Contingent Worker Instance	POI Instance
May 1, 1998	No change to employment job record.	Contingent worker instance created with this as the hire date.	
June 15, 1998	Transferred departments	No change to the contingent worker job record.	
December 15, 1999	No change to employment job record.	Contingent worker job ends and the job data record is deactivated. This date is the termination date for this instance.	
March 1, 2001	Promoted.		

This diagram illustrates how the system stores Mario's person and job data:



Mario's employee, contingent worker, and POI instances and the job records that are associated with those instances

Employment Record Numbers

Employment record numbers (ERNs), in combination with a person's ID, uniquely identify a person's job data records. The system distinguishes between a person's organizational instances by using a new ERN when you create a new instance.

The system also creates a new ERN when you create a job data record in the following circumstances:

Action	Comments
Create concurrent jobs, including: • Additional assignments. • Additional organizational instances. • (JPN) Additional appointment *(kenmu)*. • (CHE) Multicontract.	• Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) to add an additional job (using the action of Add Additional Job) to the one an employee or contingent worker already holds. This job is added to an existing organizational instance, retains the employment dates of the original job, and is terminated if you terminate the original job. **Note.** Access the Concurrent Job Data component (JOB_DATA_CONCUR) from the Add Additional Assignment component. • Use the Add Employment Instance component or Add Contingent Worker Instance component to create an additional organizational instance for a worker using the action Hire. This job record is not tied to any other jobs that the worker holds, has its own job data, and has its own hire dates. HIR is used in the Add Employment Instance only. The Add Contingent Worker Instance component uses the ADD action. **Note.** Additional organizational instances are identified as hires on human resources reports and additional assignments are not. Use this distinction to guide how you enter additional jobs in the system. If you do not need to distinguish between concurrent jobs, choose one method of entering concurrent jobs and use it consistently. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Additional Assignments. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)".

Action	Comments
Create a global assignment (employees only).	Use the Home/Host Information component (HOME_HOST_DATA) to create a global assignment job record. The system gives the global assignment (host) job record a new employment record number to distinguish it from the employee's original (home) job record. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Global Assignments*
Create a temporary assignment, including Japanese intercompany transfer *(shukkou)*.	When you assign a worker to a temporary assignment on the Job Data component, the system suspends the substantive job and identifies the temporary job record with a new employment record number. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "(JPN) Tracking Intercompany Transfers (Shukkou)".

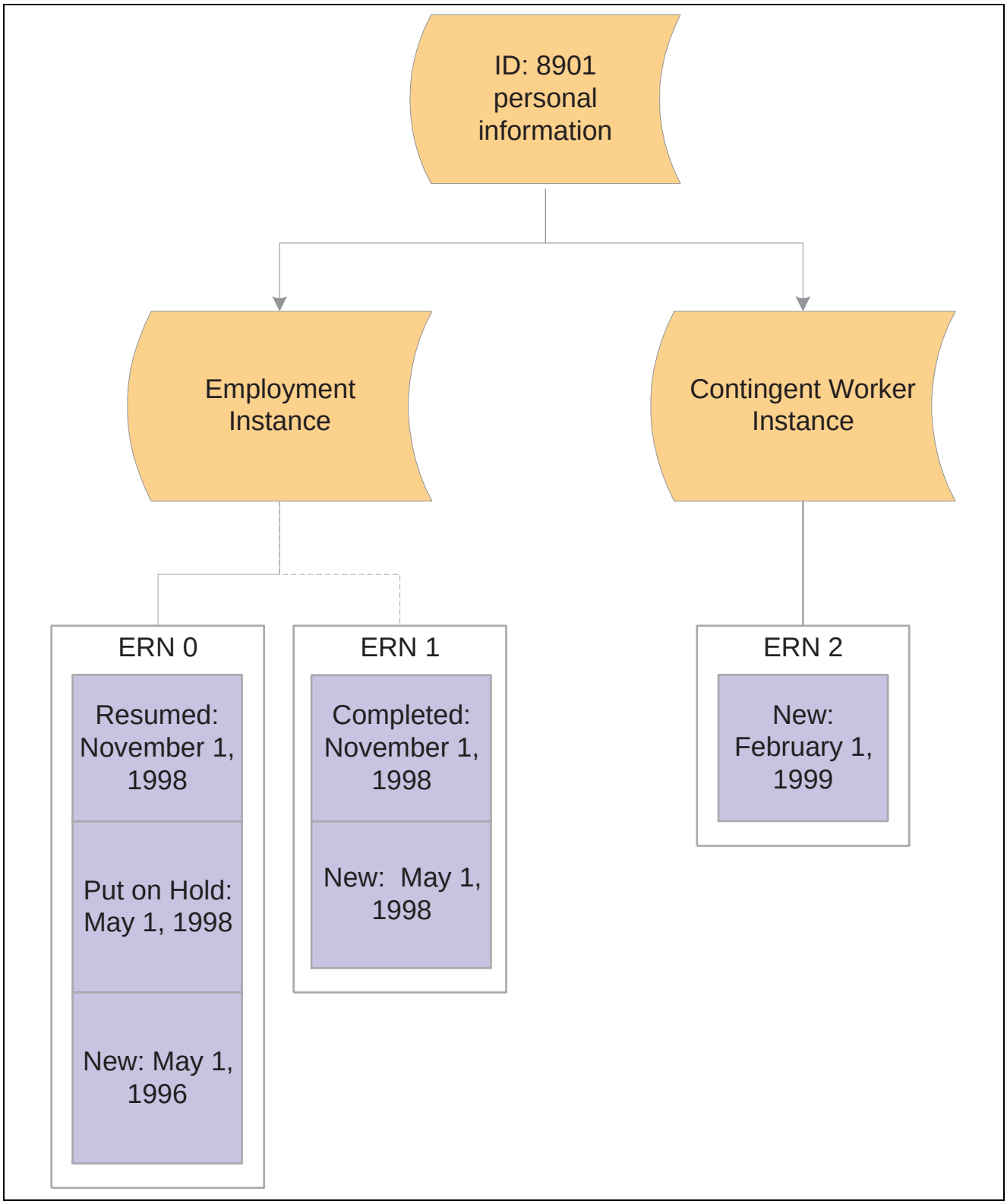
Example: A Person with Multiple ERNs

Jan Smith is hired to work in the sales division of Sutter Enterprises. After two years of outstanding performance, she starts a six-month temporary assignment in a subsidiary company to assist with the launch of a new application. At the end of the assignment she returns to her original job, but three months later she takes on a consulting role at the subsidiary in addition to her sales job. This table lists the changes to Jan's job records over the three-year period:

Action Date	Employment Instance	Contingent Worker Instance
May 1, 1996	Employment instance created. Job record identified by: • ID: 8901 • ERN: 0 • Organizational relationship: employee	
May 1, 1998	Substantive job suspended.	
May 1, 1998	New job record for temporary assignment created. Job record identified by: • ID: 8901 • ERN: 1 • Organizational relationship: employee	
November 1, 1998	Temporary assignment completed.	

Action Date	Employment Instance	Contingent Worker Instance
November 1, 1998	Substantive job resumed.	
February 1, 1999	No change to employment job record.	Contingent worker instance created. Job record identified by: • ID: 8901 • ERN: 2 • Organizational relationship: contingent worker

This diagram illustrates Jan Smith's job records under the organizational relationships:



Jan Smith's job records from May 1, 1996 to February 1, 1999

Multiple Jobs

Workers who hold more than one active job at the same time under one organizational instance create unique requirements in People Soft Human Resources, Benefits Administration, Payroll for North America, and Pension Administration. If your organization allows a worker to hold multiple jobs, you must be able to:

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

This section discusses:

- Multiple employment records compared to multiple jobs.
- Multiple jobs and PeopleSoft Enterprise Human Resources.
- Multiple jobs and Base Benefits.
- Multiple jobs and PeopleSoft Enterprise Benefits Administration.
- Multiple jobs and Payroll for North America.
- Multiple jobs and PeopleSoft Enterprise Pension Administration.

Multiple Employment Records Compared to Multiple Jobs

A person can have multiple ERNs without holding multiple jobs.

A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.

  The two organizational instances have their own job records, each identified by a unique ERN.
- A substantive job and a temporary job where the substantive job is suspended.

People have multiple jobs when they have:

- More than one active contingent worker or employment organizational instance.
- A substantive job and an additional assignment where the substantive job is not suspended.

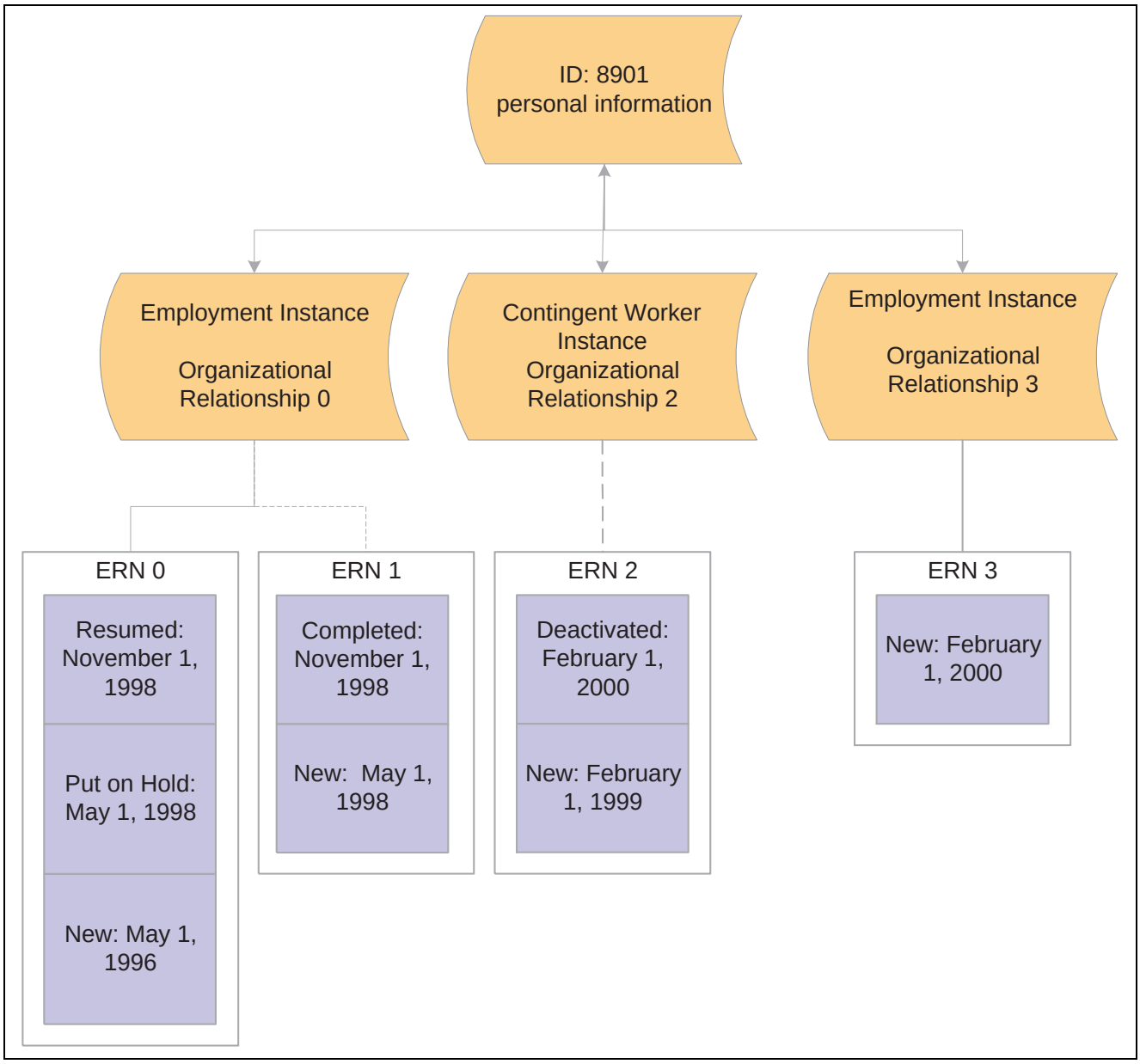
Note. Multiple jobs processing does not apply to person of interest job records.

See Chapter 3, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Multiple Jobs, page 19.

Example: A Person with Multiple Jobs

As of February 1, 1999, Jan Smith does not have multiple jobs. She has an active employment job record and an active contingent worker job record, distinguished in the system by their ERNs. After holding the consulting job at the subsidiary company as a contingent worker for a year, management decides to make the job permanent. This requires creating a new employment job record in addition to the original job record. Jan Smith now has multiple jobs.

This diagram illustrates Jan Smith's organizational relationships and job records as of February 1, 2000:



Jan Smith's job records from May 1, 1996 to February 1, 2000

Multiple Jobs and PeopleSoft Human Resources

When a worker holds multiple jobs, each job must have its Job Data record. When you enter an additional job, you need to make two decisions:

- For reporting purposes, which of the worker's jobs is the primary job.

  You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.

- Whether the worker's jobs will share a benefits program or have separate benefits.

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

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

Multiple Jobs and Base Benefits

Some of the issues regarding the PeopleSoft Human Resources Base Benefits business process and multiple jobs are:

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

Designate the Primary Job for Benefits

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

When you create a job record for a person, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Jobs Flag page (BN_PRIJOBS_MAINT). As you create other Job Data records for a person, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job Flag page would look like for an employee who is a professor and dean at a university and a doctor at the university hospital:

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

The primary job flag is used throughout the system to:

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

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

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

Group Jobs to Determine Benefit Eligibility

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

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

All enrollments for benefits are specific to a benefit record number.

Maximum Number of Concurrent Jobs

A worker can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll for North America can process only 50 benefit record numbers on one paycheck.

Calculate Benefit Deductions

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

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

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

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

Apply Regulatory Contribution Limits

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

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

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

Percent of Gross Deduction Limits

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

Multiple Jobs and PeopleSoft Benefits Administration

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

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

Determine Eligibility with Multiple Jobs

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

- Eligibility Criteria
- Grouping Method
- Evaluation Method

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

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

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

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

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

One or More At least one job in the group must satisfy the rule.

All All jobs in the group must satisfy the rule.

Sum The sum of the eligibility field's data value from all jobs in the group must satisfy the rule.

For example, the table below lists the eligibility of the employee with three jobs when processing an event for Benefit Record 0 and the Eligibility Rule for the FTE file is:

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

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

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

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

Benefits Credits and the Primary Job

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

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

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

Trigger Events with Multiple Jobs

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

There are three main categories of events:

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

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

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

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

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

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

Passive Events and Multiple Jobs

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

Mark Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. In prior versions, events were flagged for reprocessing consideration when a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior versions, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the "non-primary" Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. This flagging mechanism searches for, and flags all events for the employee that may have used the Job row indicated in the trigger. Although the system can't be sure that the Job row was used for eligibility purposes, it eliminates the risk of not flagging an event that should be considered for reprocessing.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

PeopleSoft Enterprise Benefits Administration 8.9 PeopleBook, "Defining Eligibility Rules," Setting Up Eligibility Rules

Multiple Jobs and PeopleSoft Payroll for North America

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

- Primary Pay Group

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

- Single Check

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

- Deduction Limits

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

- Union Dues

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

- FLSA Overtime Rules

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

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

Multiple Jobs and PeopleSoft Pension Administration

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

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

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

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

Multiple Jobs and the Primary Job Record

The system examines all of a worker's records and selects a primary record by choosing the first record that it finds in the following prioritized order of categories:

1. Overrides
2. Covered Active
3. Covered Inactive
4. Any Active
5. Any Inactive

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

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

See Also

PeopleSoft Enterprise Pension Administration 8.9 PeopleBook

CHAPTER 4

Working with System Data Regulation in HRMS

This chapter provides an overview of PeopleSoft HRMS system data regulation, lists prerequisites, and discusses how to:

- Work with business units.
- Work with tablesets.
- Work with permissions lists and system defaults.
- Work with job records.

Understanding PeopleSoft HRMS System Data Regulation

As companies grow larger and more complex, they often need to collect the same type of data across many locations. PeopleSoft business units and setIDs enable you to organize businesses into logical units other than companies and departments and to define how organizational data is shared among these units.

PeopleSoft HRMS system data is regulated through the use of business units, tablesets and setIDs, and tableset sharing. Business units are logical devices that enable you to implement PeopleSoft HRMS based on how *your* business is organized. Tablesets, setIDs, and tableset sharing are organizational devices that enable you to share – or restrict – the information stored in your HRMS system across business units.

Prerequisites

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

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

Component	Location
TableSet IDs component (SETID_TABLE)	PeopleTools, Utilities, Administration, TableSetIDs
Business Unit component (HR_BUSINESS_UNIT) See Chapter 12, "Setting Up Organization Foundation Tables," Defining Business Units, page 227.	Set Up HRMS, Foundation Tables, Organization, Business Unit

Component	Location
Org Defaults by Permission List component (OPR_DEF_TBL_HR) See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List
Business Unit Options Defaults component (BUS_UNIT_OPT_HR) See Chapter 12, "Setting Up Organization Foundation Tables," Setting Business Unit Defaults, page 232.	Set Up HRMS, Foundation Tables, Organization, Business Unit Options Defaults
Record Groups component (REC_GROUP_TABLE)	PeopleTools, Utilities, Administration, Record Group
TableSet Control component (SET_CNTRL_TABLE1)	PeopleTools, Utilities, Administration, TableSet Control

The procedures for accessing and entering information in these component are the same as those for updating any PeopleSoft component.

Working with Business Units

This section provides an overview of business units and discusses how to:

- Determine your business unit structure.
- Implement business units.
- Implement multiple business units.

Understanding Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HRMS based on how *your* business is organized.

You can define business units that reflect the needs of your internal human resources departments. For example, you can define business units that group workers according to functional or administrative tasks.

Or, you can define business units that reflect the business structure of your enterprise. For example, you can define a single business unit to represent your entire organization, or you can define several business units to represent various companies, agencies, subsidiaries, divisions, departments, or branch offices within your organization.

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

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

Note. For PeopleSoft HRMS, you *must* establish at least one business unit.

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

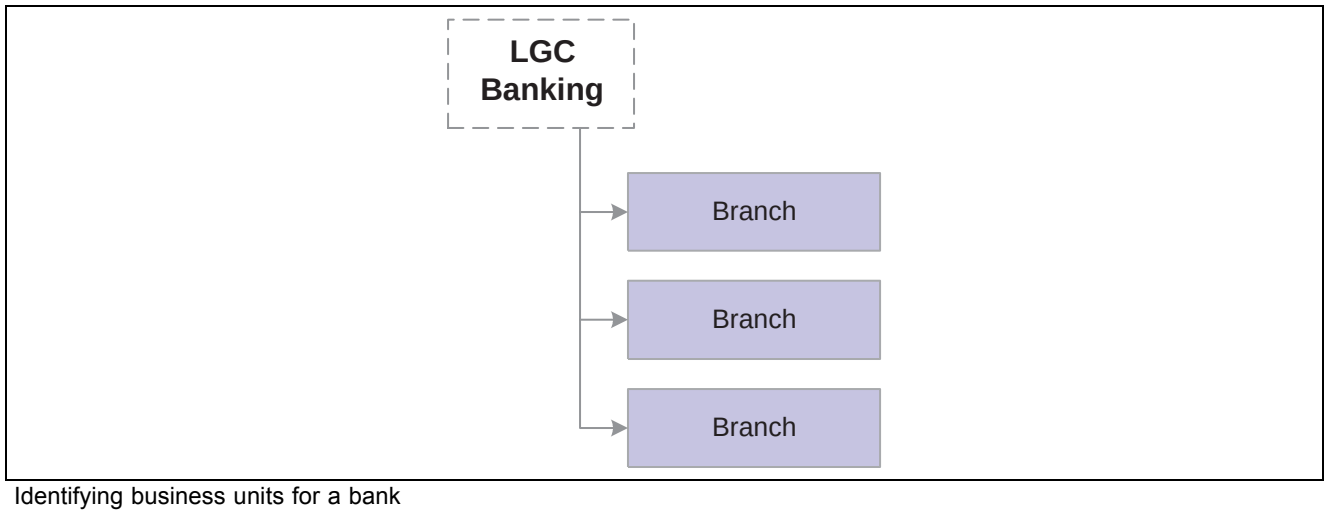
Note. The setID segregates the data in the control tables. Therefore, many business units can share the same set of data on the physical table in your human resources system.

See Also

Chapter 2, "Understanding HRMS," Control Tables, Transaction Tables and Prompt Tables, page 5

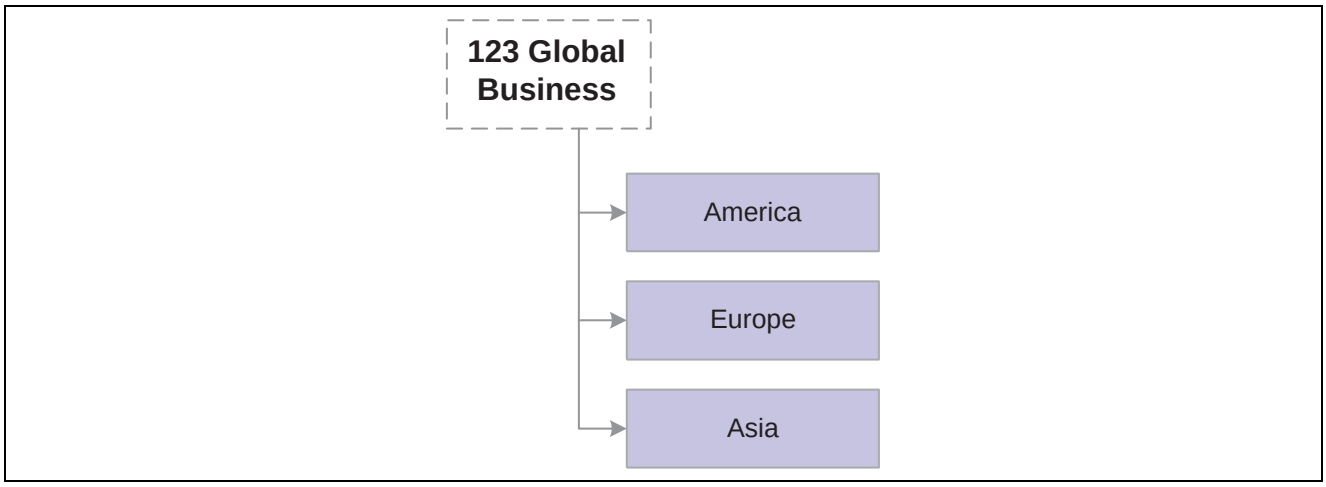
Determining Your Business Unit Structure

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



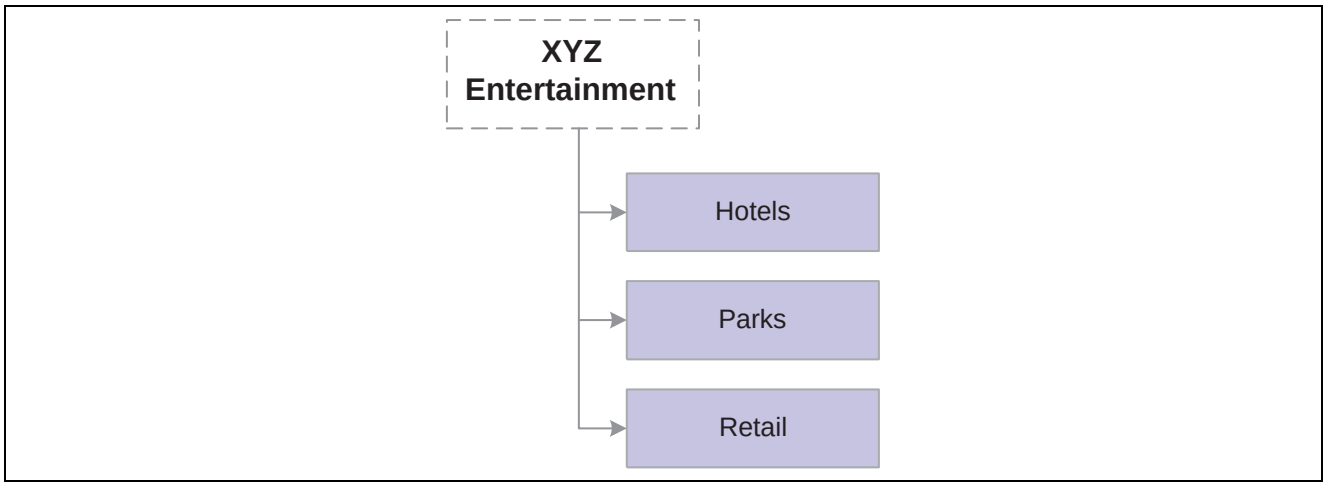
Identifying business units for a bank

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



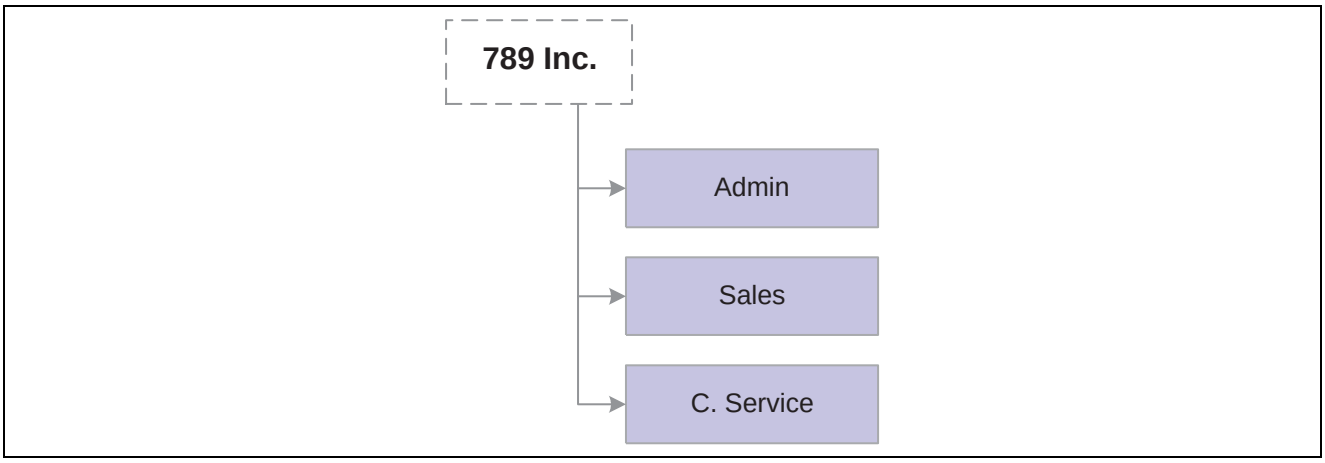
Identifying business units for a global organization

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



Identifying business units for an organization with subsidiary companies

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

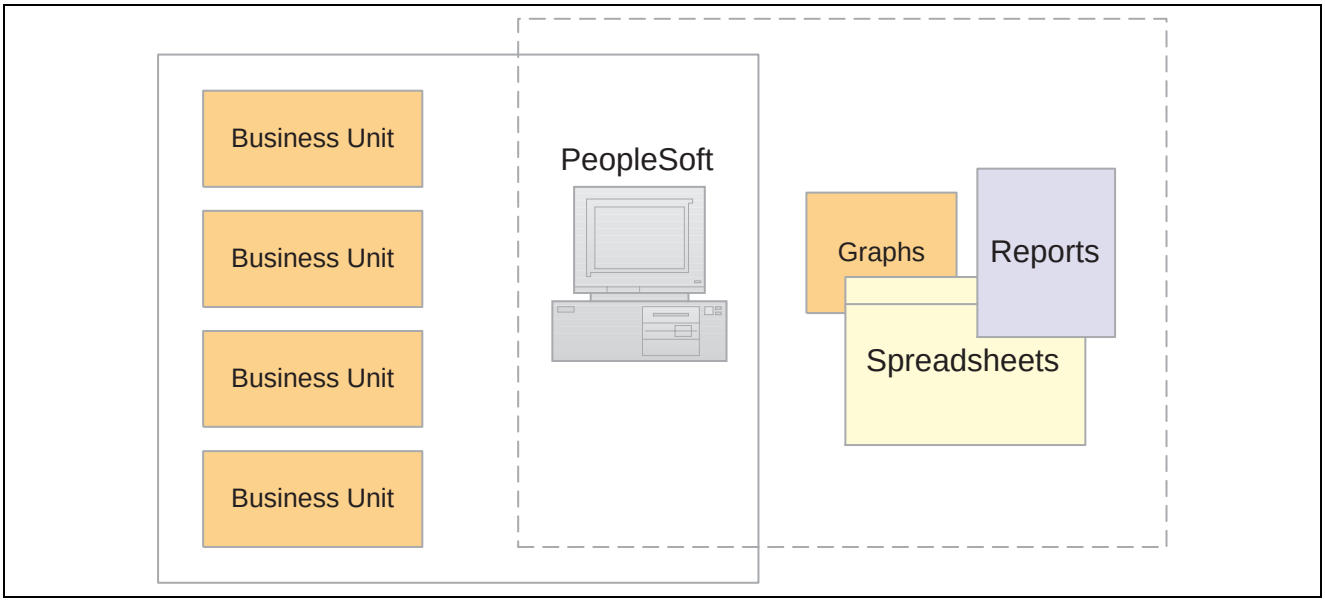


Identifying business units by functionality

You can also use a combination of all of these methods. Business units don't necessarily have a restriction, although the more business units you establish, the more information you need to maintain. You do, however, need to have at least one business unit in the system.

You have complete control over how you define business units in your PeopleSoft HRMS system, as well as how you use them to facilitate the handling of data in your data organization. For example, you could set up a business unit for each legal entity in your organization, all to be processed by a central human resources department that interfaces with and manages each business unit's information, workers, and processes. Alternatively, you could set up one business unit for each company, location, or branch office in your enterprise, enabling each unit to manage its own human resources information independently, while sharing data with a central, parent business unit.

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



Centralized data enables analysis and reporting across business units

Implementing Business Units

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

- With business unit functionality, you have another level for associating a person with your company's organizational scheme.
- Business units are always associated with a person's Job and/or Position record.
- Business units have no predetermined definition (unlike department and a company). You can implement this new organizational level as you determine its usefulness to your enterprise.
- Business units are not a legal entities, but a way of tracking specific business information for reporting and other rollup data collection.

Work closely with your PeopleSoft implementation partner early in your design to determine how best to define the business units for your PeopleSoft HRMS system. Every organization has different requirements, and it's not possible to cover all the variables that you might encounter. However, once you've identified your business unit structures and made a tentative decision about how many business units you'll need, take a step back and ask the following questions:

- Are the business unit structures and number of business units correct? Is there any reason why they would not work?
- Will these structures preclude me from taking advantage of some functionality that I might want to use?
- Will these structures restrict my reporting options?
- Will these structures cause me to process more than I want to process on any particular night?

Note. When you implement a business unit, you must assign it a setID

Implementing Multiple Business Units

While you can implement one business unit for your entire organization, establishing multiple business units can offer important reporting and data control options. Multiple businesses units enable you to:

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

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

Working with TableSets

This section provides overviews of tablesets and discusses how to:

- Share centrally maintained data.

- Reference multiple setIDs.
- Implement tableset sharing.

Understanding Tablesets

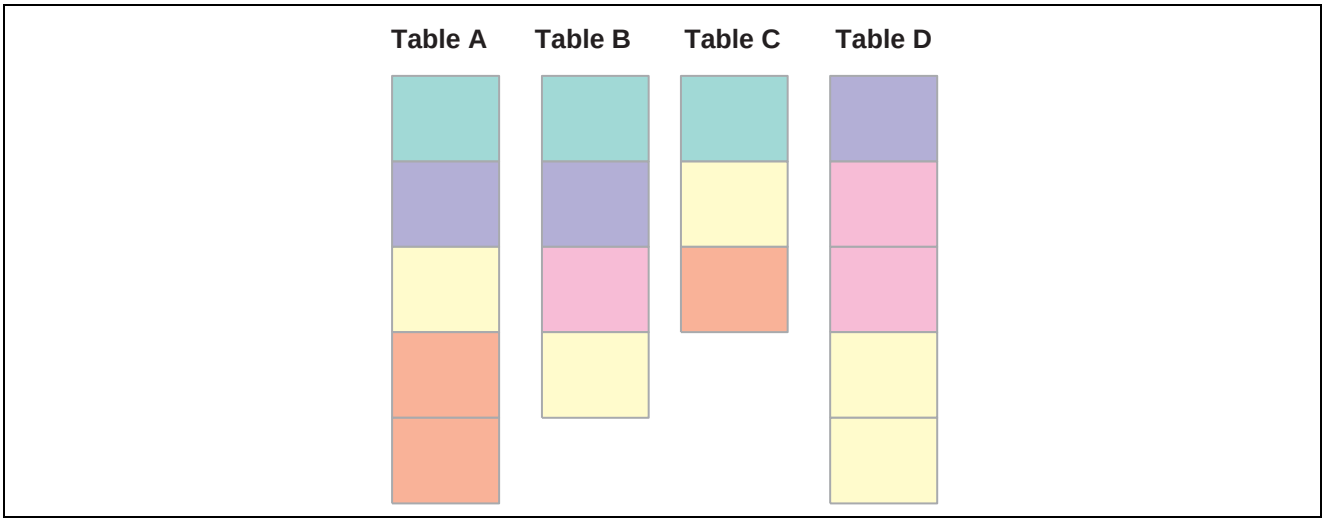
To work with tablesets, you need to be able to distinguish between tablesets, setIDs, and tableset sharing.

Tablesets and SetIDs

A tableset is a group of rows (set of data) in a control table that is identified by the same high-level key. A setID is a label (high-level key) that identifies a tableset. There are two types of setIDs:

- A *physical setID* is a label for a set of data that is identified by the following business rule: BUSINSES_UNIT = SETID. That is, specific rows of data are associated with a specific business unit. The system automatically creates physical setIDs when your enter a business unit into the system.
- A *logical setID* is a label for a set of data that is identified by some other business rules. Logical setIDs are a way to share rows of data across multiple business units.

The terms *tableset* and *setID* are sometimes used interchangeably. In many cases, this is correct, but it can cause some confusion. Remember that a tableset is a group of rows that are identified by the same setID and a setID is the label that identifies a tableset. You always have the same number of setIDs as you have tablesets. For example, the following diagram shows four control tables. Each color represents a setID, and all rows with the same color represent a tableset, for a total of five tablesets:



Tableset diagram

Note. For PeopleSoft HRMS, you *must* create at least one tableset and one setID.

You can define as many tablesets as you like, but the more you create, the more complex tableset sharing becomes. Some organizations need only one tableset.

Business Units and SetIDs

When you implement a business unit, you must assign it a setID. You have two options:

- Specify an existing setID to be used as the default.
- Create a new setID. You typically do this when you have only one business unit or when you don’t plan to share data.

Tableset Sharing

Tableset sharing is a device that enables you to share – or restrict – the information stored in control tables across business units. For example, you can centralize redundant information such a country codes while keeping information such as departments and job codes decentralized. The goal of tableset sharing is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

Tablesets form the building blocks of your HRMS system. You populate the individual tables in the tableset according to your particular business rules or processing options. You can also mix and match tablesets, by updating tableset assignments for a business unit using the TableSet Control page (SETID_TABLE).

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

See *Enterprise PeopleTools PeopleBook: Server Tools*

Sharing Centrally Maintained Data

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

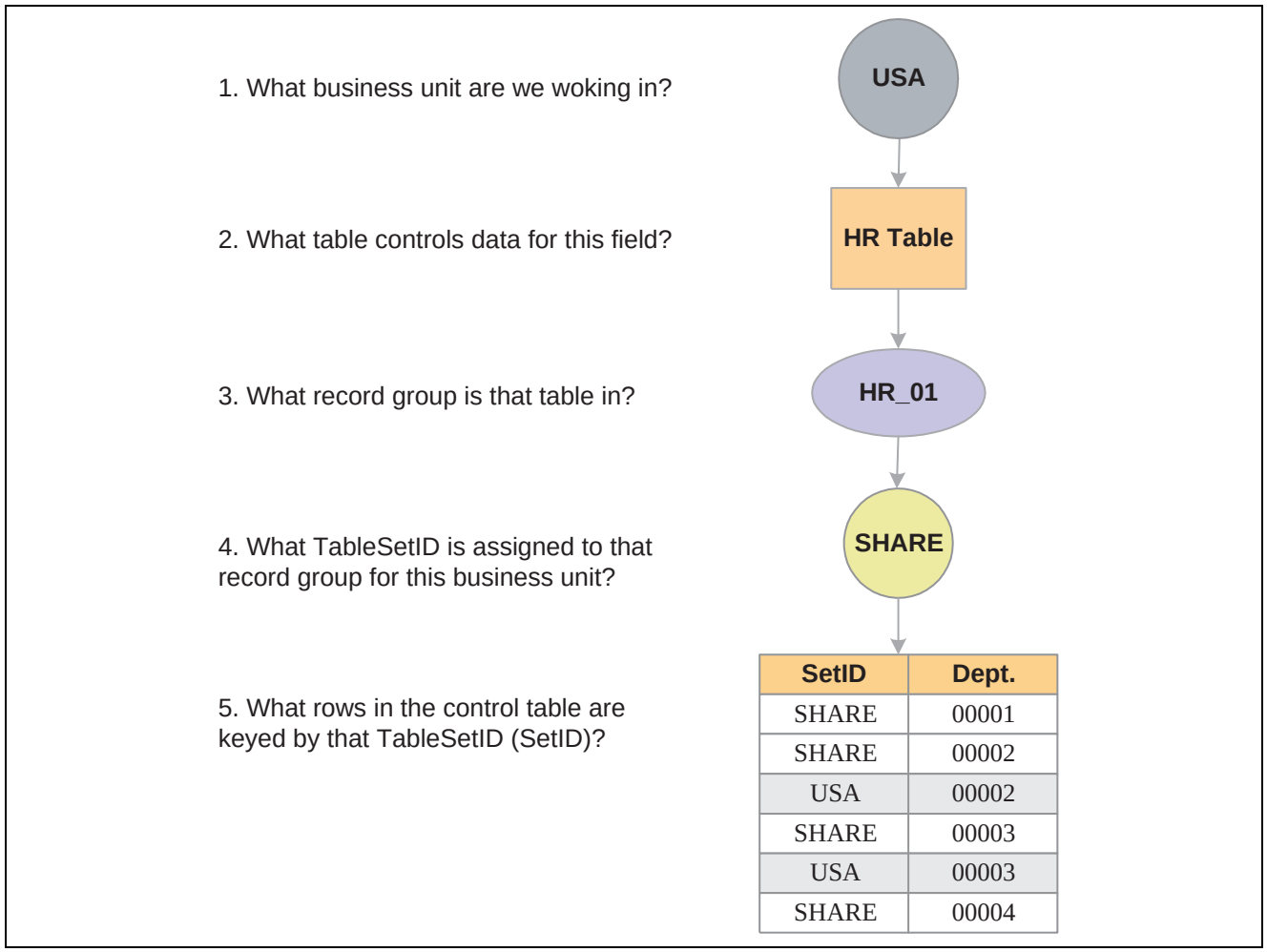
Example: Using Business Units and SetIDs to Control Information Flow

Suppose your organization has 10 business units with the same job codes. Enter the job code once and set up tableset sharing.

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

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

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



Tableset sharing process

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

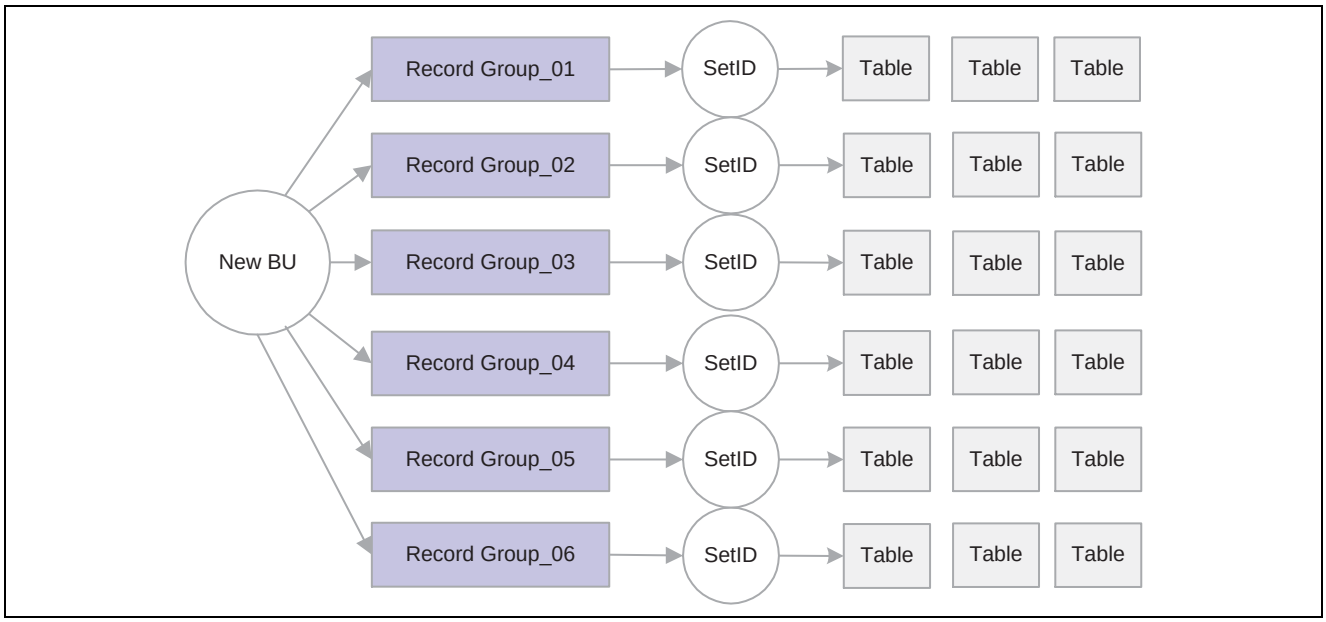
Tableset sharing is a time-saver, a way to share redundant information among business units. The key to sharing that information is defining what data is available under specific circumstances. To do this, you use setIDs. Tableset sharing consists of assigning specific setIDs to specific record groups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

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



Assigning specific setIDs to specific record groups

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



Tableset sharing

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

When TableSet Sharing Doesn't Help

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

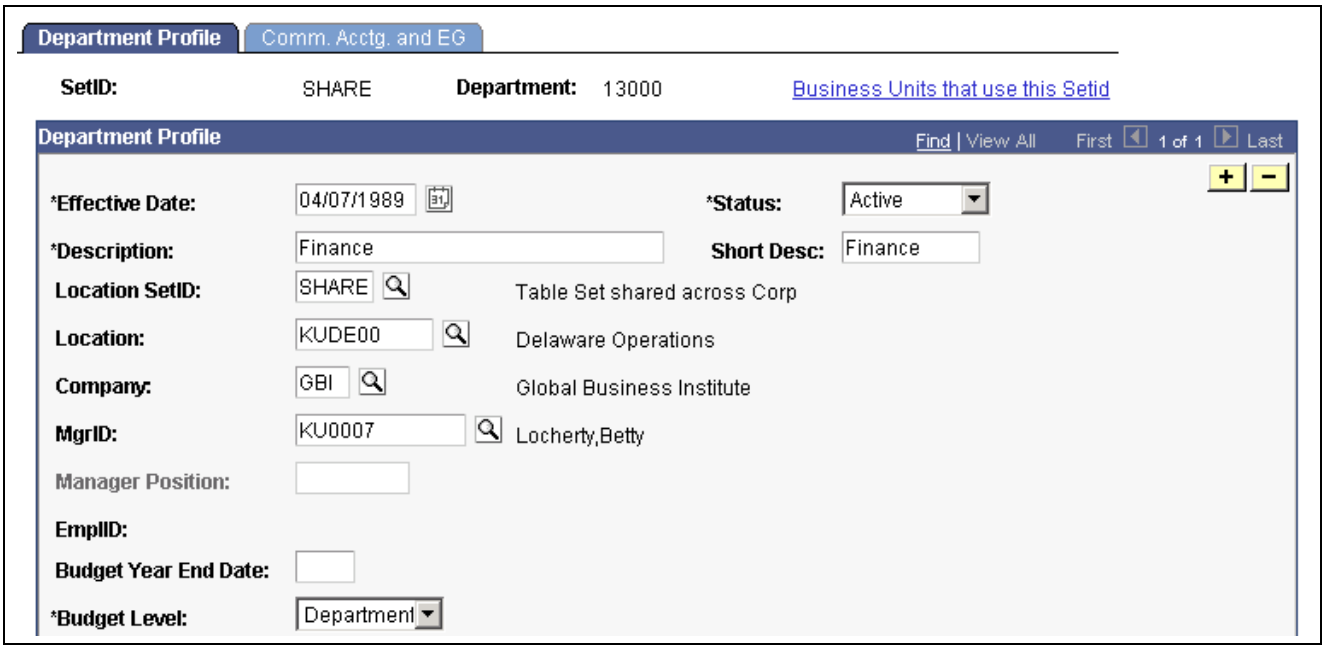
Referencing Multiple SetIDs

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

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

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

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



Department Profile page

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

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

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

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

Scenario 2: A Transaction Table with Multiple SetIDs Controlling Defaults Across the Transaction Record

Let's look at the JOB_DATA component that has a default business unit/setID that is associated with the person on the Work Location (JOB_DATA1) page. The default business unit here controls the prompt values that are displayed when you select a department on the Work Location page, based on the setIDs that are associated with that business unit on the TableSet Control - Record Group page (SET_CNTRL_TABLE1). The department that you select may or may not default in the Location, depending on whether the Location SetID is a valid setID value for that business unit. In turn, the Salary Plan default on the Compensation page (JOB_DATA3) is controlled by the Location that you select on the Work Location page. To understand how the defaulting across these different prompt tables in the Job Data pages work, consider the following scenario:

First, you've defined the following business units in the TableSet Control - Record Group page:

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

Business Unit	Record Group	SetID
	LOCATION	RUSS
	SALARY	CAN

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

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

Given the preceding TableSet Controls component , Department component, and Location components definitions, when you add a worker into PeopleSoft Enterprise Human Resources using the job data pages, defaulting on the worker's Job record occurs according to the following scenario:

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

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

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

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

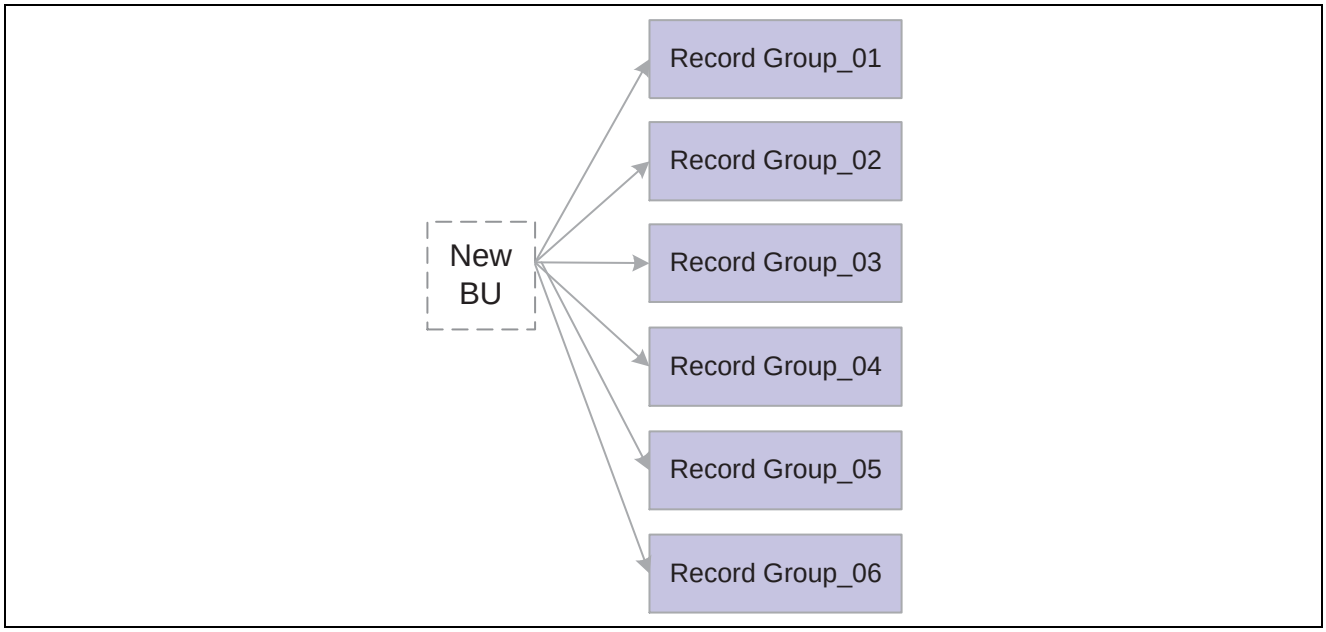
If *USA* isn't a valid setID for the PDEV Salary Plan Record Group, then the system does not insert a default value into the Salary Plan field on the Salary Plan page. When you prompt for valid salary plans on the Salary Plan field, the system displays only those salary plans that are associated with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

Implementing TableSet Sharing

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

For the purpose of tableset sharing, control tables are divided into record groups. A record group is a set of control tables and views that use the same group of setIDs in the same manner. Record groups serve two purposes: (1) they save time by enabling you to set up tableset sharing without an enormous amount of redundant data entry and (2) they act as a safety net by ensuring that tableset sharing is applied consistently across all related tables and views in your system.

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



The beginning of tableset sharing

See *Enterprise PeopleTools PeopleBook: Server Tools*

Working with Permissions Lists and System Defaults

This section discusses how to:

- Link to permissions lists.
- Define business unit HR defaults.
- Determine system default values.

Linking to Permission Lists

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Defining Business Unit HR Defaults

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

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

Understanding the Difference Between Permission List and Business Unit Defaults

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

1. The system retrieves the setID for the specified business unit, as defined in the HR_06 record group.
2. Once the system has the setID for that business unit, the system can retrieve the correct data row of default values for that unit, because the Business Unit HR Defaults table is keyed by setID.

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Enterprise PeopleTools PeopleBook: Data Administration Tools

Determining System Default Values

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

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

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

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

Working with Job Data Records

This section provides overviews on JOB records and business units and JOB records and tableset sharing.

Understanding Job Data Records and Business Units

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

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

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

CHAPTER 5

Working with Regulatory Regions

This chapter provides overviews of regulatory regions and regulatory region table relationships and discusses how to:

- Establish regulatory regions.
- Associate a regulatory region with a transaction.

Understanding Regulatory Regions

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

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

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

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

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

Understanding Regulatory Region Table Relationships

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

- Regulatory Region (REG_REGION)
- Transaction (REG_TRX)
- Regions in Transaction (REG_TRX_REGION)

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

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

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

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

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

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

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

Establishing Regulatory Regions

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

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

Note. Although the scope of a regulatory region can be smaller than a country, PeopleSoft recommends that the standard Regulatory Region be at the country level.

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

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

See Also

Chapter 7, "Setting Up and Installing PeopleSoft HRMS," Establishing Regulatory Transaction Types, page 159

Associating a Regulatory Region with a Transaction

This section provides an overview of regulatory regions and transactions and discusses how to:

- Maintain regulatory regions.
- Use regulatory regions for transaction processing.
- Establish default regulatory regions.
- Assess the impact on PeopleCode transaction processing.
- Create prompt edit transaction views for REG_REGION.
- Add REG_REGION to human resources transactions.

Understanding Regulatory Regions and Transactions

Regulatory Region is used as a control field on pages throughout your PeopleSoft Human Resources system. It is almost always a required field.

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

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

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

Maintaining Regulatory Regions

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

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

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

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

Using Regulatory Regions for Transaction Processing

The system identifies the general regulatory region for a person by looking at the current effective Job Data record for each EmplID and employee record number combination.

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

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

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

Establishing Default Regulatory Regions

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

Component	Default regulatory region value from:
Position Data (POSITION_DATA)	Org Defaults by Permission Lst
Job Data (JOB_DATA)	Position Data (if the worker is assigned to a position) *or* Org Defaults by Permission Lst (if the worker is not assigned to a position)
Incident Details (HS_INCIDENT)	Org Defaults by Permission Lst
Disability (DISABILITY)	Job Data
Establishment (ESTABLISHMENT_DATA)	Org Defaults by Permission Lst
Job Openings (HRS_JOB_OPENING)	Position Data (if the job opening is assigned to a position) *or* Org Defaults by Permission Lst (if the job opening is not assigned to a position)

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Disabilities

Chapter 12, "Setting Up Organization Foundation Tables," Defining Establishments, page 255

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Assessing the Impact on PeopleCode Transaction Processing

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

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

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

Creating Prompt Edit Transaction Views for REG_REGION

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

```
REG_STANDARD_VW
SELECT
S.OPRID,
R.REG_REGION,
R.DESCR50,
R.COUNTRY
FROM PS_REG_REGION_TBL R,
      PS_REG_TRX_REGION  T,
      PSOPRDEFN S
WHERE T.REG_TRX = 'STANDARD'
AND T.REG_REGION =   R.REG_REGION
     AND (R.REG_AVAIL = 'ALL'
          OR (R.REG_AVAIL = 'GBL'
              AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G
             WHERE S.OPRID = G.OPRID
              AND G.COUNTRY = R.COUNTRY)))
REG_HANDS_VW
```

```
SELECT
S.OPRID,
R.REG_REGION,
R.DESCR50,
R.COUNTRY
FROM PS_REG_REGION_TBL R,
      PS_REG_TRX_REGION  T,
      PSOPRDEFN S
WHERE T.REG_TRX = 'HANDS'
AND T.REG_REGION =   R.REG_REGION
     AND (R.REG_AVAIL = 'ALL'
          OR (R.REG_AVAIL = 'GBL'
              AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G
             WHERE S.OPRID = G.OPRID
              AND G.COUNTRY = R.COUNTRY)))
```

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

Adding REG_REGION to Human Resources Transactions

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

Example - Job Data

To associate REG_REGION to a person on the Job Data pages:

1. Add the Regulatory Region control field to the Work Location page (JOB_DATA1) early in the job transaction.
2. Make the REG_REGION field a required field.
3. After adding the field to the record, define a prompt edit from the standard view (REG_STANDARD_VW).

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

Example - Health and Safety

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

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

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

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

These regulatory regions were mapped to these SetIDs on the TableSet Control − Record Group page (SET_CNTRL_TABLE1).

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

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

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

Additional Transaction Modifications for Regulatory Region

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

- Position Data, with REG_STANDARD_VW as the prompt edit.
- Job Openings, with REG_STANDARD_VW as the prompt edit.
- Establishment, with REG_STANDARD_VW as the prompt edit.
- Org Defaults by Permission Lst, with REG_STANDARD_VW as the prompt edit.
- Disability/Accomodation Request, with REG_STANDARD_VW as the prompt edit.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions.

See Chapter 12, "Setting Up Organization Foundation Tables," Defining Establishments, page 255.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Disabilities.

CHAPTER 6

Setting Up and Administering HRMS Security

This chapter provides an overview of PeopleSoft security and HRMS security and discusses how to:

- Implement data permission security.
- Set up and assign tree-based permission.
- Assign role-based data permission security to permission lists.
- Refresh security join tables.
- Query data permission security.
- Create data permission security for managers.
- Create and lock user IDs.
- Set up security for Recruiting Solutions
- Set up security for local functionality.
- Modify data permission security.

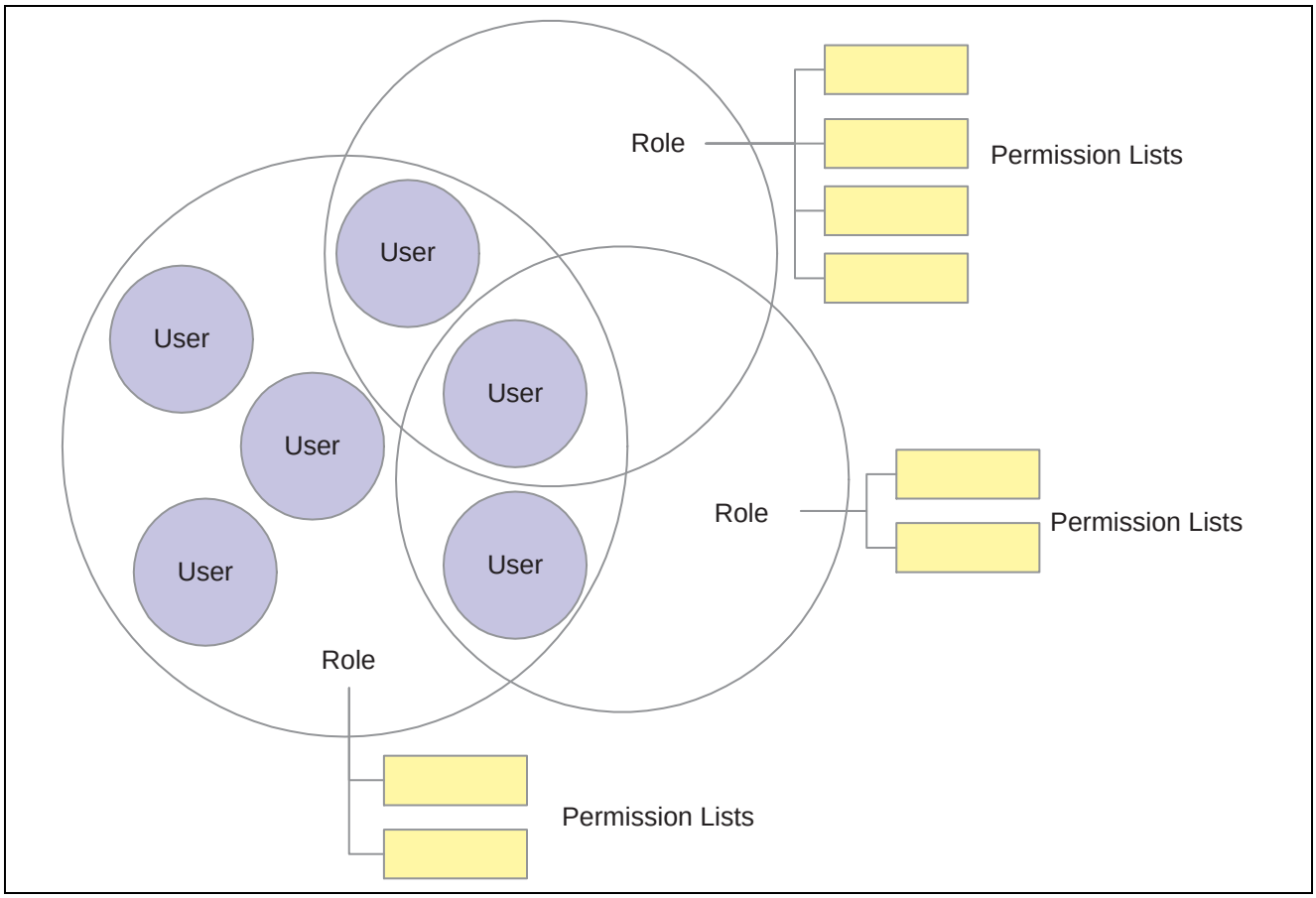
Note. Self Service transactions use both data permission security (discussed in this chapter) and security features unique to Self Service, depending on the transaction.

See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," page 667

Understanding PeopleSoft Security

PeopleSoft security is based on permission lists and roles. This diagram illustrates how permission lists and roles combine to create user security profiles:



Permission Lists and Roles Create a User's Security Profile

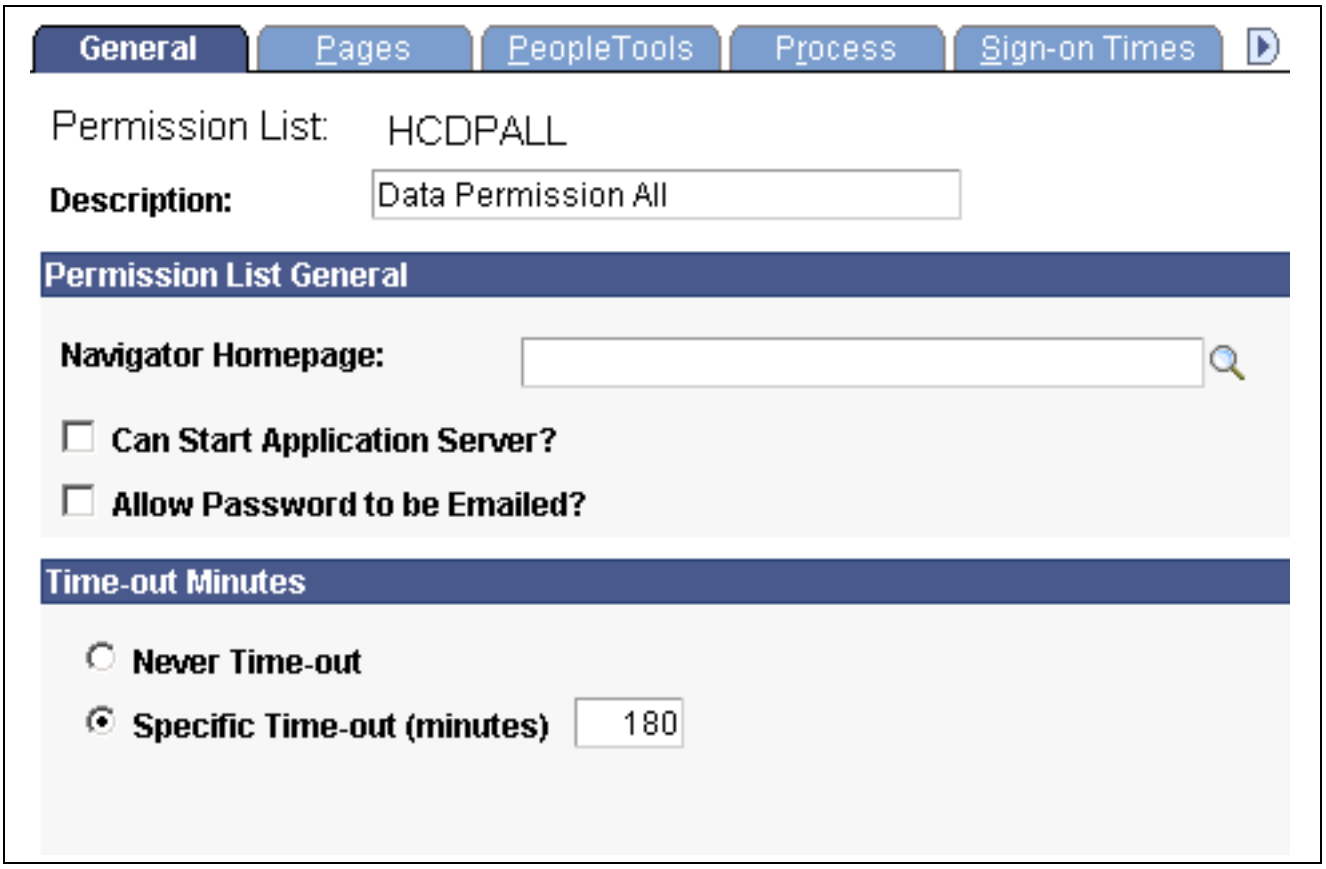
To administer security:

1. Create permission lists.
2. Create roles and attach permission lists to roles.
3. Create user IDs and attach permission lists and roles to user IDs.

Create Permission Lists

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

Create permission lists using the Permission Lists component (ACCESS_CNTRL_LISTX) and Copy Permission Lists component (PERMISSION_SAVEAS).



Create permission lists on the Permission Lists component and Copy Permission Lists component.

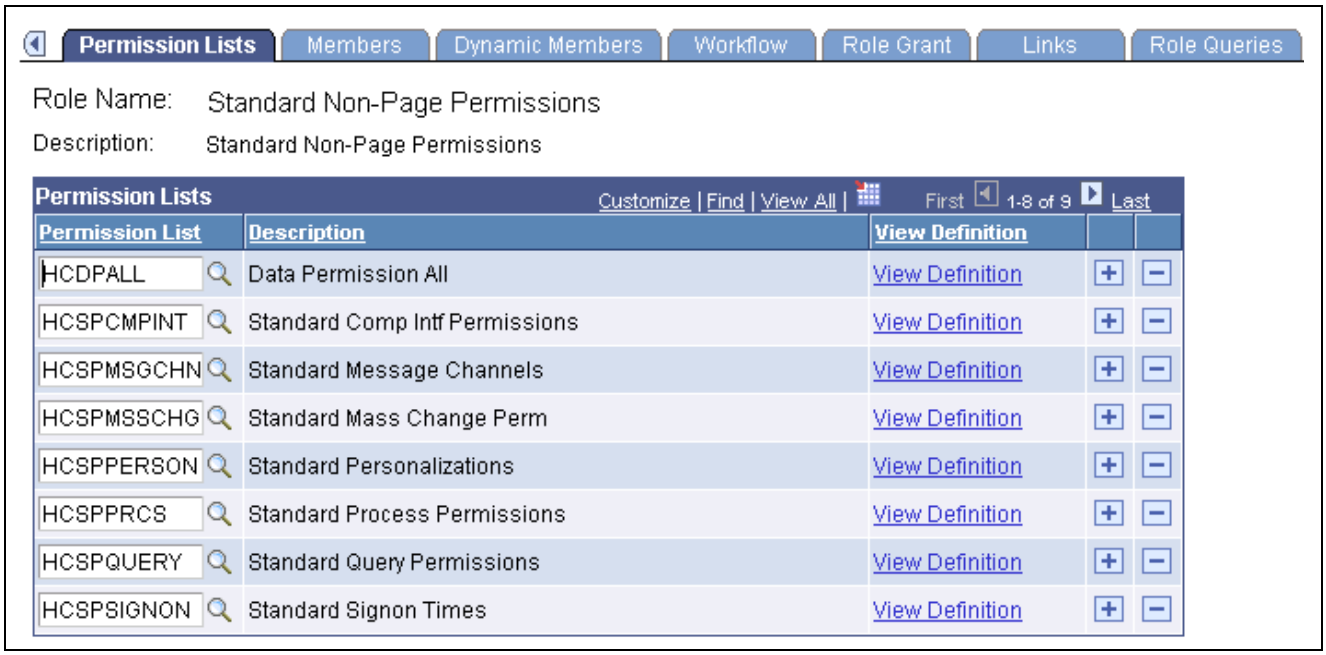
Note. Assign data permission to permission lists on the Security by Dept Tree page (SCRTY_TABL_DEPT) and the Security by Permission List page (SCRTY_CLASS).

See *Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"*

Create Roles

Create roles and assign permission lists to the roles. The access you granted to the permission lists combines under the role. For example, you would assign the permission lists required by your workforce's managers to the role of Manager which, combined, give your managers security access to all elements of the system that managers need. Roles are assigned to the user.

Create roles using the Roles component (ROLEMAINT) and Copy Roles component (ROLE_SAVEAS).



Assign permission lists to roles on the Permission Lists page (ROLE_CLASS).

See *Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Roles"*

Create User IDs

Create user IDs and assign to user IDs roles and permission lists to give them access to the system as appropriate.

In addition to the permission lists assigned to roles, the following four specific permission lists are assigned directly to the user on the User Profile - General page (USER_GENERAL). Unlike the permission lists assigned to roles, users can have only one each of these four permission lists:

- Navigation Homepage

  Navigation homepages are used by PeopleSoft Workflow.

- Process Profile

  Process profiles contain PeopleSoft Process Scheduler authorizations.

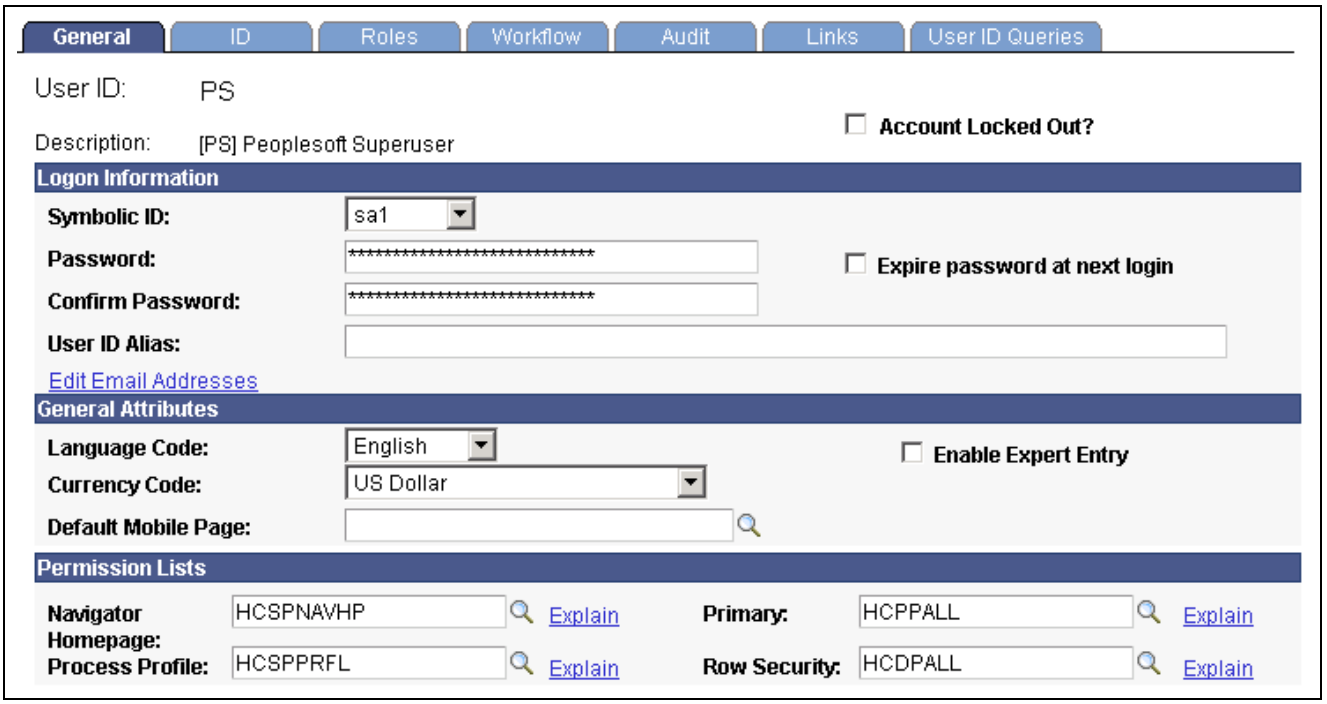
- Primary

  Primary permission lists grant global security.

- Row Security

  Row Security permission lists grant data-permission security based on a department security tree. Assign data permission to permission lists on the Security by Dept Tree page.

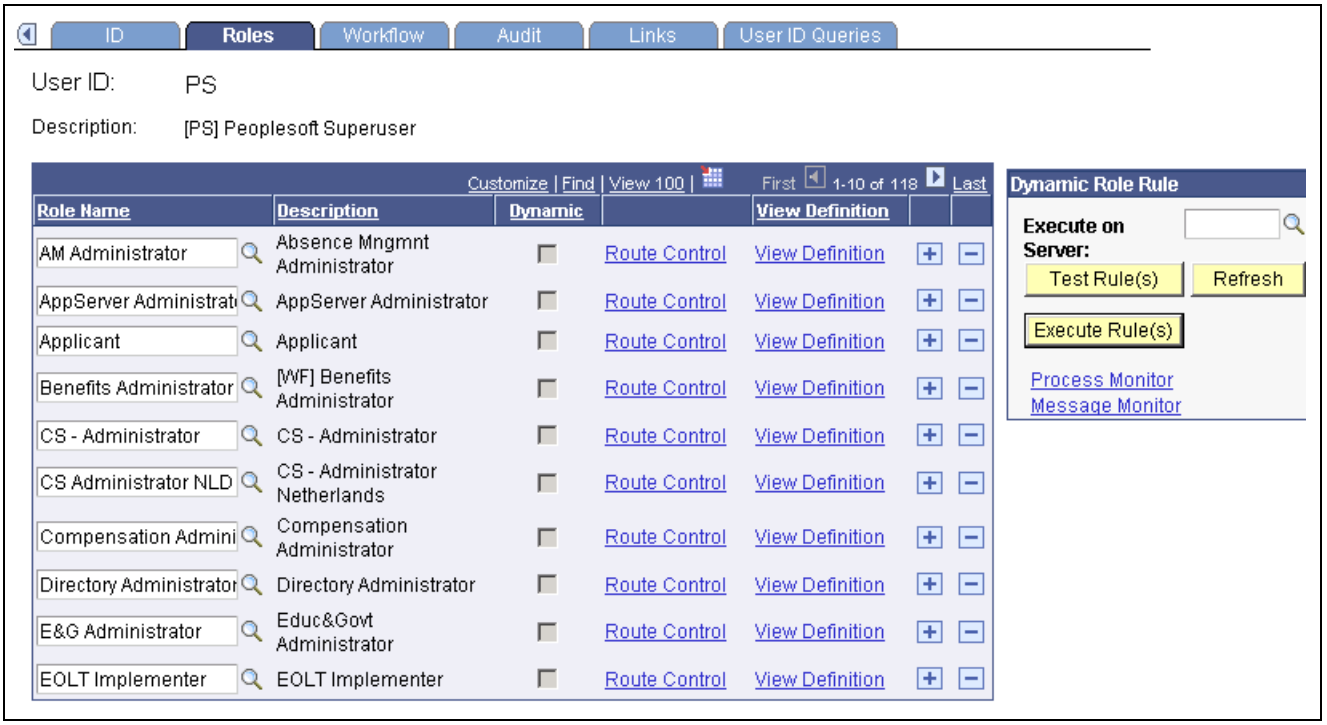
Note. On the Security by Permission List page you can assign data permission to permission lists that you attach to roles.



Create user IDs on the User Profiles component and Copy User Profiles component and assign the Navigator Homepage, Process Profile, Primary, and Row Security permission lists directly to the user profile on the General page.

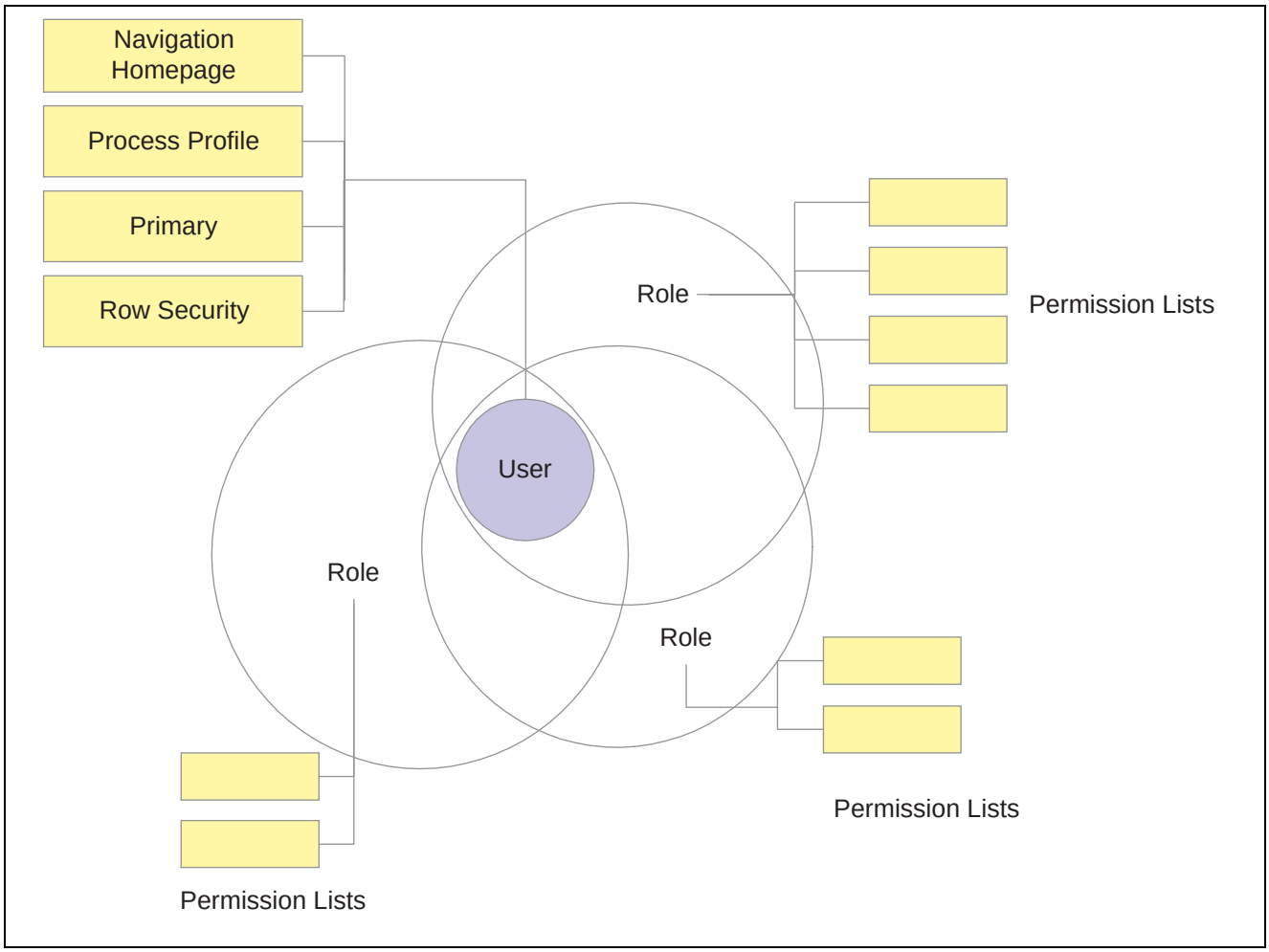
Roles and permission lists combine under the user ID to give users their security access. For example, the HR Training Manager would have the roles of manager, instructor, and employee to meet her access needs as a manager, instructor, and employee. Managers in different departments would have the same manager and employee roles, in addition to other roles that meet their needs.

Assign roles to users using the User Profiles - Roles page (USER_ROLES):



Assign roles to user IDs on the User Profiles - Roles page

This diagram illustrates how a user's security profile is made up of an assigned role, and the permission lists assigned directly to the user:



User security profiles are made up of the combined permissions of the roles and permission lists assigned to them.

See *Enterprise PeopleTools PeopleBook: Security Administration, "Administering User Profiles"*

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Data Permission Security for HRMS

Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HRMS, you can control access to the following types of data:

- People
  - Employees.
  - Contingent workers.
  - People of interest (POIs) with jobs.

- People of interest (POIs) without jobs.

Note. The data of people of interest without jobs is secured differently than the data of people with jobs.

- Recruiting job openings.
- Departments.

Note. Row security for departments secures department budgets and positions, if you are using Manage Positions. The Departments component is not secured by data permission so control access to department definitions by restricting access to the component or change the search record to DEPT_SEC_SRCH.

See Also

Human Capital Management Row Level Security in HRCS 8.9 White Paper

Chapter 3, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," page 11

Data Security and Data Retrieval

The system enforces data permission security with security search views. To understand how this is done it helps to understand how the system retrieves data when you access a component.

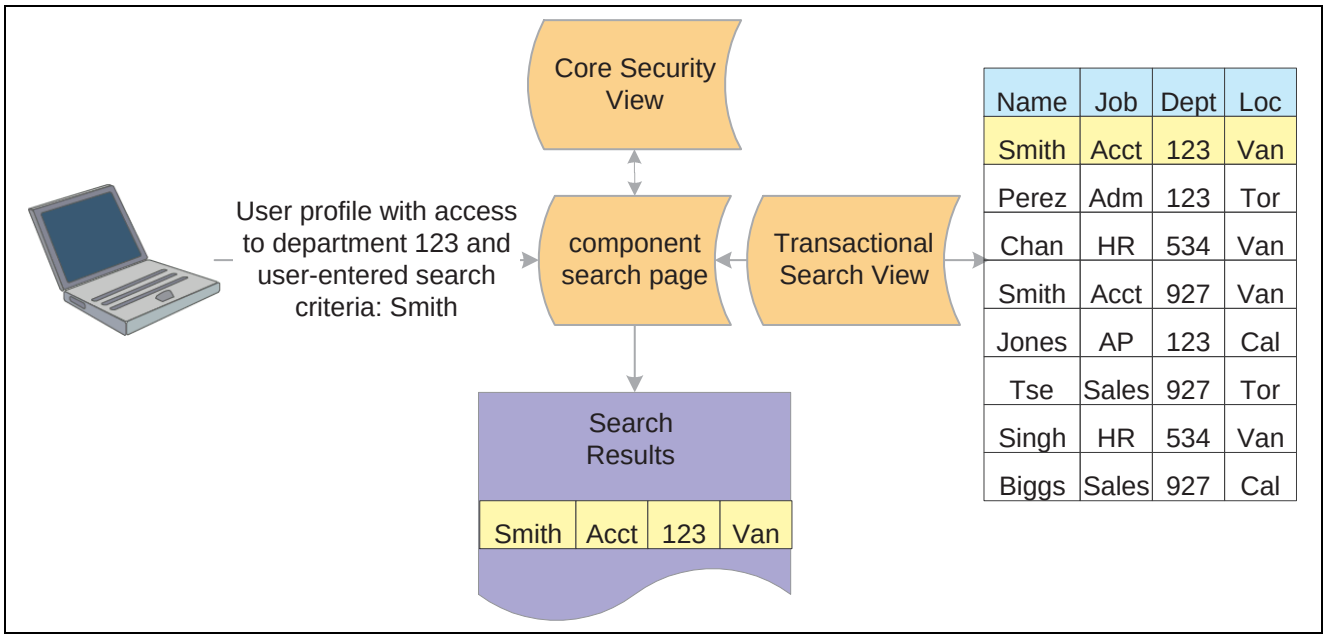
When you open a component in PeopleSoft HRMS the system displays a search page. The search page represents the search record and the fields that appear are the search keys and alternate key fields that uniquely identify each row of data. The system uses the information that you enter in the key or alternate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

The system also uses search records to enforce data permission security. Search views for components that contain sensitive data also contain a security view to control data access.

The system adds the user's security profile, including their user ID and the values of the permission lists attached to their user profile, to the SQL (Structured Query Language) select statement along with the values that the user entered on the search page. The system retrieves the data that matches the criteria from the search page and the user's data permission lists. The system doesn't retrieve data for people to whom you haven't granted the user's permission lists data access.

Using the above example, if you enter *Smith* in the Name alternate key field, the system retrieves data only for the people with the name Smith to whom you have access.

This diagram illustrates the data retrieval process:



User profile information, search criteria, and the security view enforce data permission security

Note. Security for process and queries is enforced in much the same way.

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

A component can have only one search record. To associate more than one search record with a component (for example, data level security for some users and not for others), you reinstall the component on different menus, one for each search record, and grant access to the appropriate component using application security.

Core Security Views

PeopleSoft delivers the following core security views for components tracking people:

Security Views for Components Storing All Person Types			
Type	**Includes Future-Dated Security**	**Security View**	**Rows Returned**
Component search view	Yes	PERALL_SEC_SRCH	One row per EMPLID and distinct search items. Includes future-dated rows.
SQR view	No	PERALL_SEC_SQR	One row per EMPLID.
Query view	No	PERALL_SEC_QRY	One row per EMPLID.

Security Views for Components Storing People With Jobs			
Type	**Includes Future-Dated Security**	**Security View**	**Rows Returned**
Component search view	Yes	PERS_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.
Component search view	Yes	PERS_SRCH_EMP	One row per EMPLID for employees only. Includes future-dated rows.
Component search view	No	PERS_SRCH_CURR	One row per EMPLID.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID.
Query view	No	PERS_SRCH_QRY	One row per EMPLID.
Prompt view	No	EMPL_ACTV_SRCH	One row per EMPLID for people with current, active (as of the system date) job records.
Prompt view	No	WORKER_PROMPT	One row per EMPLID for employees and contingent workers with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People With Potentially More Than One Job Data Record			
Type	**Includes Future-Dated Security**	**Security View**	**Rows Returned**
Component search view	Yes	EMPLMT_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.
Component search view	Yes	EMPL_SRCH_EMP	One row per EMPLID and EMPL_RCD combination for employees only. Includes future-dated rows.
SQR View	Yes	FAST_SQRFUT_SEC	One row per EMPLID. Includes future-dated rows.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID and EMPL_RCD combination.

Security Views for Components Storing People With Potentially More Than One Job Data Record			
Type	**Includes Future-Dated Security**	**Security View**	**Rows Returned**
Query view	No	EMPLMT_SRCH_QRY	One row per EMPLID and EMPL_RCD combination.
Prompt view	No	PERJOB_PROMPT	One row per EMPLID for people with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People Without Jobs			
Type	**Includes Future-Dated Security**	**Security View**	**Rows Returned**
Component search view	N/A	POI_SEC_SRCH	One row per EMPLID, POI_TYPE and distinct search items.
SQR view	N/A	POI_SEC_SQR	One row per EMPLID and POI_TYPE.
Query view	N/A	POI_SEC_QRY	One row per EMPLID and POI_TYPE.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Security Data

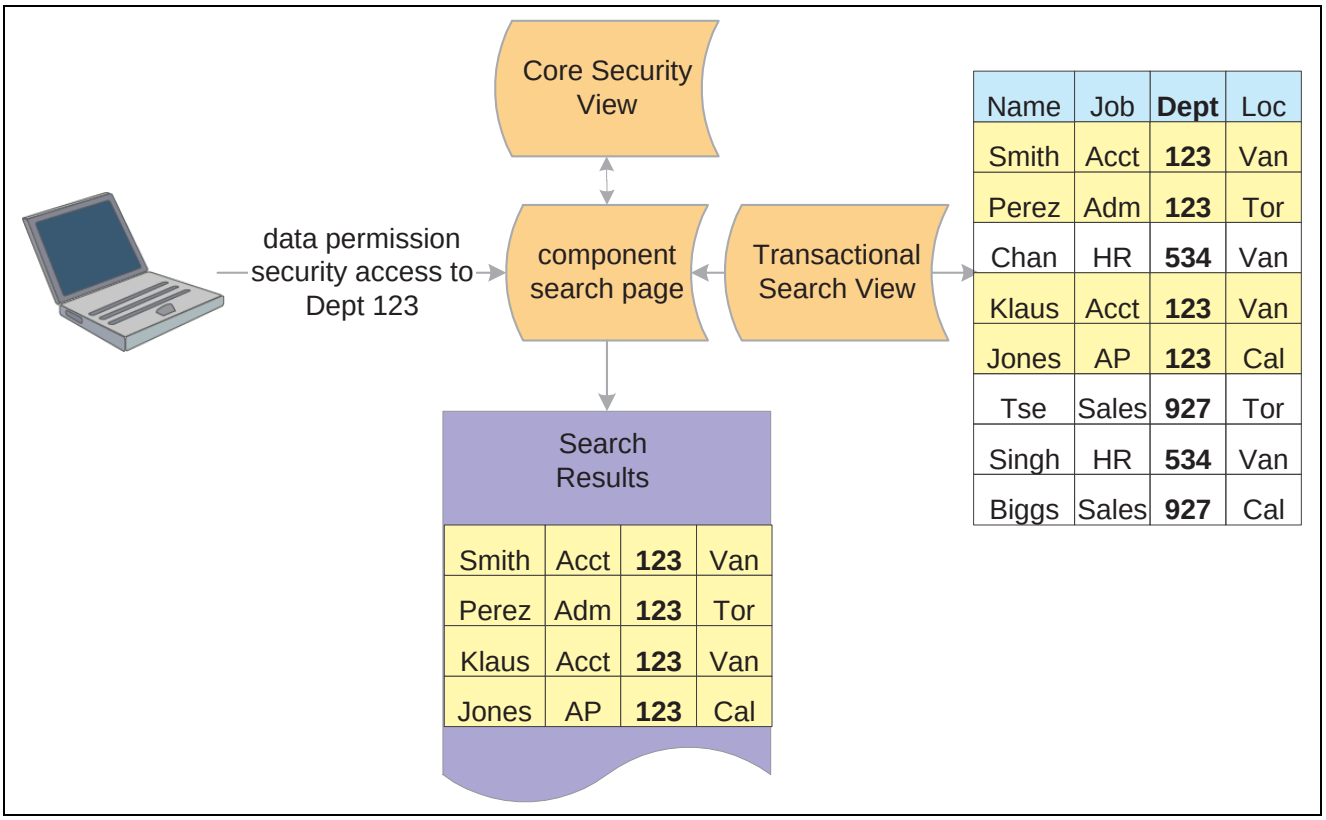
Data permission is controlled on two sides: transaction and user.

Transaction Security Data

Transaction data is the data that is being secured. Certain transaction fields on a transaction data row are used to secure access to that row. The data in these fields is called transaction security data. When the value of the transaction security data matches the value that a user can access (user security data), the system makes the entire row of data available to the user.

When the user accesses the component search page the security search view filters the data rows, displaying only the rows of data with the same transaction security values that the user has access to.

This diagram shows the Department field being used as transaction security data to secure the data of people in the organization.



The department field is the transaction value securing the data rows.

This table lists where you enter and maintain transaction data, to which record the transaction data is saved, and which fields can be used as transaction security data:

Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
Departments	Departments component (DEPARTMENT_TBL)	DEPT_TBL	• SetID • Department
Job openings	Job Opening page (HRS_JO_360)	HRS_JOB_OPENING	• Company • Business Unit • DeptID • Location

Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
• Employees • Contingent workers • POIs with jobs	• Add Employment Instance component (JOB_DATA_EMP) • Add Contingent Worker Instance component (JOB_DATA_CWR) • Add POI Instance component (JOB_DATA_POI) • Job Data component (JOB_DATA)	JOB	• Organizational Relationship (employee, contingent worker, or POI) • Regulatory Region • Company • Business Unit • Department • Location • Salary Plan • Pay Group (for customers using Payroll for North America)
POIs without jobs	• Add a POI Relationship component (PERS_POI_ADD) • Maintain a Person's POI Reltn component (PERS_POI_MAINTAIN)	PER_POI_SCRTY	• POI Type • POI Type and Business Unit • POI Type and Institution • POI Type and Company

Note. All people, regardless of type, are first entered in the Add a Person component (PERSONAL_DATA), where you enter their personal information and assign them an ID. These pages do not capture any transaction security data. Transaction security data is captured on the components that you use to enter details about the person's relationship to the organization.

Note. If you create a person but do not create a job data record or POI type record for them the system will save the person as a POI without job with a POI Type of *Unknown*. Somebody in your organization must have data permission access to unknown POIs in order to access their data and create either a job data or POI type record for them, otherwise the data is inaccessible.

Make sure that users who enter people into the system understand the consequences of not *creating* and *saving* a Job Data or POI type record for new people at the time the person is entered in the system.

When a transaction record is successfully completed and saved for the person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system deletes the Unknown POI instance for that person.

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Controlling Data Access for POIs Without Jobs.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

User Security Data

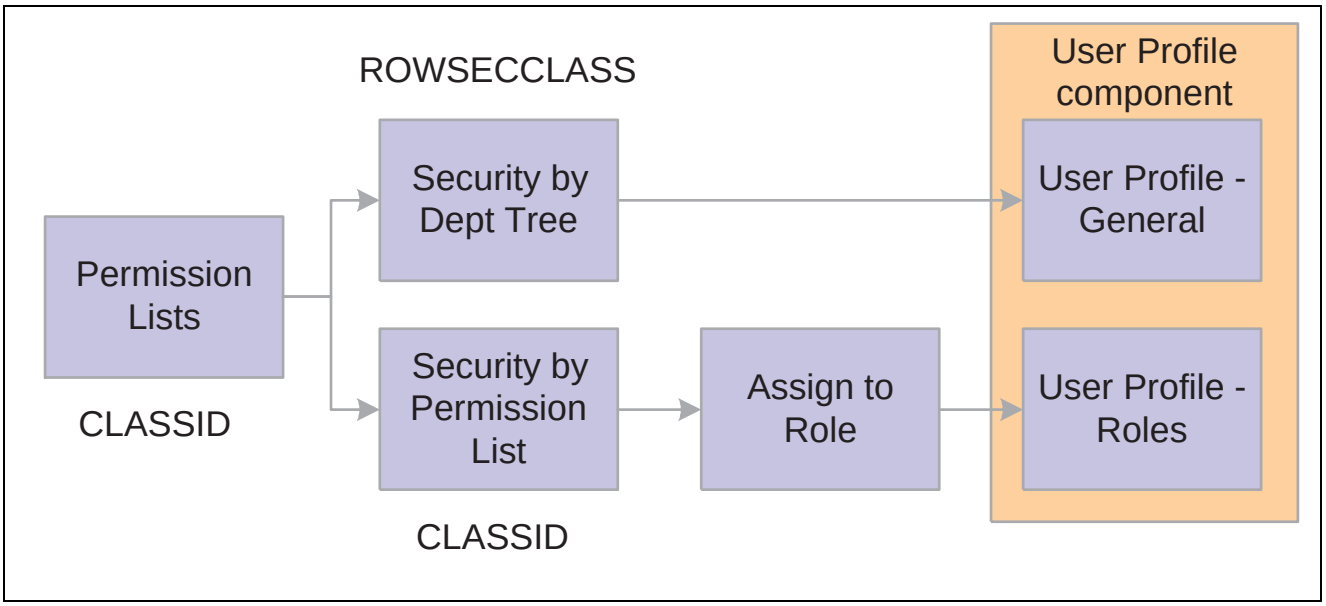
User security data is the data about a user's security access. It enables the system to ensure that users have access only to that which you have granted them access. User security data for HRMS data permission is the data permission that you assign to permission lists and the roles and users to whom you assign the permission lists.

Data permission is granted to row security permission lists (ROWSECCLASS) and regular (role-based) permission lists (CLASSID). Both permission lists are created using the Permission Lists component and Copy Permission Lists component.

When you create a permission list on the Permission Lists component you can assign security to a number of different aspects of the application. Data permission is assigned separately on the Security by Dept Tree page and Security by Permission List page.

Note. When you add a permission list to the Security by Dept. Tree component, the system saves it as ROWSECCLASS.

This diagram shows how permission lists are created, assigned data permission, and assigned to users:



Create permission lists, assign to them data permission, and assign them to users.

This table lists the key differences between role-based permission lists with data permission and row security permission lists:

Row Security Permission Lists	Role-Based Permission Lists
Are assigned to users on the Row Security field on the User Profile – General page.	Are assigned to users by way of roles.
Are limited to one per user.	Users can have multiple role-based permission lists and the combined data permission access of each list.

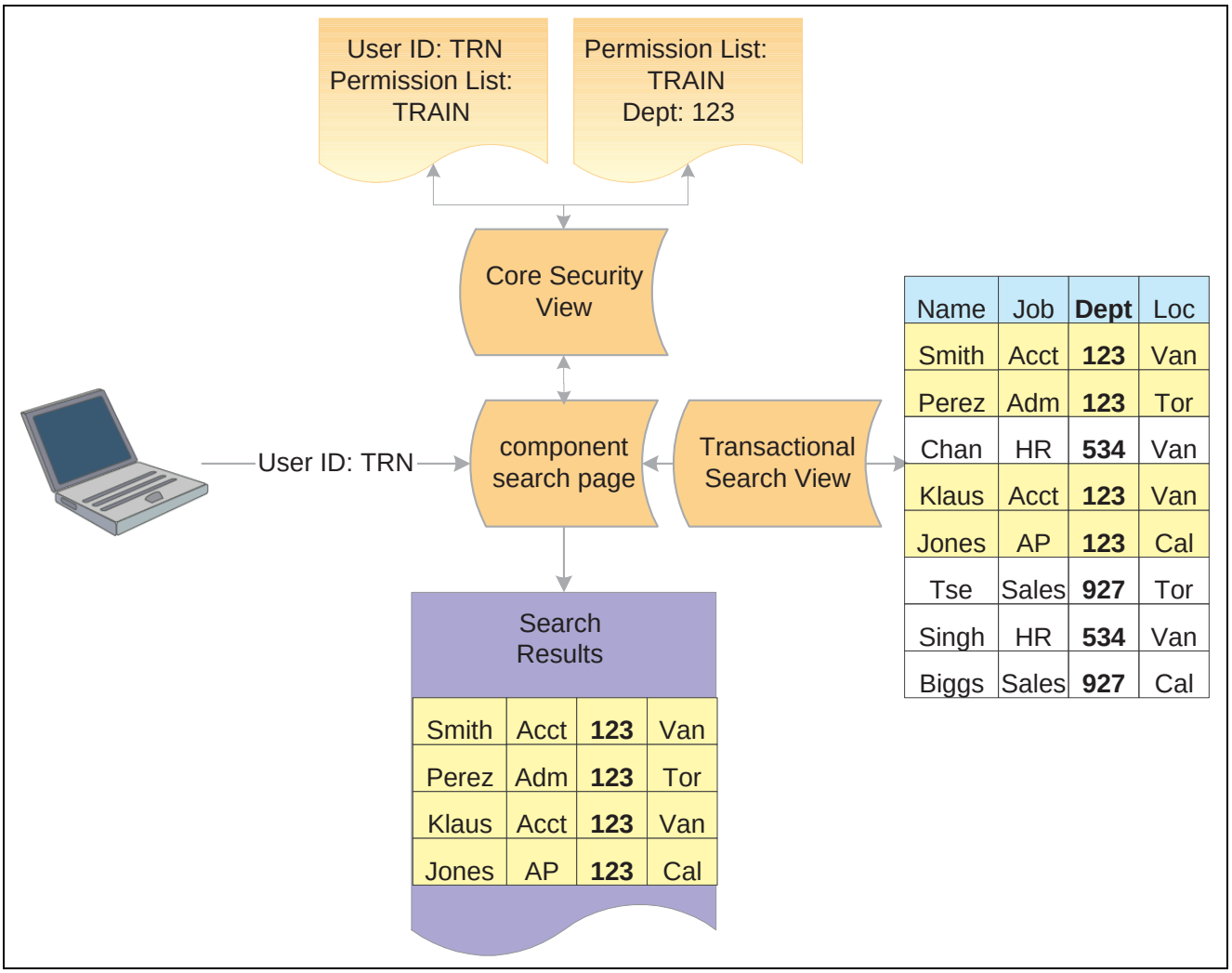
Row Security Permission Lists	Role-Based Permission Lists
Bring with them only the data permission assigned to them on the Security by Dept Tree page. The user will not have access to any application security access granted to the permission list on the Permission Lists component or any data permission access granted on the Security by Permission List page.	Bring with them data permission access assigned to them on the Security by Permission List page and any application security access granted to the permission list on the Permission Lists component. The user will not have access to any data permission assigned to them on the Security by Dept Tree page.
Should have only department security tree-based security.	Can have only non-department tree-based security.

Note. You can use the same permission list as a row security permission list and a role-based permission list by adding it to both the Security by Dept Tree component and Security by Permission List component and then adding them to the user on the User Profile - General page and by way of roles.

Note. The system recognizes non-tree based security associated with row security permission lists. Customers who modified the system to use non-tree based security in previous releases only have to import the customized table capturing the row security permission lists and security definitions into SJT_CLASS. You can continue to assign the permission lists to users in the Row Security field on the User Profile - General page.

New customers, or customers using non-tree based security for the first time, should use role-based permission lists. This will provide you much greater flexibility.

This diagram shows the search page determining which permission lists a user has and what data permission the list gives the user.



The system determines which permission lists a user has and what data permission is granted by the permission list before retrieving the matching data rows.

This table lists where you enter and maintain user security data and to which record the user security data is saved:

Data Type	Security Page in which Data is Entered or Maintained	Record Storing User Security Data
Row security permission lists	Security by Dept Tree page	SCRTY_TBL_DEPT This data is loaded into SJT_CLASS_ALL
Role-based permission lists	Security by Permission List page	SJT_CLASS This data is loaded into SJT_CLASS_ALL
Permission lists assigned to roles	Roles - Permission Lists page	PSROLECLASS This data is loaded into SJT_OPR_CLS

Data Type	Security Page in which Data is Entered or Maintained	Record Storing User Security Data
Roles assigned to users	User Profile - Roles page	PSROLEUSER This data is loaded into SJT_OPR_CLS
Row security permission lists assigned to users	User Profile - General page	PSOPRDEFN This data is loaded into SJT_OPR_CLS

See Chapter 6, “Setting Up and Administering HRMS Security,” Understanding PeopleSoft Security, page 57.

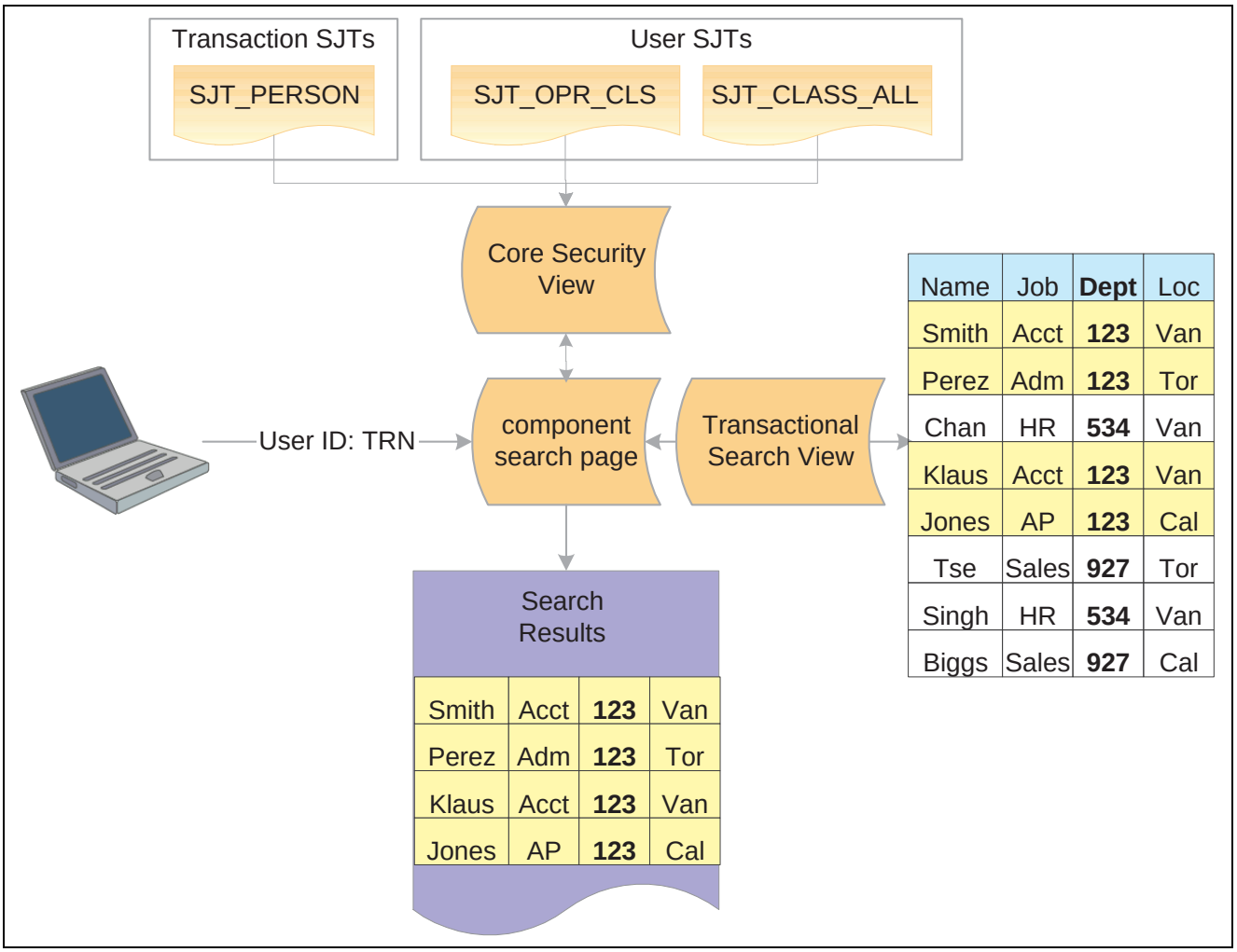
See Chapter 6, “Setting Up and Administering HRMS Security,” Setting Up and Assigning Tree-Based Data Permission, page 96.

See Chapter 6, “Setting Up and Administering HRMS Security,” Assigning Role-Based Data Permission Security to Permission Lists, page 104.

Security Join Tables

The system stores security data in transaction and user security join tables (SJTs). When you access a transaction component with a security search view, the security view references the security join tables to determine how the data is secured and what access the user has.

This graphic shows the search page determining which permission lists a user has and what data permission the list gives the user using the security join tables. The transaction security join table is determined by the type of data stored in the component.



The core security view uses the security data stored in the security join tables to determine which rows of data the user can access.

Transaction Security Join Tables

Each transaction security join table stores the transaction data required to secure each row of data. The security join tables store one row of data for each unique combination of key fields.

There are four transaction security join tables:

Transaction Security Join Table	Description	Stores Data From:	Key Fields
SJT_PERSON SJT_PERSON_USF **Note.** SJT_PERSON is used by customers using the core job data components and SJT_PERSON_USF is used by customers using the USF job data components.	Contains transaction data for the people (employees, contingent workers, POIs with jobs, and POIs without jobs) in your HCM system.	• JOB • JOB_JR • PER_ORG_ASGN • PER_POI_SCRTY	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 EMPLID
SJT_DEPT	Contains the transaction data for the HCM departments.	DEPT_TBL	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 SETID DEPTID
HRS_SJT_JO	Contains the transaction data for the job openings in your system.	• HRS_JOB_OPENING • HRS_JO_RTEAM_VW	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 HRS_JOB_OPENING_ID

The key fields are:

- SCRTY_TYPE_CD (security access type code)

  Security access types indicate which field is used for transaction security data. For example the security type 002 enables you to secure person data by location.

  Security access types are unique to a security access set.

- SCRTY_KEY1, SCRTY_KEY2, and SCRTY_KEY3 (security keys)

  The key security fields uniquely identify the security transaction data securing a row of data. The system determines the key fields by the security access type. For example, if person data is secured by location, then the key security fields are BUSINESS_UNIT (the prompt value for location) and LOCATION (the third key field isn't required for this example).

- EMPLID

  A person's unique identifying number that is assigned to them on the Personal Data pages.

- SETID and DEPTID

  A department's setID and department ID.

- HRS_JOB_OPENING_ID

  A job opening's unique identifying number, which is assigned to it on the Job Opening page.

Each table stores additional fields depending on the type of security you are using.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the security join table SJT_PERSON looks like this:

SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3	EMPLID
001	department setID: SHARE	department ID: 123	N/A	IN3321
001	department setID: SHARE	department ID: 534	N/A	IN7894
001	department setID: USA	department ID: OKL	N/A	US8390

If you used two security access types, for example Job Location (002) and Job Department Tree, SJT_PERSON looks like this:

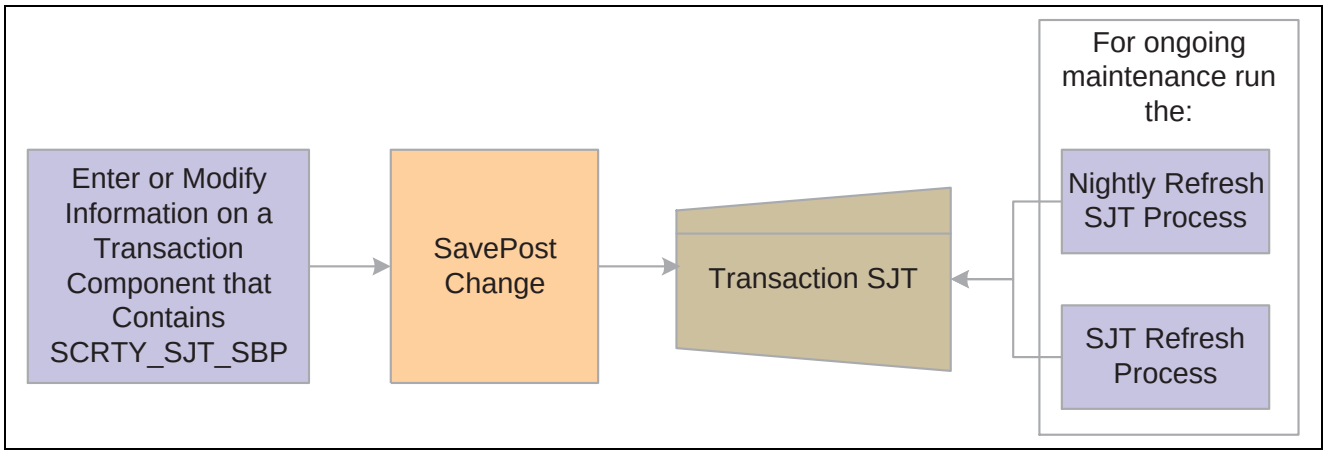
SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3	EMPLID
001	department setID: SHARE	department ID: 123	N/A	IN3321
002	location business unit: FRA01	location code: PAR	N/A	IN3321
001	department setID: SHARE	department ID: 534	N/A	IN7894
002	location business unit: AUS01	location code: SYD	N/A	IN7894
001	department setID: USA	department ID: OKL	N/A	US8390
002	location business unit: USA	location code: KSC	N/A	US8390

Note. Locations and departments do not need three key fields to uniquely identify them so the third security key field isn't necessary for this example.

When you first enable a security access type load the transaction data into security join tables using the SJT Refresh process. After the initial load, the system updates the tables using SavePostChange PeopleCode when you make a change to the transaction security data in the transaction components. You can also capture any changes the PeopleCode misses by running the SJT Refresh process as needed or the Nightly Refresh process.

Note. The SavePostChange PeopleCode on the transaction component subpage SCRTY_SJT_SBP updates the security join tables.

This graphic illustrates how the transaction security join tables are kept up to date:



Keeping the transaction security join tables up to date.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 108.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 109.

User Security Join Tables

The user security join tables store the user security data required to determine users' data permission. The security join tables store one row of data for each unique combination of key fields.

There are two user security join tables:

User Security Join Table	Description	Stores Data From:	Key Fields
SJT_CLASS_ALL	Contains the data permission information for all the permission lists that are given data access on the Security by Dept Tree page or Security by Permission List page.	• SCRTY_TBL_DEPT • SJT_CLASS	CLASSID SCRTY_SET_CD SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3
SJT_OPR_CLS	Contains the user IDs of people with data permission and the permission lists with data permission that are assigned to them.	• PSOPRDEFN • PSROLEUSER • PSROLECLASS	OPRID CLASSID

In addition to the security access type field and security key fields, the user security join tables store the following fields:

- SCRTY_SET_CD (security set code)

  A security set is a set of data secured in HRMS. For example, PPLJOB is the security set for the data of people with jobs and DEPT is the security set for the department data. Each security set has security access types.

- OPRID

The user's user ID.

- CLASSID

  The ID of the role-based or row security permission list.

Note. The security join tables store row security permission lists (ROWSECCLASS) as CLASSID permission lists but identify them using a row security flag.

The permission list data in SJT_CLASS_ALL comes from two sources:

- SCRTY_TBL_DEPT

  When you add tree-based data permission to a permission list, you use the Security by Dept Tree page and the system saves the permission list information to the SCRTY_TBL_DEPT record.

- SJT_CLASS

  When you add non-tree based data permission to a permission list, you use the Security by Permission List page and the system saves the permission list information to the SJT_CLASS record.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the SCRTY_TBL_DEPT table look like this:

ROWSECCLASS	SETID	DEPTID
TRAIN	department setID: SHARE	department ID: 123
PAY1	department setID: SHARE	department ID: 534
PAY2	department setID: USA	department ID: OKL

To load the data from the SCRTY_TBL_DEPT table, you need to run the Refresh SJT_CLASS_ALL process. In SJT_CLASS_ALL, the Refresh SJT_CLASS_ALL process:

- Creates a row of data for each enabled, tree-based security access type (and it's security set) with the data permission you set up on the Security by Dept Tree page.

  For example, if you enable security access type 012 (RS Dept Id) and security access type 001 (Job Department Tree) and grant the row security permission list TRAIN data permission to department 123, the process will create a row for each security access type and the permission will have access to people with jobs in department 123 and job openings in department 123.

- Saves the row security permission list as a CLASSID permission list.
- Saves the department setID as SCRTY_KEY1 and the department ID as SCRTY_KEY2.

If you are securing the data of people with jobs using the security access type Job Location (002), the key fields of the security join table SJT_CLASS look like this:

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	002	location business unit: FRA01	location code: PAR	N/A

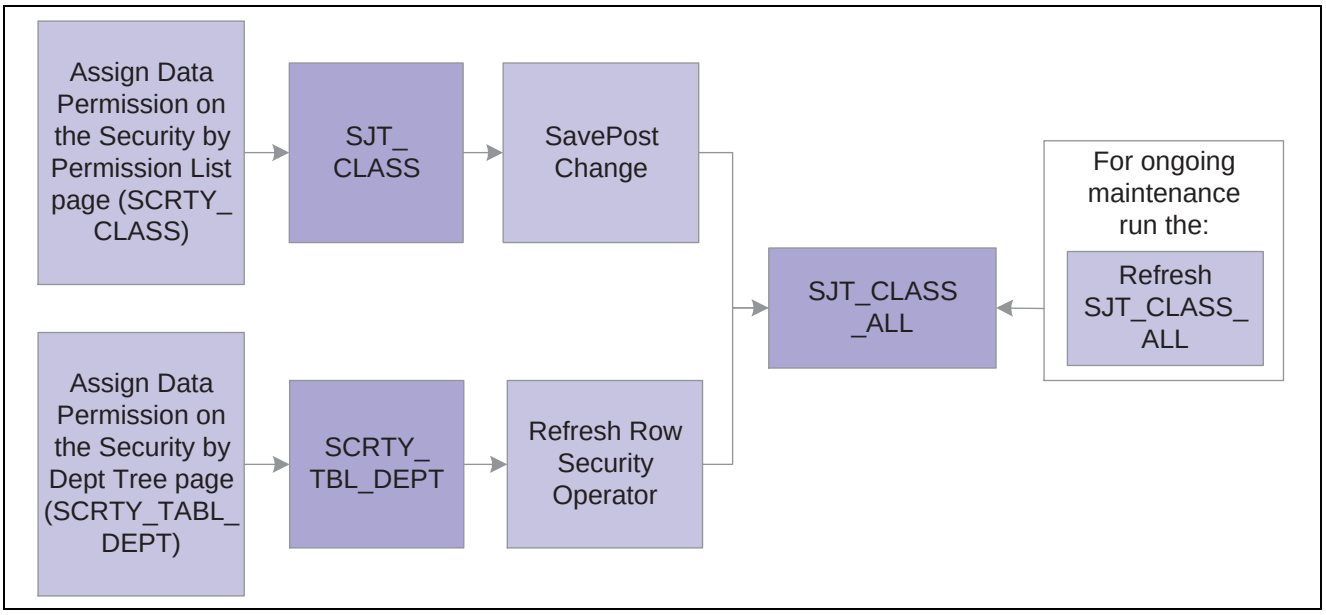
CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
PAY1	PPLJOB	002	location business unit: AUS01	location code: SYD	N/A
PAY2	PPLJOB	002	location business unit: USA	location code: KSC	N/A

When you save your changes on the Security by Permission List page, SavePostChange PeopleCode automatically updates the data to the security join table SJT_CLASS_ALL.

If you are using both security access types, SJT_CLASS_ALL looks like this after you have run the Refresh SJT_CLASS_ALL process and the PeopleCode has updated it:

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	001	department setID: SHARE	department ID: 123	N/A
TRAIN	PPLJOB	002	location business unit: FRA01	location code: PAR	N/A
PAY1	PPLJOB	001	department setID: SHARE	department ID: 534	N/A
PAY1	PPLJOB	002	location business unit: AUS01	location code: SYD	N/A
PAY2	PPLJOB	001	department setID: USA	department ID: OKL	N/A
PAY2	PPLJOB	002	location business unit: USA	location code: KSC	N/A

This graphic illustrates how the permission list user security join tables are kept up to date:



Keeping the operator security join table up to date.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 111.

The security join table SJT_OPR_CLS stores the relationship between User IDs and permission lists with data permission. The data in SJT_OPR_CLS comes from three sources:

- PSOPRDEFN

  This record contains the relationship between the User ID and row security permission list from the User Profile - General page.

- PSROLEUSER

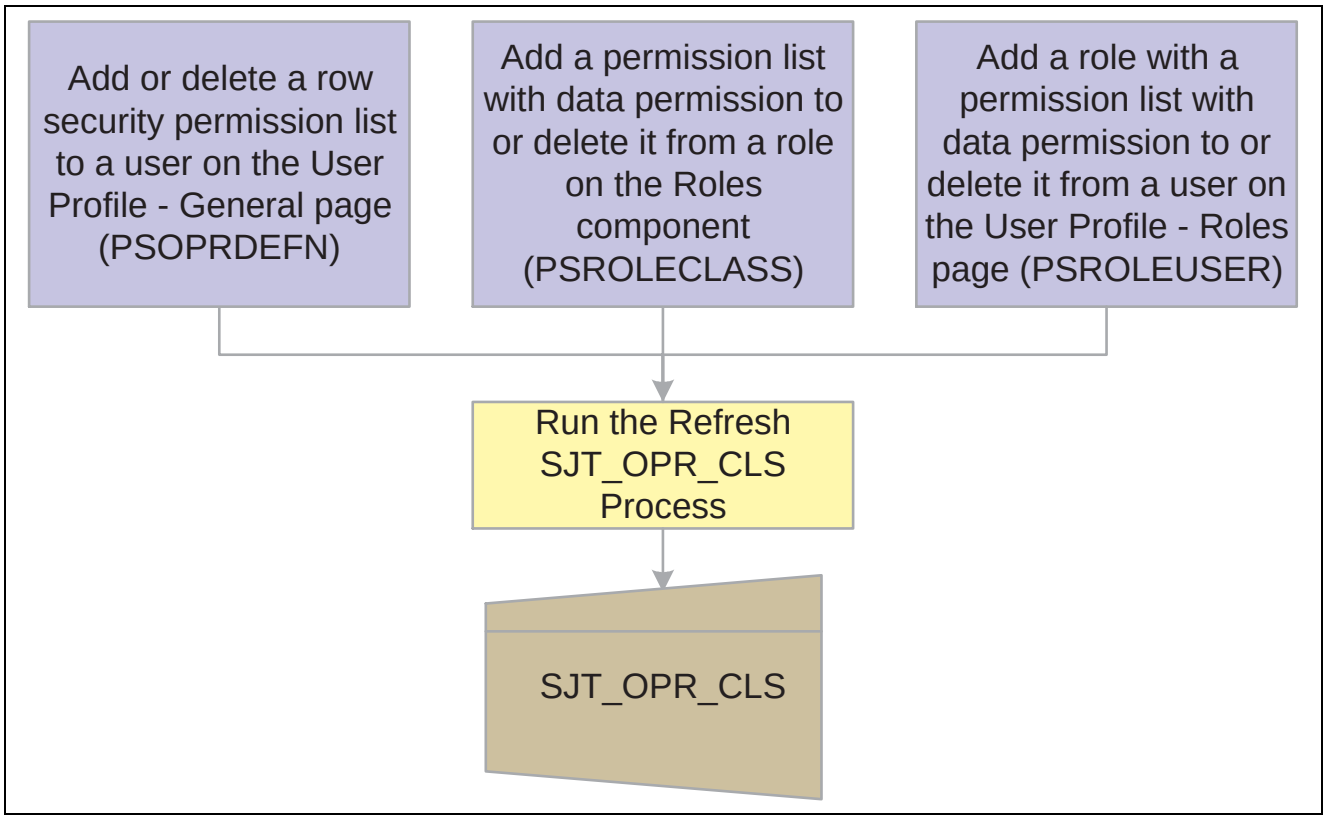
  This record contains the relationship between the User IDs and roles from the User Profile - Roles page.

- PSROLECLASS

  This record contains the relationship between roles and permission lists from the Roles - Permission Lists page.

To update SJT_OPR_CLS with the data from PSOPRDEFN, PSROLEUSER, and PSROLECLASS, run the Refresh SJT_OPR_CLS process whenever you add a permission list with data security to a user profile (either by adding a row security permission list on the User Profile - General page, adding a role with data permission on the User Profile - Roles page, or by adding a role-based permission list with data permission to a user-assigned role on the Roles - Permission Lists page) or delete one from a user profile.

This graphic illustrates when to update the user profile security join table:



Run the Refresh SJT_OPR_CLS process to keep the SJT_OPR_CLS up to date.

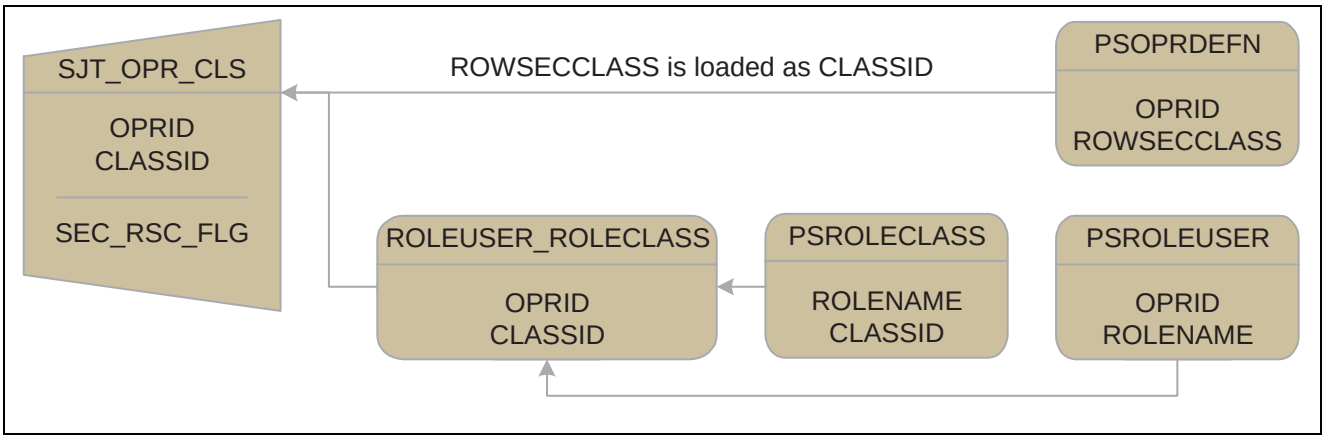
Note. You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

See Chapter 37, "Working with Enterprise Integration Points in PeopleSoft HRMS," Using HRMS EIPs that Subscribe Locally, page 722.

The Refresh SJT_OPR_CLS process loads the OPRID and ROWSECCLASS values from PSOPRDEFN directly into SJT_OPR_CLS, saving the row security permission list as CLASSID.

To establish the relationship between user profiles and role-based permission lists, the process first loads the OPRID and ROLENAME from PSROLEUSER and the ROLENAME and CLASSID from PSROLECLASS into a temporary table and then loads the OPRID and CLASSID, and the relationship between them, into SJT_OPR_CLS.

This diagram illustrates the data stored in SJT_OPR_CLS and their source:



SJT_OPR_CLS stores the relationship between user profiles and permission lists.

Note. The SEC_RSC_FLG field indicates if the CLASSID was originally a ROWSECCLASS permission list by flagging it with a value of Y.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Security Sets and Security Access Types

A security set is a grouping of data that is being secured. The sets differ by the origin of the transaction security data. For example, people of interest without jobs have a separate security set from people with jobs because the transaction data used to secure them does not come from the JOB record, but from the PER_POI_SCRTY record.

PeopleSoft delivers the following five security sets:

Security Set	Description	Security Join Table Storing Data
PPLJOB	People with Jobs Includes the data of any person who has a JOB record and all the associated data for that person.	SJT_PERSON
PPLUSF	People with Jobs for United States Federal Government Includes the data of any person who has a GVT_JOB record and all the associated data for that person.	SJT_PERSON_USF
PPLPOI	People of interest without jobs Includes the data of any person who does not have a JOB record and all the associated data for that person.	SJT_PERSON

Security Set	Description	Security Join Table Storing Data
DEPT	Departments Includes department budgets and positions.	SJT_DEPT
RSOPN	Job Openings Includes the data of job openings, including the data of applicants associated with a job opening.	HRS_SJT_JO

Note. PeopleSoft has delivered all the security sets you are likely to need. If you add new sets, it is considered a customization.

See See the security white paper posted on Customer Connection:*Human Capital Management Row Level Security in HRCS 8.9*

See Chapter 6, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 91.

Security access types are ways of securing the data within a security set. Each security set has a number of security access types that you can choose to enable. Among other things, security access types determine:

- The security transaction data.
- If there is data security for future-dated rows.
- If the access type uses a department security tree.

Note. You can only set up department hierarchies on security trees and you can only grant security access by department tree to row security permission lists.

Security access types that don't use a department security tree do not have a hierarchical structure and require that you list each field value individually for each permission list.

The following table lists the security access types by security set:

Security Set	Security Access Types
PPLJOB	• Job Department Tree (001) • Job Location (002) • Job Business Unit (003) • Job Company (004) • Job Reg Region (005) • Job Salary Grade (014) • Person Organization (015) • Job – Deptid – non Tree (025) • Job — Company/Paygroup (032)

Security Set	Security Access Types
PPLUSF	• US Federal Department Tree (016) • US Federal Location (017) • US Federal Company (018) • US Federal Business Unit (019) • US Federal Salary Grade (020)
PPLPOI	• POI Business Unit (006) • POI Location (007) • POI Institution (008) • Person of Interest (009)
DEPT	• Departments by Tree (021) • Departments - non Tree (022) • Departments by Setid (023)
RSOPN	• RS Company (010) • RS Business Unit (011) • RS Dept Id (012) • RS Location (013) • Recruiting Team (031)

Note. PeopleSoft has delivered all the security access types you are likely to need. You can add new types but it requires a very good knowledge of the application and of SQL.

Security administrators can only assign data permission using the security access types that you enable.

See Chapter 6, "Setting Up and Administering HRMS Security," Enabling Security Types, page 93.

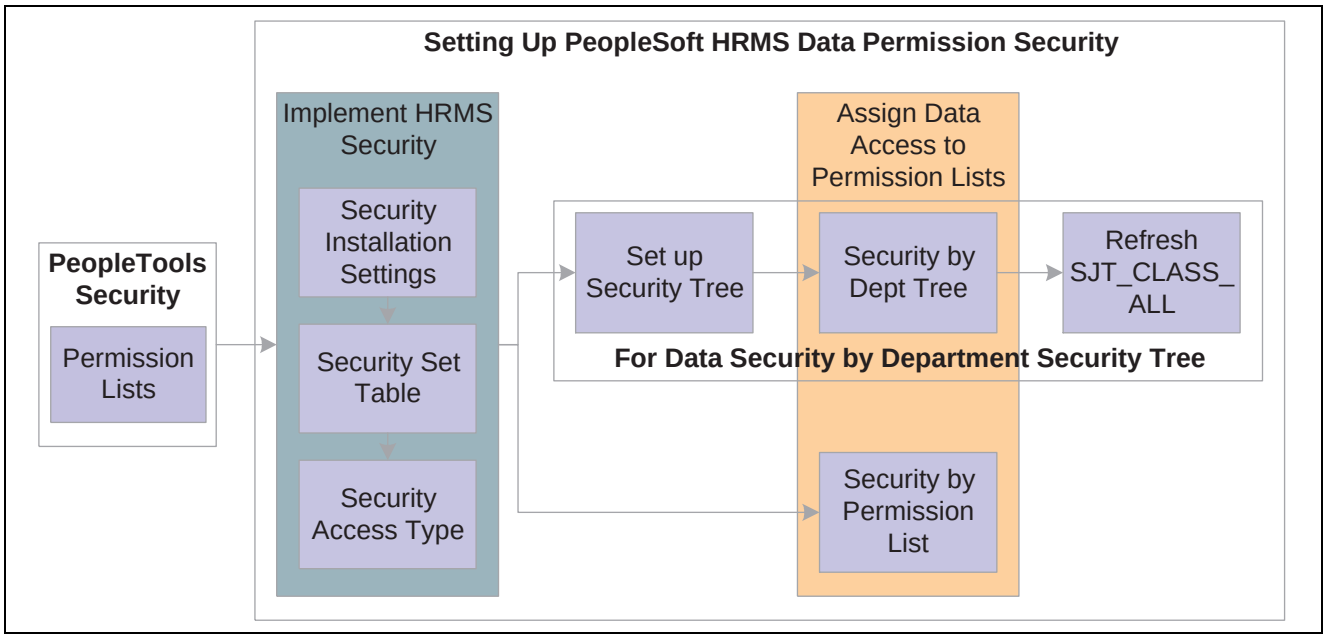
Enabling and Using Multiple Security Access Types

When you grant a permission list access to data in a security set using more than one security access type the security access creates a union, not a join or an intersect, with the two types. For example, if you enable the Job Company and Job Business Unit security access types for the PPLJOB security set and grant a permission list access to people in company A and people in business unit B, users with the permission list can access people in company A or people in business unit B; their access is not restricted to people in both business unit B and company C.

Note. See the security white paper posted on Customer Connection for information about creating security access types that join transaction fields to secure data.

HRMS Security Process Flow

When you set up HRMS data permission security you will follow this process flow:



Setting up PeopleSoft HRMS data permission security.

To set up HRMS data permission:

1. Set up permission lists in the PeopleTools pages.
2. Set the security installation settings on the Security Installation Settings component.
3. Review security sets on the Security Set Table component.
4. Enable security access types on the Security Access Type component.
5. Assign data permission to permission lists:
   - If you are using security tree-based security access types, set up a security tree, assign data permission on the Security by Dept Tree component, and refresh SJT_CLASS_ALL.
   - If you are using non-tree based security access types, assign data permission on the Security by Permission List component.

After you assign permission lists to roles, and the roles and row security permission lists to your users, refresh SJT_OPR_CLS.

Example of HRMS Data Permission

Grant the following security to these permission lists:

Permission List	Page	Security Access Type	Security Value
JobByDept	Security by Dept Tree page	Job Department Tree (001)	department 10100 (you must select setID SHARE as the first key)
JobByLoc	Security by Permission List page	Job Location (002)	location UK1 (you must select business unit GBR01 as the first key)

Permission List	Page	Security Access Type	Security Value
MyJobs	Security by Dept Tree page	Job Department Tree (001)	department 11000 (setID SHARE)
	Security by Permission List page	Job Location (002)	location USA (business unit GBL01)

Grant the permission lists to the following roles:

Role	Permission List	Outcome
Role 1	JobByDept	Role 1 has no access because tree–based department security (security access type 001) does not work with roles.
Role 2	JobByLoc	Has access to people with jobs in location UK1.
Role 3	MyJobs	Has access to people with jobs in location USA. Does not have security access to department 11000.

Grant the following row security permission lists and roles to users:

User ID	Row Security Permission List	Role	Has Access to People with Jobs In:
User A	JobByDept		department 10100.
User B	JobByDept	Role 2	department 10100 location UK1.
User C		Role 2	location UK1.
User D		Role 3	location USA
User E	MyJobs		department 11000 location USA.
User F		Role 1	Has no access.
User G	JobByDept	Role 2 Role 3	department 10100 location UK1 location USA.

Implementing Data Permission Security

To implement data permission security, use the Security Installation Settings component (SCRTY_INSTALL), the Security Sets component (SCRTY_SET_TBL), and the Security Access Type component (SCRTY_TYPE2_TBL).

This section discusses how to:

- Install HRMS security.
- View security sets.
- Set up update groups.
- Enable security types.
- Enter SQL statements.

Understanding Future-Dated Security

The Security Installation Settings page enables you to select actions that, when used on the Work Location page (JOB_DATA1), trigger the SavePostChange PeopleCode to create a future-dated row in SJT_PERSON.

The system normally secures data using the current transaction security data. Only users with data permission access to the transaction security data on the current row can access the person's data

When you include future-dated transaction security data rows the system uses both the current data and the future-dated values to secure the data. This gives users with data permission access to the transaction security data on the current row and users with data permission access to the transaction security data on the future-dated row access to the person.

The system only creates future-dated security rows in SJT_PERSON when you:

1. Select one or more actions on the Security Installation Settings page.
2. Enable future-dated rows for the security access type.

   Note. This enables you to use future-dated security with some types but not others.

3. Create and save a future-dated row in a component that uses the JOB record using one of the actions you selected on the Security Installation Settings page.

If you have selected the action of *Transfer* in the Actions that trigger Future Dated Security Rows grid, then when you create a future-dated Job Data row with the action of *Transfer* for a person, the system will add a row to the SJT_PERSON with the transaction data from the new row. Users with data permission to the future-dated transaction security data will have access to the person's data.

Note. Only component security views use future-dated security rows.

For example, as of January 1, 2005 Kenny Wong works in department 42000. Starting July 1, 2006 he will transfer to department 44000. On April 15, 2006, in anticipation of the transfer, the HR administrator enters a future-dated job data row for the transfer.

Julie Sparrow manages department 42000 and Barry Deere manages department 44000 and each has data permission to the people in their departments.

As of April 15, 2006 Kenny Wong has the following two job data rows:

Effective Date	Action	Department
January 1, 2005	Hire	42000
July 1, 2006	Transfer	44000

The data permission depends on if you are using future-dated security for that security access type and if you have selected the action of *Transfer* on the Security Installation Settings page:

- If you have *not* selected it:
  - The SavePostChange PeopleCode does not update SJT_PERSON with the new department information from the future-dated row because it is not yet effective.

    Note. When the transfer row does become effective, the Nightly SJT Update process updates SJT_PERSON, overwriting the old row with the new row.

  - Julie can access Kenny's data until June 30, 2006 and Barry can access it starting July 1, 2006.
- If you *have* selected it:
  - The SavePostChange PeopleCode creates a new row in SJT_PERSON with the future-dated transaction security data. The system identifies this row as future-dated.

    Note. When the transfer row becomes effective, the Nightly SJT Update process updates SJT_PERSON, removing the old row and making the future-dated row current.

    Note. Search views that don't use future-dated security will not use the future security row when enforcing data permission.

  - Julie can access Kenny's data until June 30, 2006 and Barry can access it starting April 15, 2006.

Understanding Special Job Security Options

Without special job security options, the system creates a single transaction security data row for each unique combination of ID and employment record number. When you use special job security options, the system creates additional rows in SJT_PERSON with different security key values to enable access to rows to which a permission list would normally not have access.

For example, if you are securing data by department and have enabled people with access to the home job data record to view the host job data record but are *not* allowing people with access to the host job data record to view the home job data record, the system will create the following three rows of data in SJT_PERSON (only the relevant columns are shown) for a person whose home job data record (employee record number 0) is in department 25000 and whose host job data record (record number 1) is in department 20000:

Key 1	Key 2	EmplID	Empl Rcd#	Home/Host	Intl. Type
SHARE	25000	K0G019	0	Home	
SHARE	25000	K0G019	1	Host	Home-Host
SHARE	20000	K0G019	1	Host	

The system creates the row marked Home-Host to grant the special job security option. By creating a row for the host record with the department value of the home record, people with data permission to the home record can access the host record.

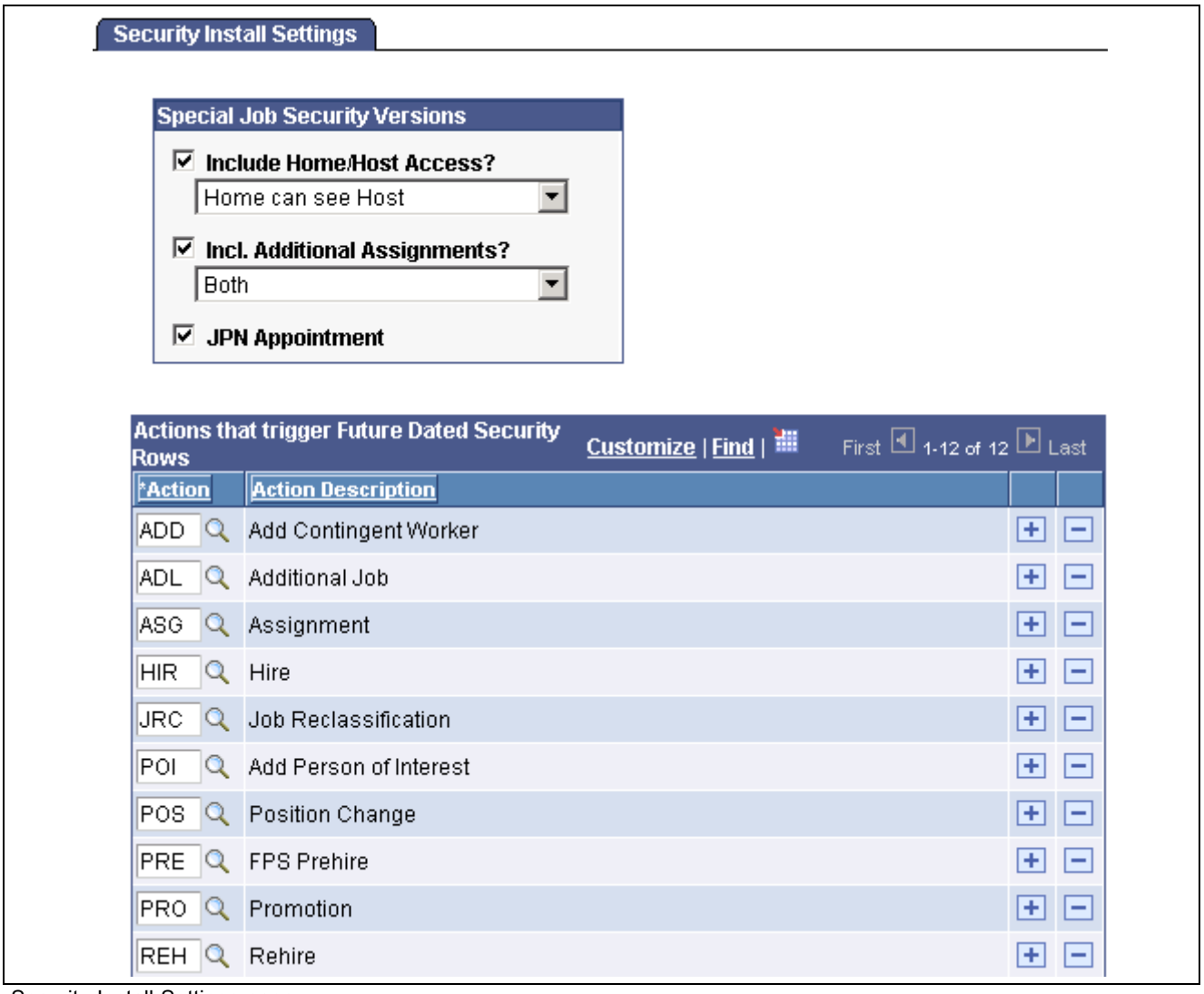
The system works the same way for the other special security options, creating an additional row and inserting the key values that enable the access.

Pages Used to Implement Data Permission Security

Page Name	Object Name	Navigation	Usage
Security Install Settings	SCRTY_INSTALL	Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Install Settings	Choose the HRMS security settings for your installation.
Security Set Table	SCRTY_SET_TBL	Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Set Table	Review existing security sets and the security access types you've attached to them.
Security Update Groups	SCRTY_SJT_UPD	Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Update Groups	Define the data groups that can be updated by the SJT Refresh process.
Security Type Table	SCRTY_TYPE2_TBL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table	Use to enable or modify existing security access types or create new ones.
Security Type SQL	SCRTY_TYPE2_SQL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type SQL	Use to enter the SQL statements for the new security types.

Installing HRMS Security

Access the Security Install Settings page.



Security Install Settings page

Special Job Security Versions

The options you select here will be available for your installation but will not be enabled unless you select them again for the security access types you are using. This enables you to use the security versions for some security access types and not others.

Include Home/Host Access? This option is for tracking global assignments. When an employee is on assignment they have a host record and a home record. Select one of the following options:

- *Home can see Host*: Select to enable a person with data permission that enables them to view the home record to also view the employee's host record. A person with just data permission to the host record will not be able to see the employee's home record.
- *Host can see Home*: Select to enable a person with data permission that enables them to view the host record to also view the employee's home record. A person with just data permission to the home record will not be able to view the host record.

- *Both*: Select to enable a person with data permission to the home record to view the host record and a person with data permission to the host record to view the home record.

If you do not select Include Home/Host Access? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Global Assignments*, "Tracking Assignments".

Incl. Additional Assignments?

This option is for workers with additional assignments added using the Job Data Concurrent component (JOB_DATA_CONCUR).

When a worker has an additional assignment, they have a controlling employee or contingent worker instance with an active job data record and an additional assignment job data record. Select one of the following options:

- *Assignment can see Instance*: Select to enable a person with data permission that enables them to view the assignment job data record to also view the person's controlling instance job record. A person with data permission to the controlling instance job data record will not be able to see the worker's assignment job data record.
- *Instance can see Assignment*: Select to enable a person with data permission that enables them to view the controlling instance job record to also view the person's assignment job data record . A person with data permission to the assignment job data record will not be able to see the worker's controlling instance job data record.
- *Both*: Select to enable a person with data permission that enables them to view the controlling instance job record to also view the assignment job data record and a person with data permission that enables them to view the assignment job data record to also view the controlling instance job record.
- *None*: Select to make additional assignments job data records available to all users.

If you do not select Incl. Additional Assignments? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Additional Assignments.

Jpn Appointment

(JPN) Select so that users who have access to the additional appointment of a worker can access the main appointment record for that worker.

The system assigns some additional assignments (Kenmu) to a particular EmplID and record called a *main appointment*, the job you can access through the Job Data pages.

If you do not select Jpn Appointment? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments.

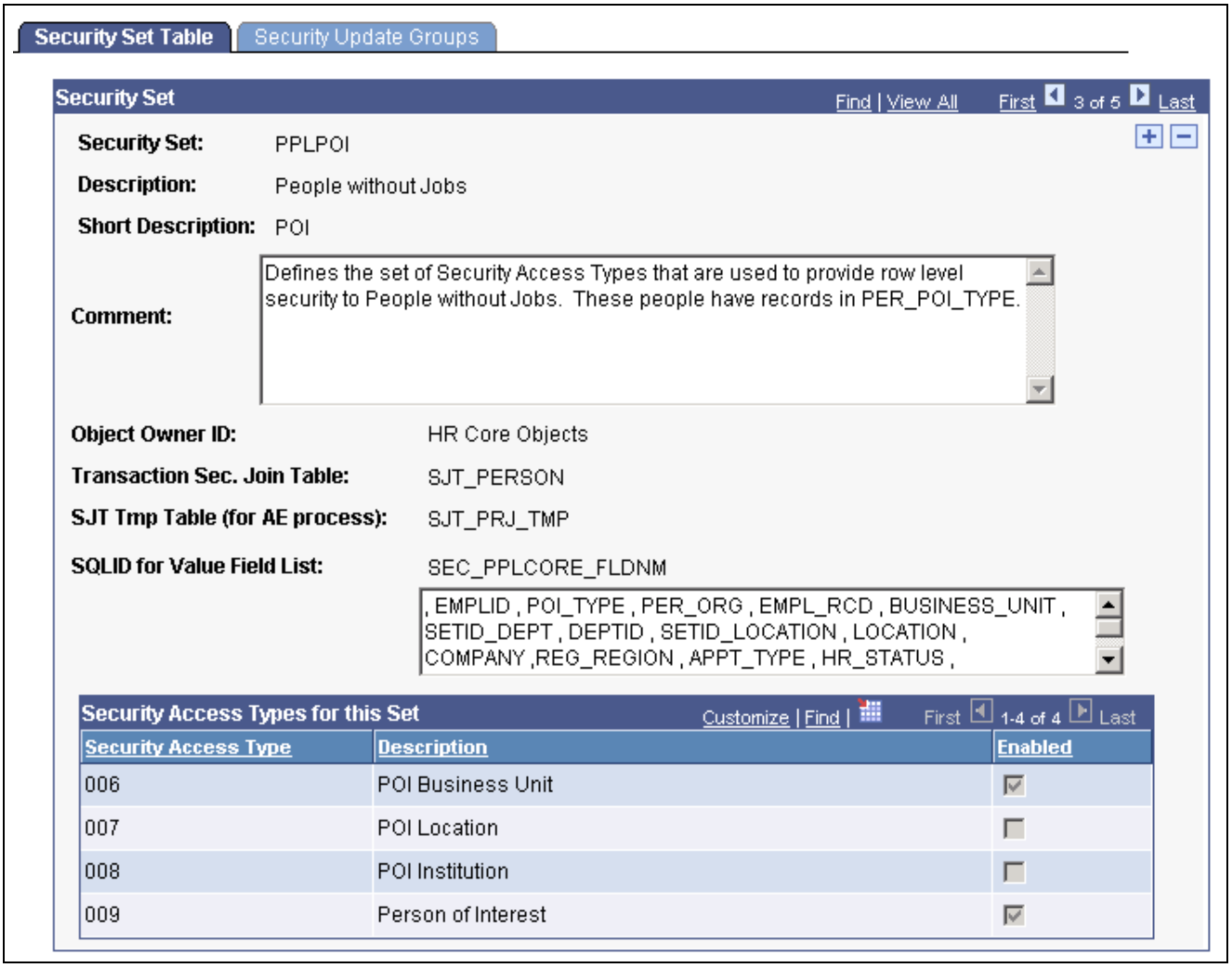
Actions that trigger Future-Dated Security Rows

Select the actions that will trigger the SavePostChange PeopleCode in the components using the JOB record to create a future-dated security row in SJT_PERSON when they are used in a future-dated row in the Job Data pages. The system will not create security rows for future-dated rows with actions other than those listed here.

To create future-dated rows, you need to select the Include Future Dates check box on the Security Type Table. This enables you to use future-dated security for some security access types and not others.

Viewing Security Sets

Access the Security Set Table page.



Security Set Table page

Object Owner ID Security sets with a PeopleSoft Object Owner ID are system data and not available for modification on this page. You can still modify the Security Update Groups of delivered security sets.

Transaction Sec. Join Table The security join table that stores the transaction data for this security set.

Note. If you are creating a new security set, you must have created this table in Application Designer before creating the security set.

Creating a new security set requires modification of the system. Please refer to the Security white paper on Customer Connection for directions.

SJT Temp Table (for AE process) The temporary record used for PeopleSoft Application Engine. It is a copy of the transaction security join table and also contains the Application Engine process fields. This table updates the transaction security join field using the Application Engine process.

SQLID for Value Field List The list of fields (not including the key fields) that are in the transaction security join table.

Generate SQL Click to generate the SQL and SQLID for the value field list.

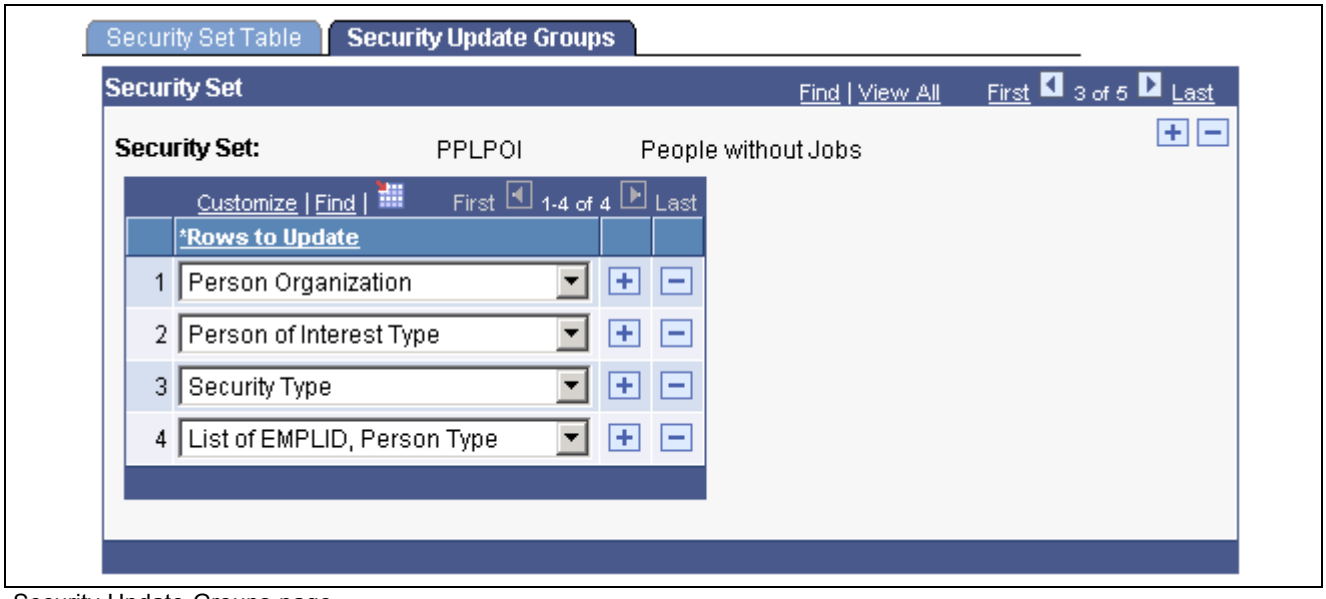
Security Access Types for this Set

The system lists the security access types for this security set and indicates which ones are enabled. Enable or disable security access types on the Security Type Table page.

See Chapter 6, "Setting Up and Administering HRMS Security," Enabling Security Types, page 93.

Setting Up Security Update Groups

Access the Security Update Groups page.



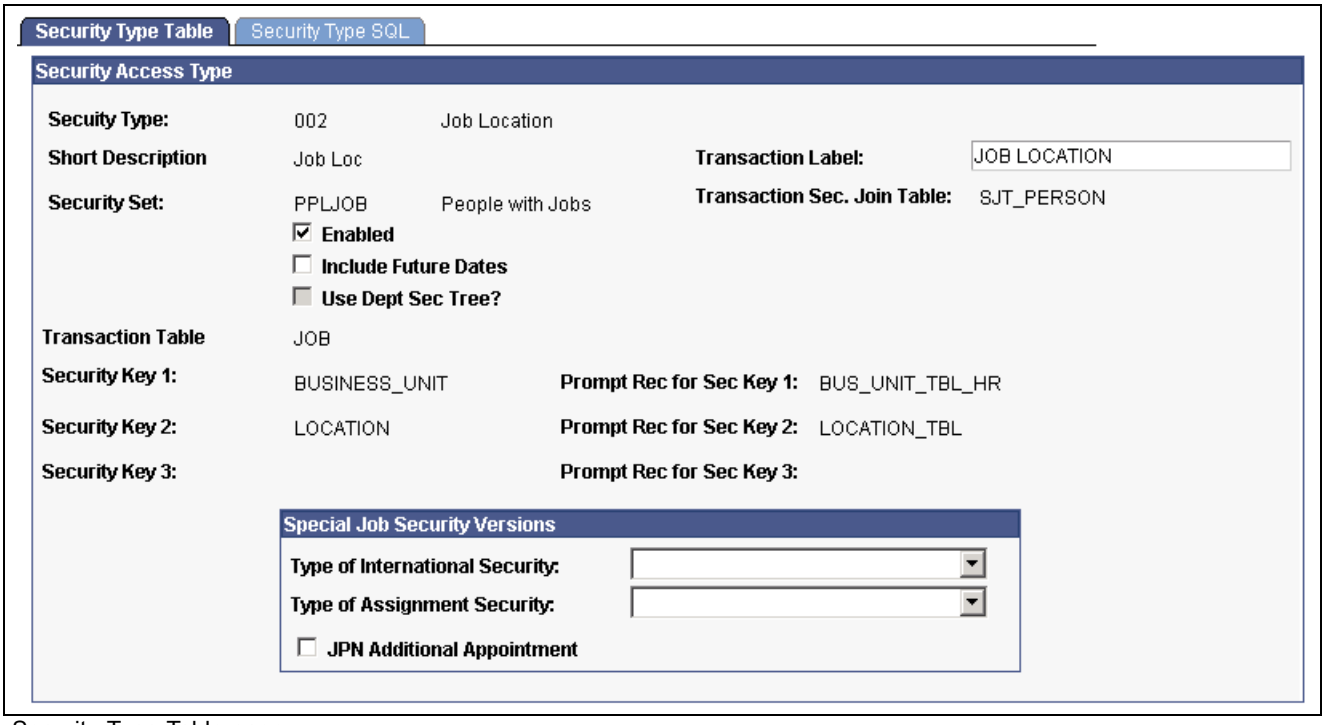
Security Update Groups page

Select which refresh options to make available when updating the security set using the SJT Refresh process. The system makes the options you select here available for this security set on the Refresh SJT page, enabling you to select portions of the security join table to update.

For example, you could refresh all the rows for external instructors by selecting the refresh option Person of Interest Type and the POI Type *External Instructors*.

Enabling Security Types

Access the Security Type Table page.



Security Type Table page

You can enable more than one security access types for a security set and you can assign data permission access to a permission list using more than one access type.

Note. PeopleSoft has delivered the most asked for security access types and you should not need to create new types. Enable or disable the types your installation requires.

Please refer to the Security white paper on Customer Connection for directions on how to create new security types.

Note. The more security access types you enable and options you use, the more rows of data the system stores in the security join tables. This affects system performance. PeopleSoft advises you to enable only the security types and options required to manage your data permission needs.

Security Type — The system automatically numbers new security types.

Transaction Label — Enter a field label. The system will display this label on a transaction page when the security access type is used as a field to gather data.

For example, if you are using fields in addition to POI type to control access to the data of POIs without jobs, the system will use the label you enter here on the Add a POI Type page and Edit POI Relationship page to prompt for security transaction values.

Security Set and **Transaction Sec. Join Table** — The security set whose data you are securing and the security join table associated with the security set.

See Chapter 6, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 91.

Enabled Select to enable the security type.

Include Future Dates Select to enable the security join tables to store future-dated security rows for this type. The system will only update the security join tables with the future-dated rows that have the actions you selected on the Security Install Settings page.

Use Dept Sec Tree? (use department security tree?) Select if this security type uses the department security tree.

You can only create department security trees for departments and can only grant data permission based on department security trees to row security permission lists.

Transaction Table The transaction table that stores the field or fields that will control security for this type.

Special Job Security Versions If you enable special job security versions on the Security Install Settings page, enable the options for this security access type.

See Chapter 6, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 88.

Prompt Rec for Sec Key 1 (prompt record for security key 1), **Prompt Field for Sec Key 1** (prompt field for security key 1), **Prompt Rec for Sec Key 2** (prompt record for security key 2), **Prompt Field for Sec Key 2** (prompt field for security key 2), **Prompt Rec for Sec Key 3** (prompt record for security key 3), and **Prompt Field for Sec Key 3** (prompt field for security key 3) Define the security data fields for this type. The fields need to be on the Transaction Table record.

The prompt record is the record the prompt field values come from when you are assigning values to a permission list. You must select all the records and fields necessary to make a unique qualification here.

For example, to select a location (key 2), you first need to select a business unit (key 1). The prompt record for the BUSINESS_UNIT field is BUS_UNIT_TBL_HR and the prompt record for the LOCATION field is LOCATION_TBL.

Refreshing the Transaction Security Join Tables

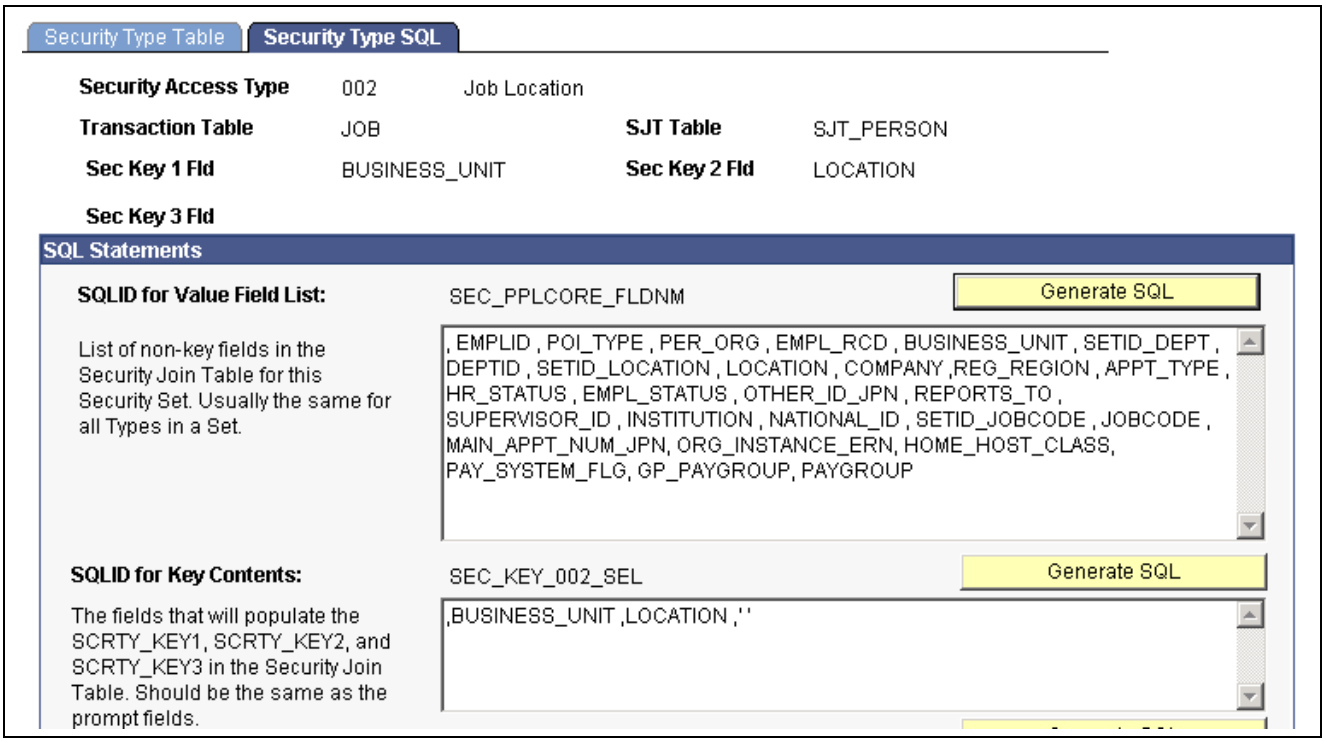
You should refresh the transaction security join tables whenever you:

- Enable or disable a security access type.
- Enable or disable a future-dated security for an enabled security access type.
- Change the special job security versions for an enabled security access type.

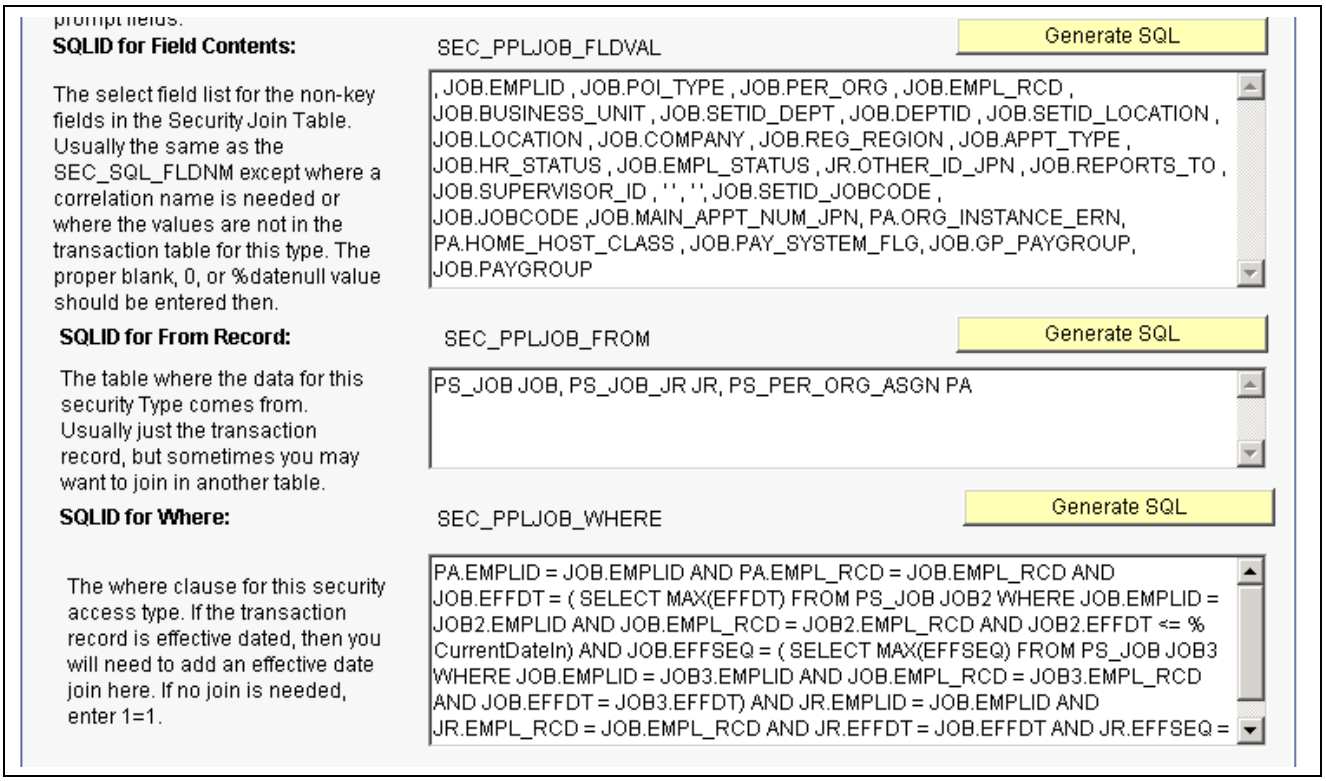
See Chapter 6, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 109.

Entering SQL Statements

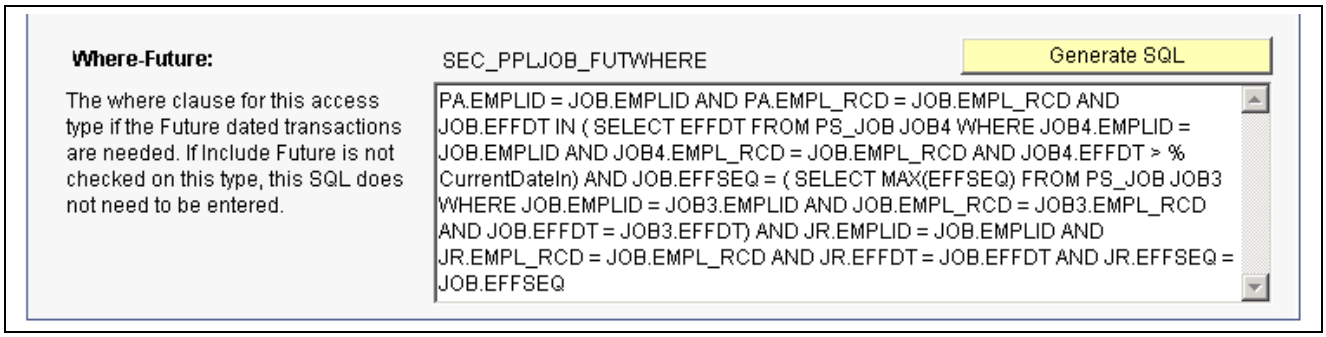
Access the Security Type SQL page.



Security Type SQL page (1 of 3)



Security Type SQL page (2 of 3)



Security Type SQL page (3 of 3)

The Application Engine uses the SQL fragments on this page to build the update and insert statements to update the transaction security join table.

You can use any SQLID but when you click the Generate SQL buttons, the system generates unique IDs based on the security set and/or type.

Warning! This page should only be used by users with a strong understanding of SQL joins and the table relationships.

Setting Up and Assigning Tree-Based Data Permission

To set up and use tree-based data permission, use the Tree Manager component (PSTREEMGR), Security Tree Audit Report component (RUNCTL_PER506), Security by Dept Tree component (SCRTY_DATA), and Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

This section provides an overview of the data permission security by department security trees and discusses how to:

- Create and modify security trees.
- Audit security trees.
- Assign tree-based data permission to row security permission lists.
- Refresh SJT_CLASS_ALL with tree and row security permission list data.

Note. After you assign a row security permission list to a user, you must run the Refresh SJT_OPR_CLS process.

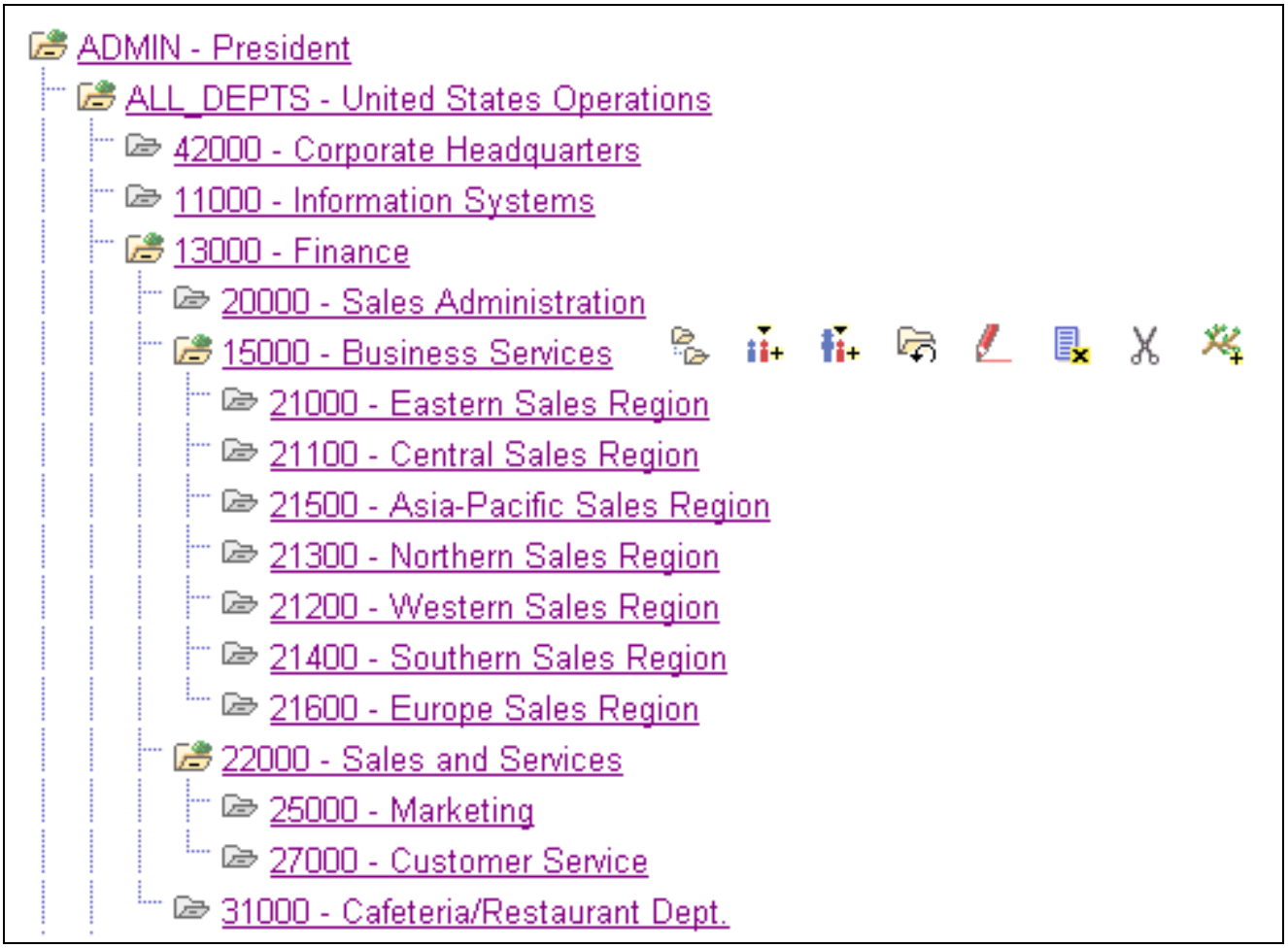
See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Understanding Data Permission Security by Department Security Trees

Each security set has a tree-based security access type. Tree-based security access types use department security trees to set up a hierarchy of your departments and enable you to use this hierarchy to simplify data assignment.

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

To grant a row security permission list access to a group of departments, you grant access to the department to which all of those departments report. You can restrict access to individual departments or to a group of departments if you need to. This is an example of a department security tree for the SHARE setID:



Portion of the SHARE department security tree

Using this security tree you could, for example, grant a row security permission list access to department 13000 and the system includes department 13000 and all the departments that report to it, giving the permission list access to everyone in all fourteen finance departments.

You can also restrict access to one of the branch entities. For example, if a row security permission list needs access to everyone in Finance except for Business Services, grant access to department 13000, but restrict access to department 15000, giving access to departments 13000, 20000, 22000, 25000, 27000, and 31000.

Note. You can only grant tree-based data permission to row security permission lists.

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

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

See Chapter 6, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 96.

See Chapter 6, "Setting Up and Administering HRMS Security," Assigning Role-Based Data Permission Security to Permission Lists, page 104.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Security Trees and Departments

For the purpose of building department security trees, PeopleSoft defines all entities in an organization—from companies to departments—as departments. The department data is created and stored in the Departments component (DEPARTMENT_TBL), which you can access from PeopleSoft Tree Manager or the Set Up HRMS menu. You assign security access based on these departments so define each entity in your organization in the Departments component so that you can add its department ID code to the security tree.

Trees are built with levels and nodes:

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

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

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

Note. You should include inactive departments on your security tree; otherwise, data for retired, terminated, or transferred people who used to be in inactive departments will be inaccessible.

See Chapter 12, "Setting Up Organization Foundation Tables," Maintaining Departments, page 277.

Security Trees and Effective Dates

All security trees are called DEPT_SECURITY. Security trees are uniquely identified by their setID and effective date.

You can create future-dated trees to reflect a change in your reporting structure and you may want to grant access using the newer tree (or, perhaps, to a historical tree).

When you assign data to a permission list on the Security by Dept Tree page select the date as of which you want the trees to be effective. When you add a row in the Define Security Profile grid on the Security by Dept Tree page and select the setID of the security tree, the system references the security tree that is effective as of the date you selected in the As of Date for the Trees field.

For example, it is now April, 2005 and you have created a future-dated security tree for the SHARE setID dated January 1, 2006. You wish to try out the data permission using the new tree. On the Security by Dept Tree page, enter January 1, 2006 (or a higher date; the date does not have to be the exact effective date of the tree) in the As of Date for the Trees field. Add a row in the Define Security Profile grid and select the SHARE setID. The system displays January 1, 2006 in the Effective Date field in the grid and uses the future-dated tree to enforce data permission for that permission list.

When the future-dated tree becomes effective, the system does *not* automatically update the security profiles of permission lists referencing the old tree. For example, on January 1, 2006, the system continues to use the previous SHARE tree to enforce data permission for all the permission lists that were referencing it.

To update the permission lists so that they reference the new tree, enter the Security by Dept Tree page, enter the date January 1, 2006, and click the Refresh Tree Effective Date button. The system will update the effective dates of all the trees referenced by that permission list to the dates the trees effective as of January 1, 2006.

Pages Used to Set Up and Assign Tree-Based Permission

Page Name	Object Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager, Tree Manager	Use to set up or modify department security trees. You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.
Department Tbl & Departmental	PRCSRUNCNTL	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Report, Department Tbl & Departmental	Use to create a list of discrepancies between the data you've entered in the Departments component and the departments you've added to the current security tree.
Security by Dept Tree	SCRTY_TABL_DEPT	Set Up HRMS, Security, Core Row Level Security, Security by Dept Tree, Security by Dept Tree	Grant tree-based department data access to row security permission lists.
Refresh Row Security Operator	SCRTY_OPR_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh Row Security Operator	Run the Refresh SJT_CLASS_ALL process when you create or modify a security tree or when you create or modify a row security permission list to update SJT_CLASS_ALL with the user security data.

Creating and Modifying Security Trees

You can create a security tree automatically or manually.

Creating Security Trees Manually

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

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

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

You must have a node for every department in the setID. You can add nodes to your trees as you add departments to your organization.

To add a new, future-dated departments in order to maintain data security for people added to the new departments, create a future-dated security tree. This will enable you to add people to the new department before it becomes effective and still be able to control access to their data in the present.

Creating Security Trees Automatically

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

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

1. Import the entity data.

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

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

2. Set up the reporting hierarchy.

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

3. Build the department security tree.

   Run PER508 to build your DEPT_SECURITY tree. The effective date of the tree is the latest effective date of the departments that were processed in step 2.

   Note. To set up multiple trees to represent security or organizational structures at different points in time, perform step 2 for each tree, setting the As of Date each time, and perform this step again.

4. Transfer department data into the department component.

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

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

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

Modifying Security Trees

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You also need to run the Refresh SJT_CLASS_ALL process to update the data access profiles and security join tables.

See Chapter 6, "Setting Up and Administering HRMS Security," Refreshing SJT_CLASS_ALL with Tree and Row Security Permission List Data, page 104.

Renumbering Gaps in Security Trees

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

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

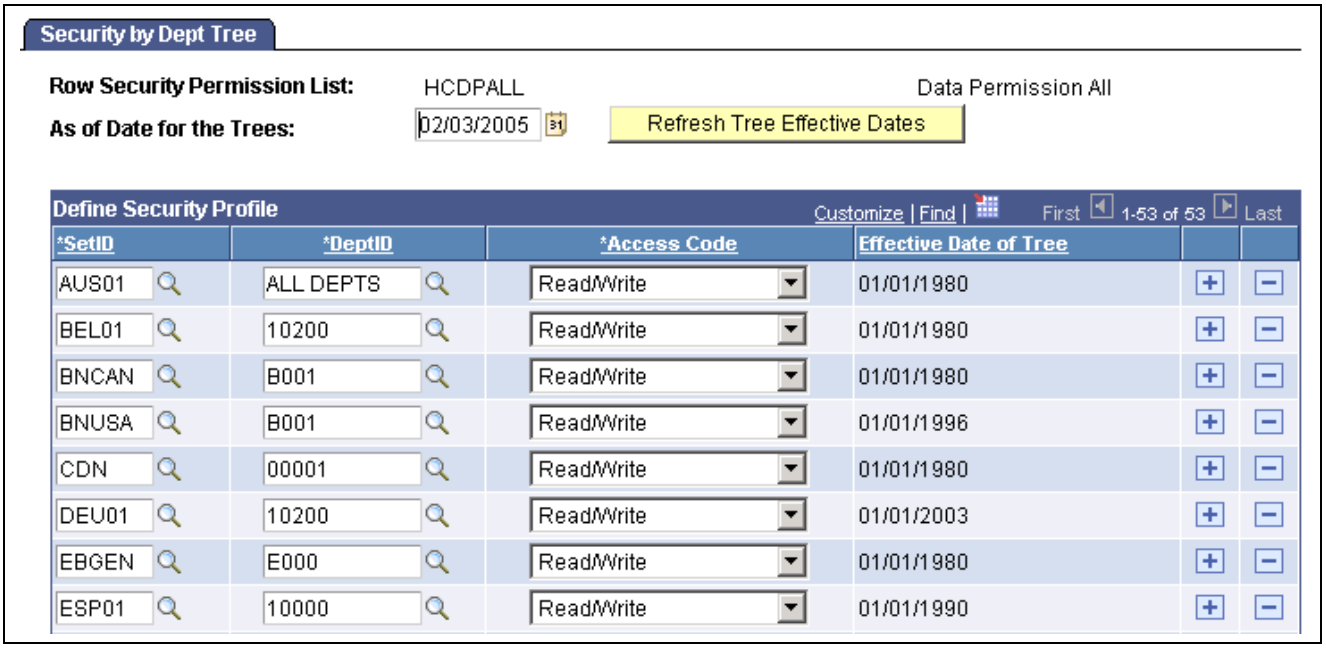
- You load your security tree structure.
- You modify your security tree.
- An error message tells you to gap your tree.

Auditing Security Trees

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

Assigning Tree-Based Data Permission to Row Security Permission Lists

Access the Security by Dept Tree page.



Security by Dept Tree page

As of Date for the Trees

The system will reference the trees that are effective as of this date when you select a tree setID in the Define Security Profile grid. Select a date in the future to reference a future-dated tree.

For example, to use the department security trees that are current as of today's date, enter today's date in this field.

Refresh Tree Effective Dates

Select to refresh the trees listed in the Define Security Profile grid to trees that are effective as of the date in the As of Date for Trees field.

Note. To ensure that your row security permission lists use the current trees you must enter the appropriate as of date and click this button whenever you create a more recent version of a setID's security tree.

Define Security Profile

SetID and **DeptID** (department ID)

Enter the tree setID and the ID of the department that you are granting access to. The row security permission list has access to each department ID that reports up to this one on the security tree (unless you specify otherwise) so you don't have to select each department ID individually.

Access Code

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

To restrict access to one or more departments that report up to a department ID that you've granted access to, insert a row and select the restricted department's ID and then select an Access Code of *No Access*.

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

Effective Date Displays this setID's tree effective date. Make sure that the effective date of the tree is accurate. The system will not update the effective date automatically if you make a newer version of a tree.

To update trees, enter the date as of which the tree is effective in the As of Date of Tree field and click the Refresh Tree Effective Date button.

Refreshing SJT_CLASS_ALL with Tree and Row Security Permission List Data

Whenever you add or modify a tree or add or modify a row security permission list on the Security by Dept Tree component you need to run the Refresh SJT_CLASS_ALL process to update SJT_CLASS_ALL with the new user security data.

You can access the new or modified tree on the Security by Dept Tree page before you run this process so if you are creating a tree and then using it on a new or existing permission list you only need to run the process once, as long as you refresh the appropriate rows.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 111.

Assigning Role-Based Data Permission Security to Permission Lists

To assign data permission security to role-based permission lists, use the Security by Permission List component (SCRTY_CLASS).

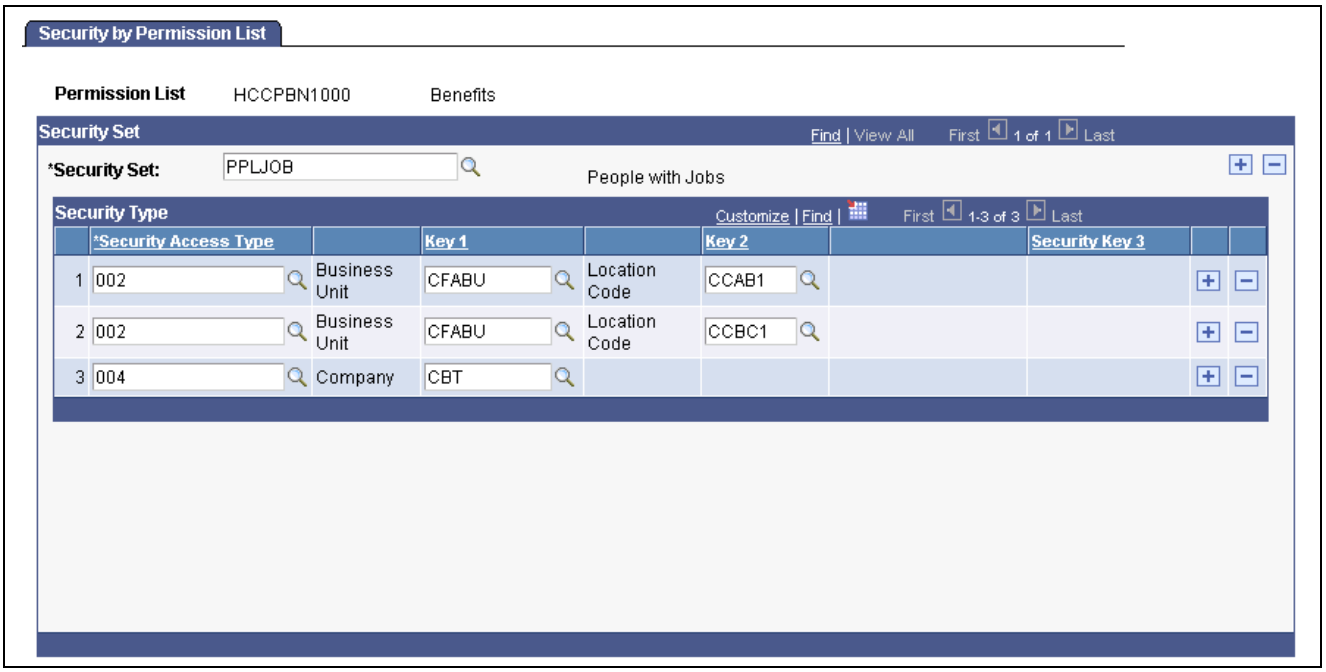
This section discusses how to assign data permission security by field value to permission lists.

Page Used to Assign Role-Based Data Permission Security to Permission Lists

Page Name	Object Name	Navigation	Usage
Security by Permission List	SCRTY_CLASS	Set Up HRMS, Security, Core Row Level Security, Security by Permission List, Security by Permission List	Grant data permission security by field values to role-based permission lists.

Granting Data Access to Permission Lists by Field Value

Access the Security by Permission List page.



Security by Permission List page

Security Set

Select the security set whose data you want to secure with this permission list. To secure the data of more than one set, add more security set rows.

Security Type

Access Type

Select the security access type. The system only lists those types enabled for the security set.

You can use more than one access type to set data permission for a permission list.

Note. You cannot use tree-based security types on this page.

Note. The security access type 031 (Recruiting Team) works with the assignments on a job opening to grant access.

See Chapter 6, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions, page 130.

Key 1, **Key 2**, and **Security Key 3**

Select the transaction security value to which this permission list has access. You may have to select one, sometimes two, key prompts before you can select the transaction value.

For example, to give this permission list data permission access to people with jobs in location UK1, select the security set PPLJOB and the security access type Job Location. To select a location, you first must select a business unit, so in the Key 1 field, select the business unit GBR01 and in the Key 2, select the location UK1.

Add more rows to select more locations.

To use more than on access type, enter a row and select a different access type and select the field values for the type's security keys.

Note. Security types are not cumulative; they have an *or* relationship.

Refreshing Security Join Tables

To refresh security join tables, use the the Nightly SJT Refresh Process component (SCRTY_SJTDLY_RC), Refresh Trans. SJT tables component (SCRTY_SJT_RC), the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC), and the Refresh SJT_OPR_CLS component (SCRTY_OPRCLS_RC).

This section describes when to use the refresh processes and discusses how to:

- Run the nightly refresh process.
- Run the transaction security join table refresh process.
- Run the Refresh SJT_CLASS_ALL process.
- Run the Refresh SJT_OPR_CLS process.

Understanding When to Run the Refresh Processes

PeopleSoft HRMS core row level security has four refresh processes. Use the refresh processes to keep your security data up to date so that the system is enforcing data permission using the most current information.

Nightly Refresh SJT

Run the Nightly Refresh SJT process nightly to refresh the transaction security join tables. The nightly refresh process:

- Updates the transaction security join tables with any changes to transaction security data that bypassed the SavePostChange PeopleCode.

  The system automatically updates the transaction security join tables when you make and save a change on the transaction components, either by manual entry or a mass update that triggers the component interface. If you bypass the PeopleCode, you will need to capture the changes using a refresh process.
- Updates the security join table with future-dated security rows that have become current (when the current calendar date matches up with the effective date of the transaction record) because SavePostChange PeopleCode is not triggered when a future-dated row becomes current..
- If you are using future-dated security rows deletes the old security row and makes the future-flagged row the current row.

Run this process nightly for every security set you are using.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 108.

SJT Refresh

Run the SJT Refresh process to refresh the transaction security join tables.

You will need to refresh the tables using this process when you:

- Enable or disable a security access type.

When you enable a security access type, you need to load the transaction security data for that type into the security join table.

You need to run it when you disable a security access type in order to clear the security join table of the transaction security data. You won't compromise your security if you don't run it but you will improve performance by removing the unnecessary rows.

- Update the transaction components using a process that bypasses the component interfaces.

  The Nightly Refresh SJT process also captures this data but you may want to refresh the tables immediately rather than waiting for a scheduled run.

You can run this process for all security sets at once, individually, or by a smaller grouping of data.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 109.

Refresh Row Security Operator

Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL.

You will need to refresh SJT_CLASS_ALL using this process when you:

- Modify a security access type.

  Modifications include selecting to use future-dated security rows or changing the job data security options.

- Create or modify a department security tree.
- Create or modify a row security permission list on the Security by Dept Tree component.

  Modifications include adding or removing data permission and refreshing the effective dates of trees.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 111.

Refresh SJT_OPR_CLS

Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS.

You will need to refresh SJT_OPR_CLS whenever you create or change the relationship between a user profile and a permission list with data permission. Run the process when you:

- Clone a user profile that has data permission.
- Add a row security permission list that has data permission to, or delete one from, a user on the User Profile - General page.
- Add a role with permission lists with data permission to, or delete one from, a user.
- Add a permission list with data permission to, or delete one from, a user-assigned role

---

Note. SavePostChange PeopleCode on the Security by Dept Tree component and the Security by Permission List component updates SJT_OPR_CLS when you add a permission list to either component for the first time. If you add a permission list to the user first, either in the Row Security field or by way of a role, and then add it to the Security by Dept Tree page or Security by Permission List page, you do *not* need to run the process.

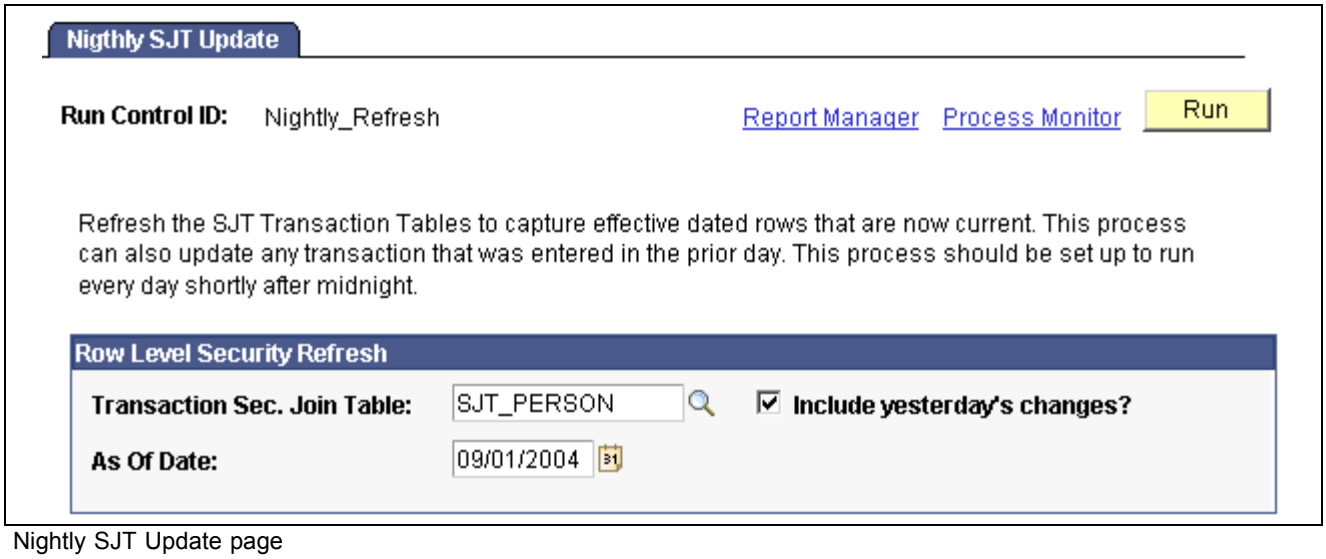
See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Pages Used to Refresh Security

Page Name	Object Name	Navigation	Usage
Nightly SJT Update	SCRTY_SJTDLY_RC	Set Up HRMS, Security, Core Row Level Security, Nightly SJT Refresh Process, Nightly SJT Update	Refresh the transaction security join tables to capture data changes that were not automatically loaded into the table. Run shortly after midnight to capture effective-dated changes.
SJT Refresh	SCRTY_SJT_RC	Set Up HRMS, Security, Core Row Level Security, Refresh Trans. SJT tables, SJT Refresh	Refresh some or all of the data in the transaction-based security join tables to capture data changes that were not automatically loaded into the table.
Refresh Row Security Operator	SCRTY_OPR_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh Row Security Operator	Refresh some or all of the data in the SJT_CLASS_ALL table to capture changes to permission lists that were not automatically loaded into the table.
Scrty Oprcls Rc (security operator class)	SCRTY_OPRCLS_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_OPR_CLS, Scrty Oprcls Rc	Refresh some or all of the data in the SJT_OPR_CLS to capture the current relationship between user profiles and permission lists.

Running the Nightly Refresh Process

Access the Nightly SJT Update page.



Nightly SJT Update page

Set up this process to run every night shortly after midnight using a recurring schedule and leaving the As Of Date field empty. By running the process shortly after midnight, you capture the formerly future-dated rows that have just become effective.

As Of Date Leave the as of date blank when you schedule this run control ID to run on a recurring basis. The system will use the current, system date each time it runs.

Transaction Sec Join Table Select the transaction security join table to update.

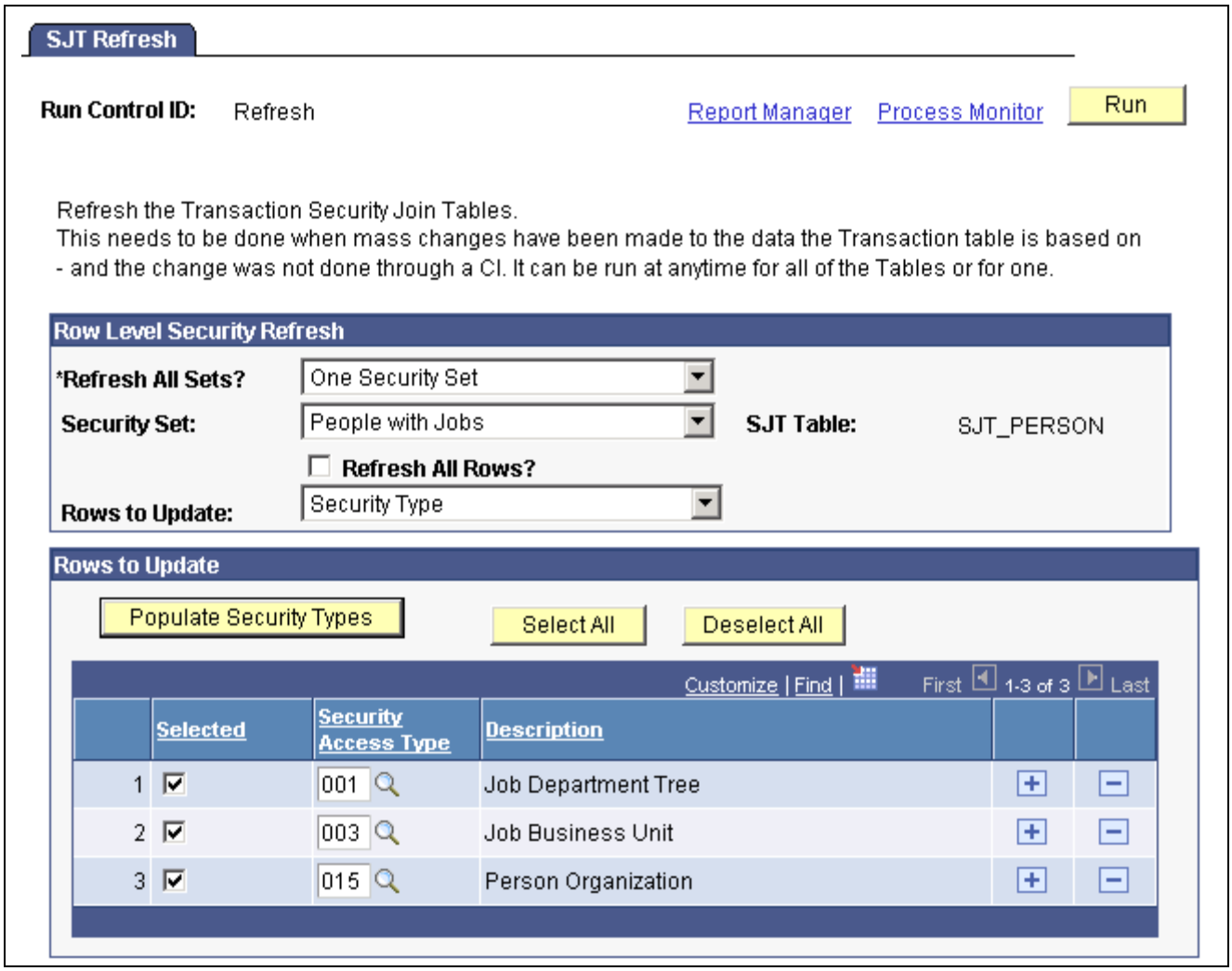
Include yesterday's changes? Select to include the previous day's changes. The program searches the system for any changes to the transaction records on the previous day and updates the transaction security join tables with those changes. This ensures that any changes that were made to the data outside of components or component interfaces are captured.

If you do not select this check box, the process will only update the transaction security join tables with the changes made on the As Of Date.

Note. It is recommended that you select this option every time you run this process to guarantee that you are updating the transaction security join tables with the latest information. Only clear the check box if you are experiencing performance issues and you are certain that the records are not being updated outside of the regular user interface or component interfaces.

Running the Transaction Security Join Table Refresh Process

Access the SJT Refresh page.



SJT Refresh page

Refresh All Sets?

Select *All Security Sets* to refresh all security sets.

Select *One Security Set* to refresh one security set.

Security Set and **SJT Table**

If you are refreshing one security set, select the set. The system displays the transaction security join table associated with the security set.

Refresh All Rows?

Select to refresh every row in the security join table.

Clear to refresh select rows in the security join table. The system displays the Rows to Update field and grid.

Rows to Update

Select the rows to update. The options available are the ones you selected for the security set on the Security Sets component.

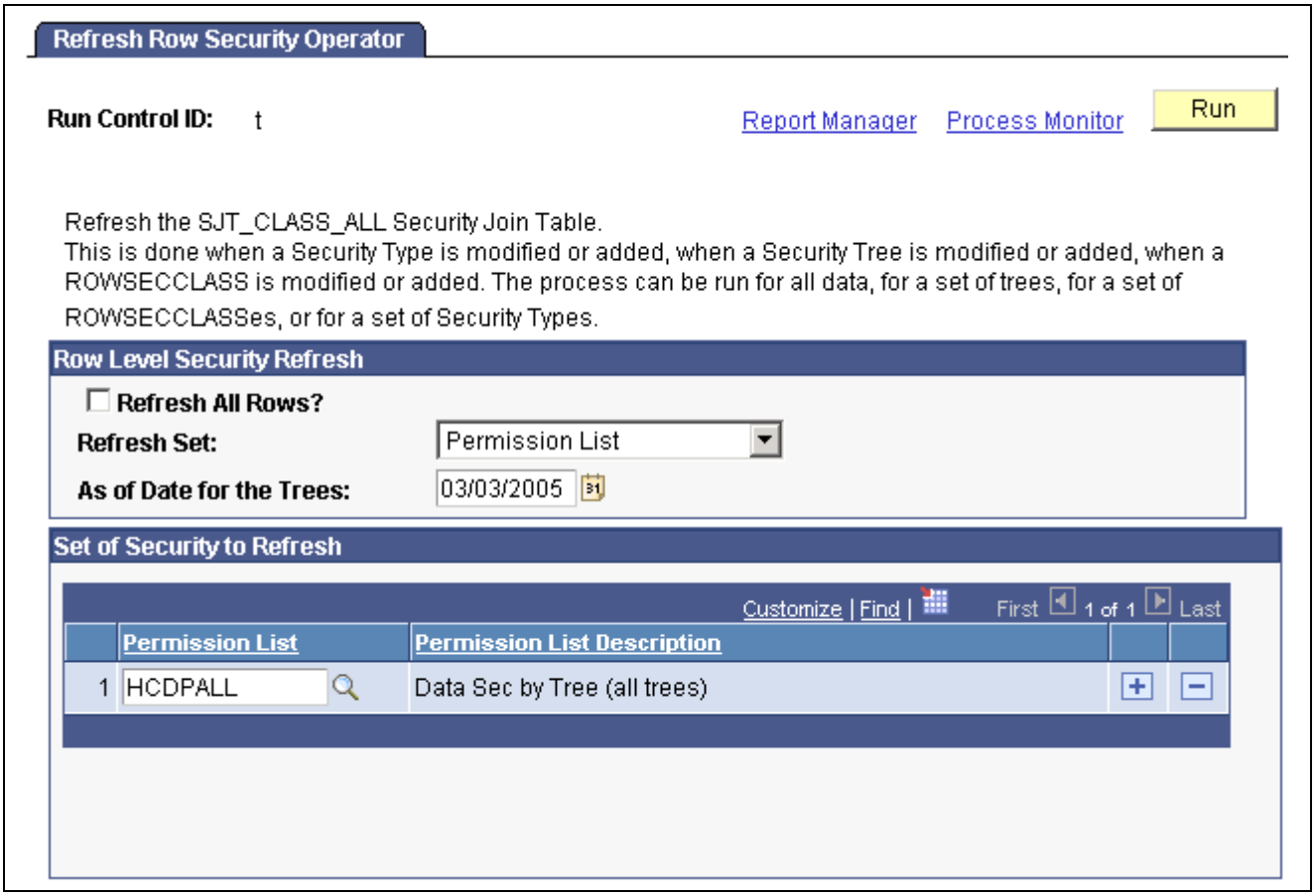
Rows to Update

The fields and buttons in the Rows to Update grid will vary depending on the rows you select to update in the Rows to Update field. Enter the rows of data you want to update.

For example, if you select *Security Type* in the Rows to Update field, select the security types whose transaction data you want to refresh.

Running the Refreshing SJT_CLASS_ALL Process

Access the Refresh Row Security Operator page.



Refresh Row Security Operator page

Row Level Security Refresh

Refresh All Rows? Select to refresh every row in SJT_CLASS_ALL.

Clear to refresh selected rows. The system displays the Refresh Set field.

Refresh Set Select the set of rows to refresh. The system displays the Set of Security to Refresh grid.

You can select to refresh:

- *Tree*.
- *Permission List*
- *Security Type*

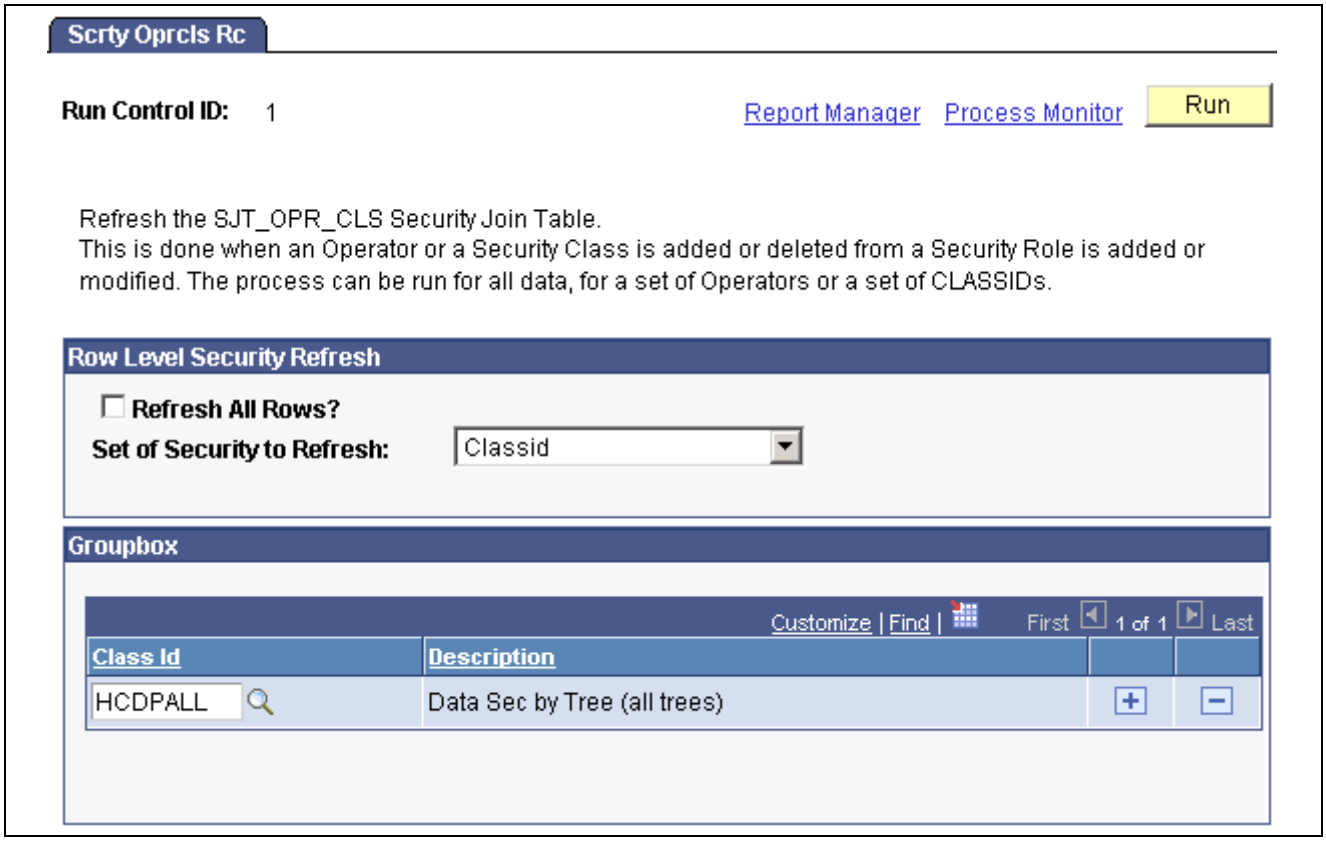
As Of Date Select the date as of which you are refreshing the table. The process will refresh the table with the security data that is effective as of this date.

Set of Security to Refresh Select the values to refresh.

For example, if you've modified a row security permission list, rather than refreshing the entire table, select *Permission List* in the Refresh Set field and select the permission list you modified here.

Running the Refresh SJT_OPR_CLS Process

Access the Scrty Oprcls Rc page.



Scrty Oprcls Rc page

Note. You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

See Chapter 37, "Working with Enterprise Integration Points in PeopleSoft HRMS," Using HRMS EIPs that Subscribe Locally, page 722.

The Refresh SJT_OPR_CLS process refreshes SJT_OPR_CLS as of the system date.

Refresh All Rows? Select to refresh every row in SJT_OPR_CLS.

Clear to refresh selected rows. The system displays the Set of Security to Refresh field.

Set of Security to Refresh Select the set of rows to refresh.

You can select to refresh:

- *Classid*

Select to refresh the table with the selected row security or role-based permission lists IDs of users to whom they are attached.

- *Orpid*

  Select to refresh the table with the selected user IDs and the permission lists assigned to them.

Querying Data Permission Security

To query data permission security, use the Security Data Inquiry component.

This section discusses how to:

- Find search views.
- Search security data.
- Search user security data.
- Search transaction security data in SJT_PERSON and SJT_PERSON_USF.
- Search transaction security data in SJT_DEPT.
- Search transaction security data in HRS_SJT_JO.

Understanding Data Permission Queries

The Security Data Inquiry component enables you to quickly and easily query aspects of your data permission setup in the event that you have questions or concerns about the implications of the access you've set up. The component consists of seven pages, each querying a different aspect of HRMS data permission:

Page	Description
Find Search View	Use this page to review details about the security search view used by a component. There are a number of different search views and even the same component can use a different view, depending on which menu it is on. The security view text tells you which security set the data in the component falls into and if there is any special selection criteria. To use query search views you need to know the: • Component name. • Market. • Menu name. • Access mode the user was attempting: (either add or update). - If they were trying to add a record, you want to query the add search view (the system displays this in the Add Search field). - If they were trying to update or review a record, you want to query the search view displayed in the Search Record Name or Override Search Record field.
Display Security Data	Use this page to review security data for the selected security set and security access type. You can further refine the query by selecting a user ID, permission list, or security key value, or a combination of the three. Review both the permission list access and the transaction data secured by the parameters. For example, you can review the data permission assigned to the permission list MyJobs for security set PPLJOB and security access type 001 (department 11000). Or you can review the transaction data available to permission list MyJobs for security set PPLJOB and security access type 002 (112 people with jobs). To compile a list of access for more than one access type, download the data in the grids to Microsoft Excel

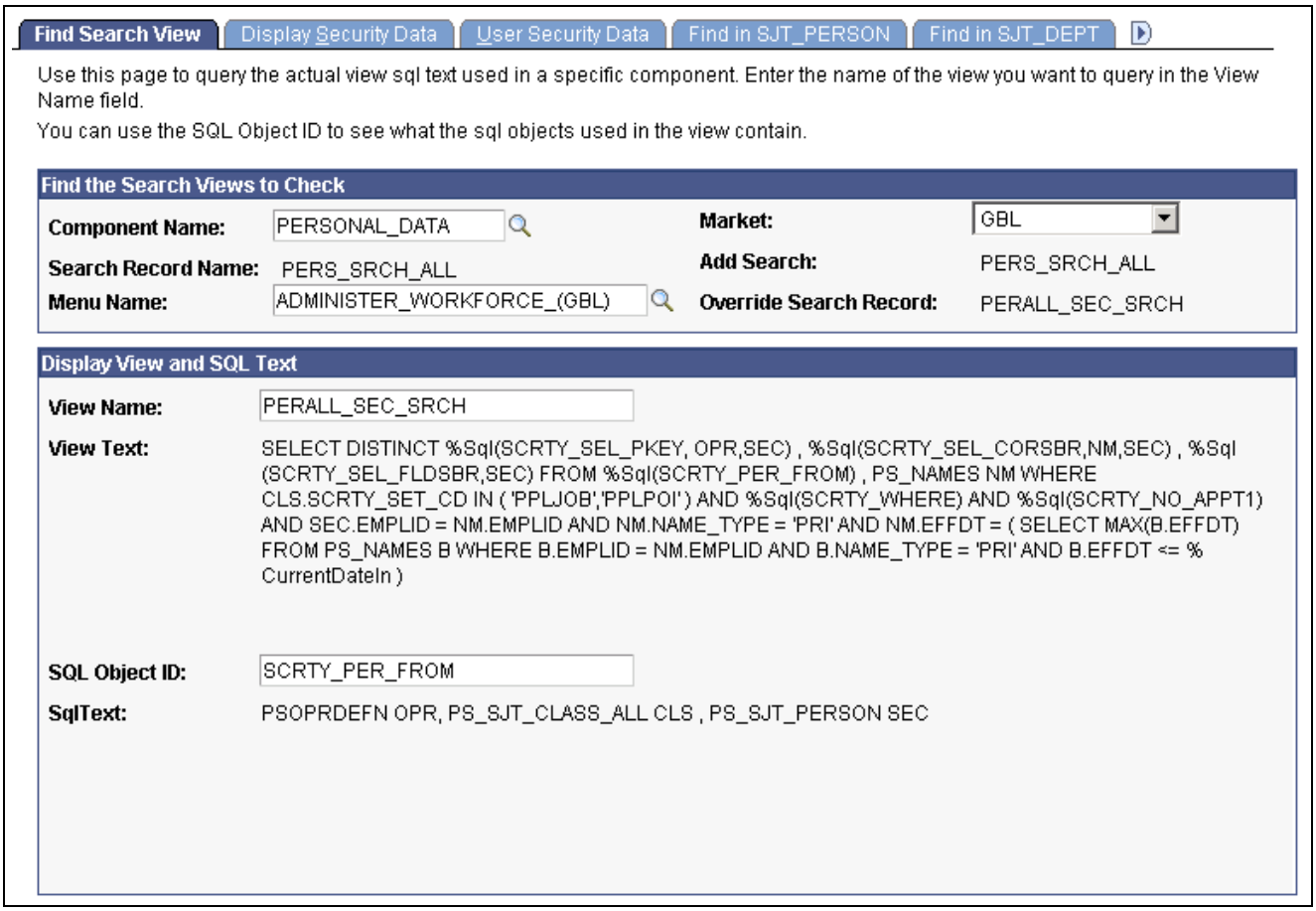
Page	Description
User Security Data	Review a user's data permission profile, including his or her roles, role-based permission lists, and row security permission lists, and the data permission associated with them. The query only includes the roles and role-based permission lists that contain data permission security.
• Find in SJT_PERSON • Find in SJT_DEPT • Find in SJT_PERSON_USF • Find in HRS_SJT_JO	Use this page to review the access to transaction data. You can review: • The data securing transaction records. • Which permission list has data permission access to selected records. • Which users are assigned the selected permission lists.

Pages Used to Query Data Permission Security

Page Name	Object Name	Navigation	Usage
Find Search View	SCRTY_CLASS_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find Search View	Use this page to query the actual view SQL text used in a specific component. Enter the name of the view you want to query in the View Name field. You can use the SQL Object ID to view the definitions of the SQL objects used in the view.
Display Security Data	SCRTY_TRANS_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Display Security Data	Use this page to display the security data for a selected security set and access type. You can view the user security data using the type and the transaction data secured by the type.
User Security Data	SCRTY_OPR_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, User Security Data	Use this page to query and review a user's security data, including assigned roles and permission lists.
Find in SJT_PERSON	SCRTY_SJT_PERSON	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON	Use this page to review the transaction data used to secure a person's data and the permission lists and users who have access the person.
Find in SJT_DEPT	SCRTY_SJT_DEPT	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_DEPT	Use this page to review the transaction data used to secure a department's data and the permission lists and users who have access the department.
Find in SJT_PERSON_USF	SCRTY_SJT_PER_USF	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON_USF	(USF) Use this page to review the transaction data used to secure a person's data and the permission lists and users who have access the person.
Find in HRS_SJT_JO	SCRTY_SJT_RSOPN	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in HRS_SJT_JO	Use this page to review the transaction data used to secure a job opening and the permission lists and users who have access the job opening.

Finding Search Views

Access the Find Search View page.



Find Search View page

To review the view and SQL text used in a security search view indicate which search view to search by entering the:

- Component name.
- Market
- Menu name

Search Record Name Displays the component's default search record when you access the component in update or display mode.

Note. You can assign an override search record to a component at the menu level. If the component uses an override search record, the search record displayed in the Override Search Record will be different from this one and you should search it instead.

Add Search Displays the component's search record when you access the component in add mode.

Override Search Record Displays the component's override search record when you access the component in update or display mode.

View Name and **View Text** To review the text from a search record view, enter it into the View Name field. The system displays the view text when you tab out of the View Name field.

SQL Object ID and **SqlText** To review the SQL text within an SQL Object used by the view, enter the SQL object ID into the SQL Object ID field. The system displays the SQL text when you tab out of the SQL Object ID field.

Note. SQL objects are used to store common SQL.

For example, the security search view for the Personal Data component on the Administer Workforce menu, when accessed in Update mode, is PERALL_SEC_SRCH. This search view uses the security sets PPLJOB and PPLPOI and the transaction security join table SJT_PERSON. The view text has a special selection criteria to not return rows where the APPT_TYPE (appointment type) is equal to 1.

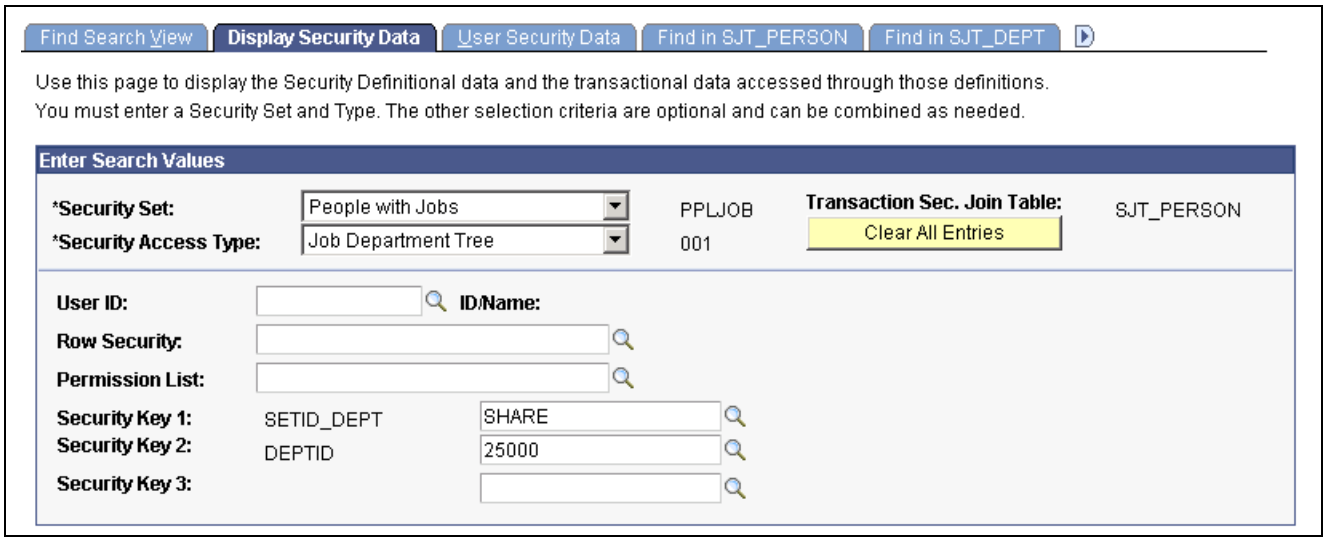
You can use this information to review the security data in greater detail. Perhaps to see what data is secured in security set PPLPOI or if the record a user is trying to access in this component has an appointment type value equaling 1 and that is why the record is unavailable.

See Also

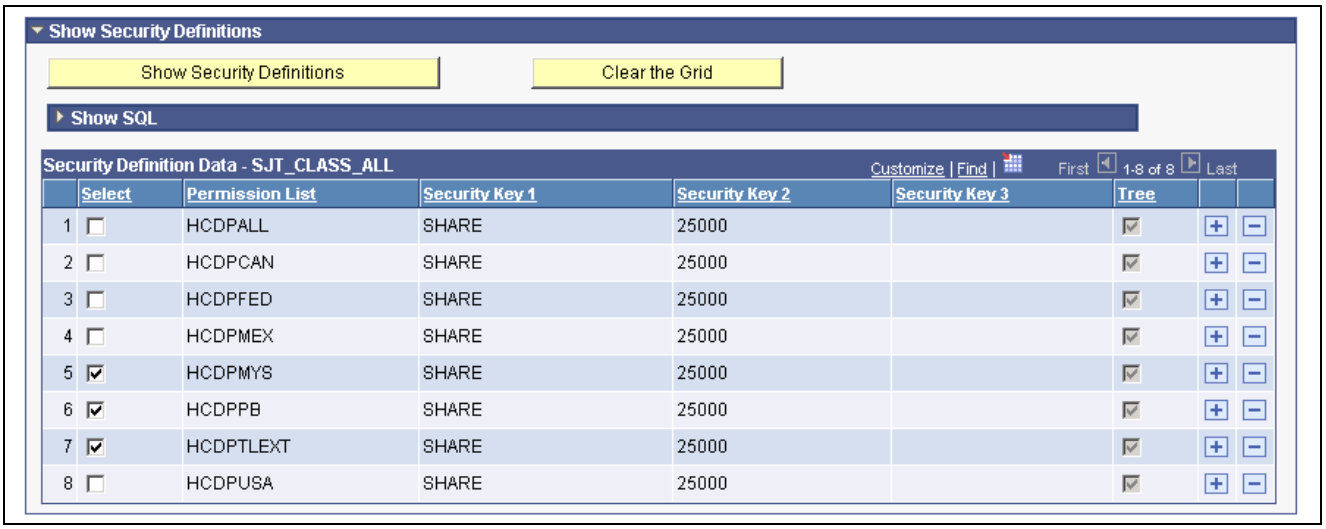
Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer

Searching Security Data

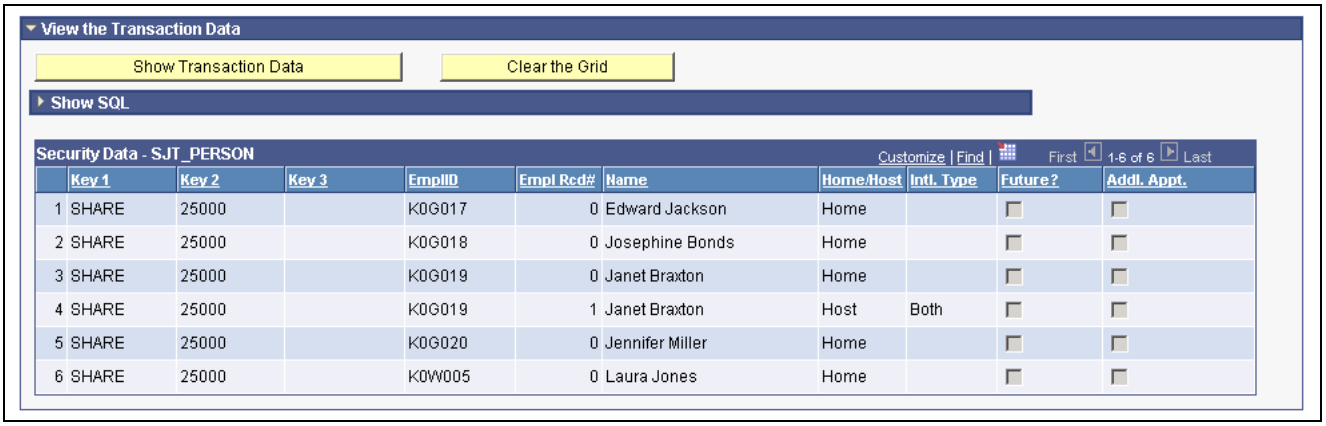
Access the Display Security Data page.



Display Security Data (1 of 3)



Display Security Data (2 of 3)



Display Security Data (3 of 3)

Click the Clear All Entries button to clear the search value fields.

Enter Search Values

Security Set, **Transaction Sec. Join Table**, and **Security Access Type** — Select the security set and security access type whose security data you want to review. The system displays the transaction security join table used by the security set.

Note. If you want to review date permission security data for more than one security access type or for more than one of the additional parameters below, down the results in the Show Security Definitions and View the Transaction Data grids to Microsoft Excel and add to them as you perform your search.

To further refine the search within the selected security set or security access type, enter one or more values in these fields:

User ID and **ID/Name** — To review a user's data permission security data, select the user ID. The system displays the ID and name of the person assigned to the selected profile.

Row Security — To review the data permission security data of a row security permission list, select the permission list.

When you select a tree-based security access type and enter a user ID, the system enters the row security permission list associated with the user ID.

This field is only available when you select a tree-based security access type.

Security Key 1, **Security Key 2**, and **Security Key 3**: To review the data permission security data for a selected security key, select the values (for example, to review the security data for department 10000, enter the department setID SHARE in Security Key 1 and the department id 10000 in Security Key 2).

Expand the Show SQL group boxes in the Show Security Definitions group box and the Viewing Transaction Data group box to review the SQL used to query SJT_CLASS_ALL table and transaction security join table for this query.

See Chapter 6, "Setting Up and Administering HRMS Security," Understanding Data Permission Security for HRMS, page 62.

Show Security Definitions

Click the Show Security Definitions button to display the user security data that meets the search criteria.

The grid displays the permission list and the security key values that the permission list can access.

Tree: The system selects this check box for row security (tree-based) permission lists.

View the Transaction Data

Click the Show Transaction Data button to display the transaction data stored in the transaction security join table of the selected security set. The rows in the grid vary depending on which security set you are querying.

Security Key 1 or **Key 1**, **Security Key 2** or **Key 2**, and **Security Key 3** or **Key 3**: Displays the transaction security data (and the necessary key values) used to secure this row of data.

SetID, **Department**, **Effective Date**, and **Description**: For rows of department transaction data, displays the set ID and the department whose data is secured.

Job Opening ID: For rows of recruiting solutions job openings, displays the ID of the job opening whose data is being secured.

EmplID, **Empl Rcd#**, and **Name**: For rows of person transaction data, displays the ID, employee record number (if applicable), and the name of the person whose data is secured.

A person with more than one unique emplID and employee record number combination will have more than one row of data.

Home/Host: This field is for global assignments and indicates if the transaction row is from the home or the host assignment job data record. Only job data records for the global assignment will display *Host*.

See Chapter 6, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 88.

Intl. Type (international type): If you are using special security options for global assignment job data records, this field indicates if this row was created by the system to enable special job security.

See Chapter 6, "Setting Up and Administering HRMS Security," Understanding Special Job Security Options, page 87.

Future? This field indicates of the row comes from a future-dated transaction row.

See Chapter 6, "Setting Up and Administering HRMS Security," Understanding Future-Dated Security, page 86.

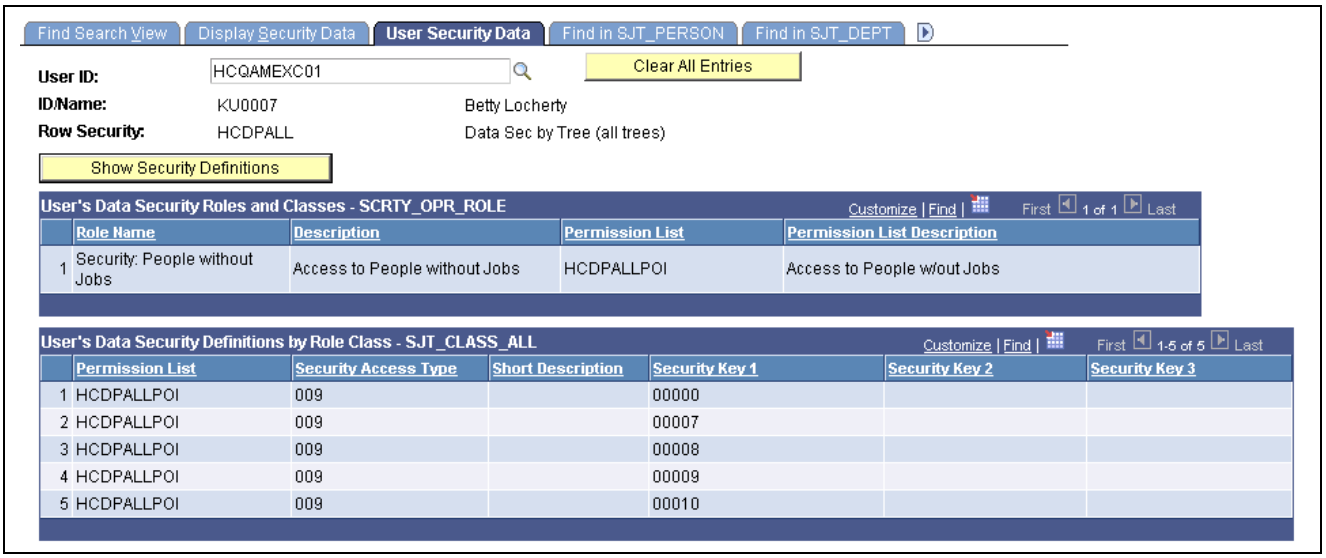
Addl Appt. (JPN) Indicates if this is an additional appointment transaction row.

See Chapter 6, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 88.

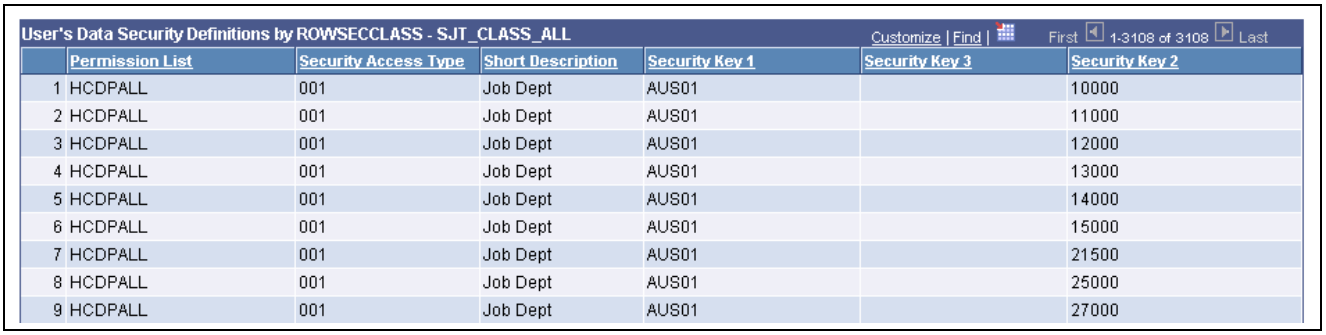
WIP Status, **Retirement**, **NOA Code**, and **Stat Type** (USF) displays additional information about the job data row. These values are not used to secure data.

Searching User Security Data

Access the User Security Data page.



User Security Data page (1 of 2)



User Security Data page (2 of 2)

User ID Select the User ID of the person whose data permission access you want to query.

The system displays the user's name and his or her row security permission list.

Click the Show Security Definitions button to populate the grids on the page.

User's Data Security Roles and Classes – SCRTY_OPR_ROLE

Displays the roles assigned to the user and the permission lists with data permission assigned to those roles.

Note. The SCRTY_OPR_ROLE table only stores the roles that have permission lists with data permission. The grid does not list roles that do not have data permission .

User's Data Security Definitions by Role Class – SJT_CLASS_ALL

Displays the data permission of the role-based permission lists associated with this user's roles.

User's Data Security Definitions by ROWSECCLASS – SJT_CLASS_ALL

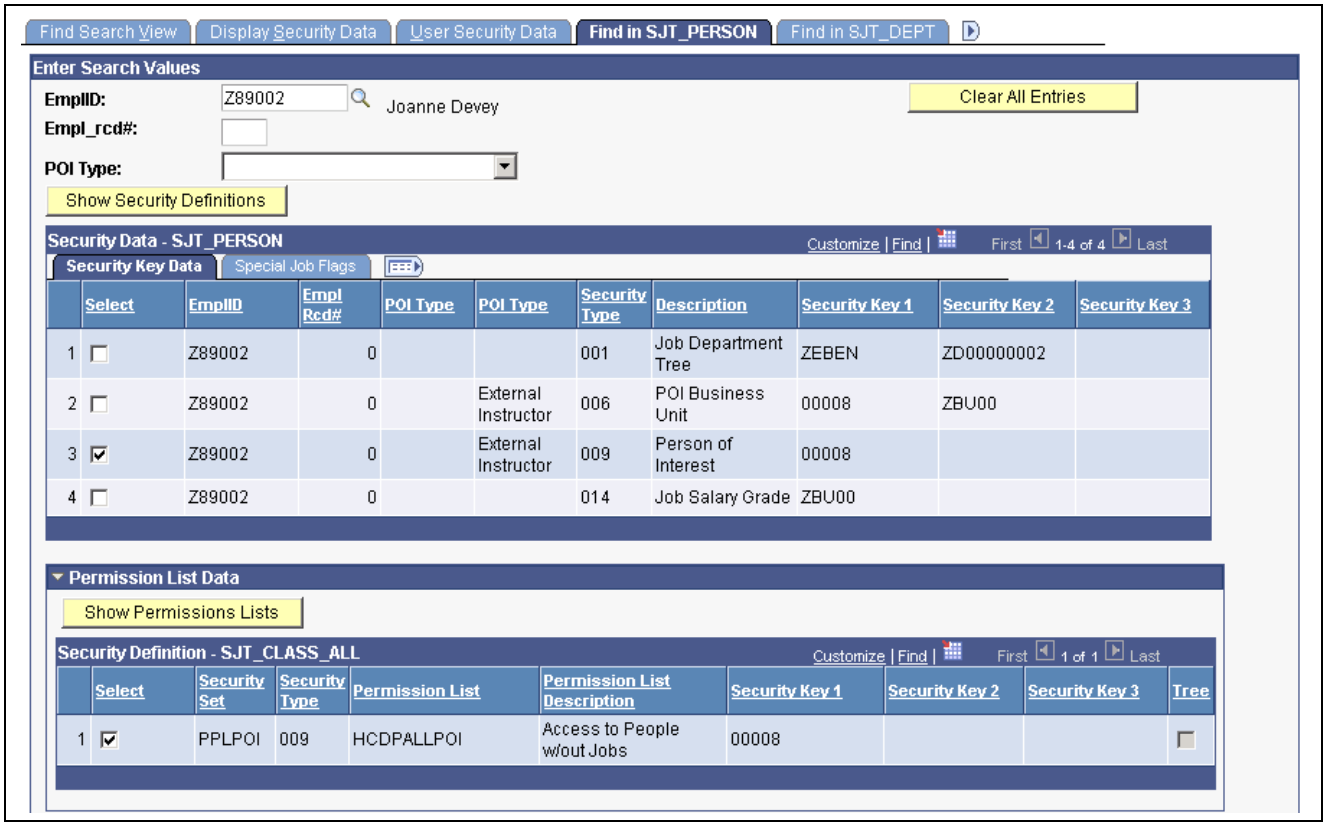
Displays the permissions of the row security permission list assigned to this user.

See Also

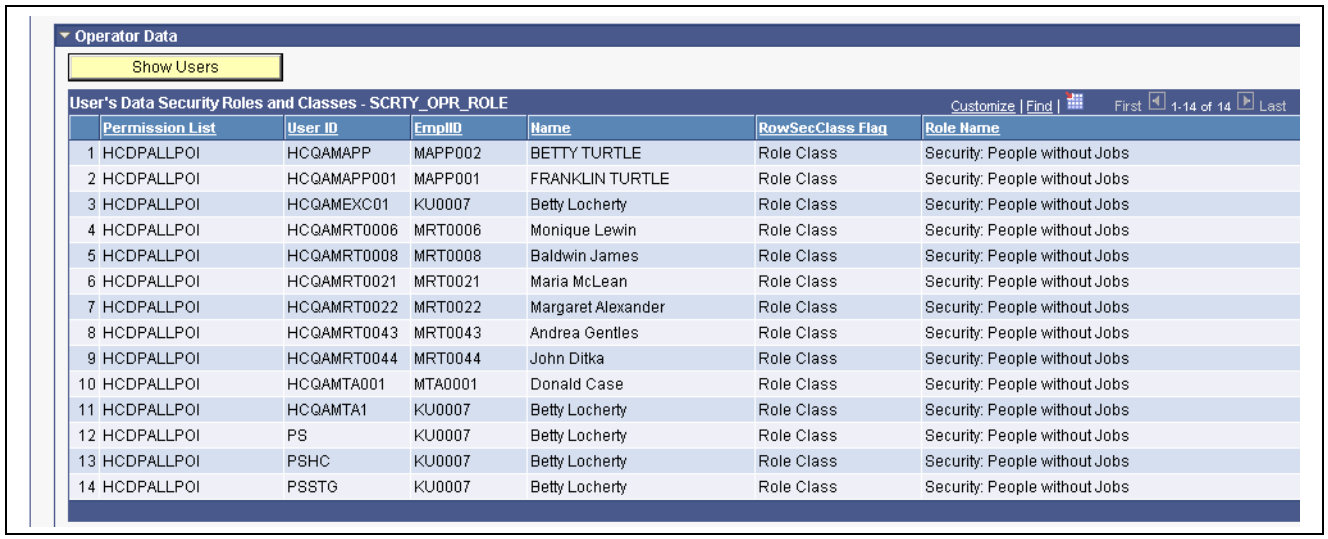
Chapter 6, "Setting Up and Administering HRMS Security," Security Data, page 66

Searching Transaction Security Data in SJT_PERSON and SJT_PERSON_USF

Access the Find in SJT_PERSON page or Find in SJT_PERSON_USF page.



Find in SJT_PERSON page (1 of 2)


Operator Data

Show Users

User's Data Security Roles and Classes - SCRTY_OPR_ROLE

Customize | Find | First 1-14 of 14 Last

	Permission List	User ID	EmplID	Name	RowSecClass Flag	Role Name
1	HCDPALLPOI	HCQAMAPP	MAPP002	BETTY TURTLE	Role Class	Security: People without Jobs
2	HCDPALLPOI	HCQAMAPP001	MAPP001	FRANKLIN TURTLE	Role Class	Security: People without Jobs
3	HCDPALLPOI	HCQAMEXC01	KU0007	Betty Locherty	Role Class	Security: People without Jobs
4	HCDPALLPOI	HCQAMRT0006	MRT0006	Monique Lewin	Role Class	Security: People without Jobs
5	HCDPALLPOI	HCQAMRT0008	MRT0008	Baldwin James	Role Class	Security: People without Jobs
6	HCDPALLPOI	HCQAMRT0021	MRT0021	Maria McLean	Role Class	Security: People without Jobs
7	HCDPALLPOI	HCQAMRT0022	MRT0022	Margaret Alexander	Role Class	Security: People without Jobs
8	HCDPALLPOI	HCQAMRT0043	MRT0043	Andrea Gentles	Role Class	Security: People without Jobs
9	HCDPALLPOI	HCQAMRT0044	MRT0044	John Ditka	Role Class	Security: People without Jobs
10	HCDPALLPOI	HCQAMTA001	MTA0001	Donald Case	Role Class	Security: People without Jobs
11	HCDPALLPOI	HCQAMTA1	KU0007	Betty Locherty	Role Class	Security: People without Jobs
12	HCDPALLPOI	PS	KU0007	Betty Locherty	Role Class	Security: People without Jobs
13	HCDPALLPOI	PSHC	KU0007	Betty Locherty	Role Class	Security: People without Jobs
14	HCDPALLPOI	PSSTG	KU0007	Betty Locherty	Role Class	Security: People without Jobs

Find in SJT_PERSON page (2 of 2)

Note. The Find in SJT_PERSON_USF page does not have the option to search for POIs.

Select the EmplID of the person whose transaction security data you want to review. To limit the search to a single job data record, enter the employee record number. To limit the search to a specific person of interest type, select the type.

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid with the transaction security data securing this person's record or records.

Security Data – SJT_PERSON

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid.

The system lists the rows in SJT_PERSON that match the search criteria you entered. Review the security keys on the Security Key Data tab. Click the Special Job Flags tab to review special security job option data, such as if a row is a future-dated row or if it was created to enable home/host access or additional assignment access.

To review which permission lists have data permission access to one or more of these rows, select the rows and click the Show Permission Lists button.

Permission List Data

Click the Show Permission Lists button to populate this grid

For each security set and security access type, the system lists the permission lists that can access the transaction rows you selected.

To review which users are assigned to one or more of these permission lists, select the rows and click the Show Users button.

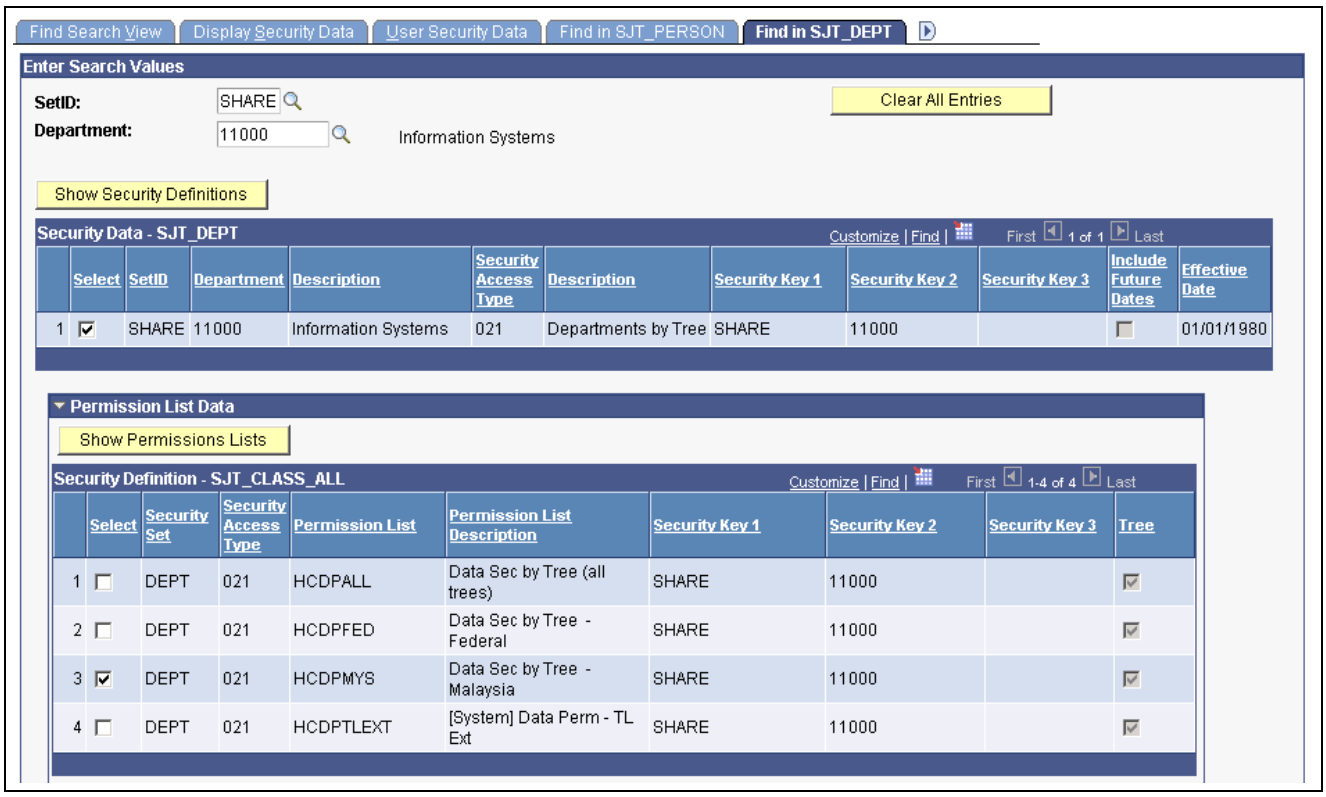
Operator Data

Click the Show Users button to populate the grid.

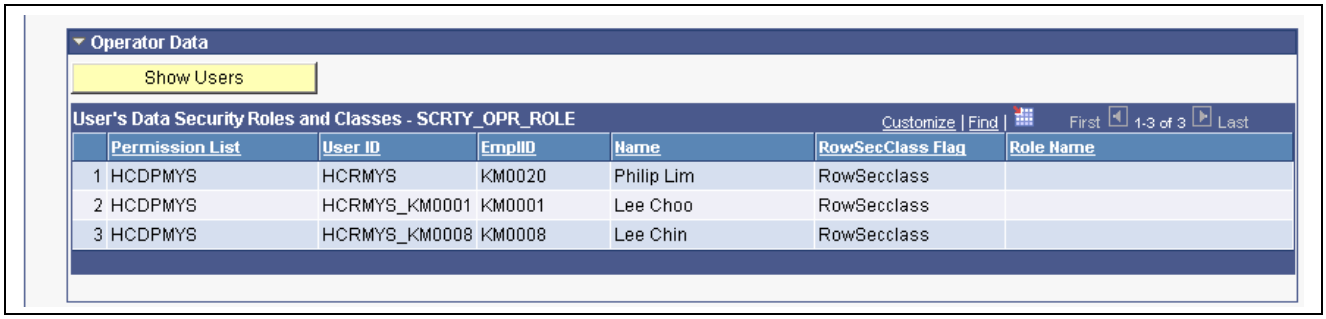
The system displays each user assigned to the permission list or lists that you selected and indicates if the permission list is assigned to the user as a row security permission list or role-based (role-class) and, if the permission list is role-based, which role it is assigned to on the user's profile.

Searching Transaction Security Data in SJT_DEPT

Access the Find in SJT_DEPT page.



Find in SJT_DEPT page (1 of 2)



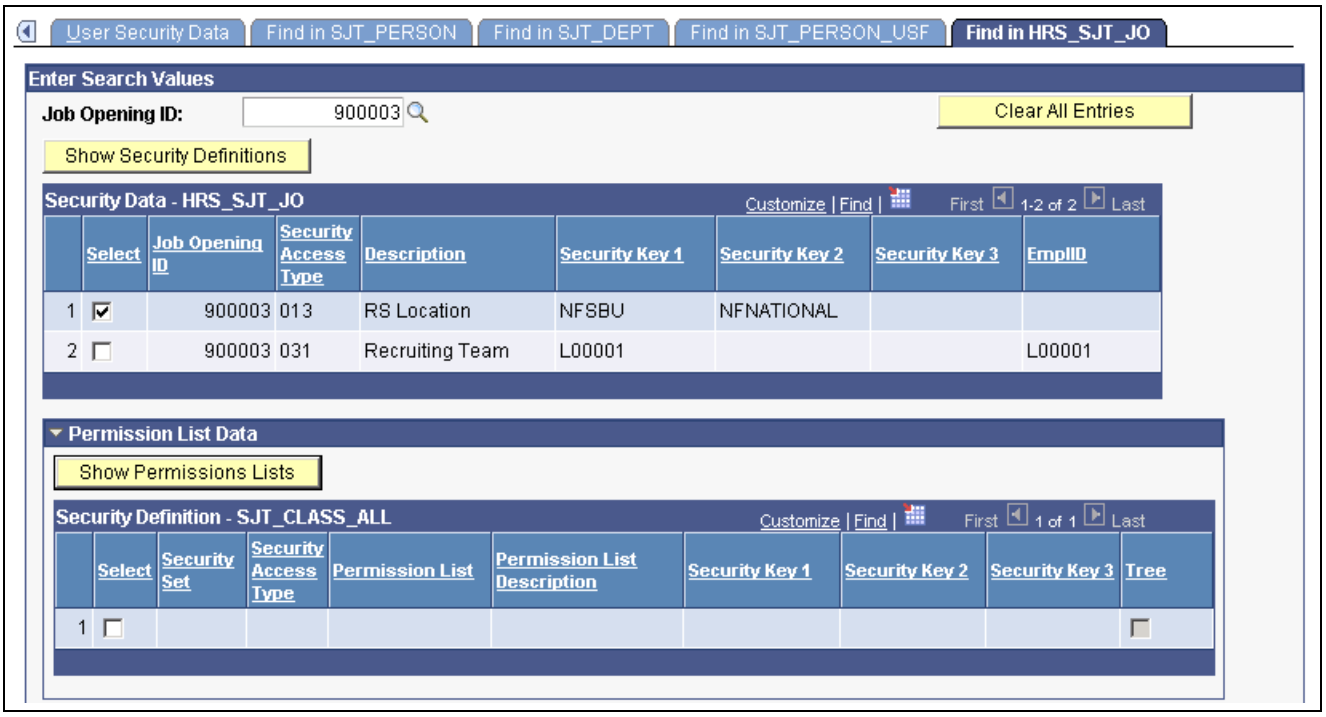
Find in SJT_DEPT page (2 of 2)

Select the setID and department ID of the department whose transaction security data you want to review.

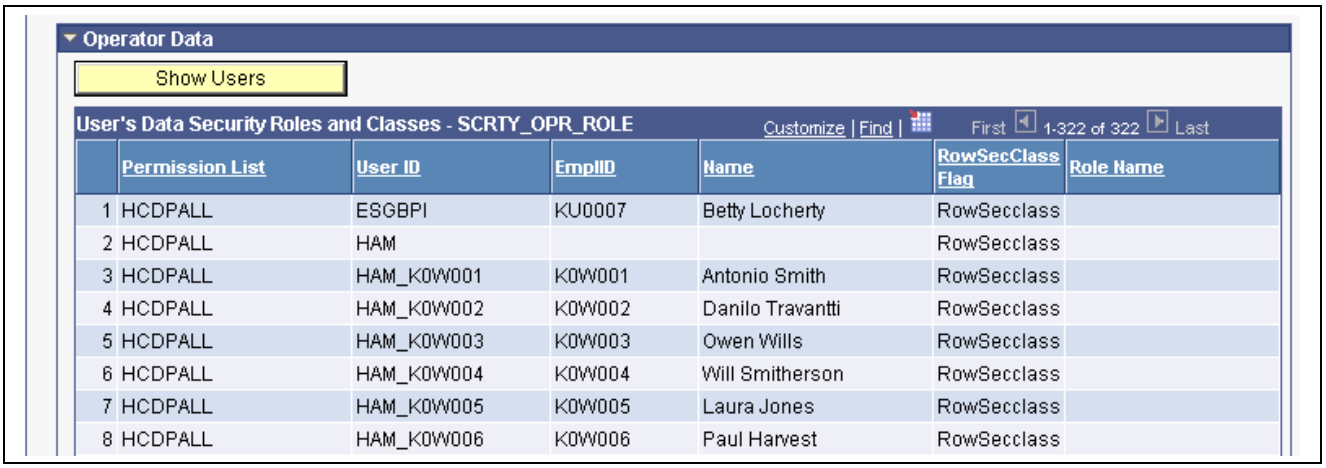
Click the Show Security Definitions button to populate the Security Data - SJT_DEPT grid with the transaction security data securing this department's record or records.

Searching Transaction Security Data in HRS_SJT_JO

Access the Find in HRS_SJT_JO page.



Find in HRS_SJT_JO page (1 of 2)



Find in HRS_SJT_JO page (2 of 2)

Select the ID of the job opening whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - HRS_SJT_JO grid with the transaction security data securing this job opening's record or records.

Creating Data Permission Security for Managers

To create data permission security for managers, use the Create Manager Users and Sec. component (RUN_PER510).

This section provides an overview of data permission for managers and discusses how to create data permission for managers.

Understanding Data Permission for Managers

Use the Create Row Level Security for Dept Managers process to grant the appropriate data permission security access for department managers. The process will:

- Create a user profile if the manager is new and has no user profile.
- Create or update an existing row security permission list for each department manager, giving them access to the data in the departments that they manage.
- Delete the row security permission list for a user if it is obsolete (for example, the employee is no longer a manager).

The system uses the MgrID value from the Department Profile page (DEPARTMENT_TBL_GBL) to determine a department's manager. Managers will be given access to every department for which their ID is listed in the MgrID field.

Since you can list only one department manager per department, you will have to manually update the profiles of additional department managers. You can do this by assigning the row security permission list the system creates for the official manager to the unofficial manager's profile. Remember that the system will remove this list every time you run the Create Row Security for Mgr process.

Note. The Create Row Security for Mgr process uses the managers' EmplID as their user ID and uses the following naming convention for row security permission lists: HCDP_DEPT_MGR_[manager's EmplID]

Before You Begin

The Create Row Security for Mgr process uses tree-based security to create row security permission lists for managers. Before you run this process, you must have set up a department security tree.

The hierarchy rules of the department security tree apply to these permission lists. If a manager's department has departments reporting up to it on the security tree, the manager will have access to the people in those departments as well as his or her own.

Refresh User Security Join Tables

The Create Row Security for Mgr process creates and modifies row security permission lists and assigns row security permission lists to, or deletes them from, user profiles. Both of these actions require that you:

- Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL with the row security permissions list data.
- Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS with the new user profile and row security permission list pairings from the User Profile - General page.

The system will not enforce the new data permission set up by the process until you run these refresh processes.

See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 111.

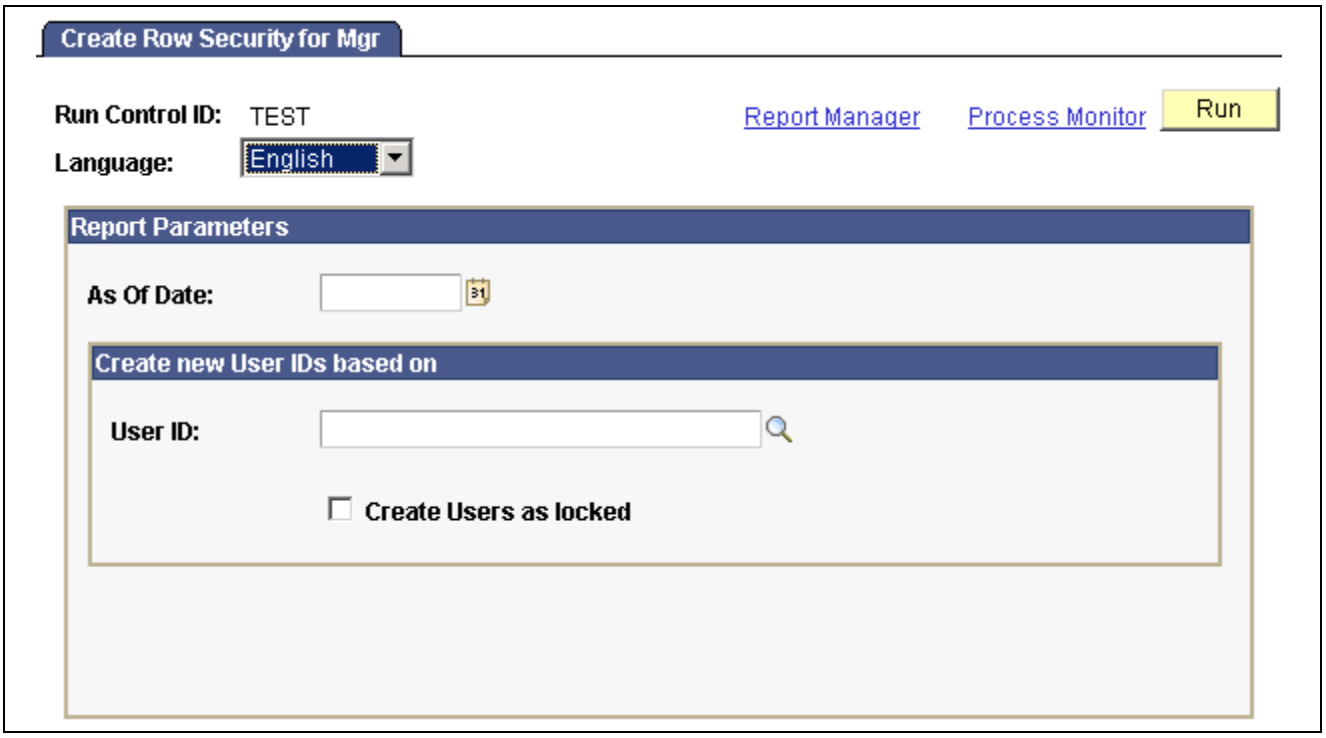
See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Pages Used to Process Row Security for Managers

Page Name	Object Name	Navigation	Usage
Create Row Security for Mgr (create row security for manager)	RUNCTL_PER510	Set Up HRMS, Security, User Maintenance, Create Manager Users and Sec., Create Row Security for Mgr	Use to create and update manager row security permission lists.

Processing Data Permission for Managers

Access the Create Row Security for Mgr page.



Create Row Security for Mgr page

As Of Date Select the date as of which the row security list permission list should become effective.

User ID Select a default User ID. The system will base the new user IDs on this default.

Create User as Locked? Select to lock all the new user IDs.

The Create Row Security for Mgr process consists of two PeopleSoft Application Engine processes and one SQR report:

1. HR_PER510.

   Determines the changes required in order to maintain data-permission for department managers.

2. HR_PER510_CI

   Applies to the database the changes determined by HR_PER510.

3. SQR report PER510

Lists the changes determined by HR_PER510 and applied by HR_PER510_CI and their status.

Note. You must select each process individually and wait for it to complete successfully before selecting and running the next process.

Creating and Locking User IDs

To create and lock user IDs, use the Create Users component (CREATE_USERS) and Lock Users component (LOCK_USERS).

This section provides an overview of security for user IDs and discusses how to:

- Create users.
- Lock users.

Understanding Security for User IDs

Create user IDs for your workforce using Group Build and the Create Users page. Create and populate a group using Group Build and then use the Create Users page to create User IDs for each group member.

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

See Also

Chapter 24, "Setting Up Group Definitions and Security," page 539

Chapter 25, "Setting Up and Working with Groups," page 559

Common Elements Used in This Section

Group ID Select the ID of the group whose members require user IDs.

Populate Group Click to populate the page with the group members.

EmplID and **Name** Displays the EmplIDs and names of the individuals in the selected group.

User ID Displays the user IDs of the individuals once you've clicked the Create User IDs button. The system uses the EmplID as the User ID.

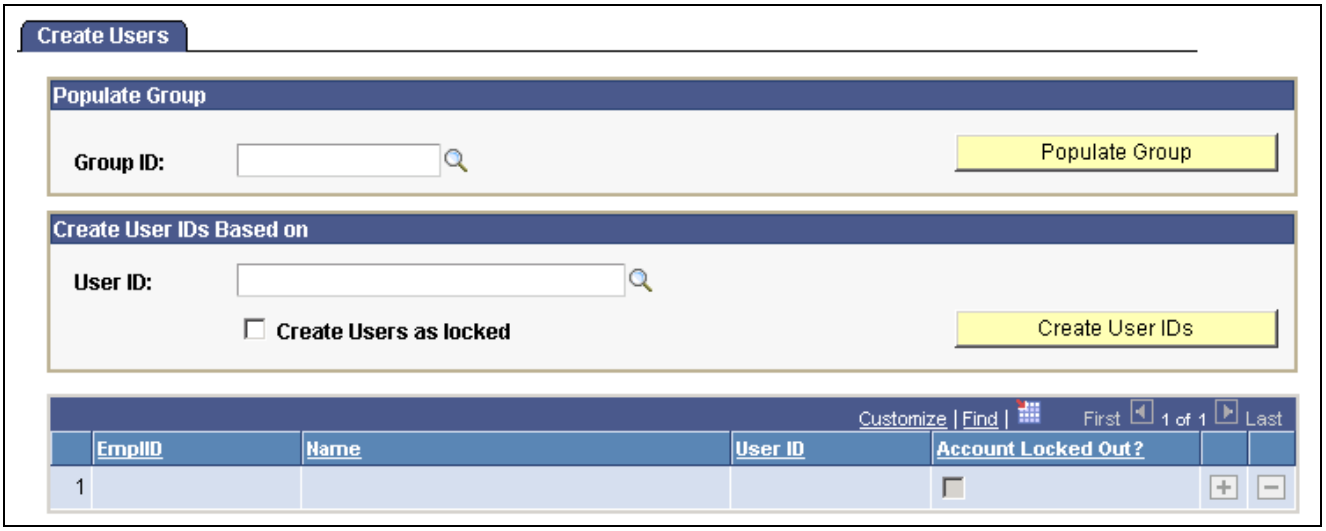
Account Locked Out? The system selects this option if the user ID account is locked out.

Pages Used to Create and Lock User IDs

Page Name	Object Name	Navigation	Usage
Create Users page	CREATE_USERS	Set Up HRMS, Security, User Maintenance, Create Users, Create Users	User to create user IDs for a group of individuals.
Lock Users page	LOCK_USERS	Set Up HRMS, Security, User Maintenance, Lock Users, Lock Users	Use to lock or unlock groups of user IDs.

Creating Users

Access the Create Users page.



Create Users page

User ID Select a default User ID. The system will base the new user IDs on this default. Once created, you can modify individual profiles on the User ID pages.

If the user ID upon which you are basing the new users has data permission, you will need to run the Refresh SJT_OPR_CLS process. Otherwise the system will not recognize the data permission on the new user profiles.

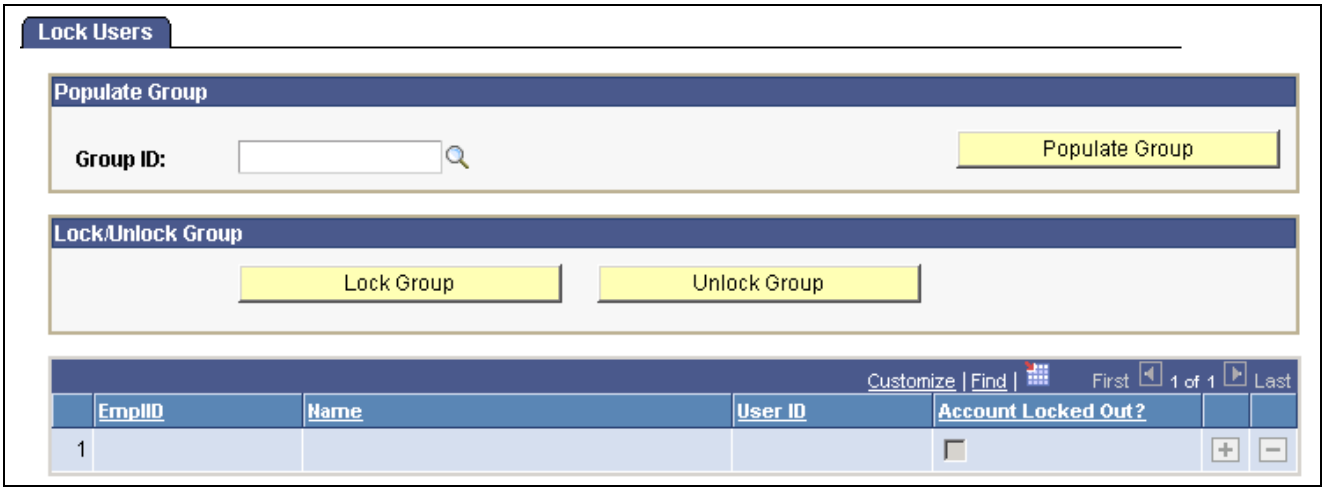
See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Create User as Locked? Select to lock all the new user IDs.

Create User IDs Select to run the process.

Locking Users

Access the Lock Users page.



Lock Users page

Lock Group	Click to run the process and lock the user IDs of the entire group.
Unlock Group	Click to run the process and unlock the user IDs of the entire group.

Activating Additional Security for Recruiting Solutions

To activate additional security for PeopleSoft Enterprise Recruiting Solutions, use the Recruiting Row Level Security component (HRS_SEC_TBL).

This section provides an overview of data permission security for job openings and discusses how to activate additional security for recruiting solutions.

Understanding Data Permission Security for Recruiting Solutions

You can secure access to job openings at three points. The following people have access to job openings:

- The creator of a job opening, as indicated on the Create New Job Opening component (HRS_JO_LAUNCH).
- Users with standard data permission access to the transaction data in the job opening.
- The recruiting team.

Recruiting Team Access

In some circumstances, the members of your recruiting team may not have standard data permission access to the transaction data in the job opening. To set up data permission to job openings for recruiting team members:

1. On the Security by Permission List page:
    a. Select the security set RSOPN.
    b. In the Security Type group box, select the type *031* (Recruiting Team).

        The system displays EmplID for the Key 1 field. Leave this field empty. This security access type has hardcoded key values so you do not need to specify any EmplID values.
2. Assign the permission list to one or more roles and assign the roles to those users who need recruiting team access.
3. Assign users to a job opening in the Assignments group box on the Job Opening component (HRS_JOB_OPENING).

When a recruiting team member accesses the job opening, the system will determine if the user has a permission list with recruiting team access and if he or she is listed in the assignments group box when granting access to the opening.

See Chapter 6, "Setting Up and Administering HRMS Security," Granting Data Access to Permission Lists by Field Value, page 104.

See *PeopleSoft Enterprise Talent Acquisition Manager 8.9 PeopleBook*, "Creating Job Openings," Creating Job Openings.

Applicant Data Access

The data of applicants associated with job openings is available to those with access to the job openings. Applicants not assigned to a job opening are available to anyone with access to the applicant components. To restrict access to applicant data use application security to restrict which users have access to the applicant components.

Recruiting Administrator Privileges

You can also grant recruiting administrator privileges to row security permission lists on the Recruiting Row Level Security page by selecting the Recruiting Administrator check box. Privileges include being able to change the status of draft applicants or overriding the status of a job opening.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 8.9 PeopleBook, "Entering Applicants"

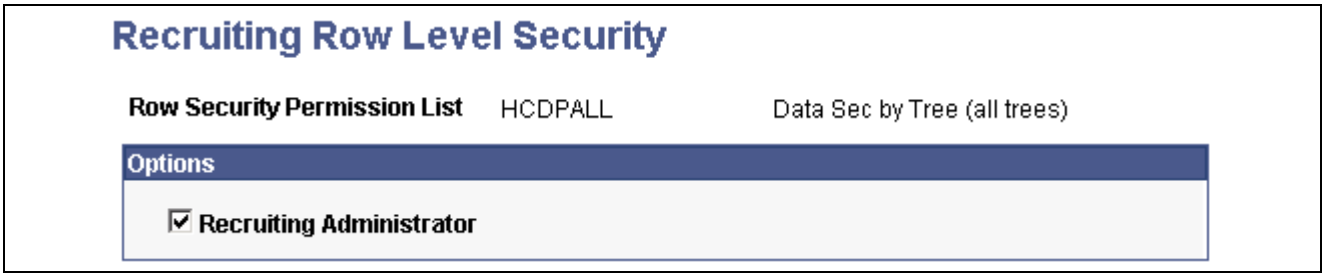
PeopleSoft Enterprise Talent Acquisition Manager 8.9 PeopleBook, "Managing Job Openings"

Page Used to Set Up Security for Recruiting Solutions

Page Name	Object Name	Navigation	Usage
Recruiting Row Level Security	HRS_SEC_TBL	Set Up HRMS, Security, Core Row Level Security, Recruiting Row Level Security	Grant advanced recruiting solutions privileges to row security permission lists, which are assigned to users in the User Profile component. **Note.** A user can only have one row security permission list.

Setting Up Security for Recruiting Solutions

Access the Recruiting Row Level Security page.



Recruiting Row Level Security page

Note. You do *not* need to run the Refresh SJT_CLASS_ALL process when you modify a row security permission list on this page.

Setting Up Security for Local Functionality

This section provides an overview of security for local functionality and discusses how to:

- Grant access to local country functionality.
- Restrict access to local country functionality.

Understanding Security for Local Functionality

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

To grant users access to local country functionality on the global menus:

1. Use the Country Specific - Installed HR Countries page (INSTALLATION_SEC) to select the local country functionality that is installed as part of your PeopleSoft HRMS system.

   If you do not specify a country here, its local functionality can't be accessed.
2. Grant the primary permission lists access to country-specific functionality using the Global Panels page.
3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See Also

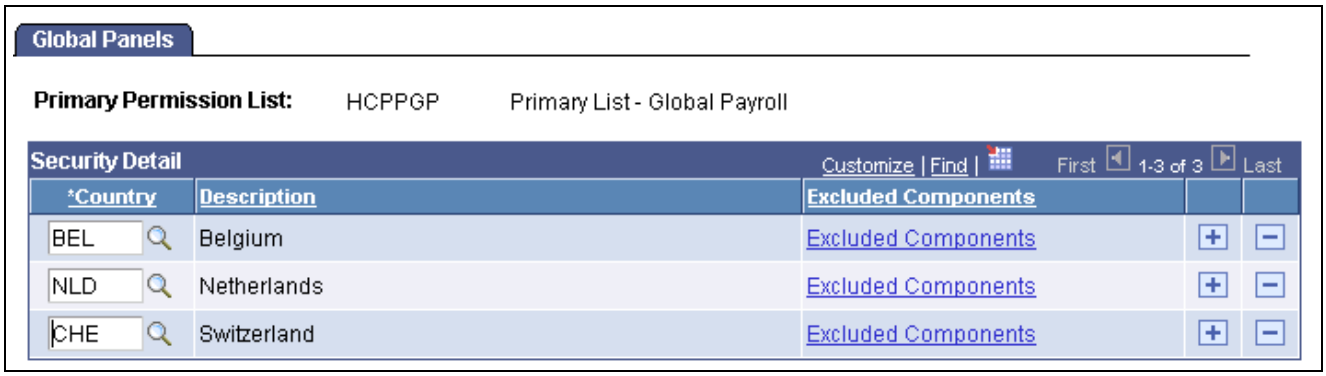
Enterprise PeopleTools PeopleBook: Security Administration

Pages Used to Grant Access to Local Country Functionality

Page Name	Object Name	Navigation	Usage
Global Panels	SCRTY_TBL_GBL	Set Up HRMS, Security, Component and Page Security, Setup Global Security, Global Panels	Select which country functionality a primary permission list can access on global components.
Global Panels - Excluded Panelgroups	SCRTY_GBL_SEC	Click the Excluded Components link on the Maintain Global Security page.	Restrict access to local functionality on selected components.

Granting Access to Local Country Functionality

Access the Global Panels page.



Global Panels page

Primary Permission List Users assigned to this permission list can access the country-specific sections on global components of the countries that you indicate on this page.

Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

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

Excluded Components When you click Excluded Components, the system displays the Restricting Access to Local Country Functionality page. Using this page, you can restrict access to country-specific functionality in select components.

For example, you can grant a permission list access to Italian sections on all global components except for Personal Data.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

Restricting Access to Local Country Functionality

Access the Global Panels - Excluded Panelgroups page.



Excluded Panelgroups page

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

Modifying Data Permission Security

This section discusses how to:

- Modify security for hiring and transferring people.
- Allow people to update their own data.

Modifying Security for Hiring and Transferring Workers

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

If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_SEC_VW. You may also want to change the security view on the DEPARTMENT_TBL component to this view if you want users to only be able to access departments they have access to. This is defined using the Department Security Sets.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Allowing Workers to Update Their Own Data

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

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

To enable the Allow EmplIDChg function:

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

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

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

```
if %Component = Component.PERSONAL_DATA then
   AllowEmplidChg(true);
end-if;
```

5. Save your changes and exit the PeopleCode page.

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

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

CHAPTER 7

Setting Up and Installing PeopleSoft HRMS

This chapter discusses how to:

- Set up implementation defaults.
- Set up HRMS options on the PeopleTools Options page.
- Administer country codes.
- Set up regulatory regions.
- Establish regulatory transaction types.

Setting Up Implementation Defaults

To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

This section provides an overview of implementation defaults and discusses how to:

- Select PeopleSoft applications for your installation.
- Select HRMS options.
- Enter application and industry-specific installation information.
- Enter country-specific installation information.
- Select local country functionality.
- Specify the starting number for system-assigned numbers.
- Define parameters for using third-party applications.
- Enter alternate character types.

Understanding Implementation Defaults

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

Warning! You must complete the information on the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) for each primary permission list. Most of the defaults in PeopleSoft HRMS come from the Org Defaults by Permission Lst component and not the Installation Table pages. Other PeopleSoft HRMS applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Enterprise Human Resources, all defaults are based on the settings that you make on the Org Defaults by Permission Lst component. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

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

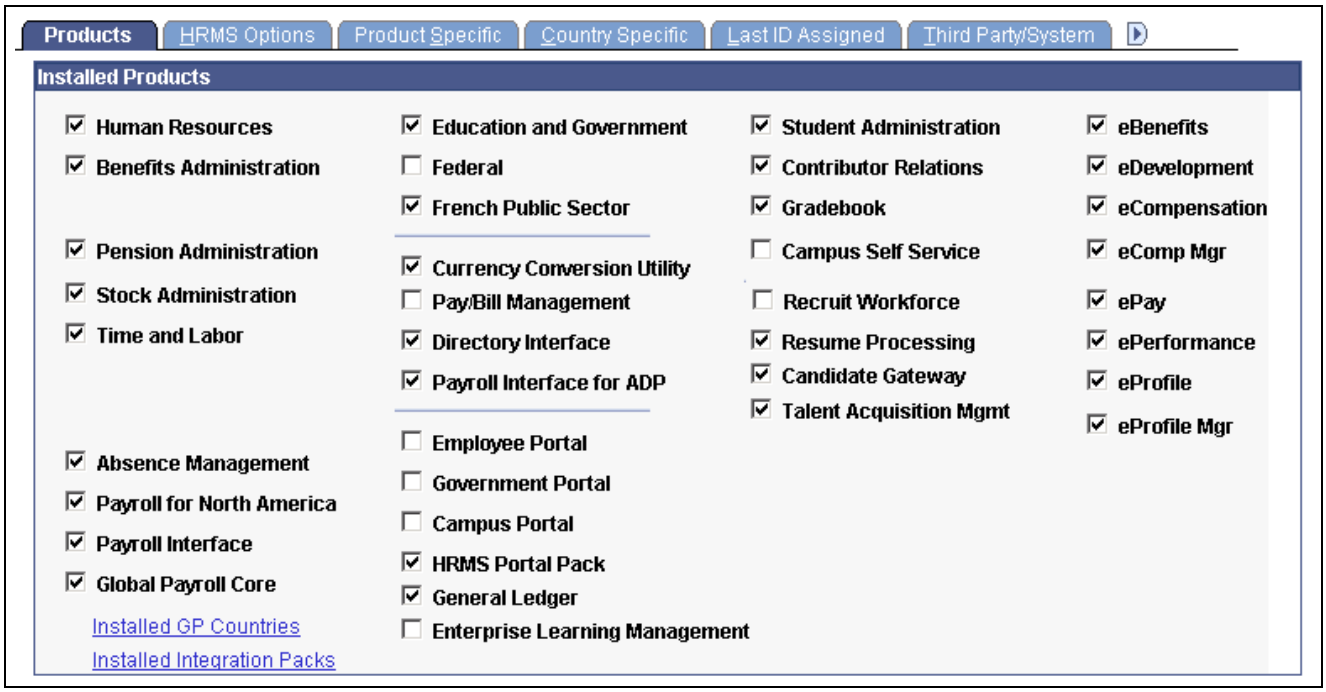
Pages Used to Set Up and Report on Implementation Defaults

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Specify the PeopleSoft applications for your installation.
Global Payroll Country Extensions	INSTALL_GP_SEC	Set Up HRMS, Install, Installation Table, Products Click the Installed GP Countries link on the Products page.	Select the PeopleSoft Enterprise Global Payroll country extensions you are implementing.
Installed Integration Packs	INSTALL_PIP_SEC	Set Up HRMS, Install, Installation Table, Products Click the Installed Integration Packs link on the Products page.	Select the payroll integration pack you are using, if applicable.
HRMS Options	INSTALLATION_TBL1B	Set Up HRMS, Install, Installation Table, HRMS Options	Specify how to drive your system: by person, by position, or both. Enter the PeopleSoft HRMS defaults that are related to your organizational policies.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Enter product- and industry-specific installation information.
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table, Country Specific	Enter country-specific installation information.

Page Name	Object Name	Navigation	Usage
Installed HR Countries	INSTALLATION_SEC	Set Up HRMS, Install, Installation Table, Country Specific Click the Installed HR Countries link on the Installation Table - Country Specific page.	Specify which local country functionality to activate for users in PeopleSoft Enterprise Human Resources.
Last ID Assigned	INSTALLATION_TBL2	Set Up HRMS, Install, Installation Table, Last ID Assigned	Specify the number that the system uses to start assigning numbers.
Third Party/System	INSTALLATION_TBL4	Set Up HRMS, Install, Installation Table, Third Party/System	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HRMS. Define parameters for using third-party applications such as Visio.
Alternate Character	ALT_CHAR_TBL	Set Up HRMS, Install, Installation Table, Alternate Character	Specify the language code and alternate character type.
Installation Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Installation Table Report, Run Control	Run the Installation Table report (PER702). This report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Selecting PeopleSoft Applications for Your Installation

Access the Products page.



Products page

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

If you are implementing PeopleSoft Global Payroll, select the Installed GP Countries link to select the Global Payroll country extensions you are implementing.

If you are implementing an integration pack, select the Installed Integration Packs link to select the integration pack.

(USF) Setting Up PeopleSoft HRMS for Federal Functionality

To set up your database for U.S. federal government functionality, select *Federal* on the Installation Table - Products page and update the Org Defaults by Permission Lst component to point to the U.S. federal government industry and sector.

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

Selecting HRMS Options

Access the HRMS Options page.



HRMS Options page

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

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

Standard Hours

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

Min Standard Hours (minimum standard hours) and **Max Standard Hours** (maximum standard hours) Enter the minimum and maximum standard hours that workers are expected to work in the standard work period. The system enters this information as default values but you can override the values on either the Job Code component (JOB_CODE_TBL) or Position Data component (POSITION_DATA).

Default Standard Hours Enter the number of hours in a standard work period at the company. This is a required field. When you define preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table component and the default standard hours value in the Salary Plan Table component (SALARY_PLAN_TABLE).

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

Work Period Select a standard work period (the time period in which workers must complete the standard hours). Values are stored on the Frequency table.

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

See Chapter 14, "Setting Up Jobs," Classifying Jobs, page 312.

Position Management Option

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

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

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

Full The system expects that you track position data for all people in your organization and that you drive your human resource system by position, not by person.

Partial The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Select to use the business process on a trial basis or for selected departments.

None You drive your system by person. You can still assign position numbers to people, but the system doesn't use position data for job records, such as work phone or mail drop ID. This is helpful for tracking only certain positions, such as those above a particular management level.

Compensation Rate Codes

Default Comp Frequency (default compensation frequency) Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.

See Chapter 14, "Setting Up Jobs," Classifying Jobs, page 312.

Use Rate Code Groups Select if your organization bundles rate codes to apply percentages when calculating compensation.

Use Salary Points Select if your organization uses rate codes that have the rate code type points.

Multi-Step Grade Select if your organization uses a multistep/grade salary plan. This causes the system to use the Salary Step Components page (SALARY_PLAN_T3GBL) to determine compensation rates.

Currency

Multi-Currency Select if you use different types of currency to pay people. This option affects only PeopleSoft Enterprise Payroll for North America. PeopleSoft Global Payroll uses a separate multicurrency in the payroll system.

Note. Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS).

Base Currency Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE). The code you select is the default currency that the system uses to calculate compa-ratios (percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft Payroll for North America, regardless of the currency that is used for individual line items.

For example, if the U.S. dollar is your base currency, but your global salespeople submit expense reports in French francs, the system calculates the expense total in U.S. dollars by internally converting all line item amounts to U.S. dollars and displaying the total in U.S. dollars.

Note. All currency defaults in PeopleSoft Human Resources are based on the base currency that you indicate on the Installation Table page, not the Org Defaults by Permission Lst component. The Org Defaults by Permission Lst component doesn't affect the currency defaults on the local country pages.

See *PeopleSoft Enterprise Components: Currencies*

Rate Type Identify the default rate type on which your currency conversion is based. Do this only if you haven't specified a default rate type for a primary permission list on the Org Defaults by Permission Lst component. The system checks the Org Defaults by Permission Lst component for a default rate type first; if none is specified, it looks at this value.

See Also

Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

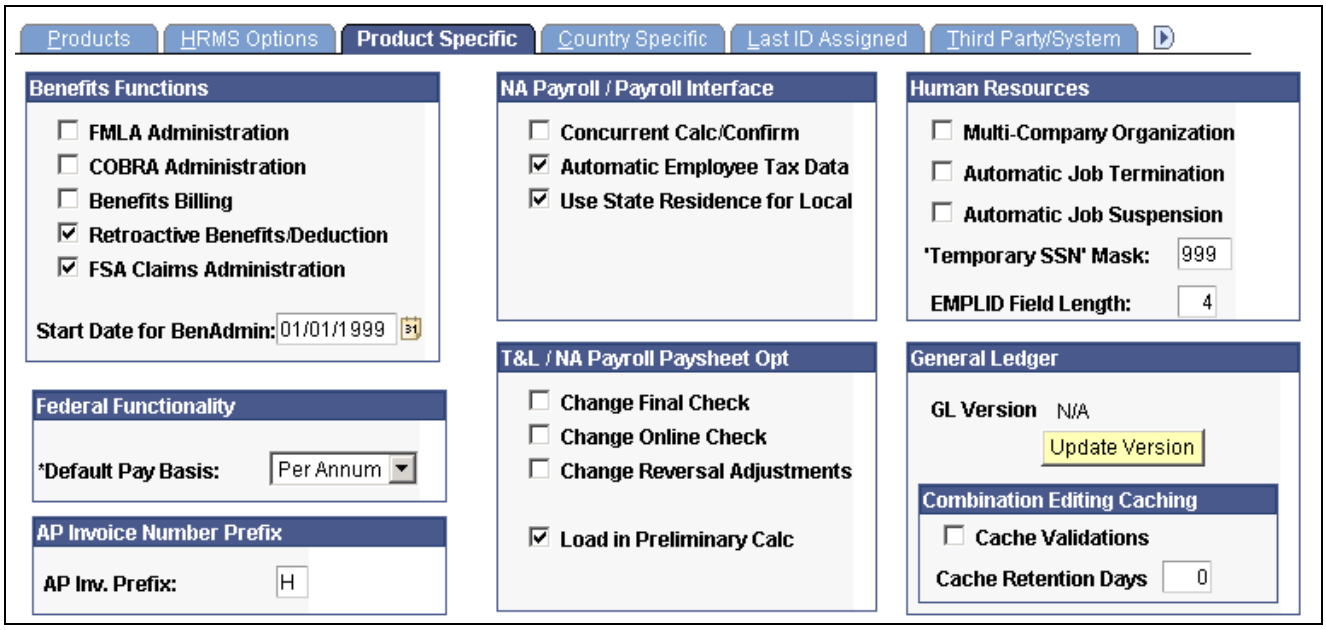
Chapter 2, "Understanding HRMS," Person or Position Structure, page 7

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Managing Base Compensation and Budgeting

Chapter 10, "Setting Up and Working with Currencies," page 197

Entering Application- and Industry-Specific Installation Information

Access the Product Specific page.



Product Specific page

Benefits Functions

FMLA Administration (Family Medical Leave Act), **COBRA Administration** (Consolidated Omnibus Budget Reconciliation Act administration), **Benefits Billing,**, **Retroactive Benefits / Deductions** and **FSA Claims Administration**

Select to activate these different types of benefits functionality.

Start Date for BenAdmin (start date for Benefits Administration)

Enter the start date in PeopleSoft date format: MM/DD/YYYY.

NA Payroll / Payroll Interface (North American Payroll and Payroll Interface)

Concurrent Calc/Confirm (concurrent calculation and confirmation)

Select to enable the system to run a calculation and confirmation at the same time. It is possible for a person to be in two concurrent runs; this could cause a deadlock situation where the process ends abnormally.

Automatic Employee Tax Data

Select to enable the system to create employee federal, state, and provincial tax records automatically whenever the following criteria are met:

- You hire an employee.
- An employee has a job change requiring a new work tax location.
- You add a concurrent job that requires a new work tax location for an employee.
- You hire an employee from the Applicant Tracking System.
- An person transfers to a new company.

Use State Residence for Local — Automatically selected when you select Automatic Employee Tax Data. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, clear this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck.

Human Resources

Multi-Company Organization — Select if your organization comprises more than one company. Select if you use PeopleSoft Pension Administration, because you set up companies specifically to house your pension payees.

Automatic Job Termination — Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.

Automatic Job Suspension — Select to activate substantive job suspension for workers working in temporary assignments where the substantive job requires suspension for the duration of the assignments.

'Temporary SSN' Mask (temporary Social Security number mask) — Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.

EMPLID Field Length — Enter the number of characters to be used for EmplIDs.

(USF) Federal Functionality

Default Pay Basis — For the Default Pay Basis, select the value to use for quoting and reporting salaries. This field is required if you selected Federal on the Products page.

AP Invoice Number Prefix (accounts payable invoice number prefix)

AP Inv. Prefix (accounts payable invoice prefix) — (Optional) Enter a prefix to be used for accounts payable invoices that are generated through HRMS.

T&L/NA Payroll Paysheet Opt (Time and Labor and Payroll for North America paysheet options)

Change Final Check, Change Online Check, and **Change Reversal Adjustments** — Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Enterprise Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.

Load in Preliminary Cal (load in preliminary calculations) — Select to have PeopleSoft Payroll for North America load PeopleSoft Time and Labor data each time that a user initiates the preliminary Pay Calculation process. The system loads only the payable time that was not previously sent to PeopleSoft Payroll for North America.

General Ledger

GL Version — Displays the version of PeopleSoft Enterprise General Ledger that is interfacing with PeopleSoft HRMS. Click the Update Version button if you change versions. The system will automatically update the GL Version.

Note. Full chartfield functionality is only available when you use PeopleSoft General Ledger 8.4 or higher.

Update Version — Click to test the integration with PeopleSoft Enterprise Financials and display the latest version of Financials.

Cache Validations — Select to cache the results of your validations. This improves performance by enabling you to cached validations.

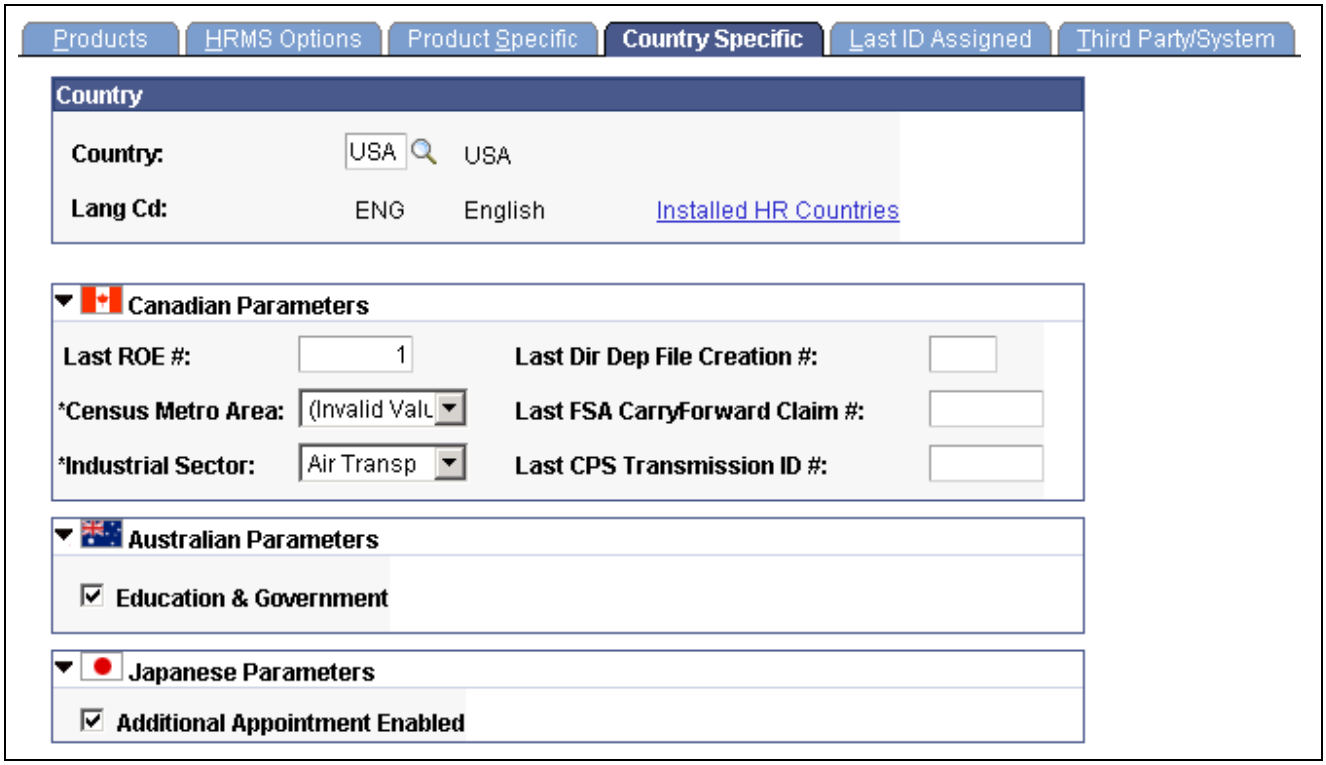
Cache Retention Days — Enter the number of days to store validation results. The system will delete anything in the cache older than this.

See Also

PeopleSoft Enterprise Benefits Administration 8.9 PeopleBook, "Understanding Benefits Administration," Benefit Information Automation

Entering Country-Specific Installation Information

Access the Country Specific page.



Country Specific page

Country

Country and **Lang Cd** (language code) — Select a country for the system to enter as a default value. The system displays the code of the language spoken in the selected country.

Installed HR Countries — Select this link to go to the Installed HR Countries page, where you can select which local country functionality is installed in the system.

(CAN) Canadian Parameters

Last ROE # (last record of employment number), **Last Dir Dep File Creation #** (last direct deposit file creation number), **Last FSA CarryForward Claim #** (last flexible spending account carry-forward claim number), and **Last CPS Transmission ID #** (last CPS transmission ID number)

Enter the last ROE, direct deposit file, flexible spending account carry-forward claim, and CPS transmission ID numbers that were used.

The system increases each number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. These values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Census Metro Area (census metropolitan area)

Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Org Defaults by Permission Lst component. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

Industrial Sector

Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Org Defaults by Permission Lst component. This value is used as the default for the Canadian Industrial Sector field in the Department component; and it identifies the industrial sector with which people in a given department are associated. This field is required.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

See Chapter 12, "Setting Up Organization Foundation Tables," Maintaining Departments, page 277.

(AUS) Australian Parameters

Education & Government Select this check box for Australian public service organizations.

(JPN) Japanese Parameters

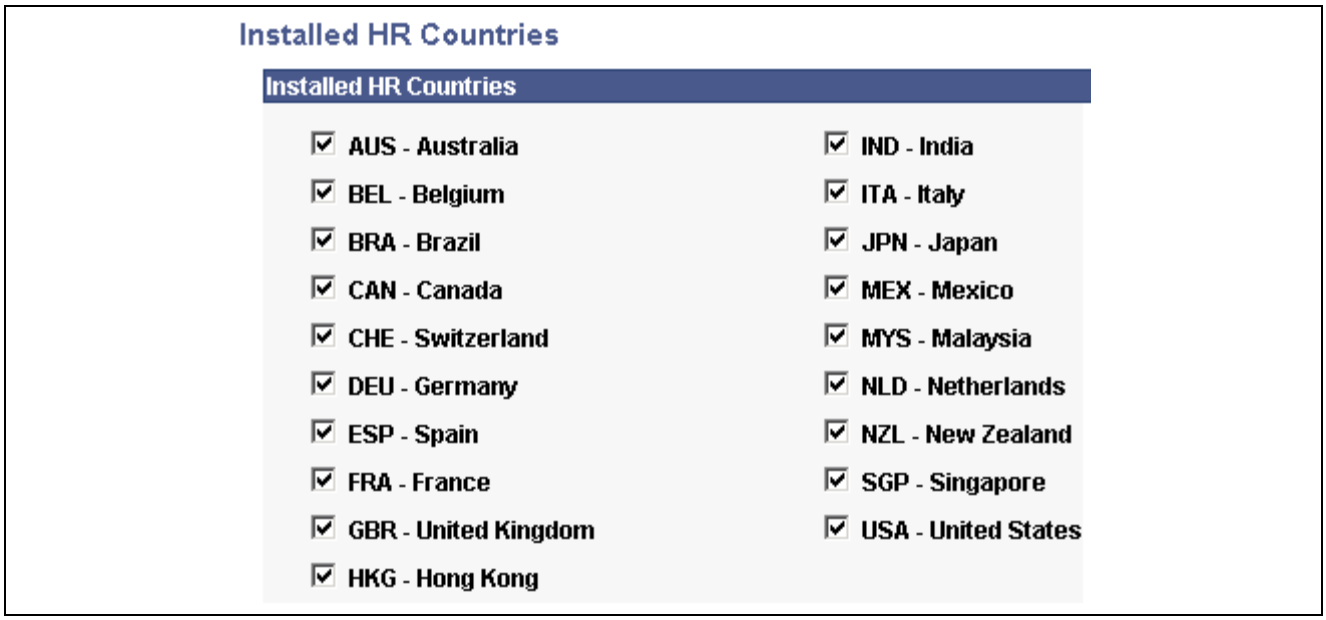
Additional Appointment Enabled

Select if you will be implementing Additional Appointment tracking *(Kenmu)*. Selecting this check box activates functionality to create a dummy additional appointment job code when you create a new business unit.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)".

Selecting Local Country Functionality

Access the Installed HR Countries page.



Installed HR Countries page

The system displays a flag for each country that has special local functionality in PeopleSoft Human Resources:

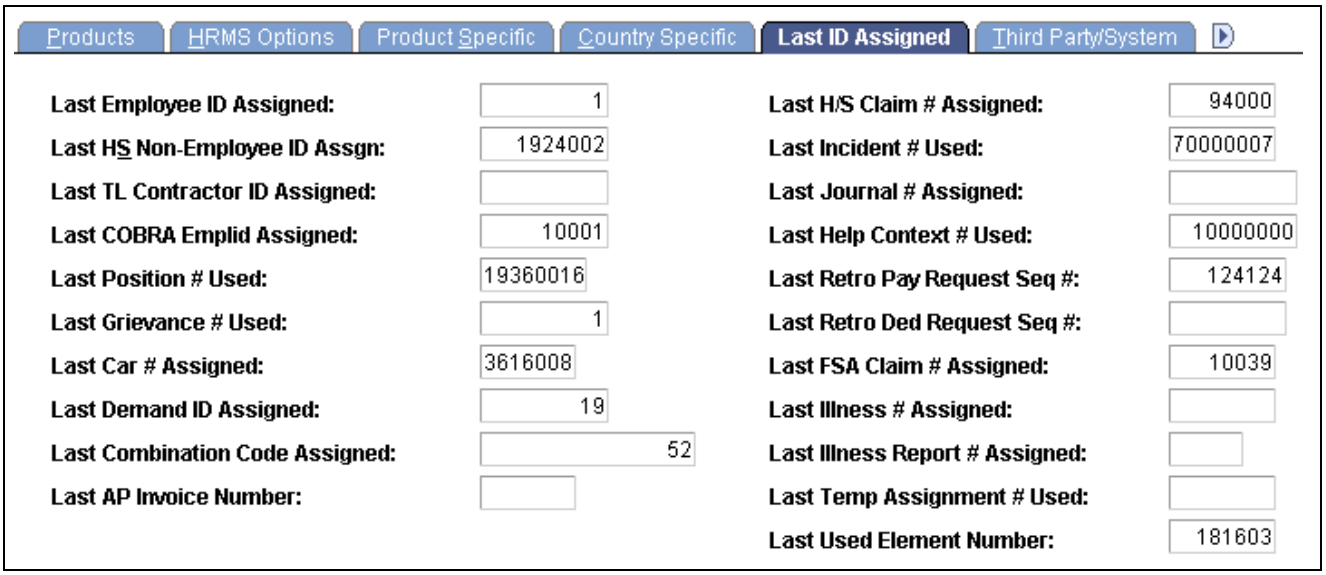
- Select a check box to activate local functionality for that country. Users who have security access can see and work with that country's local functionality.
- Clear a check box to hide that local functionality from your users.

If the check box for a country is selected on this page, but you don't grant country access to the users' primary permission list on the Setup Global Security – Global Panels page (SCRTY_TBL_GBL), users will not see local country functionality.

See Chapter 6, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 131.

Specifying the Starting Number for System-Assigned Numbers

Access the Last ID Assigned page.



Last ID Assigned page

In PeopleSoft HRMS, there are several fields where you can either enter numbers manually or let the system assign them.

The following table lists auto-numbering fields.

Field	Application	Business Process
Last Employee ID Assigned	PeopleSoft Human Resources	Administer Workforce Recruiting Workforce
Last HS Non-Employee ID Assgn	PeopleSoft Human Resources	Monitor Health and Safety Administer Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor	Administer Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Administering COBRA
Last Position # Used	PeopleSoft Human Resources	Manage Positions Plan Successions
Last Grievance # Used	PeopleSoft Human Resources	Manage Labor Administration
Last Car # Used	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training

Field	Application	Business Process
Last Combination Code Assigned	PeopleSoft Human Resources PeopleSoft Payroll for North America	Commitment Accounting
Last AP Invoice Number	PeopleSoft Human Resources	
Last H/S Claim # Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last Incident # Used	PeopleSoft Human Resources	Monitor Health and Safety
Last Journal # Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Help Context # Used	PeopleSoft HRMS	Customizing Windows Online Help
Last Retro Pay Request Seq #	PeopleSoft Payroll for North America	Manage Retroactive Pay
Last Retro Ded Request Seq #	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Manage Retroactive Benefits/Deductions
Last FSA Claim # Assigned	PeopleSoft FSA Claims Administration	Administer FSA
Last Illness # Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness # Report Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Competencies

To let the system assign numbers for the fields on this page, enter the last number that you used in the field. The system increases that number by one when it assigns a new number. The system updates the Installation Table every time it assigns a number.

Note. To avoid maintaining two different sets of numbers, either always assign numbers manually or always let the system do it.

ID Considerations

When you convert ID data to PeopleSoft Human Resources from another system, enter the highest number that was used in your previous system so that you don't duplicate IDs. If the last ID you assigned in your previous system was 1000, enter *1000* in the Last Employee ID Assigned field. When you add a person in PeopleSoft Human Resources, the system assigns an ID of *1001* and updates the Last Employee ID Assigned field accordingly.

To always enter IDs manually, enter *999999999* (nine 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

If you use Social Security or insurance numbers as IDs, change the formatting for the Employee ID field using PeopleSoft Application Designer.

Zero-filled Numbers

To make data entry faster and more accurate on several pages when you enter a number that the system has assigned, the system enters zeros before the number. For example, when you enter *4,* you see *00000004,* a total of 8 characters per number. This occurs in the following fields:

- Job Opening
- Requirements Search
- Grievance
- Incident
- Claim
- Position

Note. If you have already assigned numbers that aren't zero-filled, change their numbering so that the system can accurately track them when you convert the data to PeopleSoft Human Resources.

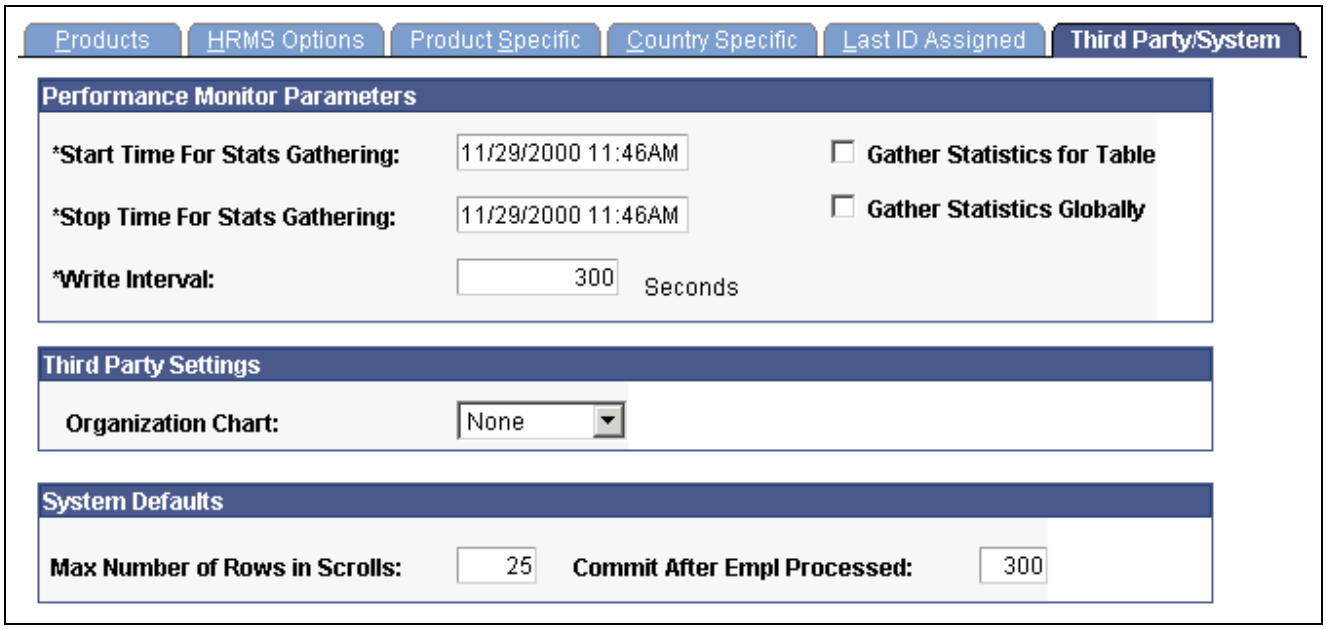
For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Defining Parameters for Using Third-Party Applications

Access the Third Party/System page.



Third Party/System page

Performance Monitor Parameters

Start Time For Stats Gathering (start time for statistics gathering) and **Stop Time For Stats Gathering** (stop time for statistics gathering) — Enter the date and time of the start and stop.

Gather Statistics for Table — Select to gather statistics locally.

Gather Statistics Globally — Select to gather statistics globally.

Write Interval — Enter the number of seconds for gathering the statistics.

Third Party Settings

Organization Chart — Enter the type of third-party program you use to create organizational charts with your human resources data.

System Defaults

Max Number of Rows in Scrolls (maximum number of rows in scrolls) — Enter the maximum number of rows in a scroll-controlled data box for third-party systems.

Commit After Empl Processed (commit after employee processed) — Enter the maximum number of people that a third-party system processes before committing.

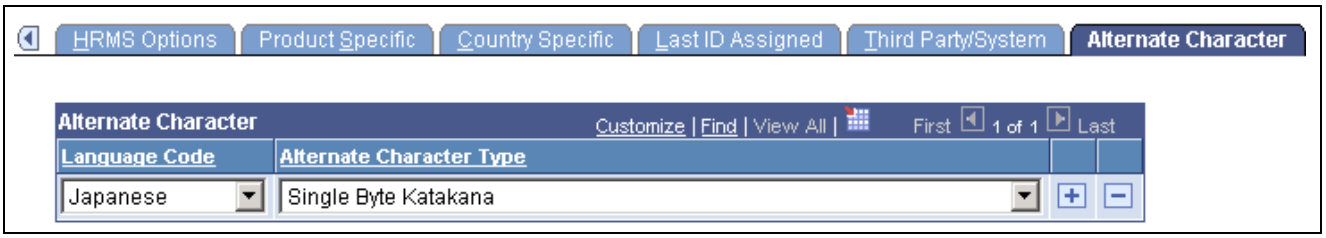
See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools

Chapter 27, "Setting Up and Building Organization Charts," page 581

Entering Alternate Character Types

Access the Alternate Character page.



Alternate Character page

Note. Because you are setting the alternate character code on the Installation Table, the setting affects your entire HRMS application configuration. Make sure that you account for all language codes for your installation.

If you don't specify an alternate character type for a language code that a user is working with, and the user tries to enter characters in an Alternate Character field, a warning message appears.

If you specify an alternate character type for a language code, and a user enters any other character type in an Alternate Character field, a warning message appears.

Note. You can ignore the warning message and enter the data in another character set, but problems can occur when data is sorted in multiple alternate character sets.

Setting Up HRMS Options on the PeopleTools Options Page

To set up HRMS options on the PeopleTools Options page, use the PeopleTools Options component (PSOPTIONS).

This section discusses how to set up HRMS options on the PeopleTools Options page.

You use the PeopleTools Options page to set a variety of values that are related to:

- Multiple jobs functionality.
- Multicompany organizations.
- Organizations that conduct business using more than one currency.

Access the PeopleTools Options page on the PeopleTools, Utilities, Administration menu.

See *Enterprise PeopleTools PeopleBook: Data Administration Tools*

Select the following check boxes, as applicable, to activate these kinds of functionality:

Multi-Company Organization Select if your organization comprises more than one company or if you use PeopleSoft Pension Administration to set up companies specifically to house your pension payees.

Multi-Currency Select to enter data in more than one currency. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and Italian lira. If you select *Multi-Currency,* the system displays a Currency Code field on pages where amount fields appear.

Note. *Multi-Currency* doesn't affect PeopleSoft Global Payroll, which has its own multiple currency functionality.

Multiple Jobs Allowed PeopleSoft delivers PeopleTools with this option selected. Leave it selected to take full advantage of PeopleSoft HRMS.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Administering Country Codes

To administer country codes, use the Country Table component (COUNTRY_TABLE), the Country Table – HR component (HR_COUNTRY_TABLE), and the State/Province component (STATE_DEFN).

This section provides an overview of country codes and enterprise integration points and discusses how to:

- View and update country information.
- Specify the address format for a country.
- Specify the county, state, and city for a country.
- Define additional information for HRMS reporting purposes.
- Add the state, province, or equivalent entity for a country.

Understanding Country Codes

On many pages in PeopleSoft Human Resources, a country appears as part of the address for a person, a company, or an office. Countries are represented as codes, such as CAN for Canada, and they are listed in the Country Table component. In the Country field on any page, the system displays a default country code, which you can change. The Org Defaults by Permission Lst component and the Business Unit Options Defaults component (BUS_UNIT_OPT_HR) can affect this default code. You can define the information that users should capture for addresses in specific countries using the Address Format page (ADDR_FORMAT_TABLE) in the Country Table component.

You need codes for all the countries where your organization does business and where the people in your system live. The Country Description page (COUNTRY_DEFN) includes an extensive list of predefined countries and codes. The page is updated with each version of PeopleSoft Human Resources according to the countries that are recognized by the International Standards Organization (ISO).

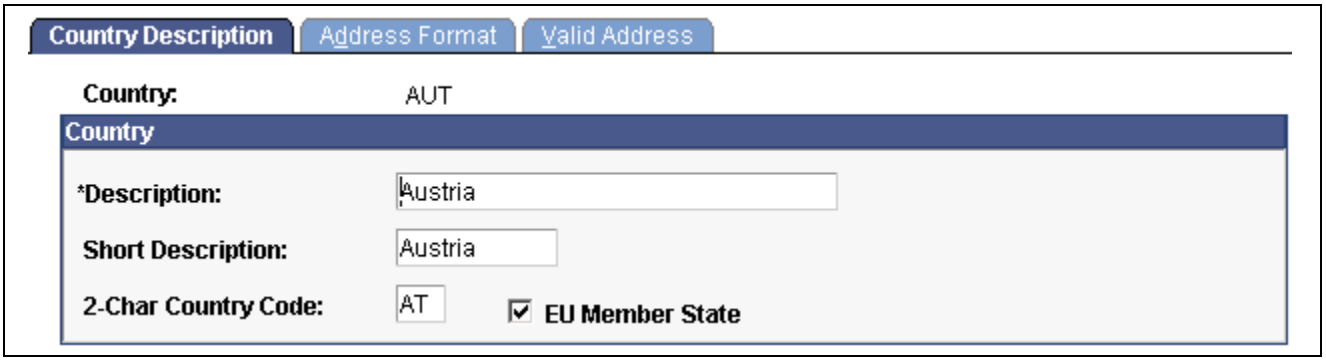
If you need a new country code, notify your PeopleSoft account manager so that we can add it to the Country Table for the next version of PeopleSoft Human Resources.

Pages Used to Administer Country Codes

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table, Country Description	View or update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.
Valid Address	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table, Valid Address	Specify the county, state, and city for the country that is selected from the Country Table.
Country Table - HR	HR_COUNTRY_DEFN	Set Up HRMS, Install, Product and Country Specific, Country Table - HR	Specify additional information about a country for HRMS reporting purposes.
State or Province Table	STATE_DEFN	Set Up HRMS, Install, State/Province, State or Province Table	Add a state, province or equivalent entity for the country that is selected from the Country Table.
Country Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report, Run Control	Run the Country Table report (PER708) that prints a list all country character codes.

Viewing or Updating Country Information

Access the Country Description page.



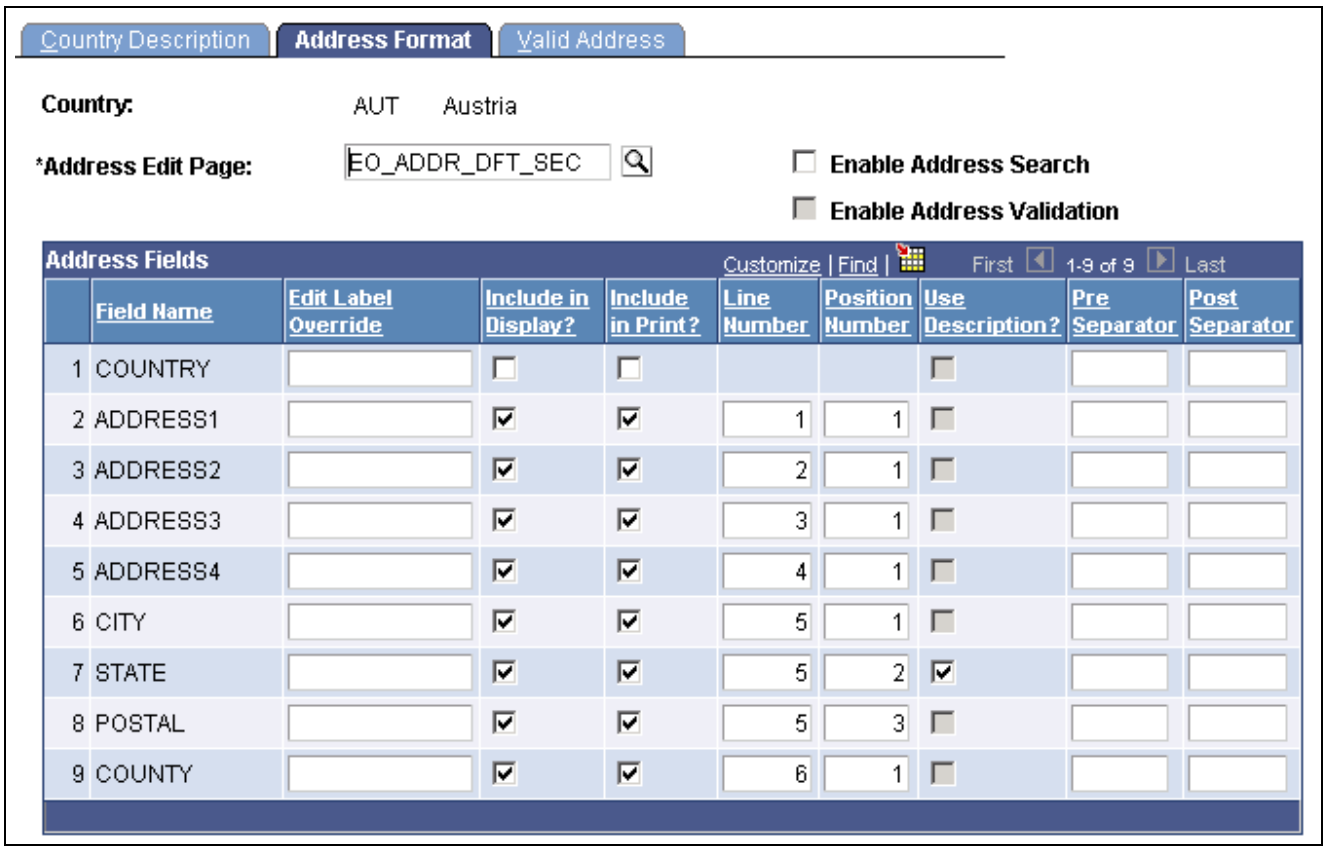
Country Description page

2-Char Country Code (Two-character country code) Enter the code that the U.S. government assigned to the country, if applicable.

EU Member State (European Union member state) Select if this is an EU member state. This field is for your reference only and doesn't impact system processing or reporting.

Specifying the Address Format for a Country

Access the Address Format page.



Address Format page

Address Edit Page Select an address page from the list of available options. The system will display the list of fields on that page in the Address Fields group box.

Enable Address Search Select to enable the address search.

Enable Address Validation Select to enable the system to validate address entries for state or province and city as shown on the Valid Address page.

Address Fields

Field Name The Field Name column displays the address fields available in the PeopleSoft HRMS.

Edit Label Override Enter a different label to override the displayed Field Name, if required for this country.

Include in Display? Select to have the system display this field whenever an address in this country needs to be entered in the system.

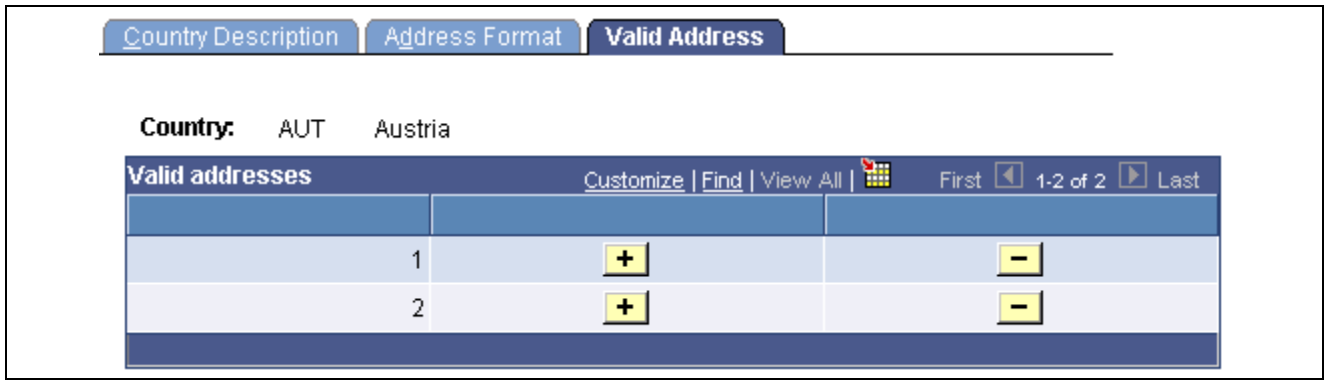
Include in Print? Select to have the system print this field whenever an address in this country will be printed.

Line Number Enter the line on the page on which this field should appear.

Position Number	Indicate this field's position in the selected line.
Use Description?	Select to have the system display a full description for this field.
Pre Separator and **Post Separator**	Enter separator characters for the address elements if applicable (for example and em dash).

Specifying the County, State, and City for a Country

Access the Valid Address page.



Valid Address page

Valid Addresses

The Valid Address page stores state/province codes with corresponding cities, as entered on the State or Province Table page. When you select *Enable Address Validation* on the Address Format page, the system checks address entries against the values stored on the Valid Address page to verify that the city and state or province match.

Note. (JPN) Japanese postal data is stored in both the Postal Code Table and the Valid Address table (EO_ADDR_VALIDAT). To keep the Valid Address table in sync with the Postal Code Table, you must enter new postal data in the Postal Code Table page. The system will not update the Postal Code Table with values you enter on the Valid Address page.

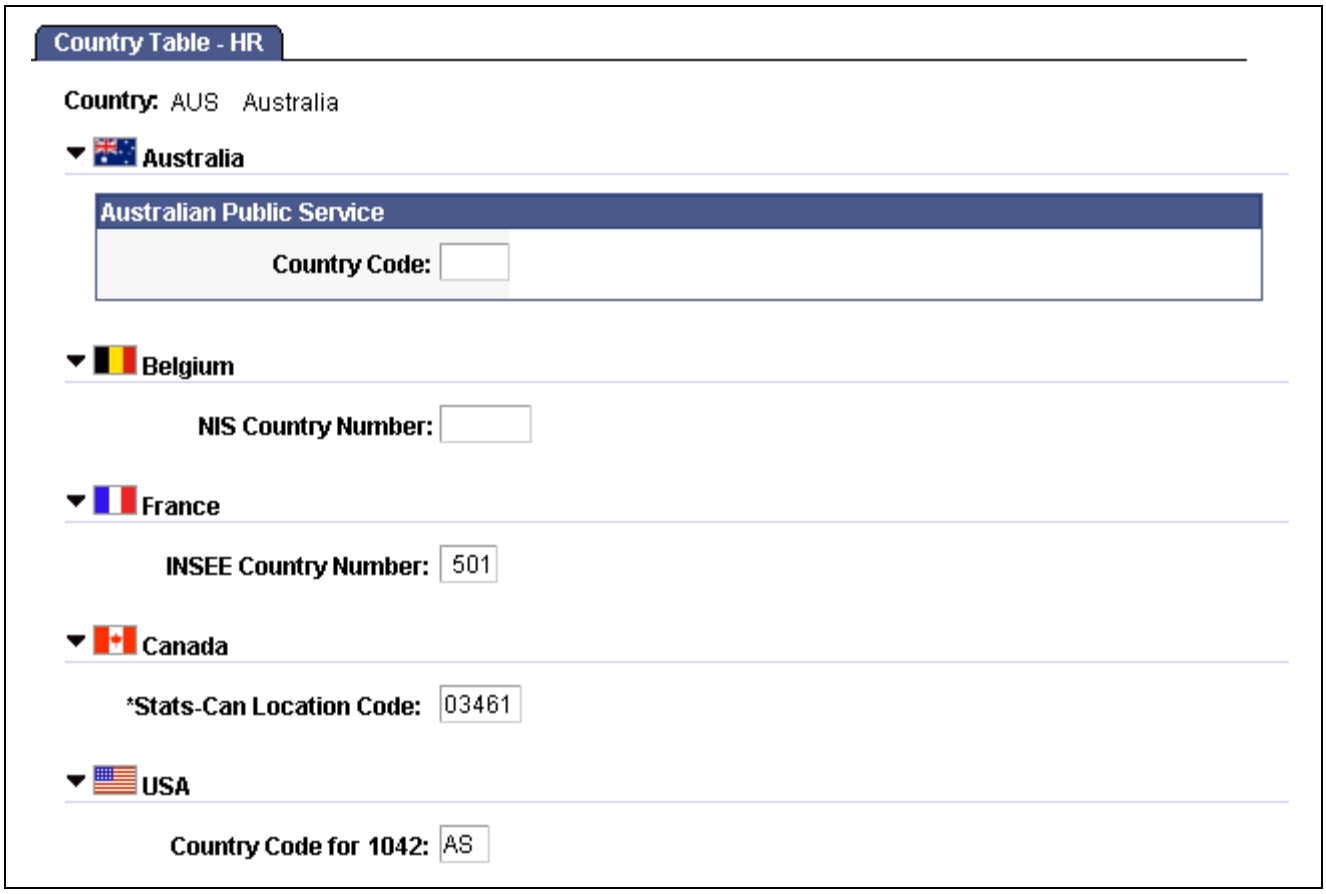
See Also

Chapter 19, "Setting Up Local Country Functionality," (ITA) Setting Up Italian City Codes, page 413

Chapter 19, "Setting Up Local Country Functionality," Setting Up the Postal Code Table, page 414

Defining Additional Information for HRMS Reporting Purposes

Access the Country Table - HR page.



Country Table - HR page

(AUS) Australia

Australian Public Service Enter the Australian Public Service four digit country code here.

(BEL) Belgium

NIS Country Number (National Institute for Statistics country number) Enter the NIS Country Number for reporting hires and terminations to the Social Insurance.

(FRA) France

INSEE Country Number (National Institute for Statistical and Economic Studies country number) INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(CAN) Canada

Stats-Can Location Code (Statistics Canada location code) Displays the Statistics Canada Country location code, which is used on the FRA INSEE Table page and Canada Academic Teaching Survey reports. PeopleSoft delivers this table with the Stats-Can location code entered. PeopleSoft does not maintain this information.

This field is intended for Canadian higher education degree-granting institutions only.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Faculty Events*, "(CAN) Working with the Statistics Canada Academic Teaching Surveys Process".

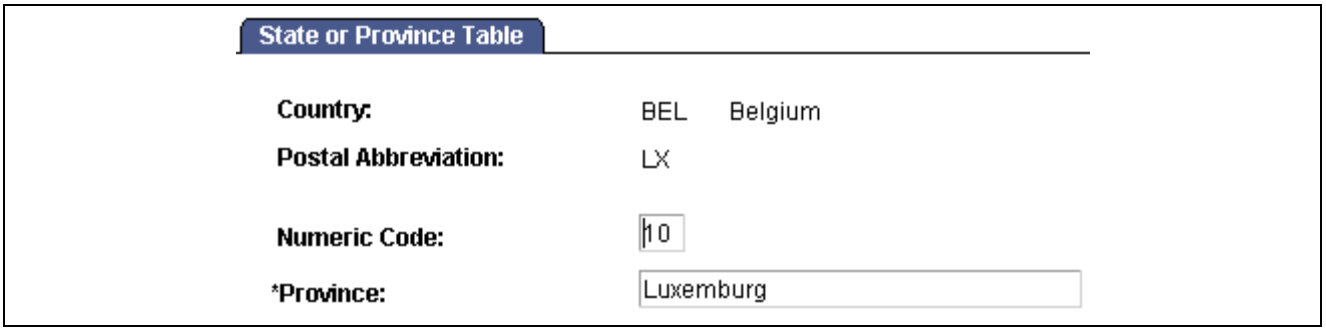
(USA) USA

Country Code for 1042 (USA) Enter the country code used when reporting wage and tax data to federal and state government agencies in the MMREF format.

(E&G) Enter the country code for nonresident alien processing

Adding the State, Province, or Equivalent Entity for a Country

Access the State or Province Table page.



State or Province Table page

PeopleSoft delivers the State or Province Table with all states, provinces, and equivalent geographical entities (such as Dutch communities and French departments) for all supported countries. The codes are based on standard postal codes. PeopleSoft updates this table with each version.

You need these state or province codes for all countries where your organization does business. You use this information in many address fields in the system.

Postal Abbreviation The state or province code is automatically displayed.

Numeric Code Enter the numeric code, if applicable. The U.S. federal government assigns a numeric code to each state for reporting purposes. You don't need to enter numeric codes for new Canadian provinces.

Setting Up Regulatory Regions

To set up regulatory regions, use the Regulatory Region component (REG_REGION).

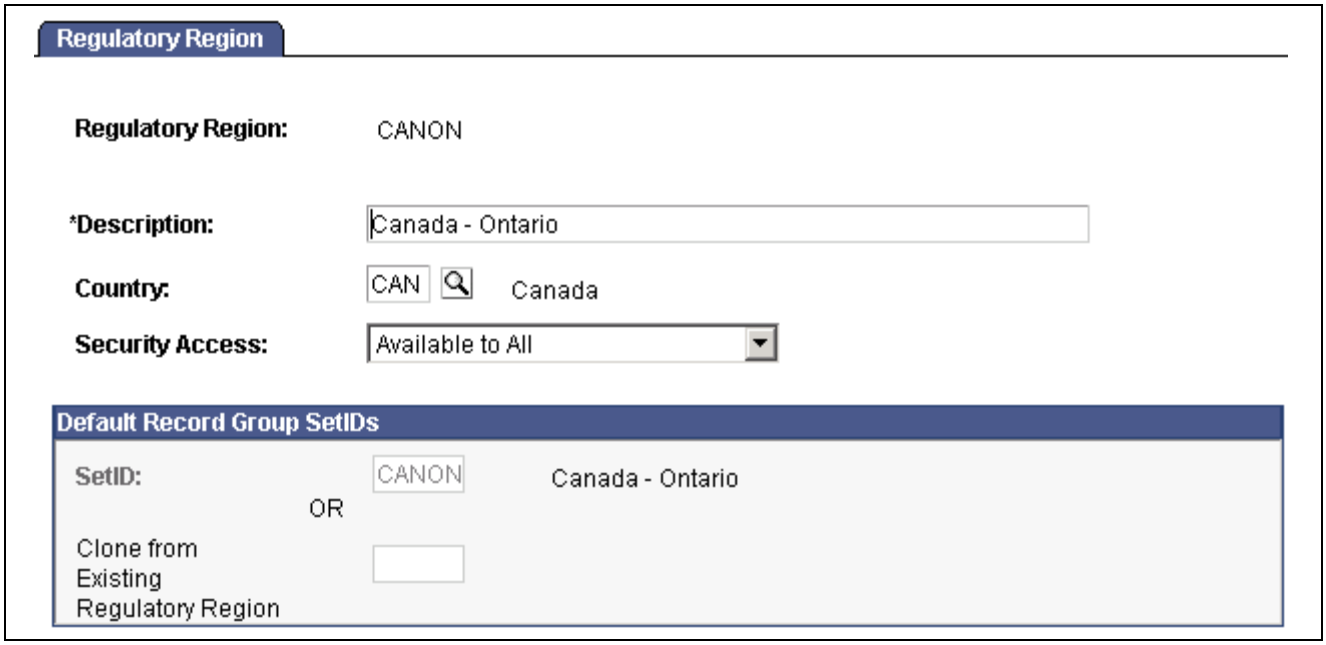
This section provides an overview of enterprise integration points and discusses how to define regulatory regions.

Page Used to Set Up Regulatory Regions

Page Name	Object Name	Navigation	Usage
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region, Regulatory Region	Set up a regulatory region.

Defining Regulatory Regions

Access the Regulatory Region page.



Regulatory Region page

Country Select a country from the list. When you create a regulatory region, you must specify the country to which the region belongs. This enables country-specific edits even when a state-level or provincial-level region is used in a system transaction. If the country you want to add isn't in the list of values, add that country to the system using the Country Table.

Security Access Select a security access level from the list. Because many companies have users working with only one, limited set of regulatory regions, this feature enables you to hide the other regulatory regions from the user. The values are stored on the Translate table. The Regulatory Region prompt edit views use these values to limit the user's Regulatory Region choices to the regions to which the user has access. Values are as follows:

- *Available To All:* Users can select this region.
- *Not Available To Anyone:* No users can select this region.
- *With Global Security Only:* Only users who have access to that region's country functionality assigned to their primary permission list can select that region.

See Chapter 6, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 131.

Note. If you choose not to maintain the country-level data security, then select *Available to All* or *Not Available to Anyone* to provide universal access to regulatory regions. To simplify maintenance, availability is established only once for each regulatory region and is used for all transactions.

Default Record Group SetIDs

Use this group box to specify the SetIDs that make up this regulatory region. Since Regulatory Region is used to drive set processing in some applications, such as Health and Safety, Regulatory Region is a set control value. The default record group SetIDs establish an initial set processing relationship for this new regulatory region.

SetID

When you add a regulatory region, the SetID field is available for entry, and the Clone From Existing Regulatory Region field is unavailable for entry. The system places a default setID in the SetID field that bears the same name as the Regulatory Region Code that you just defined. If you haven't defined a SetID that matches this code, select another applicable SetID for your regulatory region from the list of valid values. The SetIDs in the list were set up using the TableSetID table. You can select only from those SetIDs.

Note. Before you can specify SetIDs, you must define SetIDs, record groups, set control values, and TableSet record group controls, using the components on the PeopleTools, Utilities, System Administration menu.

See Chapter 4, "Working with System Data Regulation in HRMS," page 29.

Clone from Existing Regulatory Region

You can clone the SetIDs attached to this new regulatory region from an existing regulatory region. Use this option if the new regulatory region that you're defining requires the same default record group SetIDs as those that you've already created for another region.

Enter the regulatory region that you want to clone.

See Also

Chapter 6, "Setting Up and Administering HRMS Security," page 57

Enterprise PeopleTools PeopleBook: Data Administration Tools

Establishing Regulatory Transaction Types

To establish regulatory transaction types, use the Regional Transactions component (REG_TRX_REGION).

This section provides an overview of regulatory transactions and discusses how to add regulatory regions to a transaction.

Understanding Regulatory Transactions

Two sets of regulatory transactions are already defined in the system as shown in the following table:

Regulatory Transaction	Countries or Regions Included	Reason
STANDARD	All countries that are supported in the system.	Most applications apply regulatory and legislative edits at the country level.
HANDS (Health and Safety)	All countries that are included in the system, plus the Canadian provinces.	Most applications apply regulatory and legislative edits at the country level, but Canada has specific provincial laws governing their Health and Safety reporting.

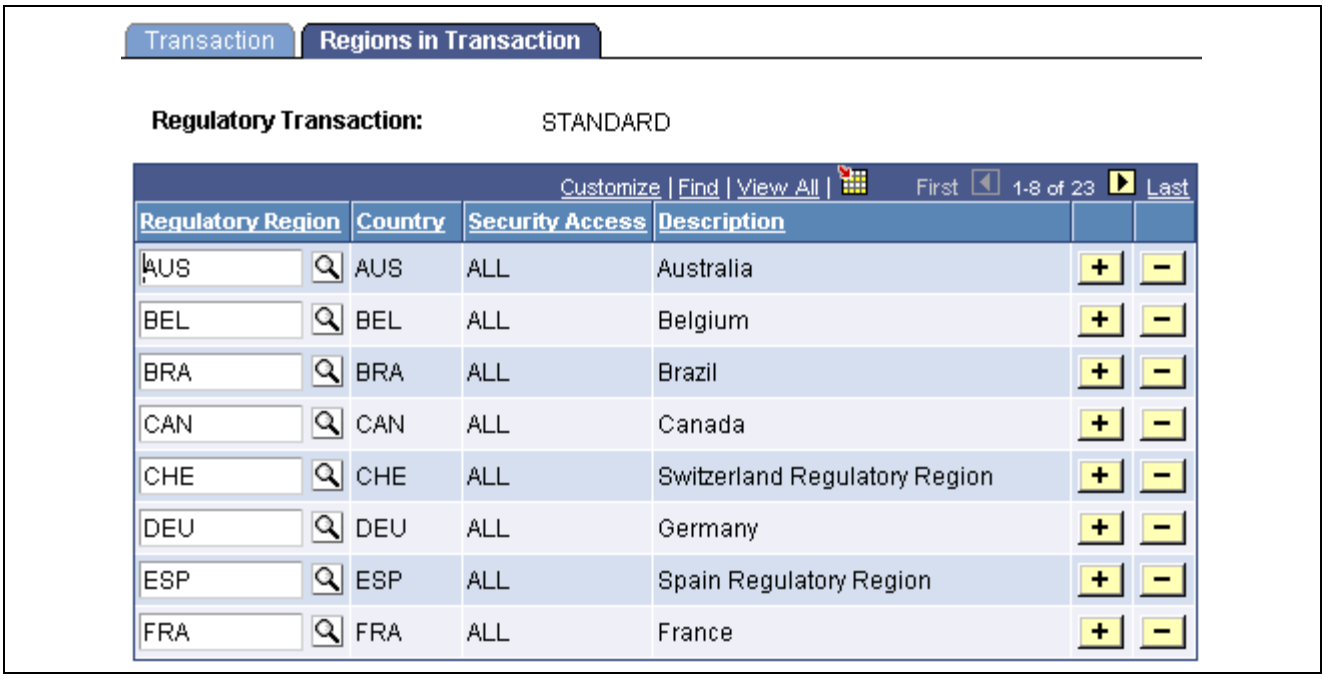
Use the two pages in the Regional Transactions component (REG_TRX_REGION) to assign new regulatory regions to these transaction types (if you have added countries or regulatory regions to the system) and to establish new regulatory transactions.

Pages Used to Update or Add Regulatory Transactions

Page Name	Object Name	Navigation	Usage
Regional Transactions - Transaction	REG_TRX	Set Up HRMS, Install, Regional Transactions, Transactions	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction	REG_TRX_REGION	Set Up HRMS, Install, Regional Transactions, Regions in Transaction	Define the regulatory regions that make up a regulatory transaction type.

Adding Regulatory Regions to a Transaction

Access the Regions in Transaction page.



Regions in Transaction page

Regulatory Region Select the regulatory regions that belong to this transaction.

Installing Person Objects

To install person objects, use the Person Object Installation component (PERSON_INSTALL).

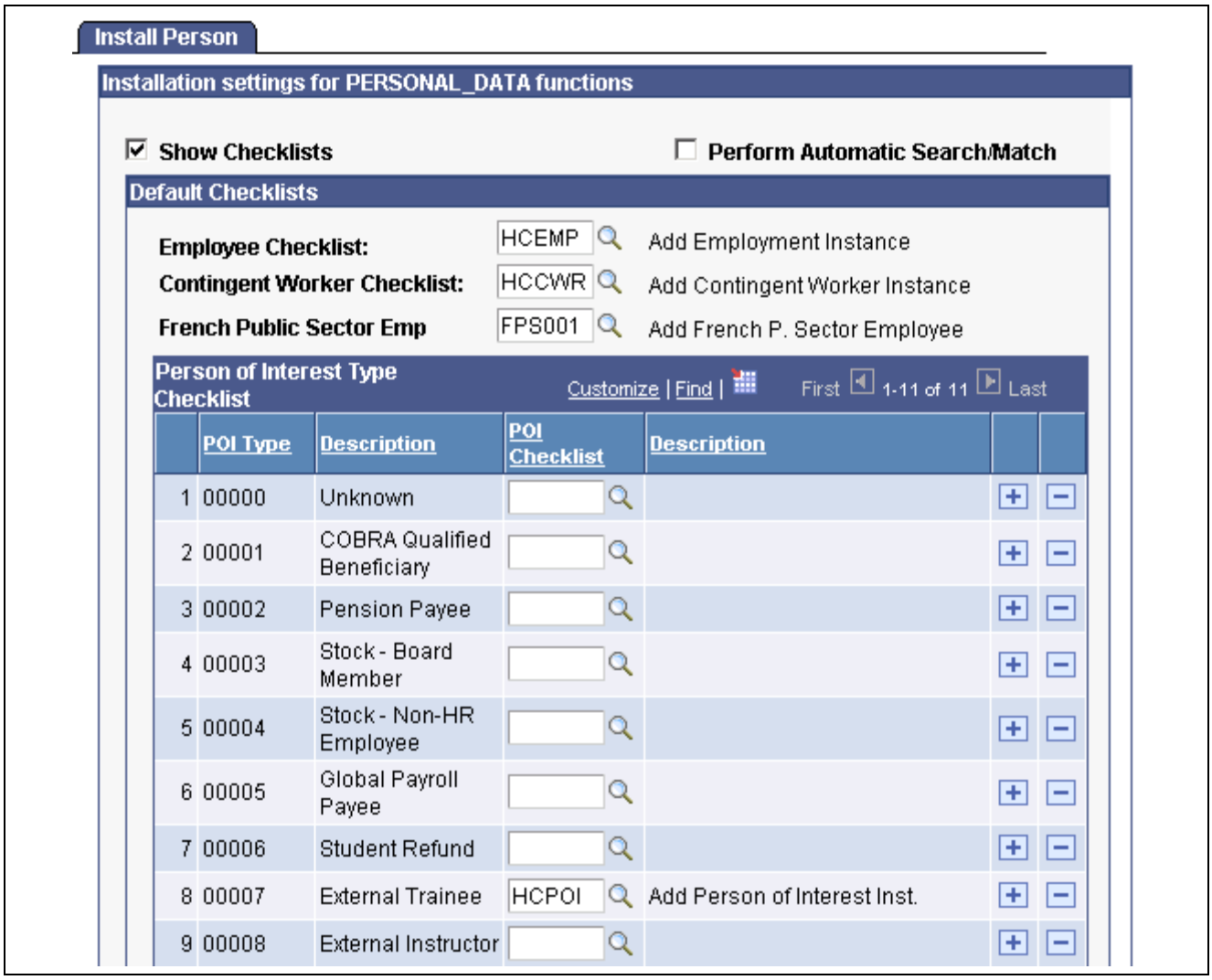
This section discusses how to install person objects.

Page Used to Install Person Objects

Page Name	Object Name	Navigation	Usage
Install Person	INSTALL_PERSON	Set Up HRMS, Install, Person Object Installation, Install Person	Select installation settings for the Add a Person component (PERSONAL_DATA).

Selecting Personal Data Installation Settings

Access the Install Person page.



Install Person page

Installation settings for PERSONAL_DATA functions

Show Checklists Select to show the Checklists Code field on the Organizational Relationships page (PERSON_DATA4), enabling users to select a checklist for the person they are adding and create a record in the Person Checklist component (PERSON_CHECKLIST).

Perform Automatic Search/Match Select to perform an automatic search and match when you add a person to the PERSONAL_DATA component. The system will search the database to determine that you are not entering a duplicate record.

Default Checklists

Select the default checklists that the system will display in the Checklist Code field on the Organizational Relationship page when you add to add one of the following relationships for the new person:

- Employee.
  - In the Employee Checklist field, select the default checklist for commercial employees.
  - In the French Public Sector Emp field, select the default checklist for French public sector employees.

- Contingent worker.

  In the Contingent Worker Checklist field, select the default checklist for contingent workers.

- Person of Interest

  For each POI type listed in the Person of Interest Type Checklist grid for which you want a default checklist, select the checklist.

The system will create a record in the Person Checklist component with this checklist if you select the Go to Person Checklist link on the Organizational Relationship page when you first create the person.

Set up checklists on the Checklist component (CHECKLIST_TABLE).

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Creating Checklists.

CHAPTER 8

Setting Up and Working with Search/Match

This chapter provides an overview of PeopleSoft Search/Match and discusses how to:

- Set up Search/Match.
- Work with Search/Match.

Understanding Search/Match

To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data into your system, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

- Person (EmplID)
- Applicant (HRS_PERSON_ID within PeopleSoft Enterprise Talent Acquisition Manager)

Note. PeopleSoft delivers these ID types as translate values inside the SM_TYPE field. They are delivered as *Active,* but you can inactivate them depending on the applications that you license. Do not, however, add or delete ID type values.

For each of these ID types, departments or business areas can, based on user security roles, define their own search criteria to perform a search. The criteria can include defining search rules and placing them in the desired order within a search parameter. Each department or business area can also set what data to display in the results to identify a possible matching ID. Departments and business areas can set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security to perform ad hoc searches without the constraints of predefined criteria.

Data returned in a search result can contain sensitive information. You can control whether to entirely or partially mask a field or display the entire field. The masking configuration can be controlled with user security access. With search results and display controls defined, users can perform Search/Match to determine if a record already exists before adding one.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID by transferring the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and reenter the data to determine whether the ID exists.

You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

Also, if you use multiple search rules, you should order the rules from the most restrictive to the least restrictive. For example, rule 1 could return matching IDs when first name, last name, phone number and national ID exactly match. Rule 4 could return matching IDs when only the first and last name match. In this example, rule 4 could return more potential matching IDs than rule 1. The search rule used by Search/Match could therefore be used as an indicator to users of how significant the returned results are.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.

Use search result codes to specify the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.

Some search rules, search parameters, and search results are delivered with your system. You can use these as they are, modify them, or add as many as you need.

Warning! Adding new search fields require significant programming effort and is not recommended.

See Also

Chapter 8, "Setting Up and Working with Search/Match," Automatic Search, page 166

Automatic Search

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

If the component name is associated with a search parameter code and a search result code, Search/Match displays the search results inside a grid on the Search Results page. This enables users to review the potential duplicate IDs without having to manually navigate to the Search/Match page. After reviewing the results on the Search Results page, the user clicks Return and is instructed to either click OK to continue saving the new ID or to click Cancel to avoid saving the transaction and investigate further.

Note. This setup is valid only when creating person IDs from HRS_PREP_FOR_HIRE component.

Warning! To display the Search Results page at save time, you must have a security role with access to the component interface HCR_SM_SEARCH.

See Chapter 8, "Setting Up and Working with Search/Match," Viewing Search Results, page 184.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Note. This setup is valid only when creating person IDs from the Personal Data (PERSONAL_DATA) component for commercial HRMS and the Employee Hire (EE_HIRE) component for Federal HRMS.

Enabling the Auto Search/Match Feature

You enable Automatic Search/Match processing in HRMS by selecting the Perform Automatic Search/Match check box on the Person Object Installation page (INSTALL_PERSON).

When you select the check box, the system checks to see if a Search Parameter and a Search Result code have been associated with the PERSONAL_DATA component (or the EE_HIRE component for Federal). If it finds codes, it displays these rule names. If not, the system generates a warning informing you that Automatic Search/Match processing will not occur until you associate Search Parameter and a Search Result code with the PERSONAL_DATA or EE_HIRE components.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types, page 221.

Understanding Automatic Search Conditions

Search/Match uses phone and email values to perform the search only when a phone or email value is marked as preferred. Therefore, to use PhoneRule and EmailAddressRule inside a search rule triggered automatically when you save a new ID, the ID must have a preferred phone number and preferred email address.

When Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule are inside a search rule triggered when you save a new person ID, Search/Match uses the address fields for only the home address type to perform the search. That is, if any address type other than *HOME* is entered, Search/Match does not use the address fields as search criteria.

Setting Up Search/Match

To set up Search/Match use the Search Match Rules (HCR_SM_RULE), Search/Match Parameters (HCR_SM_PARM), Search/Match Result Fields (HCR_SM_RSLT_FLDS), Search/Match Results (HCR_SM_RESULT), and Search/Match (HCR_SM_SEARCH) components.

This section discusses how to:

- Define search rule codes.
- Define search parameters.
- Define search permissions.
- View or add Search/Match result fields.
- Configure Search/Match results.
- Enter search results details.
- Define search results exceptions.
- Configure search result permissions.

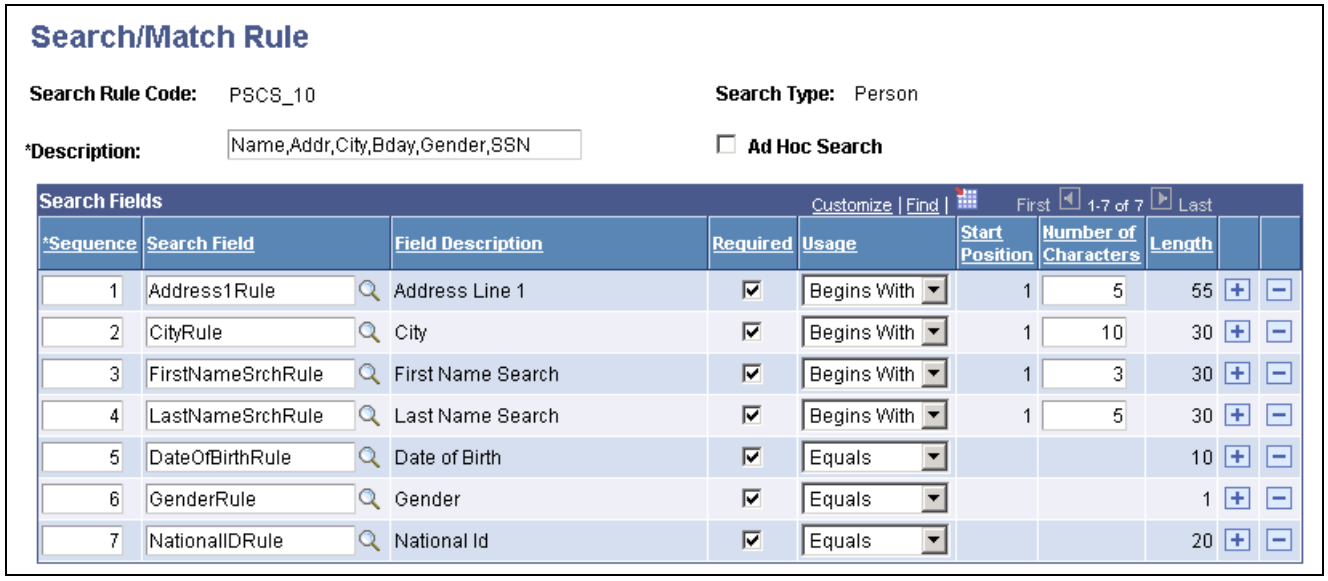
Pages Used to Set Up Search/Match

Page Name	Object Name	Navigation	Usage
Search/Match Rule	HCR_SM_RULE	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Rules	Define sets of fields to search for and identify how to search for them.
Search Parameters	HCR_SM_PARM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Permissions	HCR_SM_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Search/Match Result Fields	HCR_SM_RSLT_FLDS	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Result Fields	View or add fields that are available to define the search results.
Search Results	HCR_SM_RESULT	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Results	Specify which result fields to include in the search results and control how to display their values. **Note.** Be careful not to confuse this page with the page also called *Search Results* with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.
Search Results Detail	HCR_SM_RDTL_PG	Click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option.	Define the page to use to view more information about a specific ID returned by Search/Match.
Search Results Exceptions	HCR_SM_RESULT_EXCP	Click the Exceptions link on the Search Results page.	Define field-level security exceptions to the data display control that is set on the Search Results Permissions page

Page Name	Object Name	Navigation	Usage
Search Result Permissions	HCR_SM_RSLT_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions	Identify who should have access to this search result code. Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

Defining Search Rule Codes

Access the Search/Match Rule page.



Search/Match Rule page

Ad Hoc Search Select to permit ad hoc searches from this search rule.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Search Fields

Search fields are delivered with your system.

Warning! Adding new search fields require significant programming effort and is not recommended.

Sequence Enter the order in which you want the search fields to appear when used inside a search parameter.

Search Field and **Field Description** Select each search field that you want to assign to this search rule code. When you exit the field, the system displays the associated description. Search fields are the fields on which users are permitted to search.

Search fields are delivered with your system. Adding or modifying a search field value requires a significant programming effort. Do not attempt to delete a search field.

Note. When you include name, national ID, phone, email, or address fields in the rule without the types (Name Type, National ID Type, phone type, email type or address type), the system searches on all national IDs, phones, emails or addresses in the system for that individual.

Required Select this check box to require a value in the search field to find a potential match on this search rule. Selecting this check box is useful for making the rule more restrictive.

If the check box is not selected, the system accepts blank or nonexistent for this field inside this search rule. For example, if all the fields inside a search rule are marked as required, the user must provide data for each of those search fields to find a match on this rule. However, if the Required check box is not selected, for example, for Date of Birth, the user can still search on that search rule without specifying a date of birth.

Usage Identify how you want the search to evaluate the field value:

Begins With: The value must begin with this data. When you select this value, the Start Position field appears with a default value of *1,*and the Number of Characters fields are available for you to define. You cannot modify the start position default value.

Contains: The value must contain this data but can be preceded or followed by other data. When you select this value, the Start Position field appears with a default value of *1,*and the Number of Characters fields are available for to you define.

Equals: The value must be exactly equal to this data.

Not Used: Do not use this field value in this search.

Start Position and **Number of Characters** Enter the character position where you want the compare to start, and enter the number of characters from that start position to include in the compare.

For example, if the usage selected for National ID is *Contains*, and you enter a start position of 3 and the number or characters of 5, the system compares against the 3rd, 4th, 5th, 6th, and 7th characters in the field value. It will return matching IDs for which the National ID contains these 5 characters.

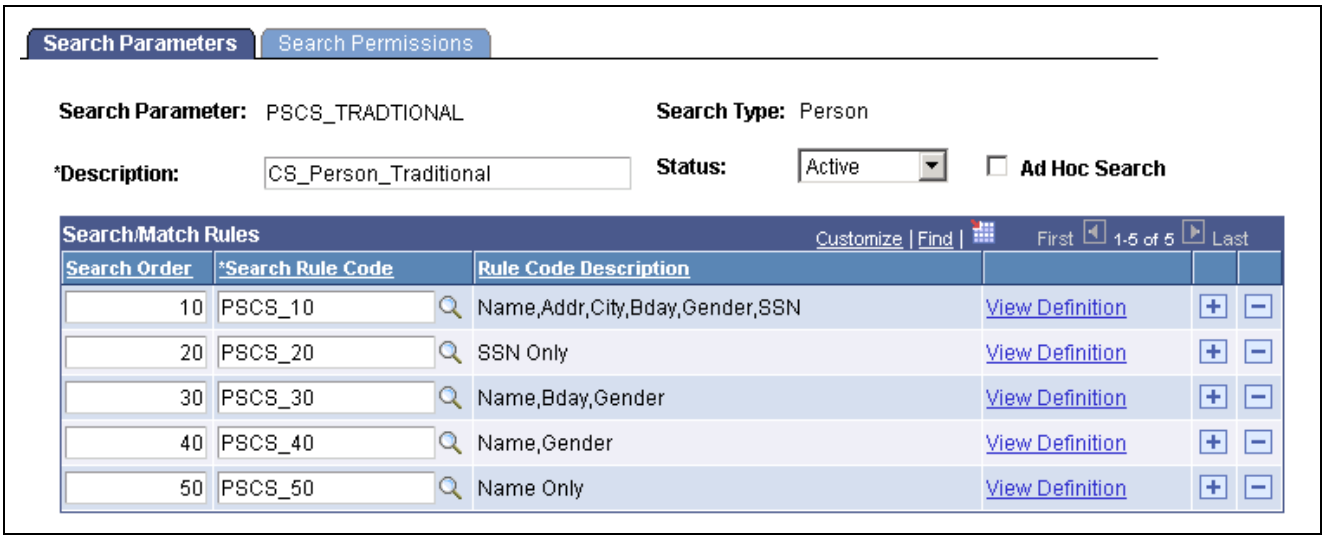
If the usage selected was *Begins With,* the start position is has a default value of *1*and you need to specify how many characters from the first character that Search/Match should use to perform the search.

Length Indicates the number of characters in the search field. When you exit a particular field in the Search Field column, the system displays the total number of characters in the associated field.

See Chapter 8, “Setting Up and Working with Search/Match,” Understanding Search/Match, page 165.

Defining Search Parameters

Access the Search Parameters page



Search Parameters page

Ad Hoc Search Select to permit only ad hoc searches from this search parameter.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *John*).

Note. Automatic search cannot be performed from a search parameter set to permit ad hoc searches.

Search/Match Rules

Search Order Enter the order in which to apply the search rule codes of this search parameter. Enter the most restrictive search rule in the lowest order number and the least restrictive search rule in the highest order number.

You can reorder the search rules at any time. When you reorder the rules and save the page, the system displays the rules in the most recent numerical order that you entered.

Search/Match processes the lowest order search rule first; if it finds one or more possible matches, it stops the search and returns the results. If it finds no results, it continues to the next search rule, and so on.

In the search results, the system displays the search order number that corresponds to the search rule where potential matching IDs are found.

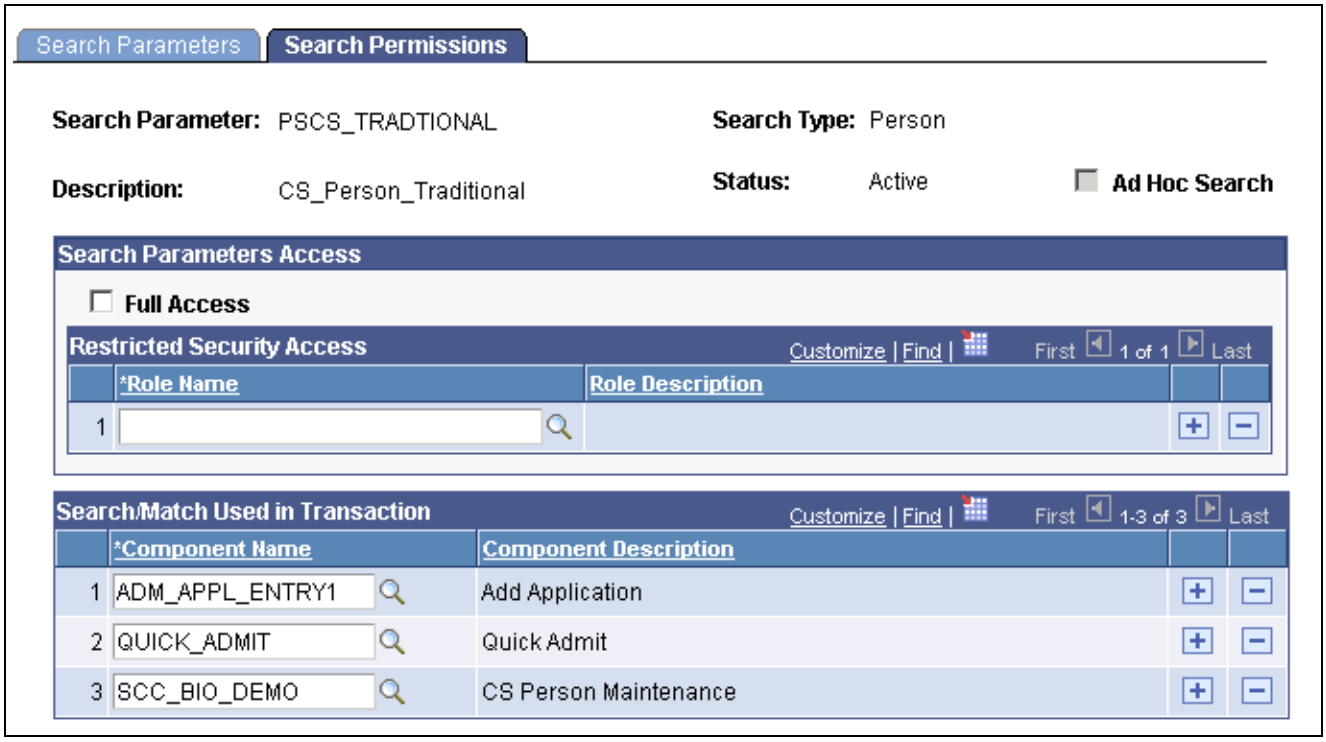
You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when theAd Hoc Search check box is selected.

Search Rule Code and **Rule Code Description** Enter the search rule code to use. When you exit the field, the system displays the search rule description. You must enter at least one search rule to create a valid search parameter.

View Definition Click this link to access the Search/Match Rule page on which you can view or edit the rule definition.

Defining Search Permissions

Access the Search Permissions page.



Search Permissions page

Search Parameters Access

Full Access Select to enable all users to use the search parameter code.

Restricted Security Access

This area appears only when the Full Access check box is not selected.

Role Name and **Role Description** Restrict the use of this search parameter code to users that have specific roles inside their security profile.

Search/Match Used in Transaction

Component Name and **Component Description** If you want to enforce the use of Search/Match when adding a new ID, select the component name where adding a new ID occurs. The system will then initiate Search/Match when a user enters the data to create a new ID and saves the transaction. You can restrict the search to specific components whether you give permissions to all roles or only to specific roles.

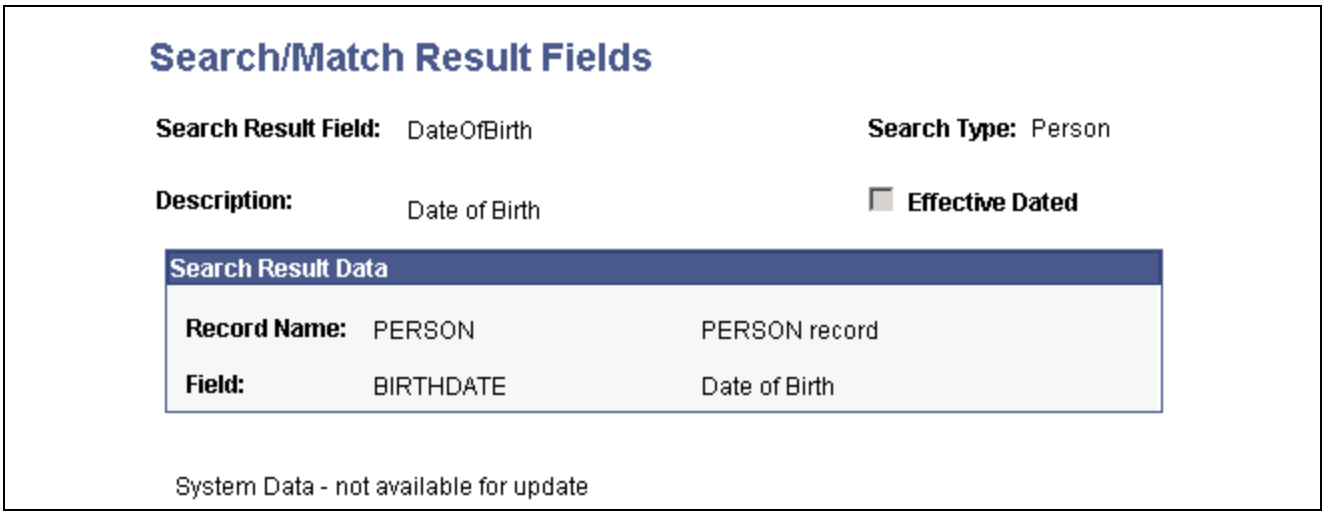
Note. A component name can be associated with only one search parameter. However, the same search parameter can be used inside several component names. Select all components where the search parameter should be used.

Note. This field is available only when the Search Type is *Person* or *Organization.*

See Chapter 8, "Setting Up and Working with Search/Match," Understanding Search/Match, page 165.

Viewing or Adding Search/Match Result Fields

Access the Search/Match Result Fields page.



Search/Match Result Fields page

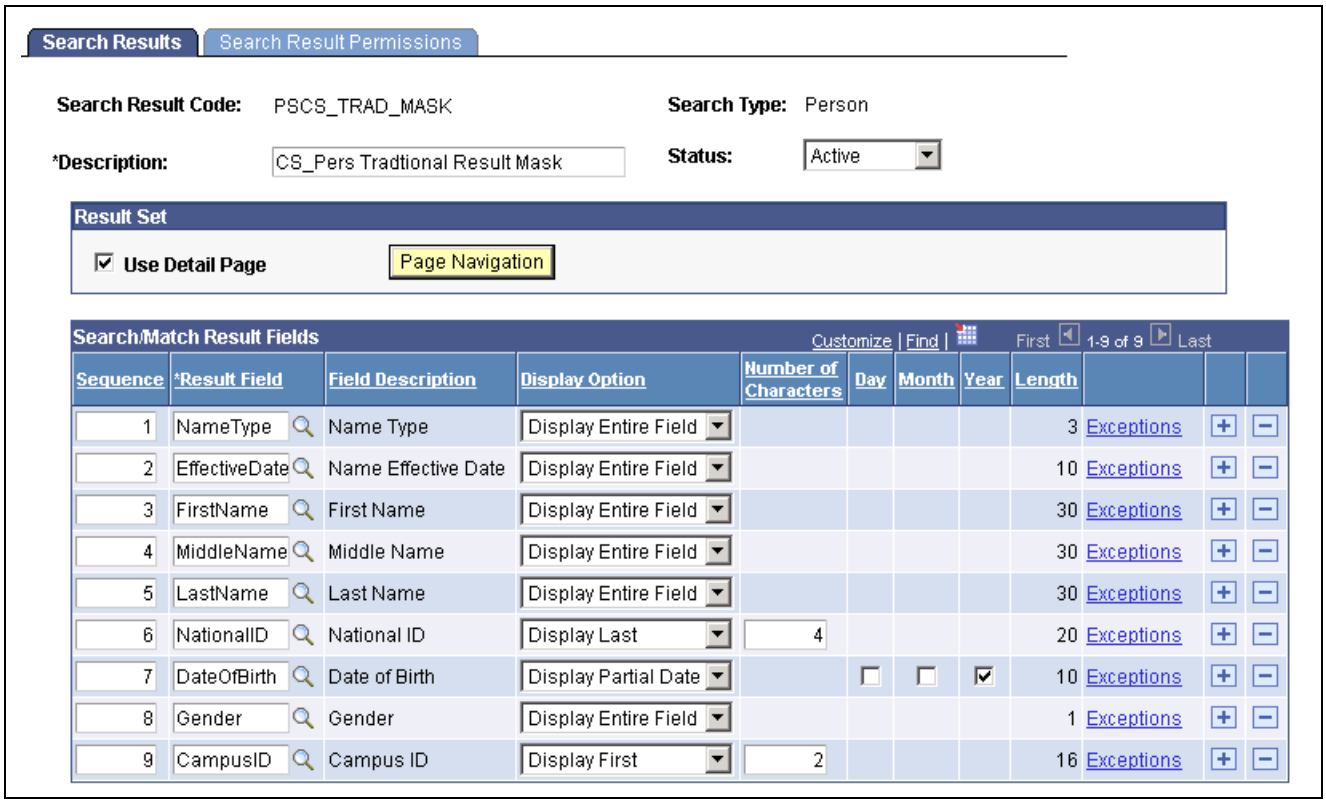
Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the predefined search fields. You can, however, select additional fields to make available for your search result codes.

When you select *Add a New Value*and enter a name for the results field, the Search/Match Result Fields page appears with enterable fields for you to select the record and field to make available within the search results. To control how the values for a field appear in the results, use the Search/Match Results setup page.

Note. You can use name and national ID fields as search result fields, otherwise type-related, effective-dated fields (address type, email type, phone type, and so on) are not recommended. Names and national IDs are type-related, effective-dated fields that are major indicators of individual uniqueness. Therefore, Search/Match returns a row for each name and each national ID that matches the search criteria. However, for other type-related, effective-dated fields, Search/Match returns only the first match that it encounters, which could be minimal and misleading when trying to detect duplicates.

Configuring Search/Match Results

Access the Search Results page.



Search Results page

Result Set

Use Detail Page Select this check box to display a Detail link beside each ID returned from a search.

When you select Use Detail Page, the Page Navigation button appears.

Page Navigation This button appears only when the Use Detail Page check box is selected.

Click to access the Search Results Detail page, on which you can define the page to which you want users to be directed to see more details about a specific ID.

Note. To be transferred to the page that you define here, the user must have security access to the page.

Search/Match Result Fields

Sequence Enter the order by which the system displays results in the in the Search/Match results grid. You can reorder the result fields at any time. When you reorder the fields and save the page, the system displays the result fields in the most recent numerical sequence that you entered.

Result Field and**Field Description** Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields).

The result fields are defined in the Search/Match Result Fields page.

Display Option Displays the default display control for that field. You can override this. Select *Display Entire Field* or *Mask Entire Field* to display or hide the entire field value respectively . The other options are:

Display First: Displays the first specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the beginning of the field value.

Display Last: Displays the last specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the end of the field value.

Display Partial Date: Displays the specified parts of a date field value. When you select this, the Day, Month, Year check boxes appear. You must select which parts of the date to display. For example if you select *Year,* only the year will appear.

Number of Characters Enter the number of first or last characters of a field value to display.

Day, Month, Year Select the parts of the date to display for a date value.

Length Displays the number of characters possible for the field value.

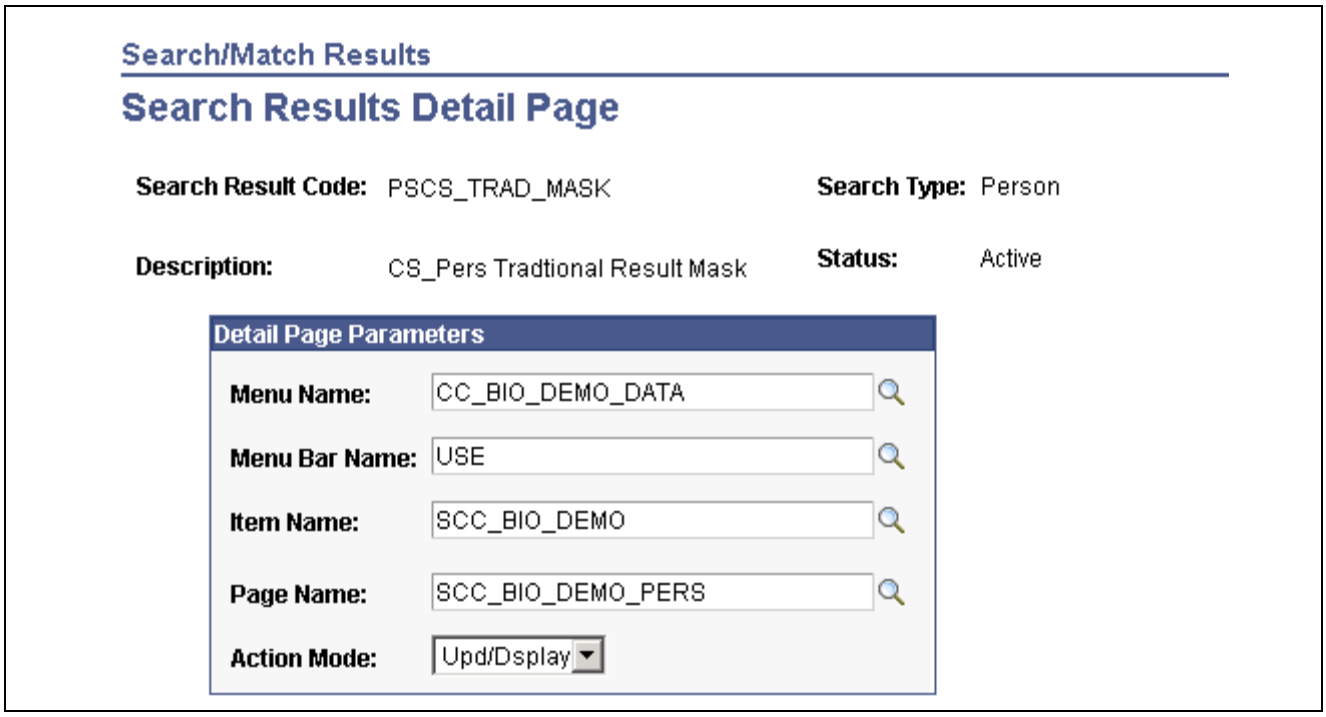
Exceptions Click this link to access the Exceptions page, on which you can define field-level exceptions to these results.

Warning! Search/Match returns all potential matching IDs regardless of data permission security. You must use field-level security to mask or partially mask sensitive data.

See Chapter 6, "Setting Up and Administering HRMS Security," page 57.

Entering Search Results Details

Access the Search Results Detail page.



Search Results Detail page

Detail Page Parameters

Menu Name, Menu Bar Name, Item Name, and **Page Name** — Select each item that corresponds to the page that you want to use to provide more details about a specific ID.

Action Mode — Select the action mode to define in which mode you want your users to access the detail page. Options are:

Add

Correction

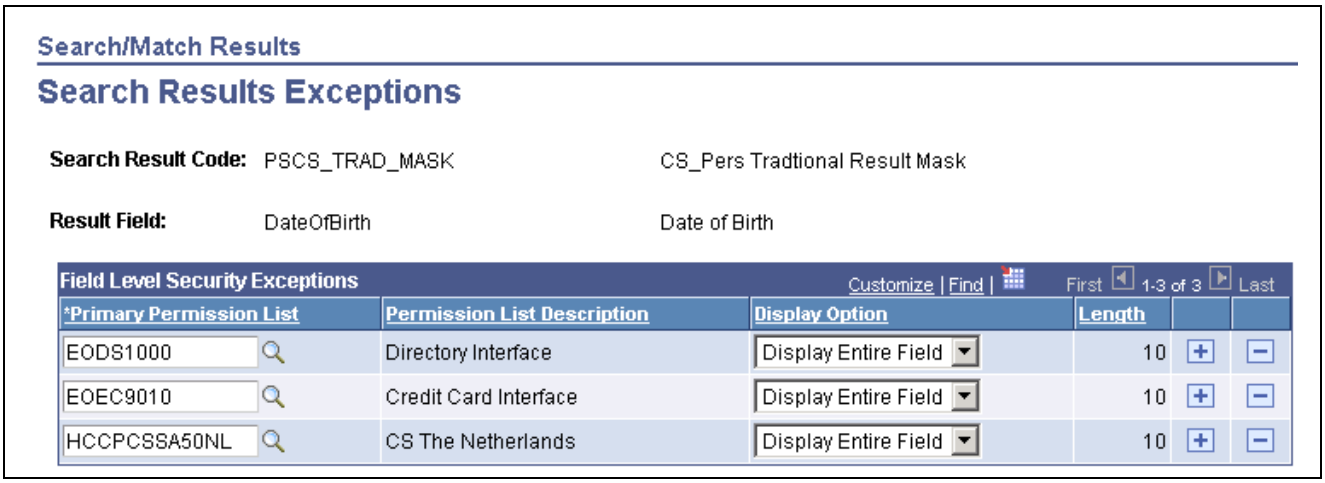
Data Entry

Update/Display

Update

Defining Search Results Exceptions

Access the Search Results Exceptions page.



Search Results Exceptions page

You can define exceptions to the search results that you set up on the Search Results page. For example, you might have partially masked the birth date field in your search results, but you want the entire field to appear for those who have a need to know. Using primary permission lists, you can set those exceptions here.

See Chapter 6, "Setting Up and Administering HRMS Security," page 57.

See *Enterprise PeopleTools PeopleBook: Security Administration*

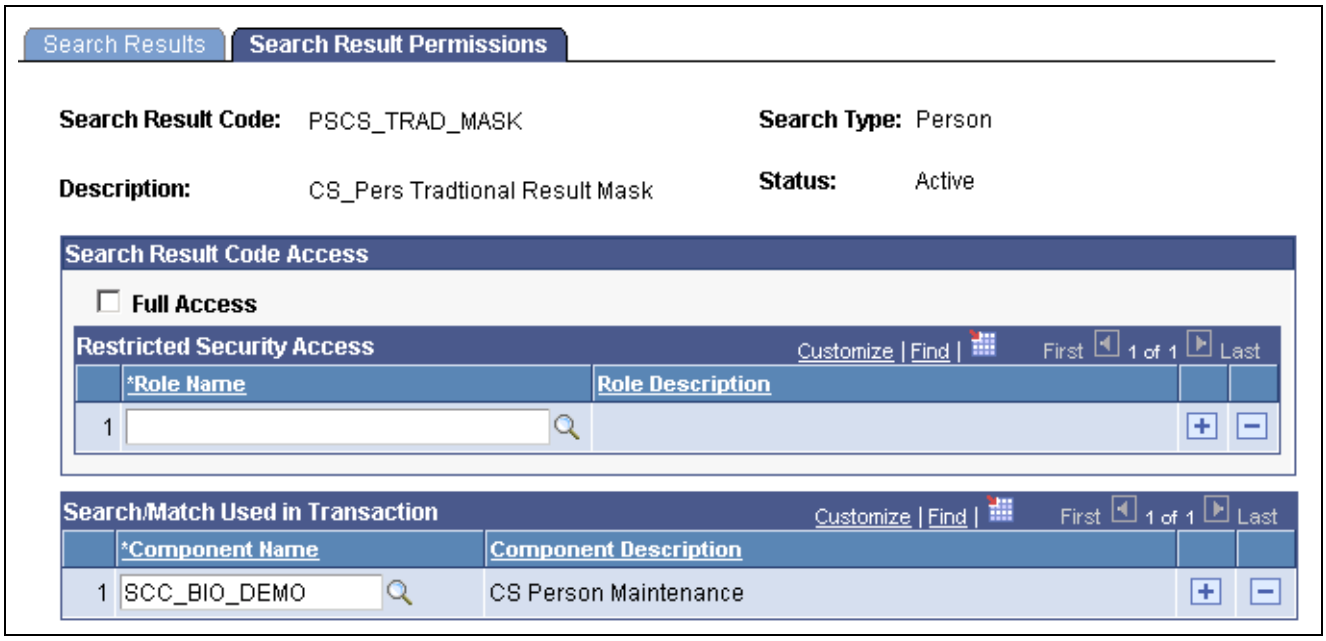
Field Level Security Exceptions

Primary Permission List and **Permission List Description** — Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.

Display Option — Select the display option to use as the exception to the display option selected on the Search Rules page.

Configuring Search Result Permissions

Access the Search Result Permissions page.



Search Result Permissions page

Full Access Select this check box to enable all users to use the search result code

Role Nameand **Role Description** Enter roles to restrict the use of this search result code to users that have this role inside their security profile.

Component This field is available only when the Search Type is *Person.*

If you use automatic search and want to display a warning message to alert users when potential duplicate IDs exist and you want to display the results of the automatic search, select the same component name or names that you selected on the Search Permissions page for the search parameter. You can restrict the search to specific components whether you give permissions to all roles or to only specific roles.

Note. A component name can be associated with only one search result code. However, the same search result code can be used inside several component names. Select all components where the search result code should be used. If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a Search Results page showing the matching IDs that were found.

See Chapter 8, "Setting Up and Working with Search/Match," Automatic Search, page 166.

See Also

Chapter 8, "Setting Up and Working with Search/Match," Viewing Search Results, page 184

Working with Search/Match

This section provides an overview of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discusses how:

- Select criteria for a search.
- View search results.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Enterprise Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft Talent Acquisition Management) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

See Also

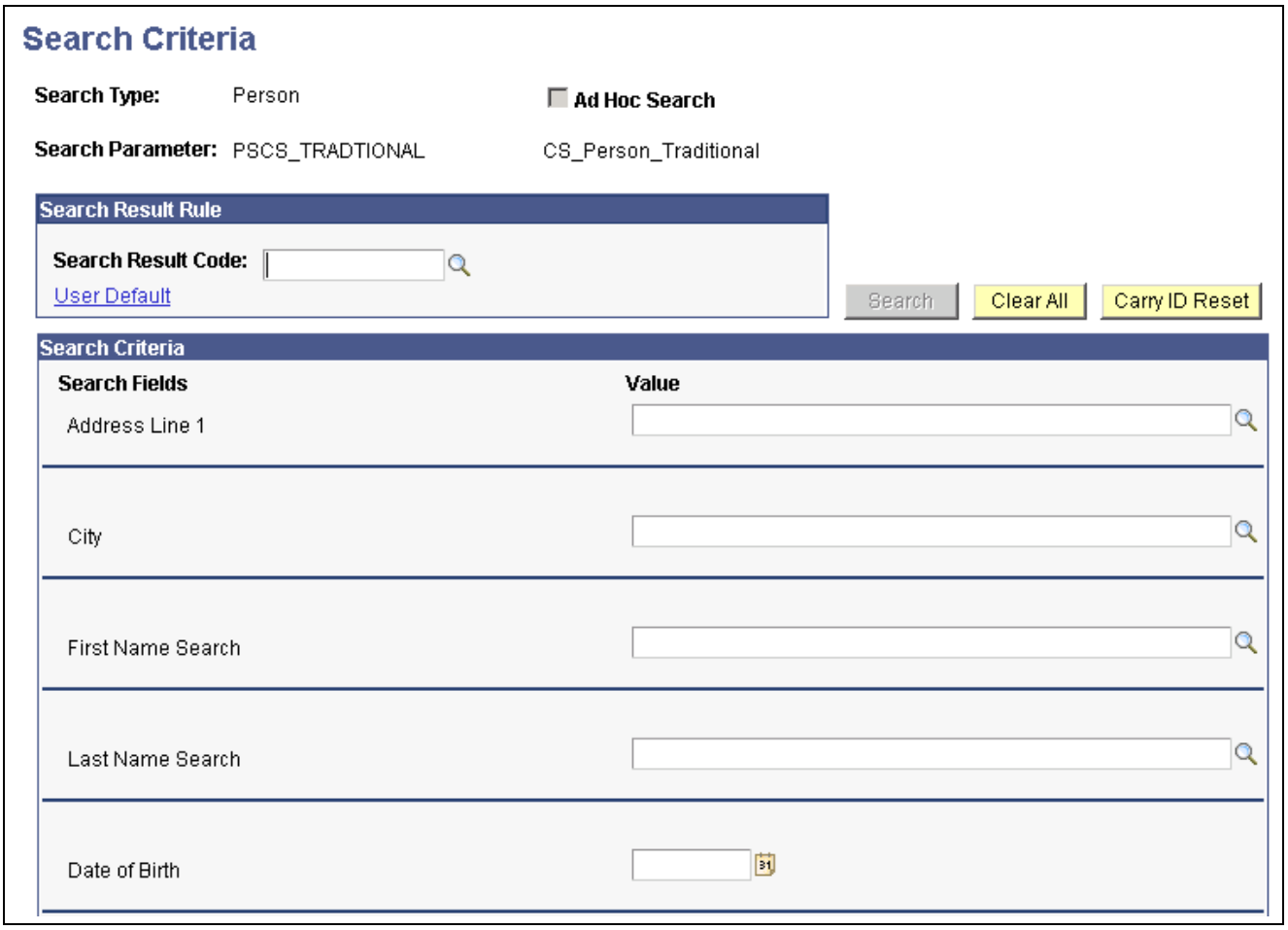
Chapter 8, “Setting Up and Working with Search/Match,” Automatic Search, page 166

Pages Used for Search/Match

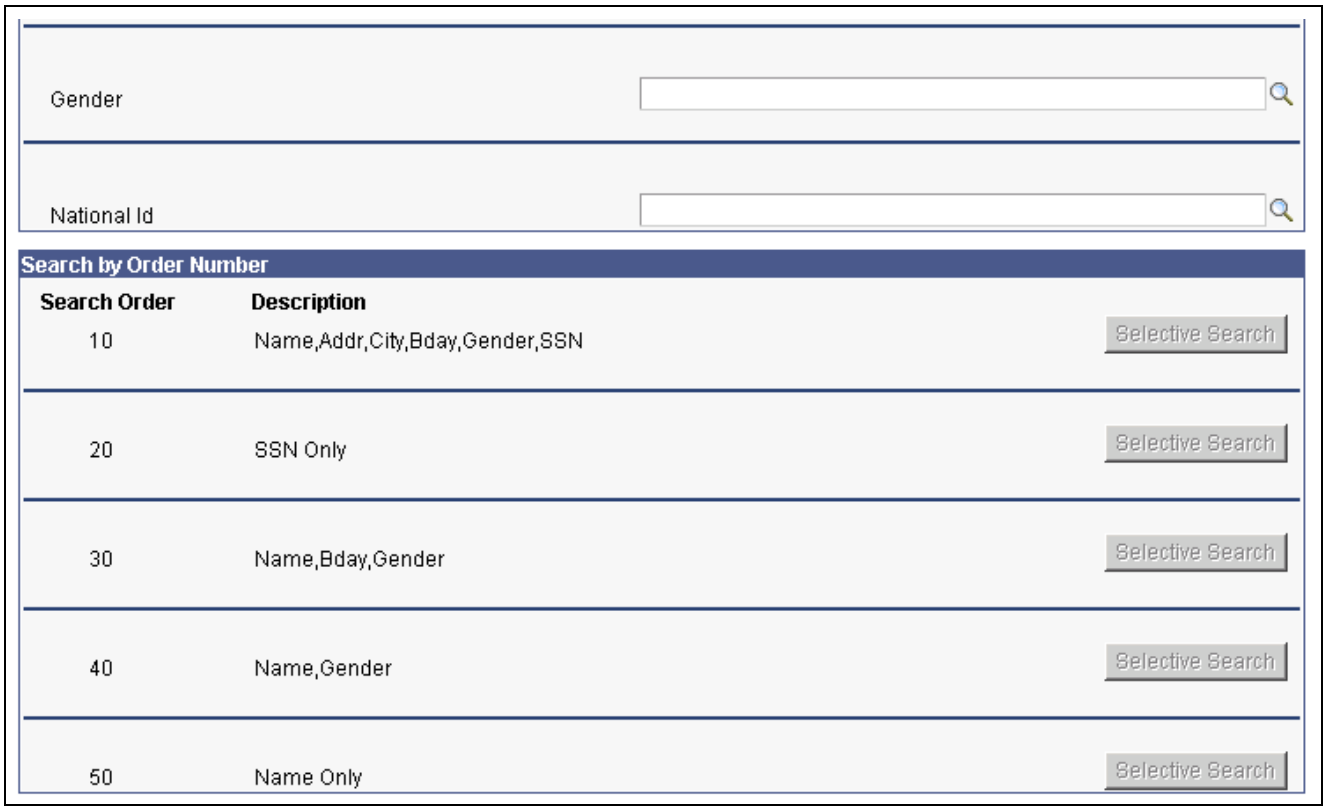
Page Name	Object Name	Navigation	Usage
Search Criteria	HCR_SM_SEARCH	• Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match, Search Criteria • Workforce Administration, Personal Information, Search for People, Search Criteria	Enter criteria to search for duplicate or multiple records.
Default Search Result	HCR_SM_USERDFLT	Click the User Default link on the Search Criteria page.	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results	HCR_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of a manual search and investigate potential duplicate IDs. **Note.** Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Selecting Criteria for a Search

Access the Search Criteria page.



Search Criteria page (1 of 2)



Search Criteria page (2 of 2)

Search Type The system displays the search type *(Person)* selected to access the page. If you have licensed PeopleSoft Talent Acquisition Management, you could have selected *Applicant*, and if you have licensed PeopleSoft Campus Solutions, you could have selected *Organization.*

Search Parameter Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page enables you to select only the search parameters to which your security roles permit you access.

Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, click the Save Search Criteria link on the search dialog page to save it prior to accessing the Search/Match page. Then, in the future, you can select it from the Use Saved Searchprompt.

Ad Hoc Search The system selects this to indicate that the Search Parameter code is set to perform a ad hoc search.

An ad hoc search enables you to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John,* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an Operand field appears for each search field. The Operand field enables you to perform a search that begins with, contains, or equals the search value that you enter.

Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear.

See Chapter 8, "Setting Up and Working with Search/Match," Defining Search Parameters, page 170.

Search Result Rule

Search Result Code Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent that you are looking for

User Default Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type.

The system permits one default search result code per search type for each user ID.

Carry ID Reset Click to reset a carried ID to *New.*

On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click Carry ID Reset, the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs.

Search Criteria

Search Fields The system displays each of the search fields associated with the search parameter that you selected.

Operand These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the Ad Hoc Search check box and hides the Search by Order Number area of the page.

Select the operand to perform the search. The valid values are *Begins With, Contains,* and *Equals.* These values are delivered as translate values and should not be changed.

Value For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

Clear All Click this button to clear all entries in the Value fields.

Search Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page.

Note. When you click Search, the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the Selective Search button for that order number.

Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

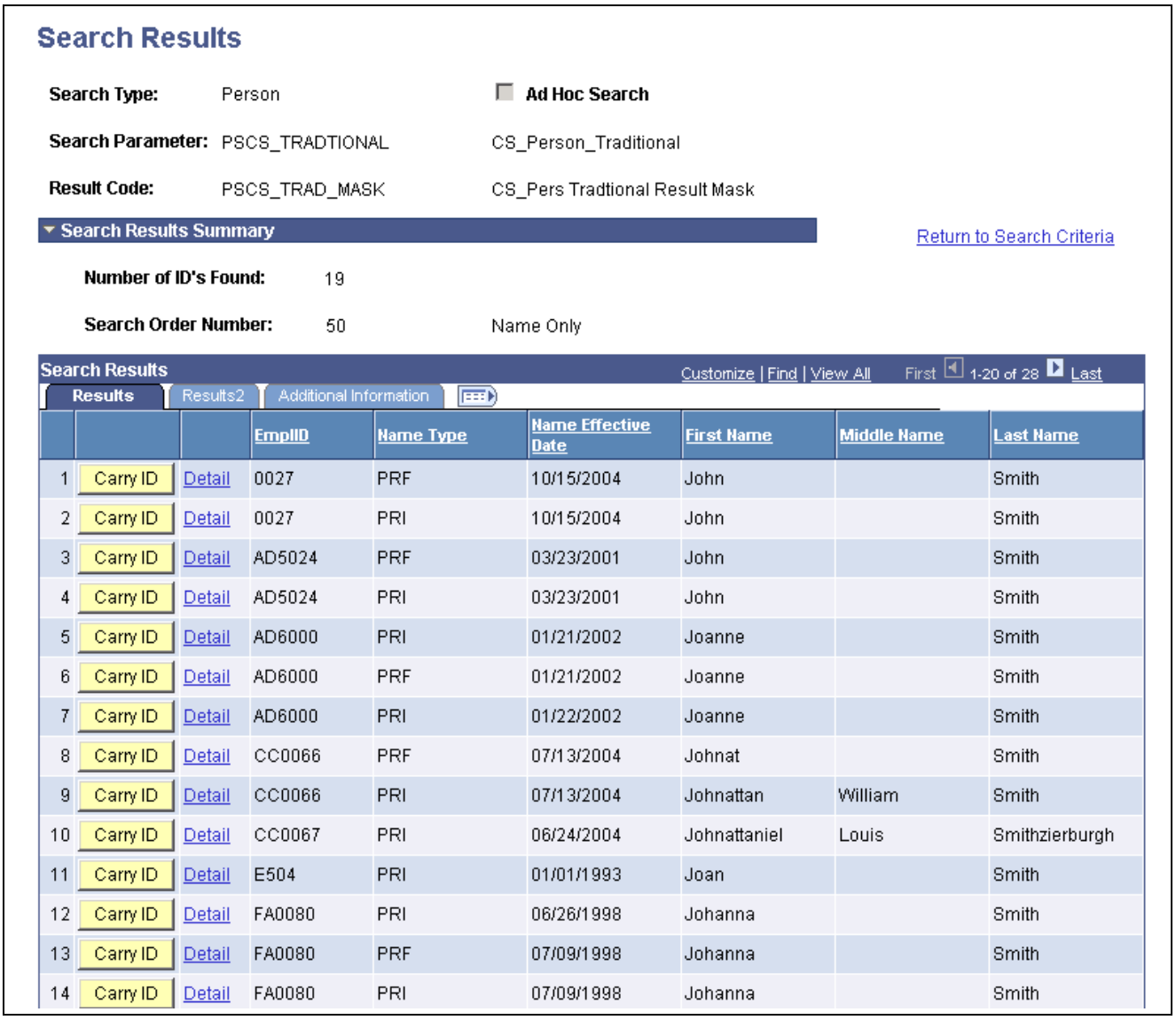
When you enter criteria in the Value fields, the Selective Search button for the search order defined with the fields becomes available.

Click the Selective Search button to conduct specific searches.

When the search is complete, the system transfers you to the Search/Match Results page.

Viewing Search Results

Access the Search Results page.



Search Results

Search Type: Person — **Ad Hoc Search**

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_MASK — CS_Pers Tradtional Result Mask

Search Results Summary — Return to Search Criteria

Number of ID's Found: 19

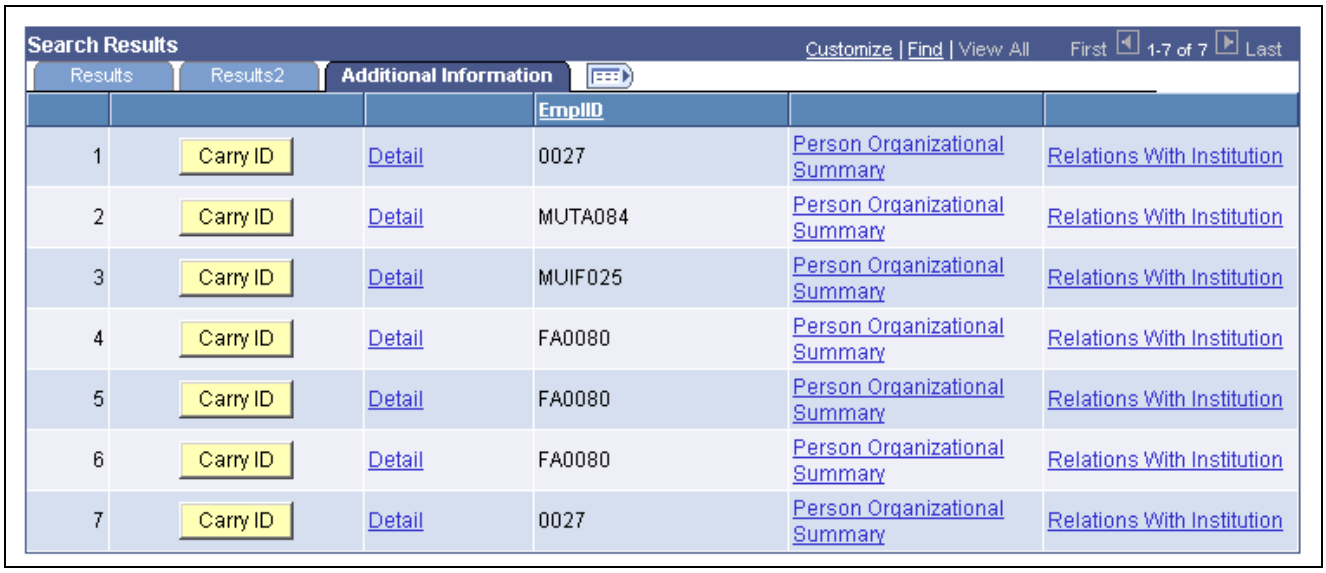
Search Order Number: 50 — Name Only

Search Results — Customize | Find | View All | First 1-20 of 28 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith
3	Carry ID	Detail	AD5024	PRF	03/23/2001	John		Smith
4	Carry ID	Detail	AD5024	PRI	03/23/2001	John		Smith
5	Carry ID	Detail	AD6000	PRI	01/21/2002	Joanne		Smith
6	Carry ID	Detail	AD6000	PRF	01/21/2002	Joanne		Smith
7	Carry ID	Detail	AD6000	PRI	01/22/2002	Joanne		Smith
8	Carry ID	Detail	CC0066	PRF	07/13/2004	Johnat		Smith
9	Carry ID	Detail	CC0066	PRI	07/13/2004	Johnattan	William	Smith
10	Carry ID	Detail	CC0067	PRI	06/24/2004	Johnattaniel	Louis	Smithzierburgh
11	Carry ID	Detail	E504	PRI	01/01/1993	Joan		Smith
12	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
13	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
14	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith

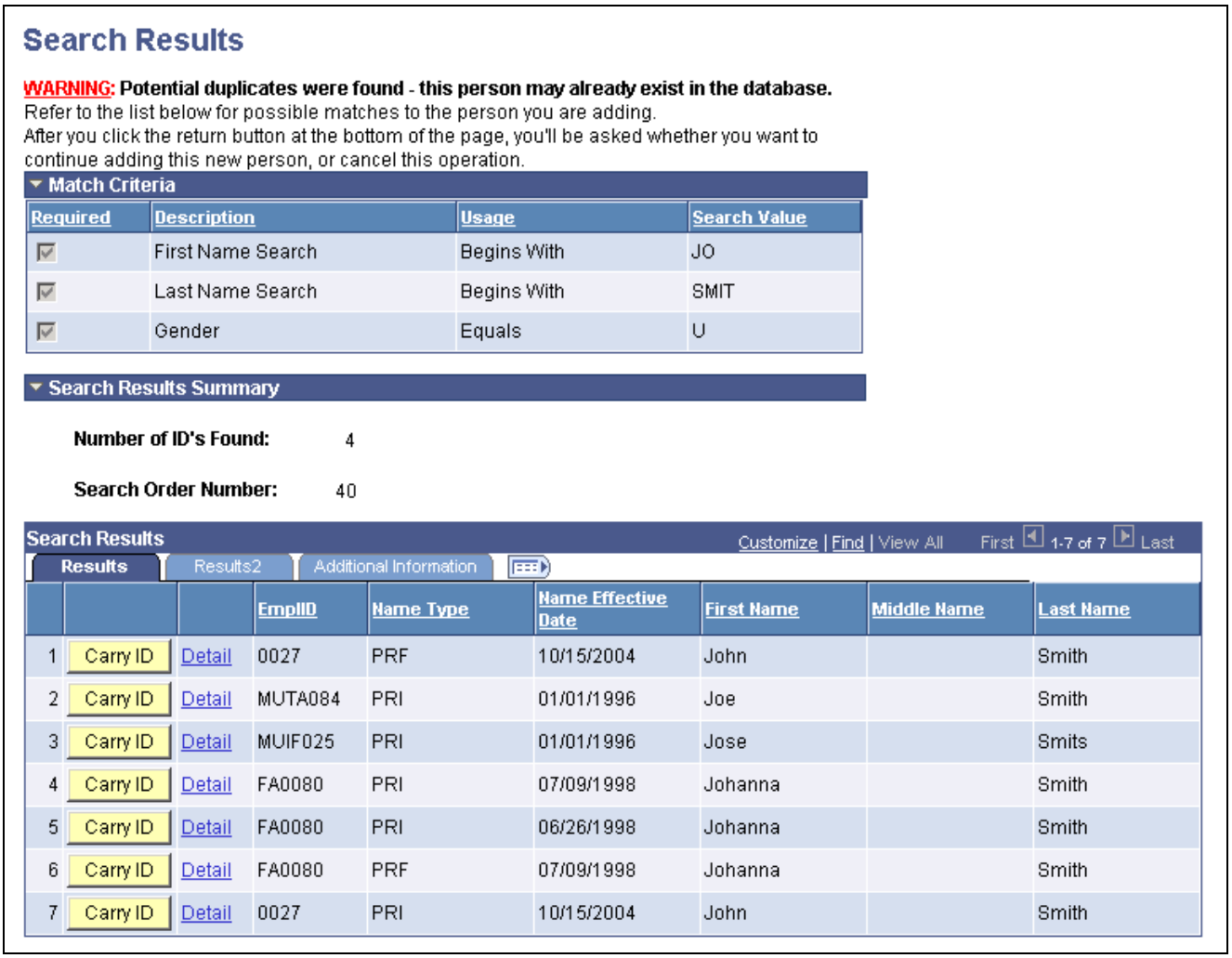
Search Results page for a manual search



Search Results page, Additional Information tab (for an automatic search)

When you enter criteria on the Search Criteria page and click Search or any of the search by order number Selective Search buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that enables creation of IDs. When you try to add an ID on a component that is set up that way and Search/Match detects potential duplicates at save time, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data entered to create the ID and what where the data used to perform the automatic search.



Search Results page, Results tab (automatic search)

See Chapter 8, "Setting Up and Working with Search/Match," Understanding Search/Match, page 165.

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click Carry ID to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Number of ID's Found: Displays the number of IDs that met the search criteria.

This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

Search Order Number Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Carry ID Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.

Detail The Detaillink appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results, Additional Information Tab

This tab appears only when the search type is *Person.*

Person Organizational Summary Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.

Relations With Institution Click to access the Campus Solutions Relations With Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Note. This link is used by customers who are also using PeopleSoft Campus Solutions and only shows if you have selected the Student Administration check box and/or the Contributor Relations check box on the Installation Table - Products page (INSTALLATION_TBL1).

CHAPTER 9

Setting Up and Working with Languages

This chapter provides an overview of language support in PeopleSoft and discusses how to:

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

Understanding Language Support in PeopleSoft

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

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

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Setting Language Preferences

This section discusses how to:

- Use the Language Preference page.

- Use the International Preferences page (INTERNATL_PREF).

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

Using the Language Preference Page

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

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

Note. The Language Code used in My System Profile page (USER_SELF_SERVICE) is applied only when you run reports and produce emails.

Using the International Preferences Page

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

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Enterprise PeopleTools PeopleBook: Security Administration

Working with Double-Byte Characters

This section provides an overview of double-byte characters and discusses how to:

- Configure your system for alternate character functionality.
- Enter alternate character information.
- Find records using phonetic searching.

- Working with alternate character system architecture.

Understanding Double-Byte Characters

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Understanding Alternate Character System Architecture

For certain names, addresses, and description fields in PeopleSoft HRMS, there is a corresponding alternate character field that is part of the record. This architecture enables the same field to be used differently for different language codes.

Alternate Character Fields Associated with Global Pages

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

Page	Auxiliary Page	Field	Comments
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	
COMPANY_TABLE1	COMPANY_ACDESCR_SEC	DESCR_AC	

Page	Auxiliary Page	Field	Comments
COMPANY_TABLE1	COMPANY_ACADDR_SEC	COMPANY_ACADDR_SBP	COMPANY_TBL.CITY_AC COMPANY_TBL.ADDRESS1_AC COMPANY_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
DEPEND_BENEF1	DEPENDBN_ACNAME_SEC	NAME_AC	
ESTAB_TBL1_GBL	ESTAB_ACDESCR_SEC	DESCR_AC	
ESTAB_TBL1_GBL	ESTAB_ACADDR_SEC	ESTAB_ACADDR_SBP	ESTAB_TBL.CITY_AC ESTAB_TBL.ADDRESS1_AC ESTAB_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACADDR_SEC	PERSDTA_ACADDR_SBP	PERS_DATA_EFFDT.CITY_AC PERS_DATA_EFFDT.ADDRESS1_AC PERS_DATA_EFFDT.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACNAME_SEC	NAME_AC	

Page	Auxiliary Page	Field	Comments
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_ TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_ TBL1	TRN_INS_ACNAME_ SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_ SEC	NAME_AC	

Search Records with Alternate Character Name Fields

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

- NAMES
- NAMES_SS_TMP
- NE_INCIDNT_SRCH
- NE_PERSONAL_DTA
- OPR_ROWS_EE
- OPR_ROWS_EE2
- PERSON_NAME
- PERS_SRCH_ALL
- PHYSICIAN_SRCH
- PHYSICIAN_SRCH2
- SHS_EMPL_TAO
- SHS_EXEMPT_TAO
- SSF_PERSON_VW
- SUCCESS_TR_SRCH
- TRN_DMNDEE_SRCH
- TRN_INSTR_SRCH
- UPG_NAMES_TAO
- WCS_NAME_SCH_VW
- WF_PERSON_NAME
- WORKER_PROMPT

Note. This list includes only Human Resources system records.

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

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

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

SQR/Crystal Reports

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

Report ID	Description
PER001	Department Action Notices
PER002	Employee Birthdays
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes

Report ID	Description
PER020	Employee Home Address Listing
PER023	Salary History
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

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

Configuring Your System for Alternate Character Functionality

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

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

To set up alternate character functionality in PeopleSoft HRMS:

1. Link the alternate character sets with language codes on the Installation Table - Alternate Character page (ALT_CHAR_TBL).

   These settings affect your entire PeopleSoft HRMS installation.

2. Enable the alternate character functionality for specific user IDs on the Org Defaults by Permission Lst page (OPR_DEF_TBL_HR).

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

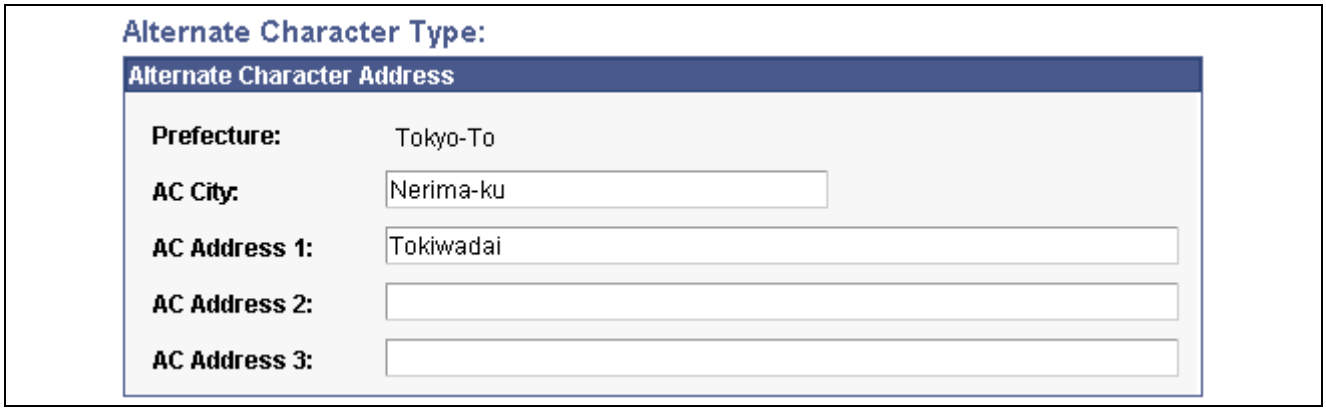
   When you click the Alternate Character button, the system opens a page where you enter or display the field value in the alternate character set.

Entering Alternate Character Information

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

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

If you click the Alternate Character Address button in the Address History secondary page (ADDR_HISTORY_SEC), the system opens the alternate character Address page, such as the example that follows, where you can enter any proper noun information, such as street and city, in the designated alternate character format.



Alternate Character Type page

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

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

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding an person and updating or adding information to the people's records in the system. If you are working with a Japanese-enabled system, you can enter a Japanese name phonetically as a search criterion.

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

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

CHAPTER 10

Setting Up and Working with Currencies

This chapter provides an overview of currency and discusses how to:

- Run currency setup reports.
- Configure currency precision.
- View multiple currencies.
- View information about current exchange rate calculations.

Understanding Currency

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

Understanding currency in PeopleSoft is a two-part process:

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

Note. Currency setup that is universal to PeopleSoft applications is discussed in another PeopleBook.

See Also

PeopleSoft 8.9 Enterprise Components PeopleBook, "Defining Currencies and Market Rates"

Configuring Currency Precision

This section provides an overview of currency precision and discusses how to:

- Activate currency precision.
- Report with currency precision.
- Expand a database for currency precision.

Understanding Currency Precision

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

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

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

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

Activating Currency Precision

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

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

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

See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools

Reporting with Currency Precision

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

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

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

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

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

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

Expanding a Database for Currency Precision

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

To expand your database:

1. Back up your database (optional).

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

2. Run Audit scripts.

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

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

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

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

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

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

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

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

   Note. This SQR is also and application engine. You can access it on the PeopleTools, Utilities, International, Process Field Size page.

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

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

7. Review SQR.LOG for errors.

   The SQR log is created in C:\TEMP, unless otherwise specified. View the log to ensure that the field size value has been changed to *15.3*. Verify the result by randomly checking the field size, opening the various records containing amount fields shown in step 5. As you build the project, executing scripts to SQL alter tables, creating views, and indexing, closely monitor the execution of the scripts and review the error log.

8. Use SQL Alter all tables.

   a. Select PeopleTools, Application Designer, File, New, Project.

   b. Select File, Save Project As.

   c. Save the Project Name as *CURR_TBL*.

   d. Select Insert, Objects into Project.

   e. Select Object Type: Record and Type: Table.

   f. Click Insert under Record Name. The system displays a list of all the tables being populated.

   g. Click Select All, and click Insert again; click Close to close the page.

   h. Select Build, Project.

   i. In the Build Options group box, select Create Indexes and Alter Tables.

   j. Under Build Execute Options, be sure that the *Build* script file is selected.

   k. Review the script file with your database administrator (DBA), and execute the file using your recommended SQL query tool.

9. Use SQL Create all views.

   a. Select PeopleTools, Application Designer, File, New, Project.

   b. Select File, Save Project As. Save the Project Name as *CURR_VW*.

   c. Select Insert, Objects into Project. Select Object Type: Record and Type: View/Query View.

   d. Click Insert and then click Select All.

   e. Click Insert again; then click Close to close the page.

   f. Select Build, Project.

g. In the Build Options group box, select Create Views.

h. Under Build Execute Options, select the Build script file.

i. Review the script file with your DBA, and execute it using your recommended SQL query tool.

10. Run Audit scripts again.

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

11. Manually change reports.

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

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

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Viewing Multiple Currencies

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

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

Viewing Information About Current Exchange Rate Calculations

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

Running Currency Setup Reports

This section lists the pages used to run currency setup reports.

Pages Used to Run Currency Setup Reports

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

CHAPTER 11

Setting Up and Working with Frequencies

This chapter provides overviews of frequency IDs, frequency for compensation conversions, frequency in PeopleSoft Enterprise Global Payroll, and frequency in PeopleSoft Enterprise Payroll for North America, and discusses how to define a frequency ID and country-specific defaults.

Understanding Frequency IDs

This section discusses:

- Frequency IDs.
- Frequency with compensation rates.
- Frequency with payroll calculations.

Frequency IDs

Frequency IDs are used in PeopleSoft Enterprise Human Resources, Global Payroll, and Payroll for North America. Frequency IDs are defined on the Frequency Table component (FREQUENCY_TBL). Each frequency ID has a frequency type and an associated annualization factor that represents the number of times that the period occurs in the course of a year.

In PeopleSoft HRMS, you use frequency IDs to define the periods of time in which compensation is quoted, standard hours are completed, and people are paid, to list a few examples.

PeopleSoft delivers a set of standard frequencies that are PeopleSoft-maintained. You can define additional, customer-maintained frequencies for nonstandard periods. For example, you could define a monthly-type frequency with a nonstandard annualization factor of 13 to represent 13 monthly periods in a year

PeopleSoft-Maintained Frequencies

PeopleSoft delivers and maintains the following frequency IDs in the Frequency Table component:

Frequency ID	Description	Frequency Type	Annualization Factor
A	Annual	Annual	1
B	Biweekly	Biweekly	26
BMX30	Biweekly Mexico Factor 30.0	Biweekly	25.7142857

Frequency ID	Description	Frequency Type	Annualization Factor
BMX34	Biweekly Mexico Factor 30.4	Biweekly	26.0571428
C	Contract	Contract	1
D	Daily	Daily	260
D365	Diaro 365 dias	Daily	365
D426	Daily 14 Payments	Daily	426
DMX30	Daily Mexico Factor 30.0	Daily	360
DMX34	Daily Mexico Factor 30.4	Daily	364.8
F	Every four weeks	Every four weeks	13
H	Hourly	Hourly	Use Standard Hours for Annualization
HMX30	Hourly Mexico Factor 30.0	Hourly	2880
HMX34	Hourly Mexico Factor 30.4	Hourly	2918.4008
JM	Japan Monthly	Monthly	12
M	Monthly	Monthly	12
M13	Monthly 13 payments	Monthly	13
M14	Monthly 14 payments	Monthly	14
Q	Quarterly	Quarterly	4
S	Semimonthly	Semimonthly	24
SMX34	Semimonthly Mexico Factor 30.4	Semimonthly	24.32

Frequency ID	Description	Frequency Type	Annualization Factor
W	Weekly	Weekly	52
WMX30	Weekly Mexico Factor 30.0	Weekly	51.4285714
WMX34	Weekly Mexico Factor 30.4	Weekly	52.1142857

Frequency with Compensation Rates

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

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

This table lists important pages on which compensation frequencies are either specified or used:

Component or Page	Default Compensation Frequency Value
Default Frequencies page (DFLT_FREQUENCY)	Specify default frequencies for each country and specify the order in which the system uses them to display base pay compensation in the Pay Rates group box on the Compensation page of the Job Data component.
Compensation page (JOB_DATA3) of the Job Data component (JOB_DATA)	Displays base pay compensation information in the frequencies that are specified for the country on the Default Frequencies page
HRMS Options page (INSTALLATION_TBL1B) of Installation Table component (INSTALLATION_TBL)	Set a default compensation frequency and a default work period for your organization. The system enters these default values in the Job Code table.
Job Code Profile page (JOBCODE_TBL1_GBL) of Job Code component (JOB_CODE_TBL)	Default compensation frequency and default work period values are taken from the Installation table.
Comp Rate Code Table component (COMP_RATECD_TBL)	Specify rate code frequencies on the Comp Rate Code table. The system enters these default values when you select the rate code in a pay components group box (found on a number of pages in PeopleSoft HRMS). You can also specify here whether the FTE (full-time equivalency) calculation should be applied to the compensation associated with the rate code.

Component or Page	Default Compensation Frequency Value
Define Salary Plan component (SALARY_PLAN_TABLE)	Specify default frequency for components of pay assigned to salary steps.
Pay Group Table component (PAYGROUP_TABLE)	Specify daily and monthly frequencies for the pay group . The system uses the frequency information to calculate pay rates.

See Also

Chapter 14, "Setting Up Jobs," Classifying Jobs, page 312

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

Frequency with Payroll Calculations

Global Payroll and Payroll for North America use frequency to define how often certain events happen.

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

Payroll for North America uses frequency IDs to define pay period frequency and to calculate pay rates and proration of pay.

See Also

Chapter 11, "Setting Up and Working with Frequencies," Understanding Frequency in Global Payroll, page 211

Chapter 11, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 215

Understanding Frequency in Compensation Rate Conversions

This section discusses:

- Factors applied to the compensation rate.
- Conversion of compensation rates to different frequencies.
- Job Data pay rate frequencies.

Factors Applied to the Compensation Rate

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

- Compensation frequency annualization factor.

- Job standard hours.
- Standard work period frequency annualization factor.
- FTE (full-time equivalency) factor.

Frequency Annualization Factor

Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in the course of a year.

See Chapter 11, "Setting Up and Working with Frequencies," Frequency IDs, page 203.

Standard Hours and the Standard Work Period

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

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

Component	Page	Assignment Level
Installation Table	HRMS Options	Values for an organization
Org Defaults by Permission Lst (OPR_DEF_TBL_HR)	Settings (OPR_DEF_TBL_HR2)	Values for a primary permission list
Position Data (POSITION_DATA)	Description (POSITION_DATA1)	Values for a position
Define Salary Plan	Salary Plan Table (SALARY_PLAN_TABLE)	Values for a salary plan
Job Code	Job Code Profile	Values for a job code
Job Data	Job Information (JOB_DATA_JOBCODE)	Values for an employee
Job Openings (HRS_JOB_OPENING)	Job Opening (HRS_JOB_OPENING)	Values for an employment application

The minimum and maximum standard hours values and the standard work period defined on the Business Unit HR Defaults page (BUS_UNIT_OPT_HR) are used for validation edits in the Job Data and Position Data components.

Defaults for Standard Hours and Standard Work Period

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

Condition	Default Source
You assign the worker a salary plan.	Salary Plan Table page
You assign the worker to a position.	Description page of the Position Data component

Condition	Default Source
You assign the worker a job code.	Job Code Profile page of the Job Code component
You didn't indicate standard hours on the Salary Plan table, Job Code table, or Position Data table.	HRMS Options page of the Installation component

Full-Time Equivalency

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

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

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

PeopleSoft Human Resources calculates FTE using the following equation:

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

FTE Equation

In this equation, the default full-time standard hours and default full-time standard work period are from:

- The Define Salary Plan component (if a salary plan is defined for the worker, and if both standard hours and standard work period are defined for this salary plan).
- The Org Defaults by Permission Lst component (if no salary plan is defined for the worker , and if both standard hours and standard work period are defined in the Org Defaults by Permission Lst component).

Conversion of Compensation Rates to Different Frequencies

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

The system performs compensation rate conversions as follows:

1. Finds or calculates the annual rate for compensation.
2. Divides the annual rate using de-annualization conversion calculations to calculate the rate at the desired frequency.
3. Multiplies the converted compensation rate by the FTE factor if Apply FTE is selected for the pay component.

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

Annualized Rate Calculations

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

Original Frequency	Formula for Conversion to Annual Frequency
Hourly	Annual Rate = Comprate × Job Standard Hours × Frequency Annualization Factor of Standard Work Period
Monthly, daily, and other	Annual Rate = Comprate × Frequency Annualization Factor

De-Annualized Rate Calculations

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

Non-Annual Frequency	Formula for Conversion from Annual Frequency
Hourly	Hourly Rate = Comprate / (Job Standard Hours × Frequency Annualization Factor of Standard Work Period)
Monthly, daily, and other	Non-Annual Rate = Annual Comprate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following job data information:

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

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

Rate	Equation
Annual	10 × 35 × 52 = 18,200
Monthly	Annualized Comprate / Frequency Annualization Factor of Month 18,200 / 12 = 1516.67

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following job data information:

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

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

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

Job Data Pay Rate Frequencies

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

Because the PeopleSoft Global Payroll and Payroll for North America systems calculate daily and monthly pay rates using frequencies established for the pay group, it is possible that the compensation rates displayed on the Job Data - Compensation page will vary from the pay rates calculated with pay group daily and monthly frequencies. This would occur if the pay group daily or monthly frequency differs from the daily or monthly frequency specified for the country on the Default Frequency page. It is recommended that you establish pay group frequencies to match the default frequencies for the country whenever possible.

The pay rates calculated with pay group frequencies are available on the JOB record in the fields JOB.ANNUAL_RT, JOB.MONTHLY_RT, JOB.DAILY_RT, JOB.HOURLY_RT. These fields are referenced by the Job Summary page and can be referenced in PS Query.

See Also

Chapter 11, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults, page 219

Understanding Frequency in Global Payroll

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

This section discusses:

- Frequency with element definitions.
- Frequency with generation control.
- Frequency with calendar periods.
- Frequency with rate codes and system elements.

Frequency with Element Definitions

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

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

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

Earnings element	In what frequency is the stated amount paid? Is it per week, per month, or per year?
Deduction element	In what frequency is the stated amount withheld? Is the stated amount the amount to withhold each pay period, each month, or for the entire year?
Absence element	Is an employee entitled to three days of holiday time per month or per year?

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

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

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

See *PeopleSoft Enterprise Global Payroll 8.9 PeopleBook*, "Defining Earning and Deduction Elements," Defining Calculation Rules for an Earnings Element.

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

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

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

Define the frequency that the stated amount represents. If you select Use Calendar Frequency, the system uses the frequency that's defined for the calendar period on the Define Calendars - Period page (GP_CALENDAR_PERIOD). If you select Use Specified Frequency, you can define your frequency directly on the Earnings - Calculation page by selecting from a list of frequencies.

See *PeopleSoft Enterprise Global Payroll 8.9 PeopleBook*, "Using Calendars," Creating Periods.

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

1200 / 52 = 23.08

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

Note. In PeopleSoft Global Payroll, there is no distinction between organizational relationships (employee, contingent worker, or person of interest). Because payroll is processed for all types of people with jobs, the PeopleSoft Global Payroll documentation refers to both of them as *payees.*

Frequency with Generation Control

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

PeopleSoft Global Payroll provides an additional generation control concept called "Generation Control Frequency" to help control the pay periods in which a specific earning or deduction is to be resolved (such as only the first pay period of a month, and so on). Generation control frequencies enable you to define meaningful names and associate the correct frequency ID with a pay period.

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

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

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if an earnings element is to be paid only on the first pay period of the month (for weekly payrolls), you can control the payroll so that this earning is only paid in Week 1, and not paid in the subsequent week's payrolls during the month:

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

  See *PeopleSoft Enterprise Global Payroll 8.9 PeopleBook*, "Defining Calculation Elements," Naming Generation Control Elements.

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

If you leave the Generation Control field blank on the Earnings - Calculation page, the system assumes to be paid every time based on normal eligibility rules for the payee.

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

PeopleSoft Global Payroll delivers four predefined generation control frequencies: *1st Month, Annual, January,* and *Quarter.* All generation control frequencies can be used in corresponding generation control elements.

Using Frequency with Calendar Periods

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

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

See *PeopleSoft Enterprise Global Payroll 8.9 PeopleBook*, "Using Calendars," Creating Periods.

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

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

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

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

Examples of Frequencies

This table provides some examples of frequencies:

Frequency	Element 1	Element 2a	Element 2b	Element 3
Amount	1,200	1,200	1,200	1,200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semimonthly (24)
Pay Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24) *

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

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

See Chapter 11, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 210.

Using Frequency with Rate Codes and System Elements

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

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

Understanding Frequency in Payroll for North America

This section discusses:

- Compensation frequency and pay frequency.
- Examples of pay rate calculations.
- Proration of compensation rates.
- Exceptions to Frequency table use.

Compensation Frequency and Pay Frequency

In Payroll for North America you use the frequencies on the Frequency Table component to specify pay period frequency on the Pay Group component. The system uses compensation and pay frequencies for the calculation and proration of pay rates during batch and online system processes.

See Also

Chapter 11, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 210

Examples of Pay Rate Calculations

This section provides examples of how the system uses compensation rates and frequencies and pay period frequency to calculate pay rates.

Example: Biweekly Pay Period Calculation of Monthly Compensation

This example illustrates how Payroll for North America calculates the pay period rate by annualizing monthly compensation using the following frequencies:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	B1	B (biweekly)	26.1
Compensation frequency (employee's Job data setup)	M	M (monthly)	12

Using a compensation rate of 1,000 USD, the calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × Compensation Frequency Factor

  12,000.00 = 1,000.00 × 12
- Pay Period (Biweekly) Rate = (Annual Rate) / Pay Frequency Factor

  459.77 = 12,000.00 / 26.1

Example: Weekly Pay Period Calculation of Hourly Compensation

Payroll for North America uses the annualization factor of the standard work period frequency in combination with the standard hours to calculate pay rates or proration of hourly compensation.

This example illustrates how Payroll for North America calculates the weekly pay period rate of hourly compensation.

The pay group's pay period frequency definition is:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	W (weekly)	W (weekly)	52

The employee's compensation frequency definition is:

Comp Rate	Comp Frequency	Standard Hours	Annualization Factor of Std Work Period
10.00	H (hourly)	40.00	52

The calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × (Standard Hours × Standard Work Period Annualization Factor)

  20,800.00 = 10 x 40 × 52
- Pay Period (weekly) Rate = Annual Rate / Pay Frequency Factor

  400 = 20,800.00 / 52

Proration of Pay Rates

The system calculates proration for partial periods when events such as new-hires, terminations, or pay rate changes occur in the middle of a pay period. It uses data that you specify on the Pay Group component in conjunction with compensation data to calculate proration.

See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Setting Up Pay Groups," Understanding Proration Rules.

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the Pay Calendar Table page (PAY_CALENDAR_TABLE). The value in the Pay Periods Per Year field on the Pay Calendar Table page is derived from the pay frequency of the pay group.

See Also

Chapter 21, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars, page 443

Chapter 14, "Setting Up Jobs," Setting Up Pay Groups, page 330

Defining a Frequency ID and Country-Specific Defaults

To define a frequency ID and country-specific defaults, use the Frequency Table component (FREQUENCY_TBL) and the Default Frequencies by Country component (DFLT_FREQUENCY).

This section provides an overview of the Frequency table enterprise integration point and discusses how to:

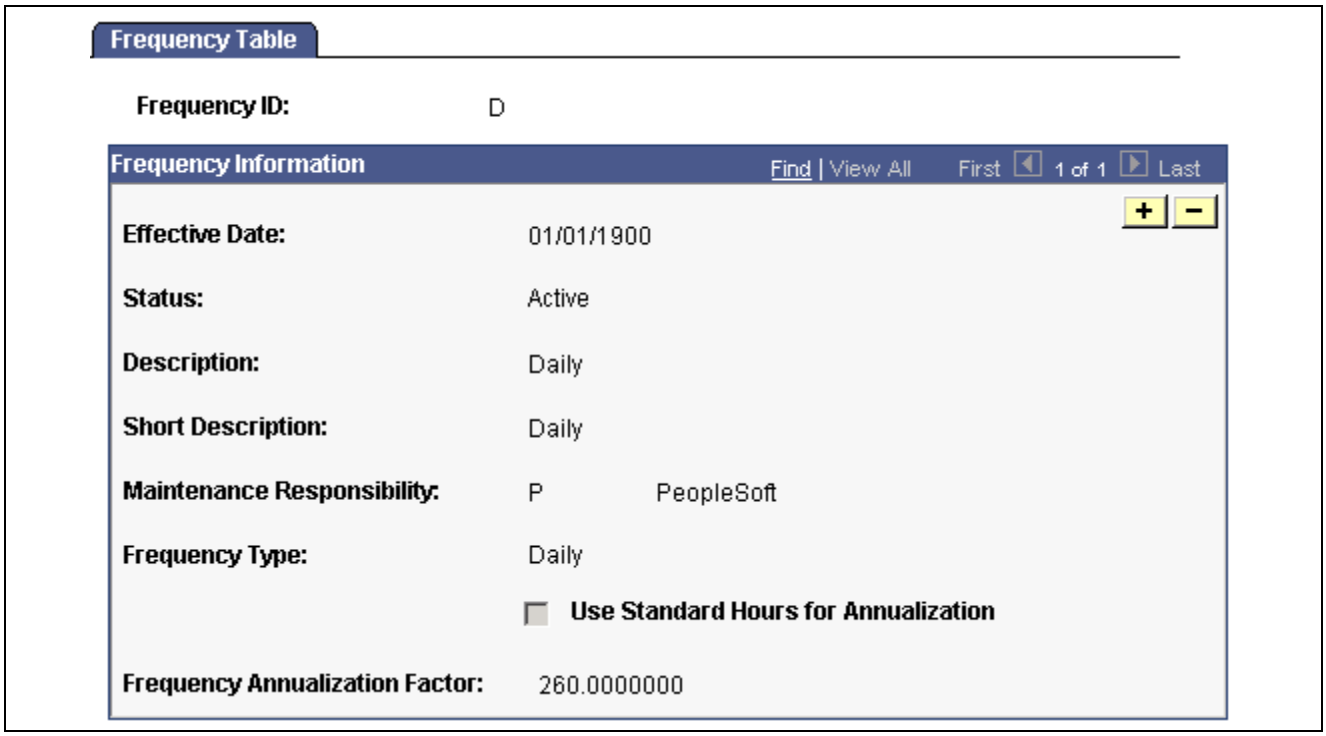
- Define a frequency ID, type, and annualization factor.
- Set country-specific frequency defaults.

Pages Used to Define a Frequency ID and Country-Specific Defaults

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

Defining a Frequency ID, Type, and Annualization Factor.

Access the Frequency Table page



Frequency Table page

Maintenance Responsibility Select a maintenance responsibility. Values are:

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

Frequency Type Select a frequency type. Values are:

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

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

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

Frequency Annualization Factor

Defines how many frequency periods occur in one year.

Examples:

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

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

Setting Country-Specific Frequency Defaults

Access the Default Frequencies page.



Default Frequencies page

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

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

See Also

Chapter 11, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 210

CHAPTER 12

Setting Up Organization Foundation Tables

This chapter provides an overview of enterprise integration points and discusses how to:

- Set up person of interest types.
- Set up holiday schedules.
- Define business units.
- Enter company information.
- (USF) Enter agency information.
- Define legal types.
- Define establishments.
- Establish locations.
- (USF) Establish federal locations.
- Set up company locations.
- Maintain departments.
- (USF) Set up federal departments.
- Set up primary permission list preferences.

Setting Up Person of Interest Types

To set up person of interest types, use the Person of Interest Types component (POI_TYPE_TBL).

This section provides an overview of POI types and discusses how to set up new POI types and activate delivered POI types.

See Also

Chapter 3, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Organizational Relationships, page 11

Understanding POI Types

PeopleSoft enables you to track information for people of interest (POIs), people who do not make up a part of your workforce but who are still of interest to the organization. Different POI types are used in different areas of your organization. For example, PeopleSoft Enterprise Global Payroll uses the Global Payroll Payee POI type, whereas the External Trainee POI type may be used by PeopleSoft Enterprise Recruiting Solutions for applicants who require training prior to being hired and PeopleSoft Enterprise Campus Solutions.

You select a POI type on three components:

- Add a Person component (PERSON_DATA_ADD)
- Job Data component (JOB_DATA)
- Person Organizational Summary component (PERSON_ORG_SUMM)

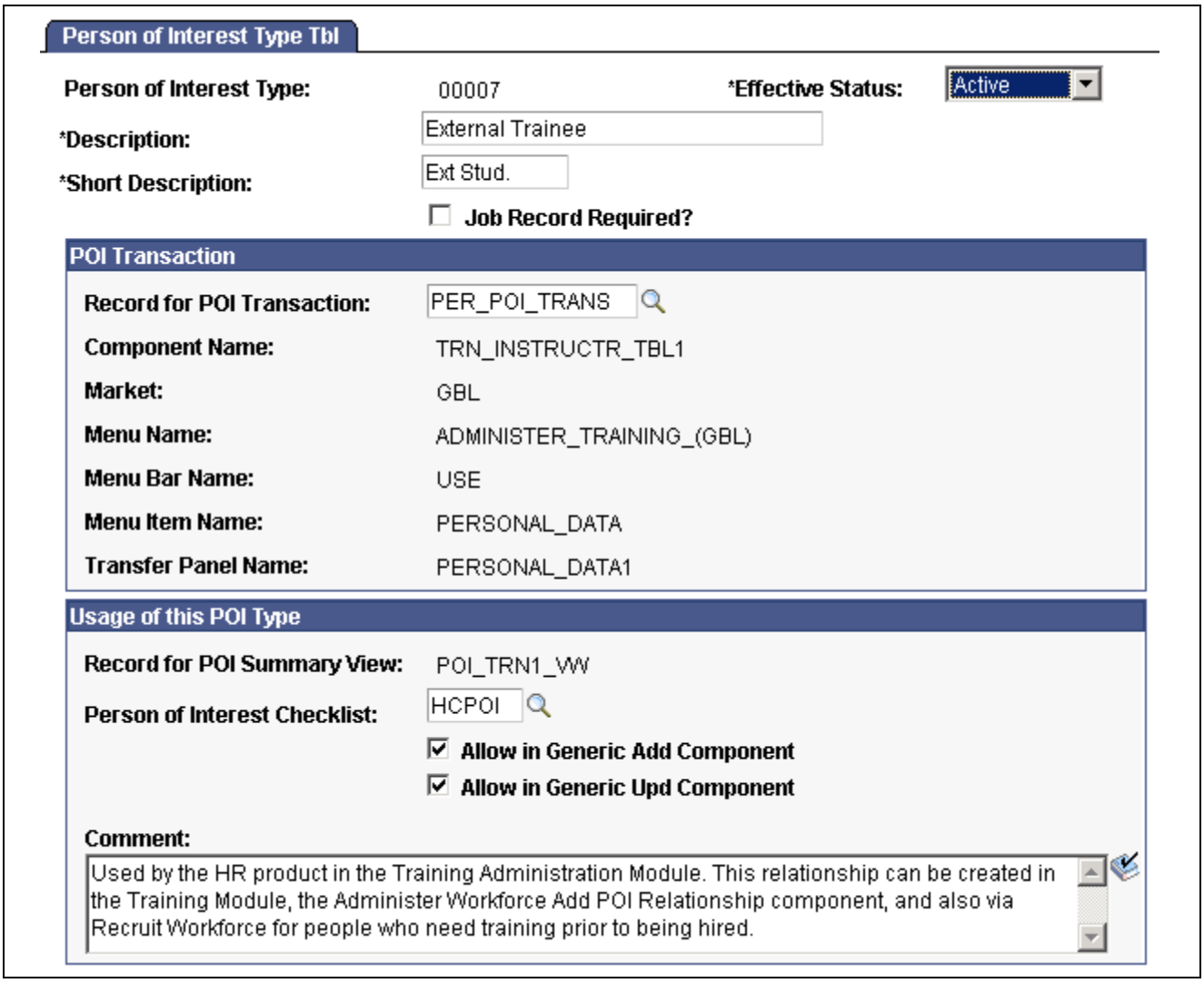
The generic components are on the Workforce Administration menu but these components are also available on different application menus throughout the system. When you set up or modify a POI type, you can limit the components on which the POI type can be selected by menu. For example, you could create a new recruiting POI type that is only available on the components on the Recruiting menu or you could make the Pension Payee POI type, which is delivered as an option only on the Pension Administration menu, available on the Administer Workforce menu components, too.

Page Used to Set Up Person of Interest Types

Page Name	Object Name	Navigation	Usage
Person of Interest Type Tbl	POI_TYPE_TBL	Set Up HRMS, Foundation Tables, Organization, Person of Interest Types, Person of Interest Type Tbl	Review the delivered POI types and modify the characteristics that govern how the system processes the information of POIs with this type.

Defining POI Types

Access the Person of Interest Type Tbl page



Person of Interest Type Tbl page

Effective Status Inactivate any system delivered POI types that you will not be using so that they do not appear as options on HRMS transaction components.

Job Record Required? Select if this POI type requires a POI job record.

When you select this check box for a new POI type, the system enters default information into the POI Transaction group box that you cannot overwrite.

POI Transaction

Record for POI Transaction Select the record used for processing and holding information about people with this POI type.

If you select the PER_POI_TRANS record (the generic POI transaction record used by the Person Organization Summary component), the system enters default information into the rest of the fields in the POI Transaction group box and the Record for POI Summary View field that you cannot overwrite.

If you choose to use a record other than PER_POI_TRANS for POI types that do not require jobs, you will need to create a view to use the in the Record for

POI Summary View field in order for the data for the data in the transaction record to show up in the Person Organizational Summary component.

Component Name Select the component using the POI transaction record. When you select this POI type on the Personal Data – Organizational Relationships page and click the Add the Relationship button, the system will move you to the component you select here.

Market, Menu Name, Menu Bar Name, and **Menu Item Name** Select the menu's market, name, bar name, and item name for the selected component.

Transfer Panel Name Enter the object name of the page you want the system to open to when you click the Add the Relationship button.

Usage of this POI Type

Record for POI Summary View Select the record from which the system draws the summary information for this POI type. When you view the organizational relationships of a person with this POI type on the Person Organizational Summary component, the system pulls the summary information from this record.

If you choose to use a record other than PER_POI_TRANS, you must create a view to use here in order for the data for the data in the transaction record to show up in the Person Organizational Summary component. Create the view in PeopleSoft Application Designer using the PER_POI_TRANS view but with different view text.

Person of Interest Checklist Select a default checklist for this POI type. When you opt to assign a POI type to a person and create a POI checklist from the Personal Data - Organizational Relationships page (PERSONAL_DATA4), the system creates a record for the person on the Person Checklist page (PERSON_CHECKLIST) and adds this checklist.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Creating Checklists.

Allow in Generic Add Component Select to make this POI type available when adding a record for a POI in the Add a Person component, Job Data component, and Person Organizational Summary component on the Administer Workforce menu. The system selects this check box for all new types.

Allow in Generic Upd Component (allow in generic update component) Select to make this POI type available when updating a record for a POI in the Job Data component and Person Organizational Summary component on the Administer Workforce menu.

Modifying a Delivered POI Type

If you can only modify the following fields for system delivered POI types:

- Effective Status
- Person of Interest Checklist
- Allow in Generic Add Component
- Allow in Generic Upd Component

Setting Up Holiday Schedules

To set up holiday schedules, use the Holiday Schedule component (HOLIDAY_SCHED_TBL).

This section provides an overview of holiday schedule defaults on the Job Record and discusses how to define holiday schedules.

Understanding Holiday Schedule Defaults on the Job Record

Because holidays might vary for different segments of your workforce population (depending on location, work schedules, or other factors), you can define as many holiday schedules as you need.

Defaulting of the holiday schedule to the worker's job record depends upon the payroll system:

- PeopleSoft Enterprise Global Payroll.

  If the payroll system is Global Payroll, the system does not enter a default holiday schedule on the Job Data - Payroll page. On the Payroll page, you may select a holiday schedule for the payee or leave the field blank. If you leave it blank, Global Payroll processes use the holiday schedule assigned to the payee's pay group.

- PeopleSoft Enterprise Payroll for North America.

  If the payroll system is Payroll for North America, the default holiday schedule entered on the Job Data - Payroll page is determined by whether you're adding a worker or updating job data, and by whether you have defined a default holiday schedule for the location.

  This section provides additional details for each of these conditions.

When You Add a Worker with Payroll for North America Payroll System

If the payroll system is Payroll for North America, the default holiday schedule initially entered on the Job Data – Payroll page is the holiday schedule that is associated with either the Location table or the Pay Group table:

- Location table.

  If you have assigned a default holiday schedule on the Location Profile page, that schedule is the default when you add a worker with that location.

- Pay Group table.

  If you leave the Holiday Schedule field blank on the Location table, the system enters the default holiday schedule that is assigned to the pay group.

You can change the holiday schedule on the worker's Job Data – Payroll page.

When You Change the Job Data of a Worker with Payroll for North America Payroll System

Changes in the following job data fields might cause a change in holiday schedule if the Holiday Schedule field is blank on the worker's Job Data – Payroll page:

- Company
- DeptID (department ID)
- Position Number
- Pay Group

Note. If the holiday schedule is already populated on the worker's job record, changes in these fields do not cause updating of the holiday schedule.

This is a description of the impact of changes in these fields:

- Company and DeptID.

  If the worker's holiday schedule is not populated, changes in Company and DeptID cause the system to first enter the default holiday schedule from the Location table. If there is no default holiday schedule assigned on the Location table, the system enters the holiday schedule assigned on the Pay Group table.

- Position Number and Pay Group.

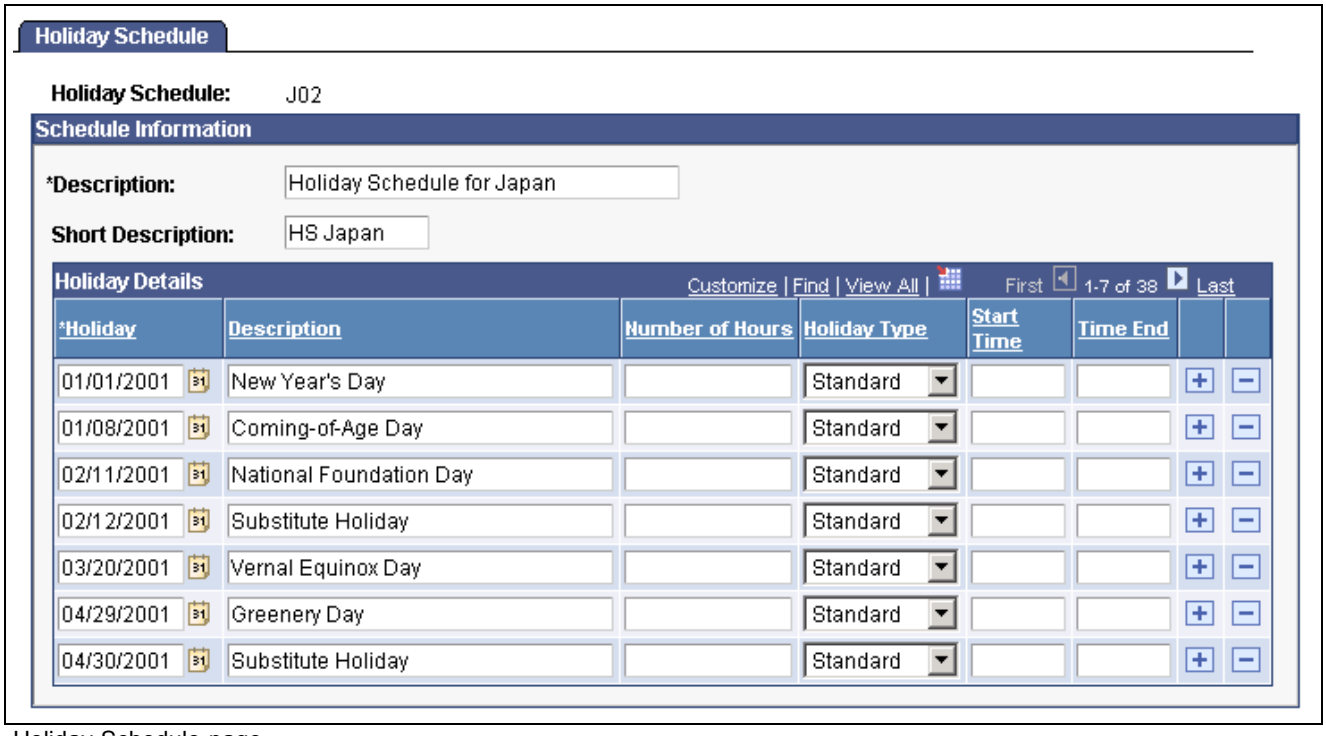
  Changes in the Position Number and Pay Group fields cause the system to enter the default holiday schedule directly from the Pay Group table if the worker's holiday schedule is not already populated.

Page Used to Set Up Holiday Schedules

Page Name	Object Name	Navigation	Usage
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up HRMS, Foundation Tables, Organization, Holiday Schedule	Designate holidays for payroll processing.

Creating Holiday Schedules

Access the Holiday Schedule page.



Holiday Schedule page

Holiday Enter all of the holiday dates that your organization observes within this schedule.

Number of Hours (Optional) You can specify the number of paid hours for each holiday.

Payroll for North America uses this field to reduce from pay.

Holiday Type Select a holiday type.

The following values are used in PeopleSoft Payroll for North America:

Canadian: In Payroll for North America, this value designates a Canada statutory holiday.

Standard: In Payroll for North America, this value designates a U.S. holiday or Canada non-statutory holiday.

US Public: Select if the holiday is a public holiday in the U.S.

Start Time and End Time (Optional) You can specify the starting and ending time of each holiday.

Note. Payroll for North America and Global Payroll do not refer to these fields.

Defining Business Units

To define business units, use the Business Unit component (HR_BUSINESS_UNIT), Business Unit Options Default component (BUS_UNIT_OPT_HR), and GL Business Unit component (BUS_UNIT_GL).

This section discusses how to:

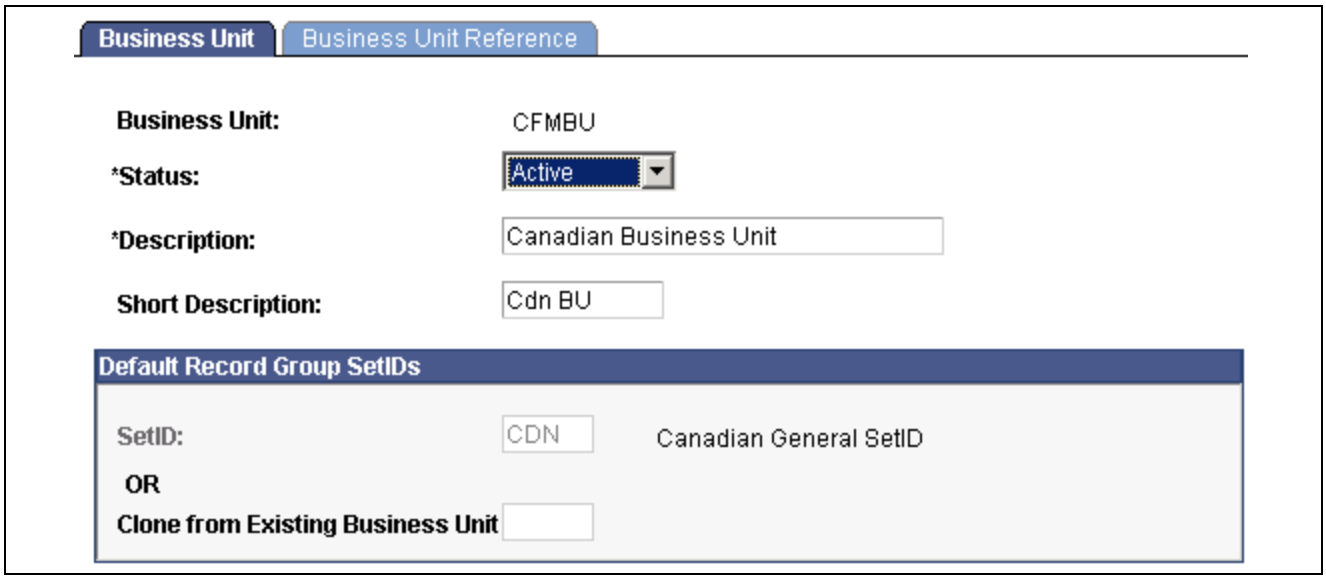
- Add and update business units.
- Identify business units in other applications.
- Set business unit defaults.

Pages Used to Update Business Units

Page Name	Object Name	Navigation	Usage
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit	Add or update business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Identify business units in other PeopleSoft applications that are related to a business unit.
Business Unit Options Default	BUS_UNIT_OPT_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit Options, Business Unit Options Default	Set system defaults such as Company, Country, and Currency for a specific SetID.
GL Business Unit	BUS_UNIT_TBL_GL	Set Up HRMS, Foundation Tables, Organization, GL Business Unit, GL Business Unit	Review GL business units.

Adding and Updating Business Units

Access the Business Unit page.



Business Unit page

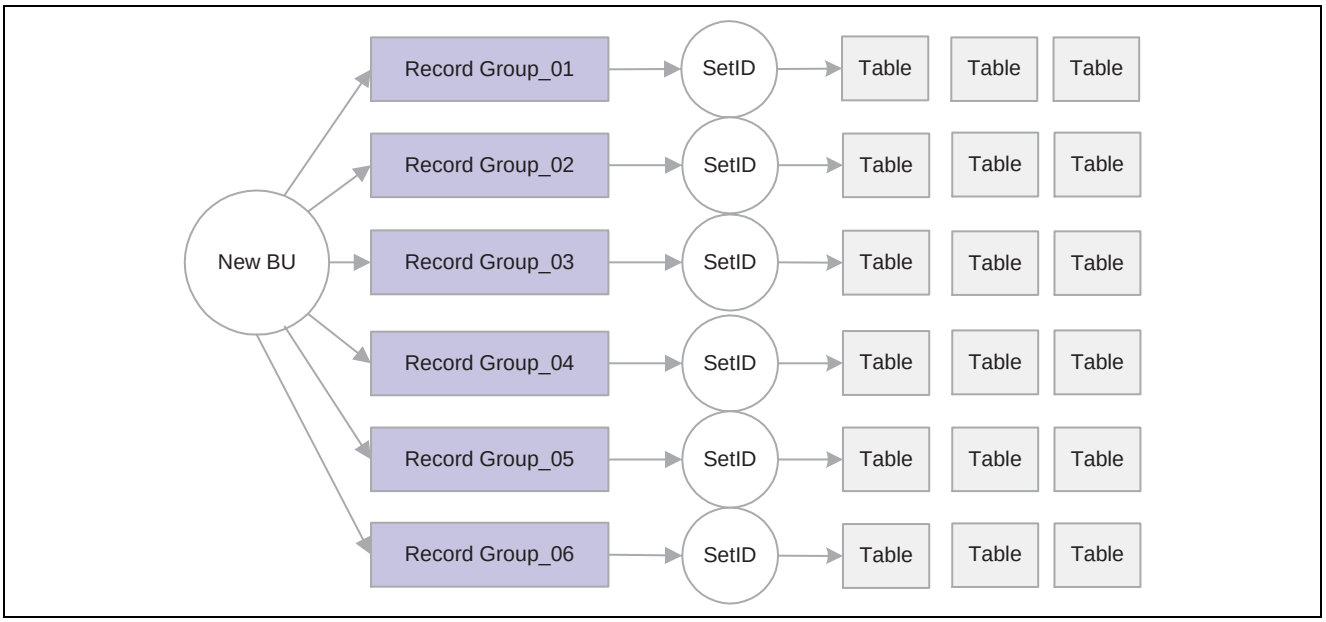
Warning! To optimize system performance, your business units must be 5 characters. If your SetIDs or business units have fewer than five characters, you will experience serious performance degradation.

Status Select *Active* or *Inactive* . If you select *Inactive* , the business unit won't appear in any business unit lists in PeopleSoft HRMS.

Note. Business units aren't effective-dated, so use this field to implement or retire business units.

Understanding Your TableSet Sharing Options

Default Record Group SetIDs When you define a new business unit on the Business Unit component, you can specify that the system establish default record group SetIDs for the new business unit, using the options in this group box. The SetID or Clone from Existing Business Unit value that you enter determines your preliminary TableSet sharing setup for the new business unit by determining the SetIDs that are assigned to each record group for the new business unit. The SetID assigned to a record group determines which TableSet is used as valid values for that business unit.



TableSet Sharing

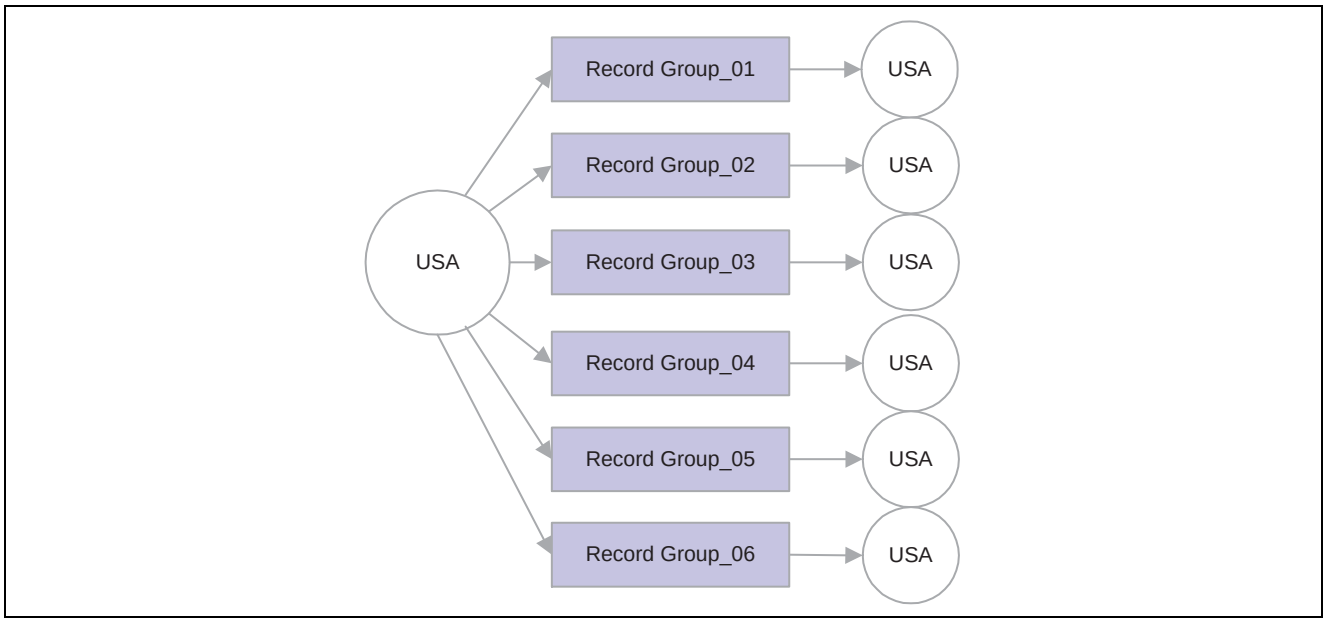
Establishing a TableSet Sharing Setup Using One Default SetID

If you want to define a TableSet sharing setup for the new business unit you are creating, using a primary default SetID that you can modify as necessary on the TableSet Control - Record Group page (SET_CNTRL_TABLE1), enter the default SetID that you want to use.

When you add a new business unit to the system, the system populates the SetID field with a SetID name that is the same as your new business unit. For example, if your business unit is called USA, then the SetID defaults to USA. You can override the default SetID as necessary.

Note. You can associate only one default SetID with a business unit.

When you save the business unit, the system creates a new SetID with the same name as the business unit, and the default SetID that you specified on the Business Unit page is assigned to each record group for the new business unit.



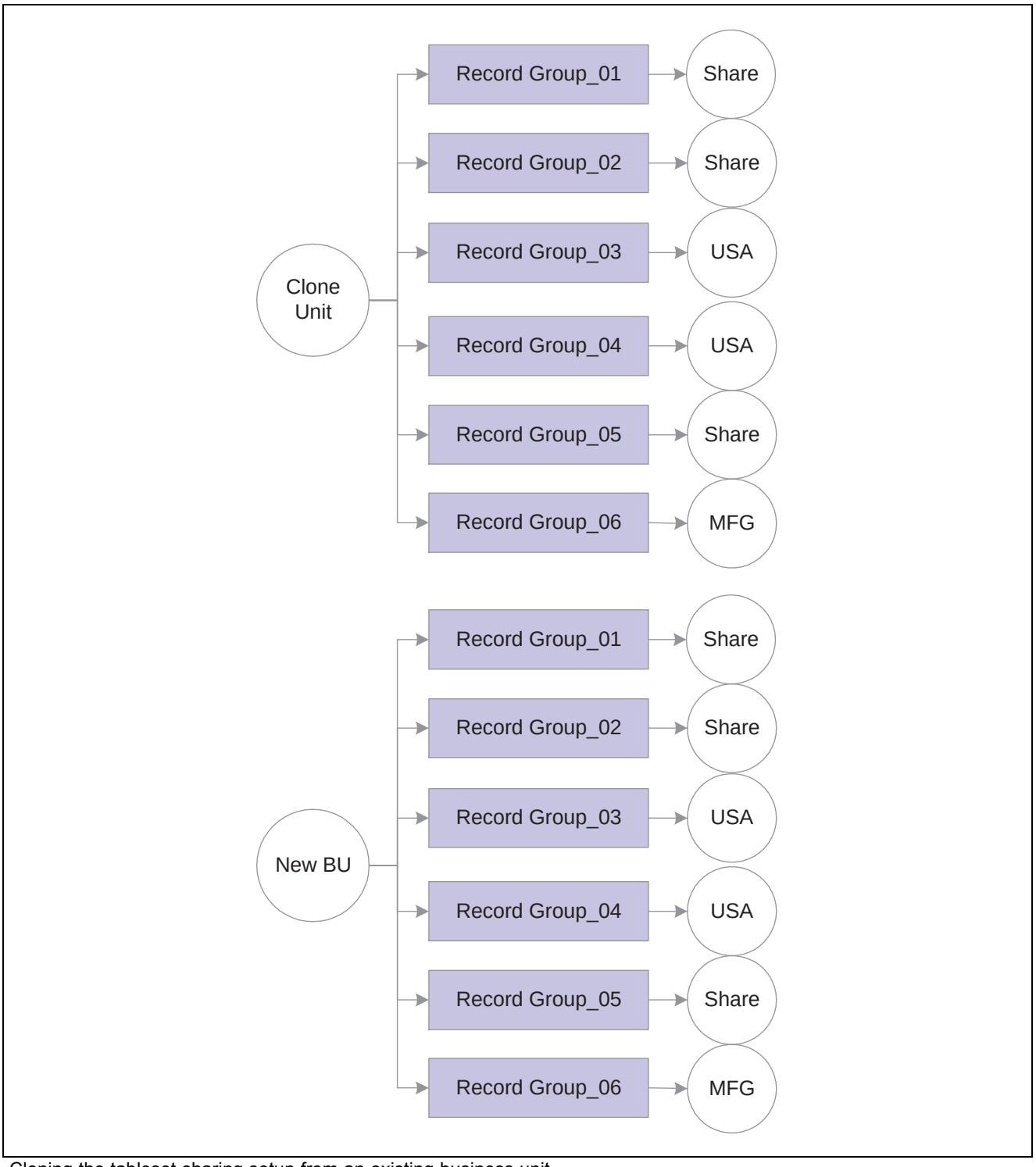
TableSet sharing using default setID.

Cloning TableSet Setup From Existing Business Units

With the Clone from Existing Business Unit option, you can clone the TableSet sharing setup of an existing business unit.

Note. When you first enter the Business Unit page, the Clone from Existing Business Unit option is clear. To activate the option, clear any SetID values from the SetID field and move out of the field.

If you want the TableSet sharing for the new business unit that you are creating to mirror that of another business unit you've defined, or if you want the two units to be similar except for a few record groups, enter the business unit that you want to mirror as the Clone Unit. When the record groups are linked to the new business unit, the system assigns each record group the same SetID that is used for the record group by the business unit that you selected as the Clone Unit.



Cloning the tableset sharing setup from an existing business unit

Whichever method you select, when you save the new business unit for the first time, the system makes the default SetID or Clone Unit unavailable for entry. You can't change the default record group SetID information for this business unit again. This rule prevents you from accidentally overwriting the TableSet record group controls for your defined business units in PeopleSoft HRMS.

Note. When you add a new business unit and save the page, the system creates all the appropriate table values provided by PeopleTools that connect the business unit ID, the record group ID, and the SetID.

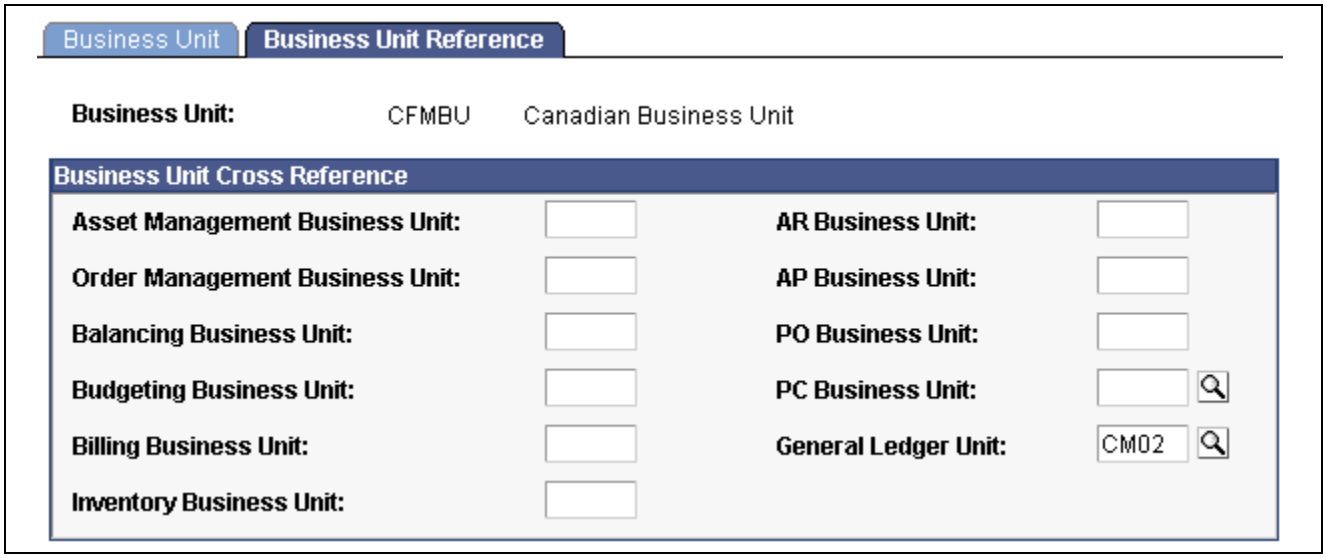
TableSet sharing is set up as soon as you create your business units. However, the sharing, especially if you have chosen to create a TableSet sharing setup using one default SetID, may need some fine-tuning. You can do this by changing the SetIDs that are assigned to individual record groups on the TableSet Control — Record Group page. The system uses the default SetID on this page when you add record groups.

See Also

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

Identifying Business Units in Other Applications

Access the Business Unit Reference page.



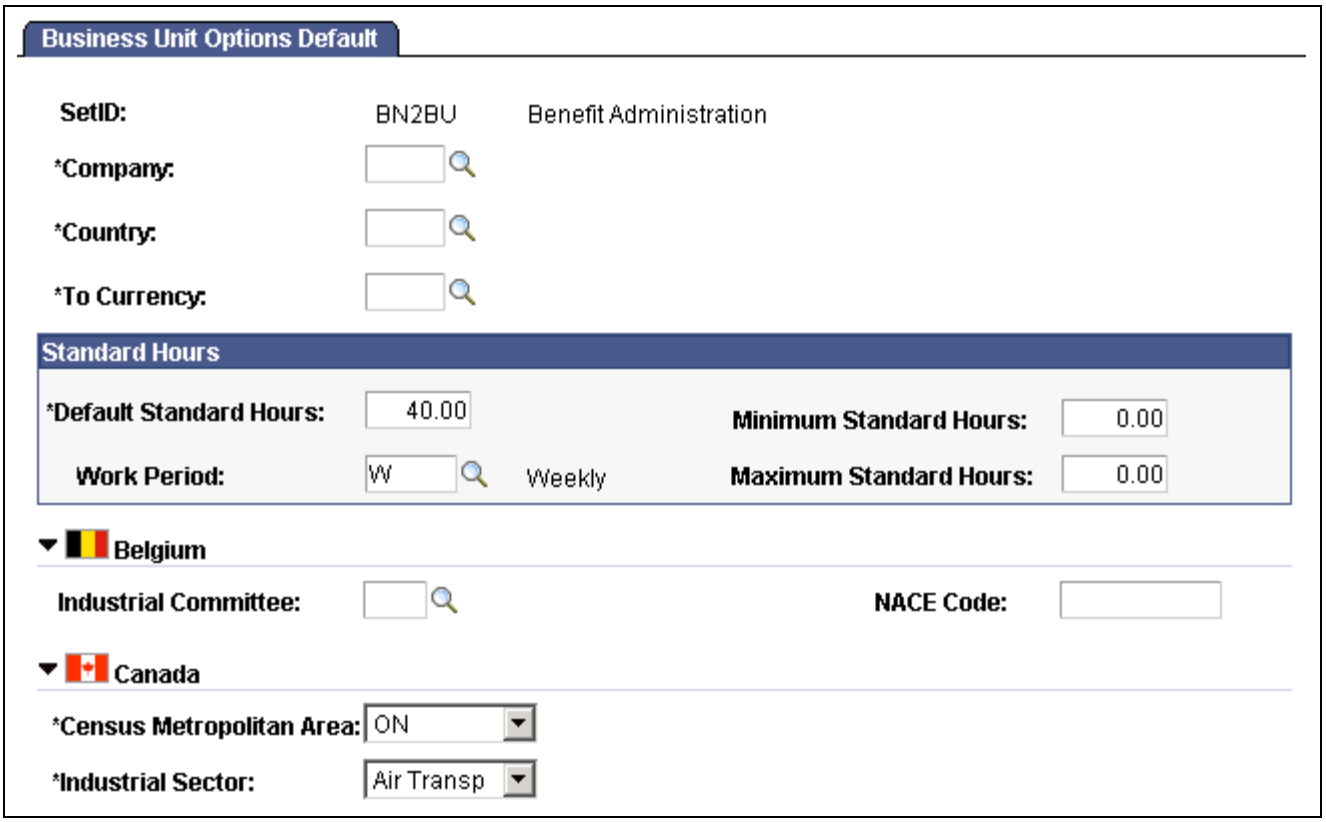
Business Unit Reference page

Business Unit Cross Reference In this group box, enter the business unit cross reference, if applicable, for any PeopleSoft application that is listed on the page. You identify other business units in other PeopleSoft applications that relate to your business unit.

Note. You can review which PeopleSoft Enterprise General Ledger units are associated with the PeopleSoft HRMS business units on the GL/HR Business Unit Mapping page (BU_GL_HR_LNK).

Setting Business Unit Defaults

Access the Business Unit Options Default page.



Business Unit Options Default page

By setting up default values for a SetID, you can specify the default values that populate these fields in your human resources system. Because the SetID keys the Business Unit Options Defaults component (you can share these defaults among multiple business units.

Warning! The values that you enter or select on this page affect the default values throughout your PeopleSoft HRMS system.

Company, Country, and **To Currency** — Select the Company, Country, and To Currency that the system will use as a default value.

Standard Hours

Default Standard Hours — The system takes default standard hours from the Define Salary Plan component (SALARY_PLAN_TABLE), the Job Code Table component (JOB_CODE_TBL), or the Installation Table component (INSTALLATION_TBL).

Work Period — The standard work period is the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency). The system takes default standard work period from the salary plan, the job code, or the Installation Table. The value that you enter here is used for validation in the Job Data pages (JOB_DATA) and the Position Data component (POSITION_DATA).

Minimum Standard Hours and **Maximum Standard Hours** — Enter the default minimum and maximum standard hours for this SetID. The value that you enter here is used for validation on the Job Data pages and the Position Data component.

(BEL) Belgium

Industrial Committee — Select the appropriate industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code — Enter the NACE code for the company. Note: You can choose the level of detail for the NACE Code. It can range from 5 digits for group level, 6 for class level and 7 for subclass level.

(CAN) Canada

Census Metropolitan Area — Select a metropolitan area.

Industrial Sector — Select an industrial sector.

Note. These values affect Canadian regulatory reporting in PeopleSoft Enterprise Human Resources.

Entering Company Information

To enter company information, use the Company Legal Type component (LEGAL_TYPE), the Company component (COMPANY_TABLE), and the Company Table Report component (RUN_PER707).

This section provides an overview of companies and discusses how to:

- Define company legal types.
- Define companies.
- Set default information for companies.
- (BEL) Enter default information and salary factors.
- (BEL) Associate a provider with a setID.
- (USA) Set up tip allocation.
- (CAN) (USA) Enter liability and expense account codes.
- (USA) Enter FICA and tax information.
- Enter phone information.
- Define company rules.

Understanding Companies

Use the Company component to enter information about a single company or multiple companies in your organization, from the corporate address to general ledger accounts, tax information, and payroll processing information.

If you're using only PeopleSoft Human Resources, you enter information only on the Company Location page (COMPANY_TABLE1) for each company that you want to add. You can also associate a default pay group with the company on the Default Settings page (COMPANY_TABLE2_GBL). The value you select appears as the default on the Job Data pages for people in this company. However, it is easier to treat each company that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific company information on the Pay Entity component (GP_PYENT), if your pay entity is the same as the company. You do this in PeopleSoft Global Payroll.

(USA) Special Considerations for U.S. Companies

PeopleSoft Enterprise Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active job data records. These retiree jobs must be associated with specific retiree companies. Therefore, be sure to set up companies to house your payees. Because pension plans are distinct tax reporting entities with their own U.S. Employer Identification Numbers (EINs), you typically set up one retiree company for each pension plan that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component (PLANADM).

For U.S. companies, if you're using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a company is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes. Because pension plans have EINs, you create companies for each pension plan. You reference a pension plan company from the payee job data record of anyone collecting benefits from that plan.

If your company uses PeopleSoft Payroll for North America, each company that you add must be equivalent to each EIN that you use. To add a company EIN, your payroll staff needs to complete all three pages at least once.

See Also

PeopleSoft Enterprise Pension Administration 8.9 PeopleBook, "Establishing Plan Administration Information," Entering Funding Provider and Company Information

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook

Pages Used to Enter Company Information

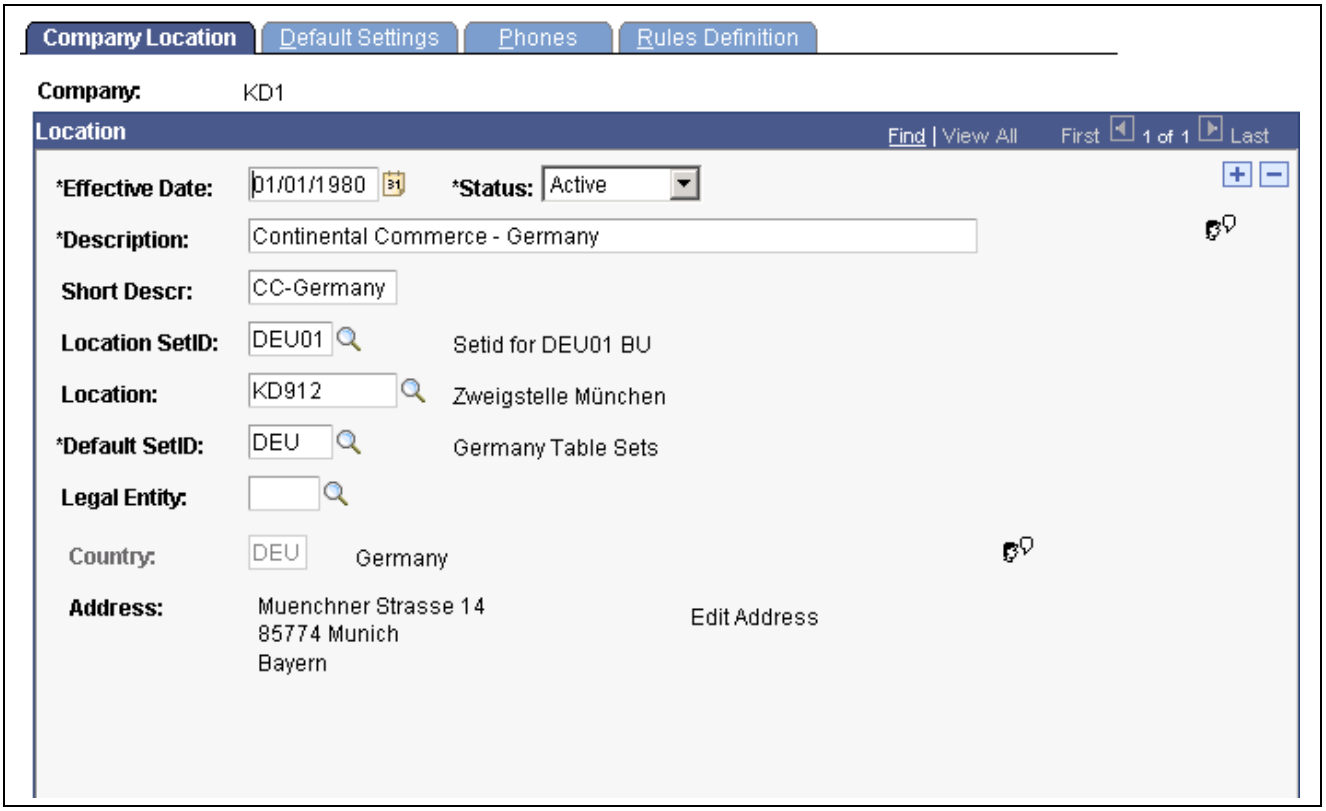
Page Name	Object Name	Navigation	Usage
Legal Type	LEGAL_TYPE_TBL	Set Up HRMS, Foundation Table, Organization, Company Legal Type, Legal Type page	Many countries require that you report on your organization's legal structure, whether it's a corporation, a public limited company, a cooperative, or another type of organization. You can associate the correct legal type with each company on the Company Table and use the information when you generate reports.

Page Name	Object Name	Navigation	Usage
Company Location	COMPANY_TABLE1	• Set Up HRMS, Foundation Tables, Organization, Company, Company Location • Set Up HRMS, Foundation Tables, Organization, Agency USF, Company Location	Define and describe companies.
Default Settings	COMPANY_TABLE2_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Default Settings • Set Up HRMS, Foundation Tables, Organization, Agency USF, Default Settings	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.
(BEL) Claeys	COMP_TBL2ABEL_SBP	Click the Claeys link on the Default Settings page.	Enter the default information and salary factors that are used to perform Claeys formula calculations.
(BEL) Providers	COMP_TBL2BBEL_SBP	Click the Providers link on the Default Settings page.	Associate a provider with a setID.
(USA) Tips Processing	COMP_TBL6USA_SEC	Click the Tips Processing link on the Default Settings page.	Set up tip allocation.
(USA) (CAN) General Ledger Liability Accts	COMP_TBL7USA_SEC	Select the Liability/Expense Account Codes link on the Default Setting page.	Use the Liability/Expense Acct Codes page to enter General Ledger Account Codes for Net Pay and Direct Deposits.
(USA) FICA/Tax Details	COMP_TBL8USA_SEC	Select the FICA/Tax Details link on the Default Settings page.	Use the FICA/Tax Details page to specify your federal employer identification number, link companies together, and define default tax status.
Phones	COMPANY_TABLE3_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Phones • Set Up HRMS, Foundation Tables, Agency USF, Company, Phones	Enter telephone information for a company.

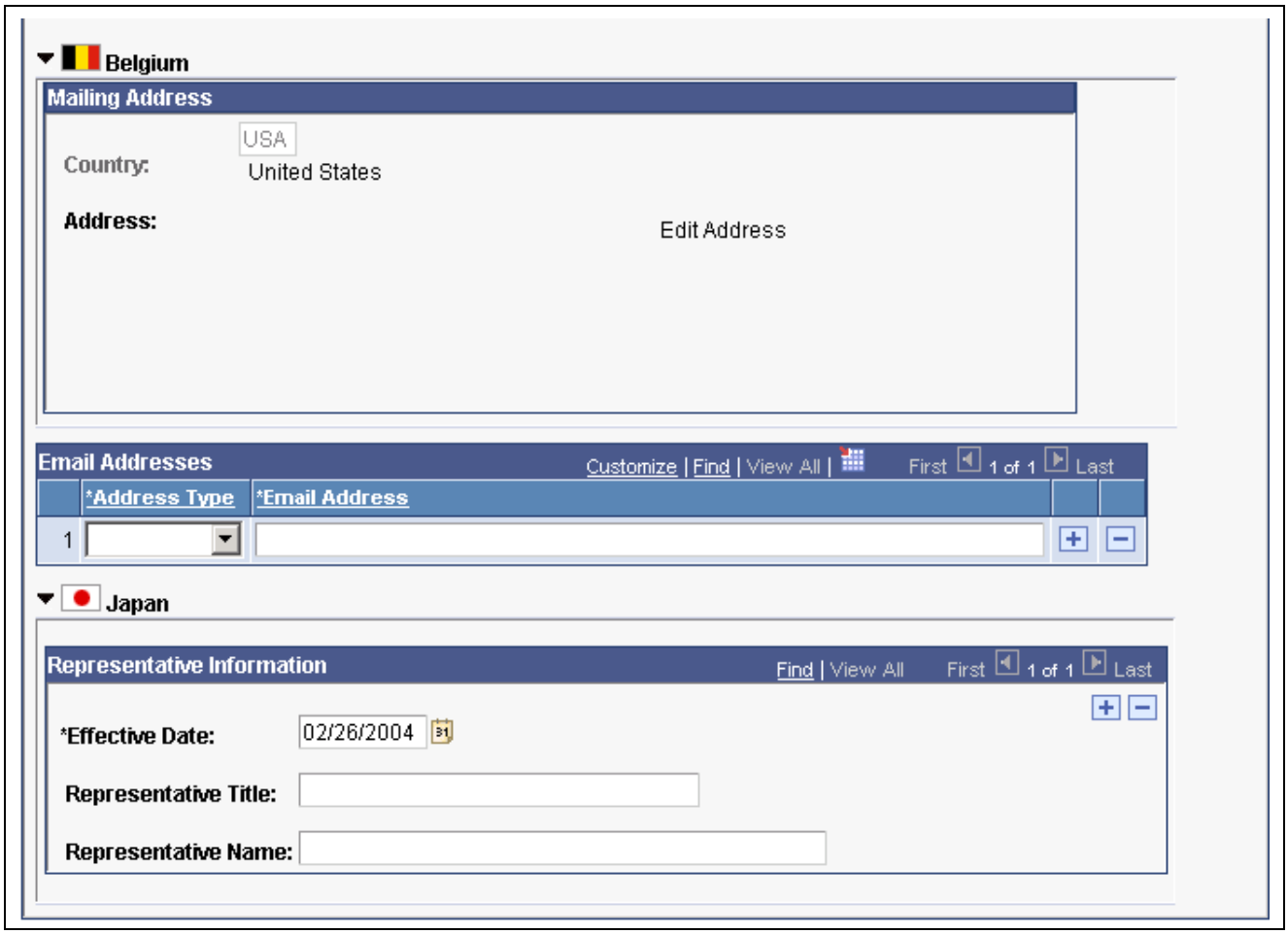
Page Name	Object Name	Navigation	Usage
Rules Definition	COMPANY_TABLE4_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Rules Definition • Set Up HRMS, Foundation Tables, Organization, Agency USF, Rules Definition	Define FTE rules for the company.
Company Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Company Table Report	Run the Company Table report (PER707). This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.

Defining Companies

Access the Company Location page.



Company Location (1 of 2)



Company Location (2 of 2)

For a single-company environment, you set up this table only once; for multiple-company environments, you set up a company code for each company.

(BEL) Belgium

Enter the address information for your Belgian companies.

(JPN) Japan

Representative's Title Enter the title of your company's representative as of the effective date. This is the person whose title (and name) appears by default on the Appointment Notification report page.

If you accept the default—which you can override on the report page—the title and name appear on the Notification of (Hiring, Department Change, Grade Advance or Termination) pages.

Representative's Name Enter the representative's name. You can override this default on the Appointment Notification report page.

See Also

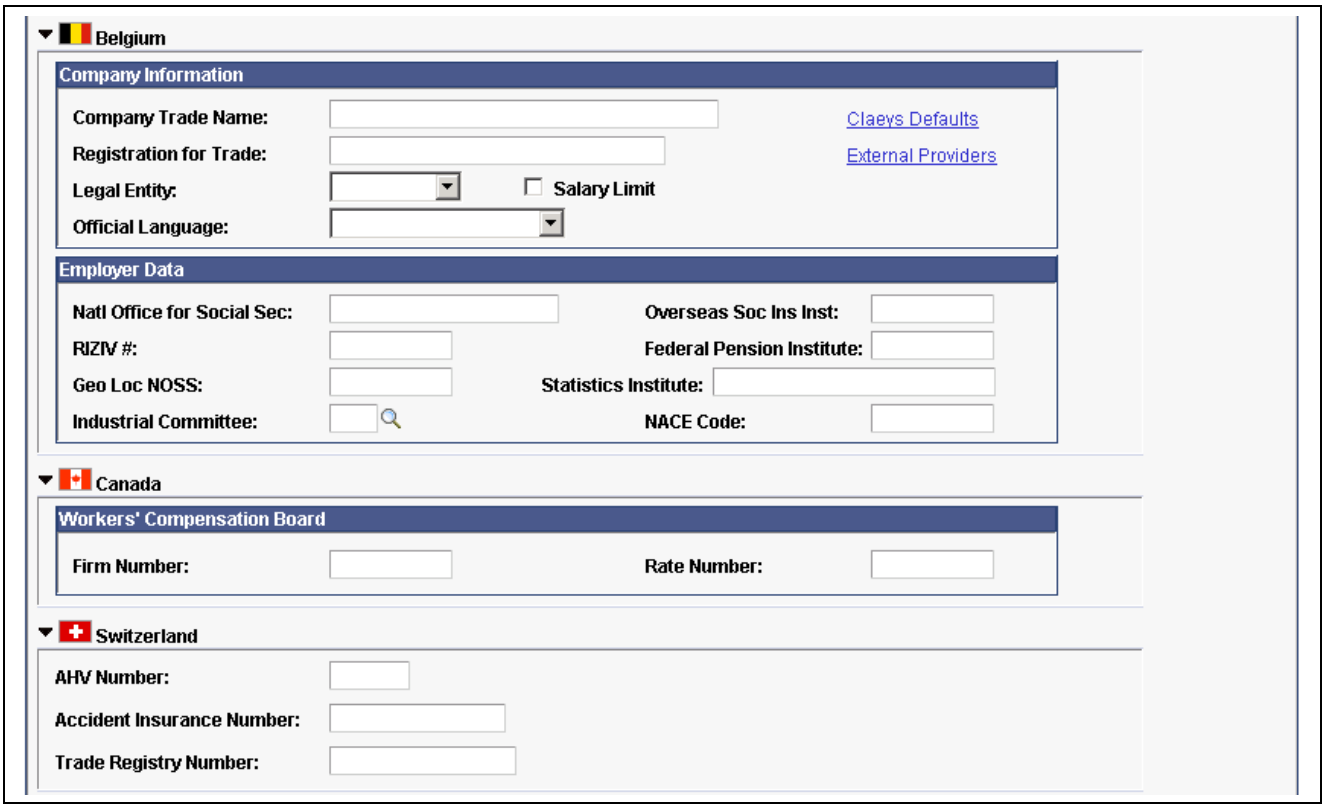
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "(JPN) Tracking Additional Appointments (Kenmu)," Recording and Viewing Employee Additional Appointments Data

Setting Default Information for Companies

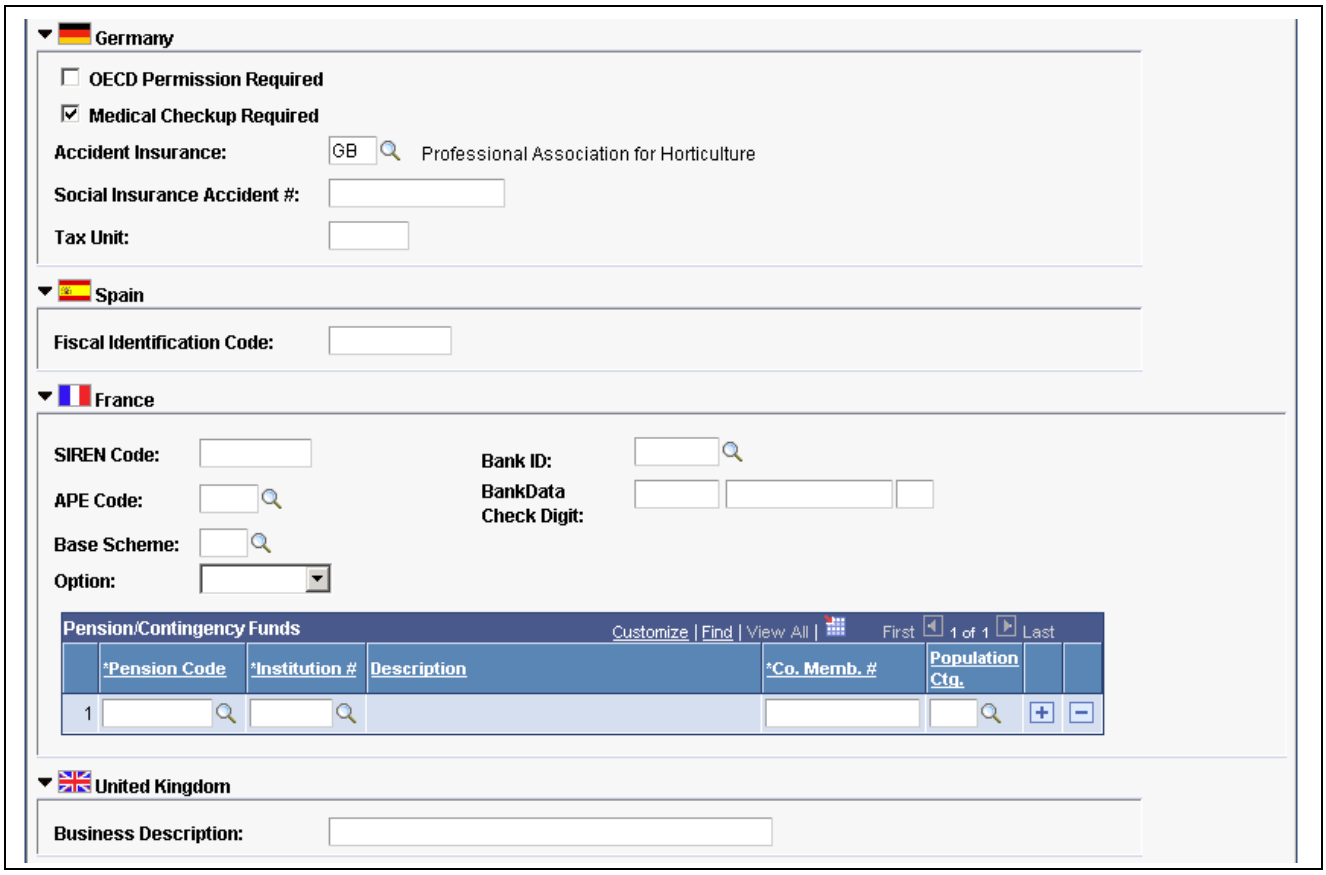
Access the Default Settings page.



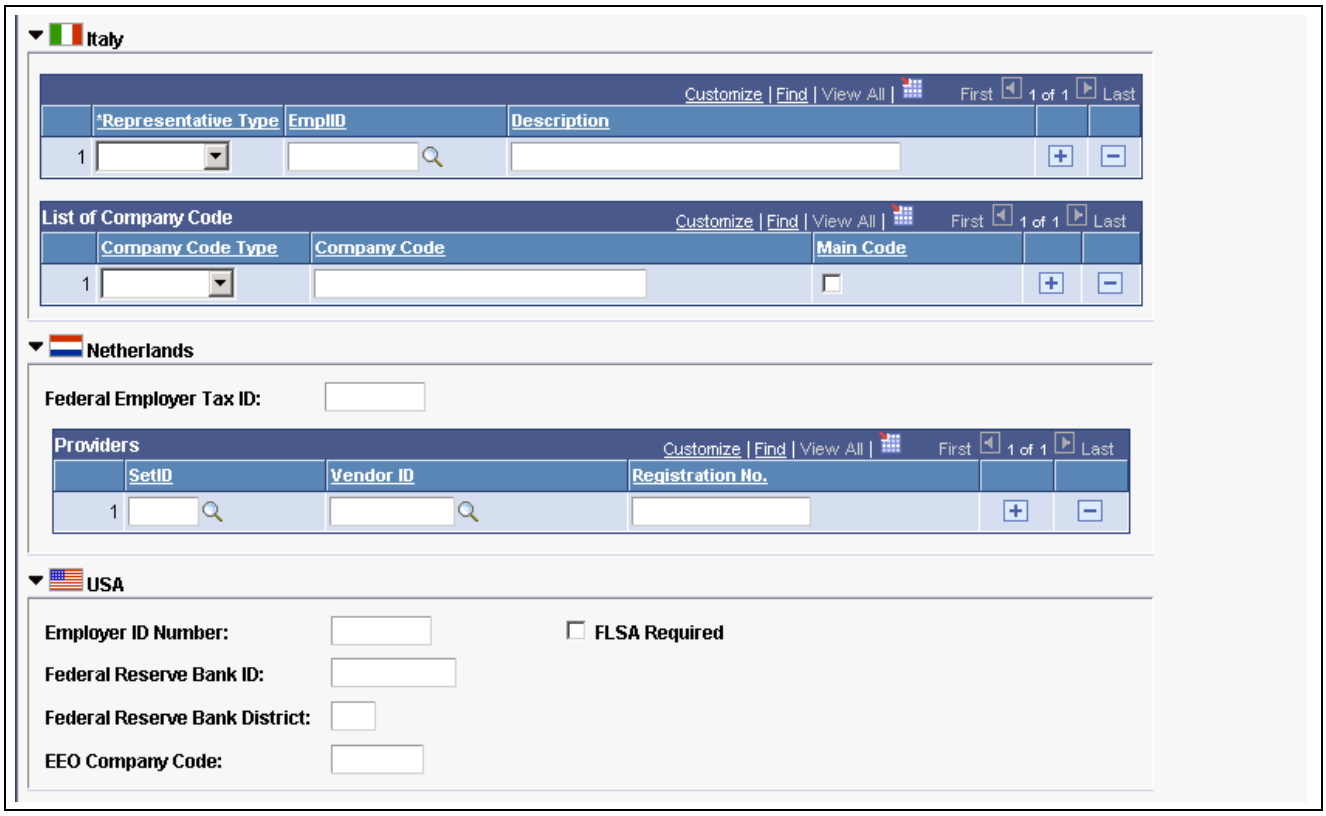
Default Settings (1 of 6)



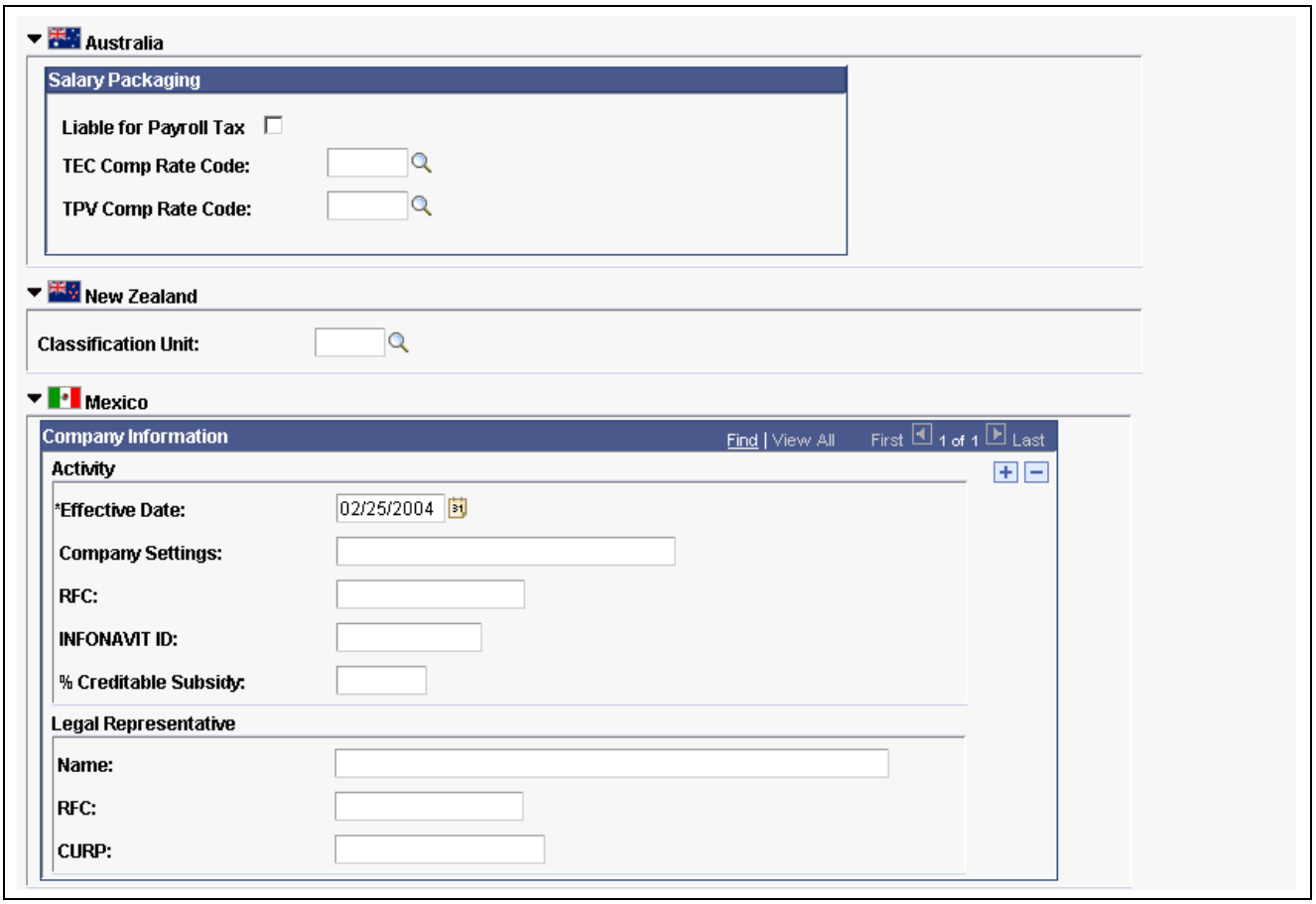
Default Settings (2 of 6)



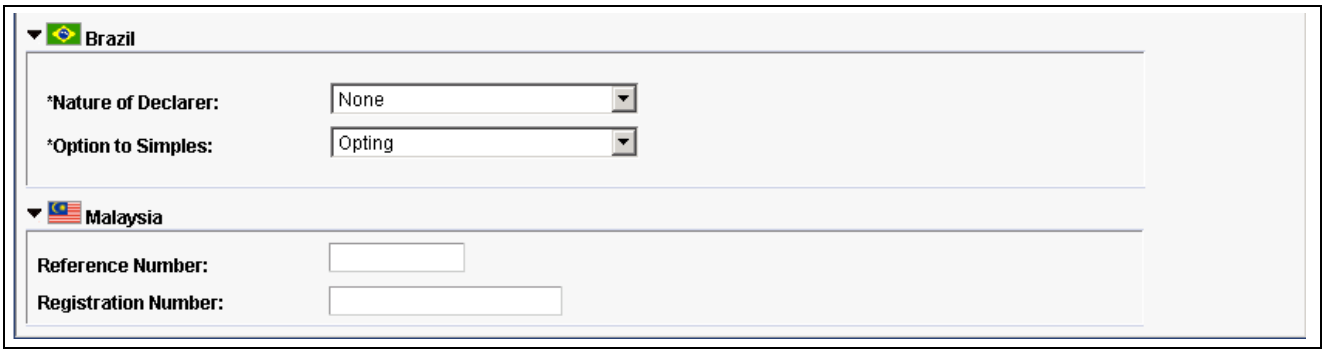
Default Settings (3 of 6)



Default Settings (4 of 6)



Default Settings (5 of 6)



Default Settings (6 of 6)

Default Settings

Points Value Enter the monetary value of your points.

Payroll for North America

These fields are for companies using PeopleSoft Payroll for North America.

Pay Group If you enter a value in this field, the pay group appears as the default for all employees in this company. You save data-entry time at the employee level if most employees have the same pay group.

Note. The size of this field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. First, set up your PeopleSoft Global Payroll or PeopleSoft Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.

Default Earnings Program Select a default value for people in this company.

Lines on Paysheet Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period.

See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Defining Earnings Codes and Earnings Programs".

Activity Days for Terminations This field is for information purposes only.

Federal Tax Deduction Priority and **State Tax Deduction Priority** Enter the federal and state tax deduction priorities.

Pay Taxes through AP (pay taxes through Accounts Payable) Select to indicate if this company is tracking its taxes through Accounts Payable.

General Ledger Account Codes Click to enter information about general ledger account codes.

Tips Processing Click to set up the parameters for handling tips in your company's environment.

Tax Details Click to enter FICA and tax details.

(BEL) Belgium

Company Trade Name Enter the name of your Belgian company; for example, Continental Commerce - Belgium.

Registration for Trade Enter the company's official registration number from the Belgian Trade Register.

Legal Entity A legal entity is the legal form that applies to a company: *Inc* (corporation), *Coop* (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.

Salary Limit Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed.

If your organization enforces periods where no salary increases are allowed or limits salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.

Official Language Select the company official language. This value is used as the default person's official language, with the exception of companies located in the

Brussels-Capital Region, for which the person's preferred language is used as the default.

Claeys Defaults Click to enter Claeys default and salary factor information on the Claeys page.

See Chapter 12, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors, page 247.

External Providers Click to enter Belgian provider information for tracking third-party providers on the Providers page.

See Chapter 12, "Setting Up Organization Foundation Tables," (BEL) Associating a Provider with a SetID, page 248.

Natl Office for Social Sec (national office for social security) Enter the number under which the company is registered at the National Office for Social Security.

Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute) Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.

RIZIV # (RIZIV number) Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.

Geo Loc NOSS (geographic location for State Social Insurance category) Enter the geographical location for the NOSS.

Statistics Institute Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.

Industrial Committee Select the appropriate industrial committee for the company. You can override this value at the department level.

NACE Code Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Firm Number and **Rate Number** Enter if you are tracking Workers' Compensation Board data for Canadian workers.

(CHE) Switzerland

AHV Number (Alters-und Hinterbliebenen Versicherung number) Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.

Accident Insurance Number Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.

Trade Registry Number Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(GER) Germany

OECD Permission Required (Organization for Economic Cooperation and Development permission required) Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.

Medical Checkup Required Select if a medical checkup is required for your workers under German labor law.

(ESP) Spain

Fiscal Identification Code Enter your company's fiscal identification code as assigned by the Spanish government.

(FRA) France

SIREN Code (Systeme Informatique pour le Repertoire des Entreprises code) Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.

APE Code (Activite Principale Exercee code) Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.

BankData Check Digit Enter a bank data check digit (optional).

Pension Code Select the code for the pension companies used by this French company.

Institution # (institution number) Select the institution number for the pension companies used by this French company.

Co. Memb. # (company membership number) Enter the membership number that was assigned to this company when it registered with the pension company.

Note. The system doesn't check the format of the numbers that you enter in the fields on this page.

(GBR) UK

Business Description Enter the company business description. This information is used on the two local UK RIDDOR reports, which are located on the Monitor Health/Safety menu. The system prints the business description of the relevant company from the Job record of each employee.

(ITA) Italy

Company Code Enter the company code that is assigned to your company by the Italian regulatory authorities.

Main Code Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Federal Employer Tax ID Enter the tax ID number that is provided by the Dutch government.

Vendor ID Select from the list of insurance providers.

Registration No. (registration number) Enter the registration number for the insurance provider, which you obtain from the provider.

Note. The information that you enter on this page is for informational purposes only, but can be included in reporting or as information that you pass to your organization's payroll system.

(USA) USA

Employer ID Number Specify the unique Federal Employer ID Number (EIN) associated with the company. This control becomes the default for the Employer ID State Withholding control on the Company State Tax Table.

Note. If you choose to set up multiple companies with the same EIN, modifications must be made to the quarterly wage reports to 'roll-up' these totals (for example, TAX810XX, TAX860XX, TAX002XX, etc.).

However, for Annual W-2 reporting, employee balances can be combined using the W-2 Reporting Company feature.

FLSA Required Select this option if *any* non-exempt employees in the company need to have the FLSA rate calculated for their overtime pay. If there are Pay Groups with non-exempt employees who do not need to have the FLSA rate calculated then the FLSA Required flag on the Pay Group should be cleared.

Clearing the FLSA Required on the Company component prevents you from using the FLSA calculation for all pay groups because the FLSA Required flag on the Pay Group component (PAYGROUP_TABLE) is hidden.

If you select this option, also select the applicable FLSA rule to indicate how and when the FLSA calculated premium will apply to overtime pay.

Higher of FLSA/Contractual FLSA premium will apply only when it is greater than the contractual rate.

Always use FLSA Premium Use the FLSA premium amount regardless of the contractual rate.

Federal Reserve Bank ID The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank (FRB) identifier assigned to this company by the FRB.

Federal Reserve Bank District The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank District Designator indicating which FRB is doing the issuing of the bonds.

EEO Company Code (equal employment opportunity company code) If the U.S. government has assigned this company a code for EE0-1 and VETS 100 reporting, enter the number.

(AUS) Australia

Liability for Payroll Tax Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page (PKG_PYTX_RT_TBL) are used in the package compensation calculation for your salary-packaged employees.

TEC Comp Rate Code and**TPV Comp Rate Code** Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment.

You set up your compensation rate codes on the Comp Rate Code Table page (COMP_RATECD_TBL).

Institute Code This group box appears only if you've selected the Education & Government check box on the Installation Table component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.

Agency Code This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

Classification Unit Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(MEX) Mexico

Company Settings Define the company's activity. Typical values are *Financial, Pharmaceutical, Manufacturing, Services, Tourism,* and *Sales.*

RFC Enter the RFC ID for your company.

The Mexican Treasury (*Secretaria de Hacienda y Credito Publico*) identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.

INFONAVIT ID Enter the INFONAVIT ID for your company.

% Creditable Subsidy Enter the percentage of accreditable subsidy. This value is used to calculate federal taxes.

Name Enter the name of the person who acts as the legal representative for the company.

RFC and **CURP** Enter these values for the legal representative.

(BRA) Brazil

Nature of Declarer Enter the legal nature of the establishment. This information is used for reporting purposes.

Option to Simples Select an option to simples value to have the company's contributions replaced by the actual invoice contribution amounts after invoices are generated.

(MYS) Malaysia

Reference Number Enter the company tax reference number (the Company C File Number). This number is used in Annual Statement of Tax Deductions - Malaysian CP159 report (GPMYTX05).

Registration Number This is the company registration number, assigned by the government of Malaysia assigns to an organization to uniquely identify the company. This is used in CP39 Monthly Statement of Tax Deductions - Electronic form (GPMYTX04).

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options

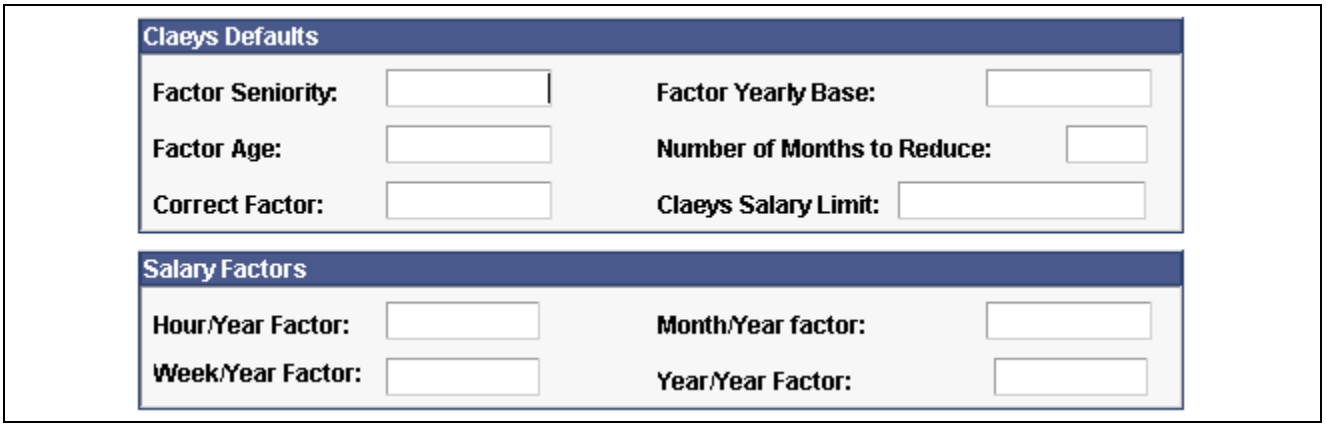
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook

(BEL) Entering Default Information and Salary Factors

Access the Claeys page.



Claeys page

Claeys Salary Limit Enter the salary limit for applying the Claeys formula.

Hour/Year Factor Enter the hour/year factor to calculate the hourly amount that an worker earns and gross that amount up to the yearly total.

Month/Year Factor Enter the month/year factor to calculate the monthly amount that an worker earns and gross that amount up to the yearly total.

Week/Year Enter the week and year to calculate the weekly amount that an worker earns and gross that amount up to the yearly total.

Year/Year Enter the year/year factor to calculate the yearly total.

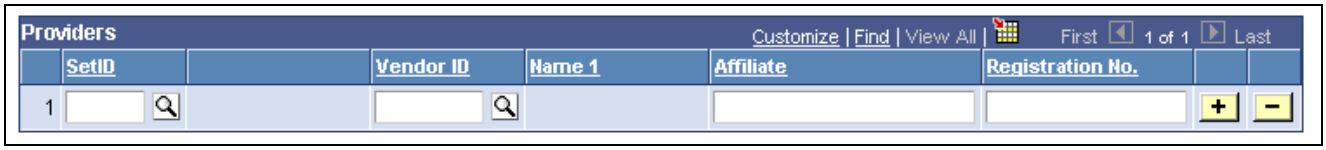
Note. In Belgium, the year factor is 13.85.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "(BEL) Entering Additional Data for Belgian Workers"

(BEL) Associating a Provider with a SetID

Access the Providers page.



Providers page

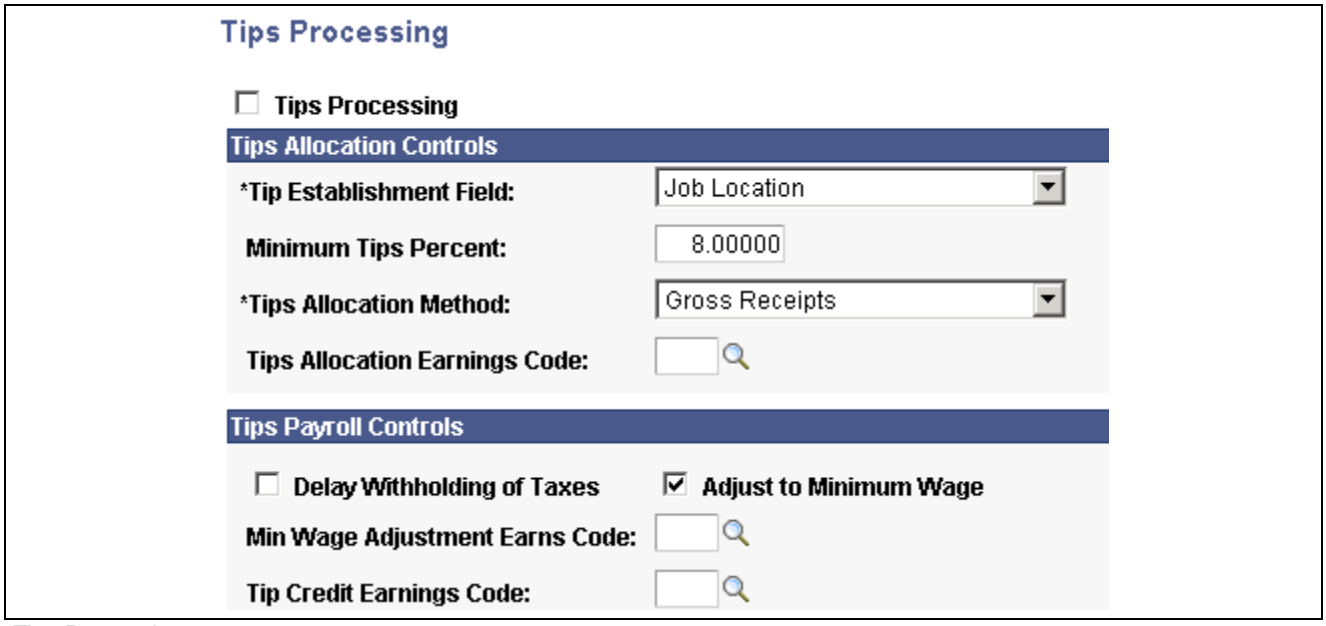
SetID and **Vendor ID** Select from the list of options. The system lists all valid providers, not just Belgian providers.

Affiliate Enter the affiliate, if applicable.

Registration No. (registration number) Enter the registration number, if applicable.

(USA) Setting Up Tip Allocation

Access the Tips Processing page.



Tips Processing page

Tips Processing Select to indicate the use of this feature. Tip allocation is required when the amount of tips reported by tipped worker for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

Tips Allocation Controls

These values populate the Tip Establishment page (TIPS_ESTAB_TBL).

Tip Establishment Field This field designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or other unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant. You cannot override this value in the Tip Establishment page.

Minimum Tips Percent Enter the minimum percentage of tips to be distributed to workers. The percentage specified by the federal regulations is 8 percent. Employers can apply for a lower percentage if it can be shown in writing that the tip rate at an establishment is less than 8 percent. You can override this value in the Tip Establishment table.

Note. The minimum tips percent value is based on federal and state regulations.

Tips Allocation Method Select the tip allocation method used for this company. Only establishments that employ fewer than 25 employees (tipped and nontipped) during a pay period can use the *Hours Worked* method. You can override this value in the Tip Establishment table.

Tips Allocation Earnings Code Select the earnings code to record the amount calculated by the tip allocation process. You cannot override this value in the Tip Establishment table.

Tips Payroll Control

These values populate the Pay Group table, where you can override them.

Delay Withholding of Taxes Select to have the system delay withholding until the worker reports 20 USD of tips in a month federal and state taxes for each earning that is indicated for tax withholding in the Tax table.

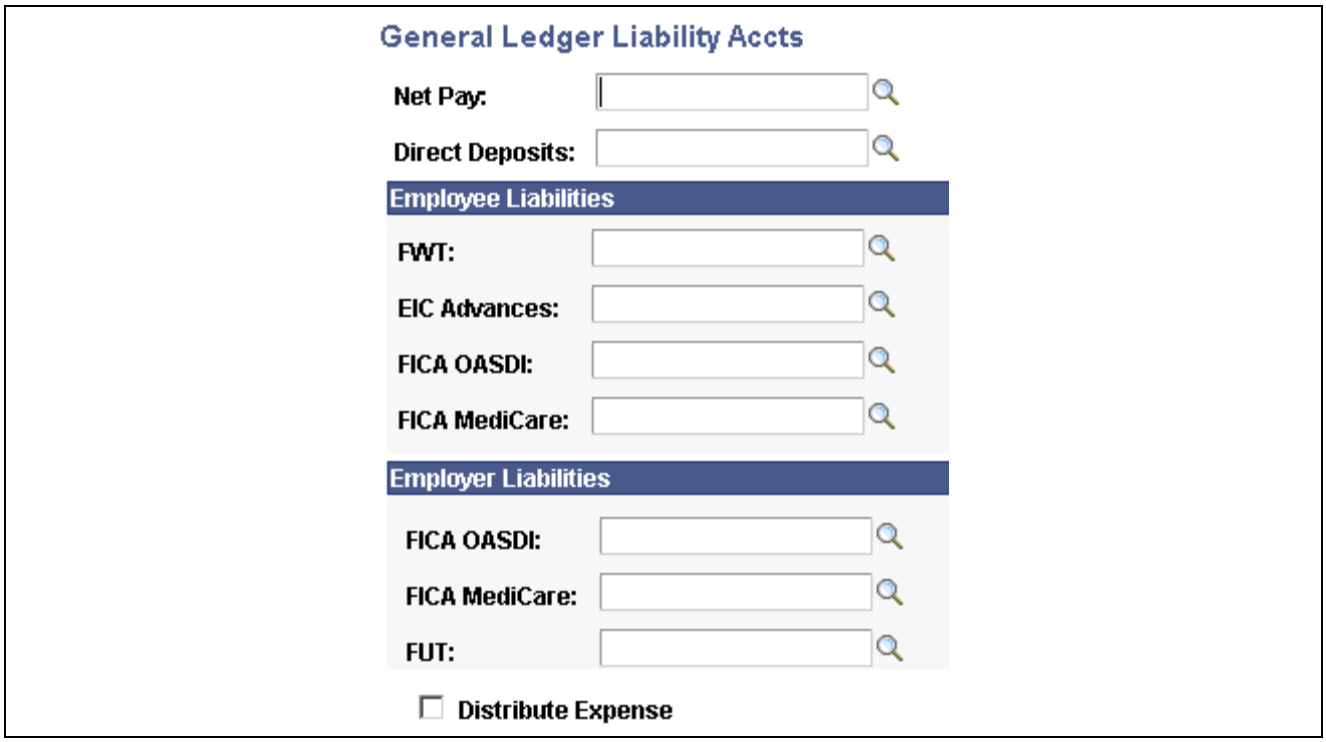
Adjust to Minimum Wage (adjustment to minimum wage) Select this check box unless your company has a special agreement with the Internal Revenue Service. This ensures that tipped workers receive necessary wage adjustments to bring them up to the minimum wage.

Min Wage Adjustment Earns Code (minimum wage adjustment earnings code) Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.

Tip Credit Earnings Code Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

(CAN) (USA) Entering General Ledger Account Codes

Access the General Ledger Liability Accs page from the Company Table – Default Settings page.



General Ledger Liability Accts page

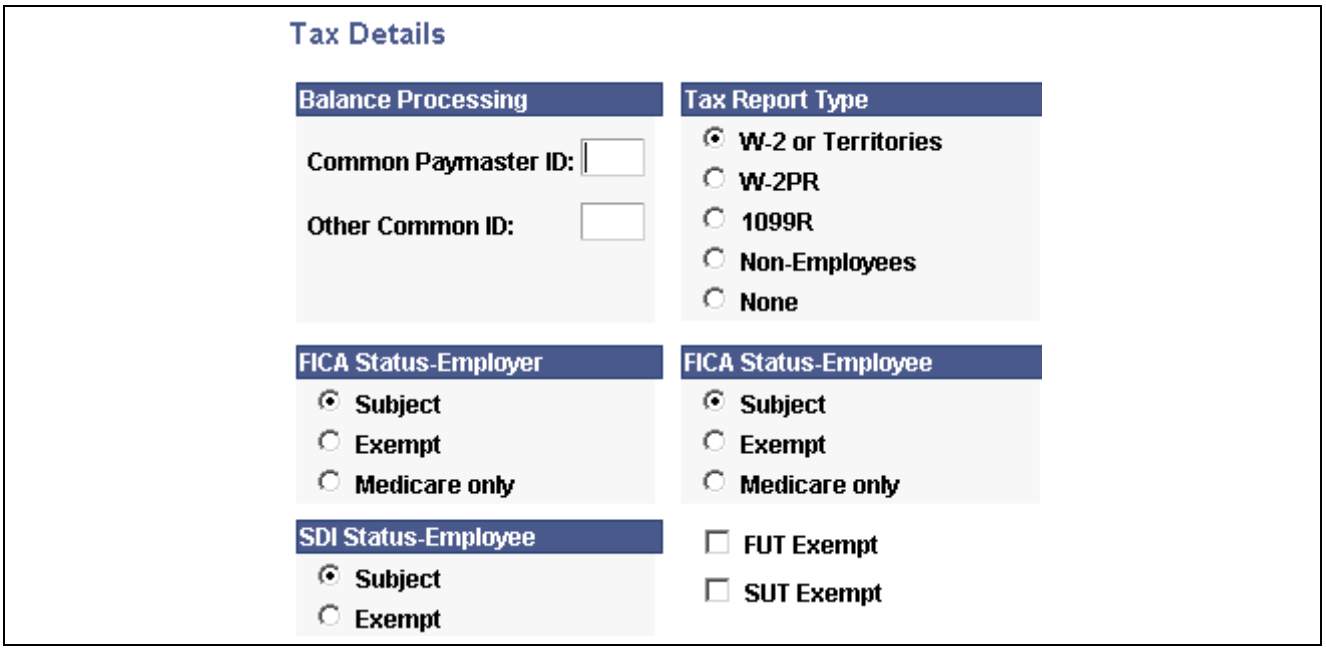
Select the combination codes for each liability.

The Net Pay and Direct Deposits fields on this page are applicable to both U.S. and Canada. The liability and expense combination codes are related to U.S. tax accounting information only. Canadian companies use the Wage Loss Plan Table to enter GL tax accounting information.

See Chapter 22, “Setting Up Payroll Tax Tables,” Defining Canadian Wage Loss Plans, page 517.

(USA) Entering FICA and Tax Information

Access the Tax Details page from the Company Table - Default Settings page.



Tax Details page

Balance Processing

Use the Balance Processing options when two or more related corporations concurrently employ one or more workers and pay them through one of the corporations as a common paymaster. By selecting these controls, the system treats simultaneous employee balances in multiple companies as one total balance when calculating payroll.

The total Social Security and Medicare taxes that must be paid are determined as if the people had one employer—the common paymaster—paying all their wages. The system will also recognize balances in all companies linked by a common paymaster when determining if a certain limit has been met—so you don't have to calculate employee balances manually.

Common Paymaster ID Enter a Common Paymaster ID to tell the system to treat *all employee tax*, *deduction*, *garnishment*, and *earnings balances* as one for companies sharing that Common Paymaster ID.

Other Common ID Enter an Other Common ID to tell the system to treat *all employee deduction garnishment, and earnings balances* as one for companies sharing that Other Common ID.

You'd typically use an Other Common ID when you need to keep your companies separate for tax purposes, but need to maintain accurate current employee balances across companies for calculating Section 415 limits, year-to-date deduction maximums, and maximum yearly earnings ceilings. Leave accrual balances are not included in Common Paymaster ID or Common Other ID processing.

Tax Report Type This field is used by the year-end tax reporting programs to select the proper set of people, either W-2, 1099R recipients, or non-employees, for inclusion on one of several possible year-end tax reports.

Note. To use PeopleSoft Payroll to produce Forms W2PR for Puerto Rico year-end reporting, you need to have paid Puerto Rico employees in one or more separate companies for the entire tax year being reported.

Note. To include retirees in your year-end reports, you need to set them up in a separate 1099-R company.

FICA Status-Employer This field is information only.

FICA Status-Employee This information appears as a default on the Job Information page (JOD_DATA_JOBCODE).

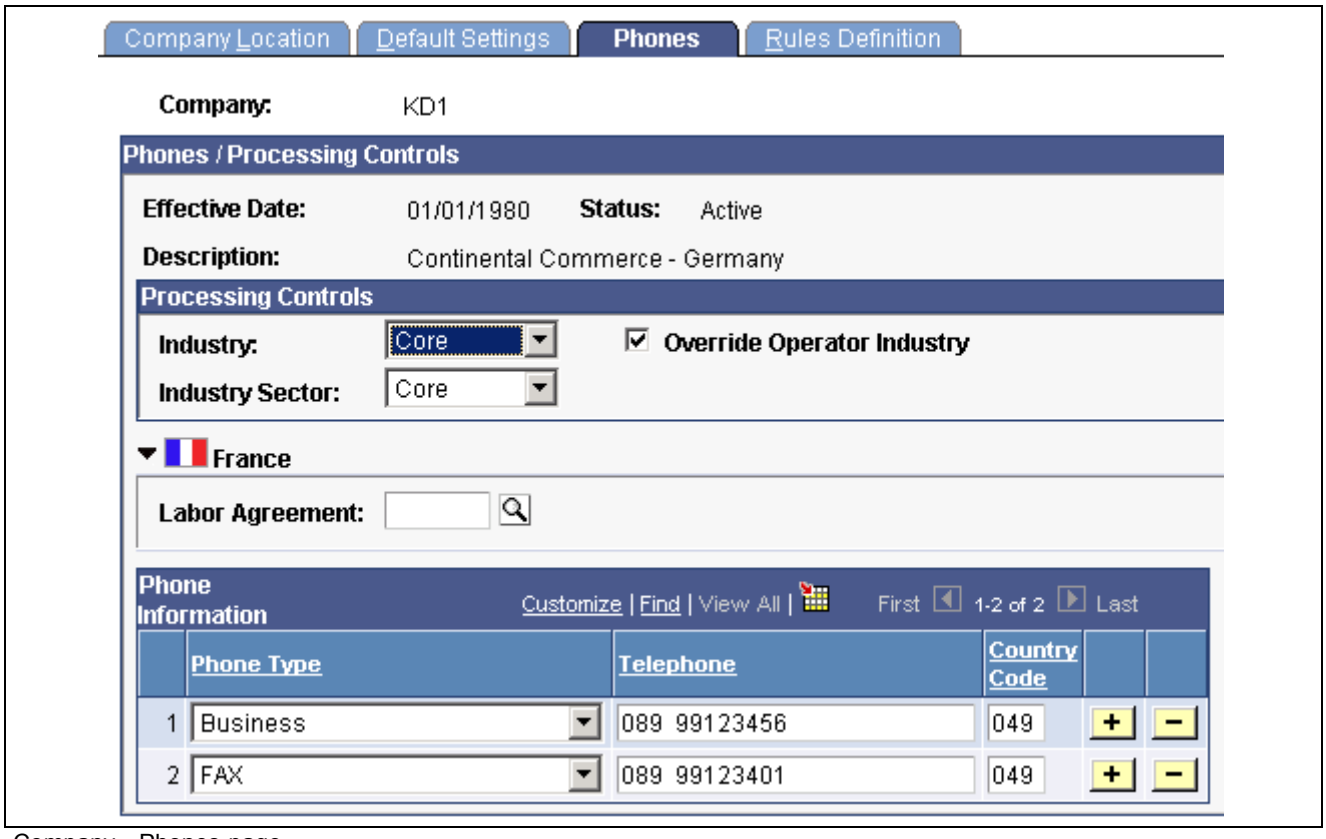
SDI Status-Employee For states where the SDI status is not specified as *Not Applicable*, the Employees' SDI Status will appear as a default.

FUT Exempt Select this option if the company is exempt from FUT.

SUT Exempt Select this option if the company is exempt from SUT.

Entering Phone Information

Access the Phones page.



Company - Phones page

Processing Controls

Override Operator Industry Select if the operator industry can be overridden.

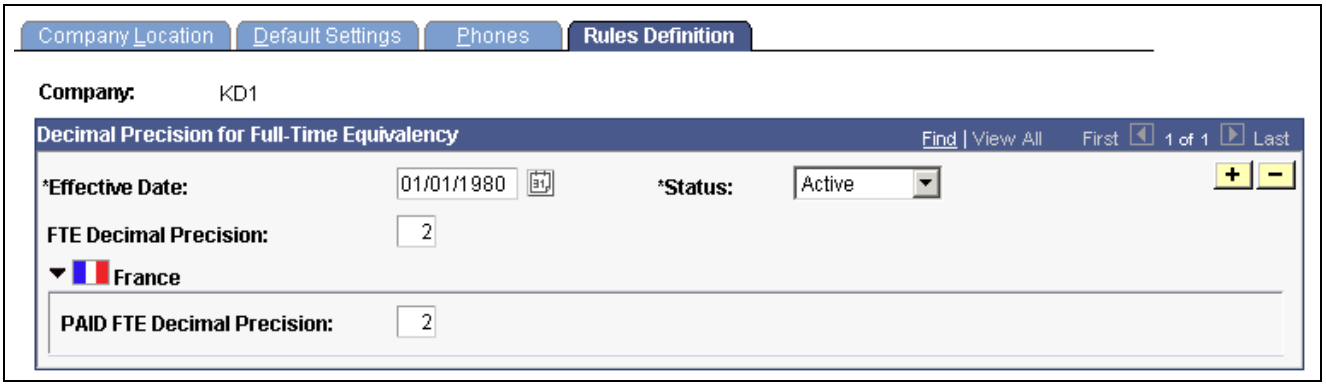
(FRA) France

Labor Agreement Select a Labor Agreement code from the list.

Phone Type and **Telephone** Enter the phone type, such as *Business, Home,* and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data.

Defining Company Rules

Access the Rules Definition page.



Rules Definition page

FTE Decimal Precision Enter the number of decimal points the system will use when calculating FTE.

Note. If you set this field to zero or leave it blank, the FTE calculations on the Job Data pages will default to 1 regardless of the number of hours entered or part/full-time status.

(FRA) France

Paid FTE Decimal Precision Enter the number of decimal points the system will use when calculating FTE for payment purposes.

(USF) Entering Agency Information

To enter agency information, use the Agency USF component (AGENCY_TABLE) and the Agency Table Report component (RUN_FGPER803).

This section provides an overview of agency information and discusses how to enter payroll information.

Understanding Agency Information

Use the Agency component (AGENCY_TABLE) to enter information about a single agency or sub-agencies in your organization, from the central agency address to general ledger accounts, tax information, and payroll processing information. Most pages contain data from PeopleSoft Payroll for North America.

If you use only PeopleSoft Human Resources, you enter information only on the first page, the Agency Location page, for each agency that you want to add. You can also associate a default pay group with the agency on the Default Settings page. The value that you select appears as the default on the Job Data pages for workers in this agency. However, it is easiest to treat each agency that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Payroll for North America, an agency is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

If your agency uses PeopleSoft Payroll for North America, each sub-agency that you add must be equivalent to each EIN that you use. Your payroll staff needs to complete all nine pages at least once to add an agency EIN.

You can print a report of your Agency table using the Agency Table report.

Note. The Agency Location, Default Settings, Phones, and Rules Definition pages in the Agency Table component are identical to those in the Company Table component and share the same object names.

Pages Used to Enter Agency Information

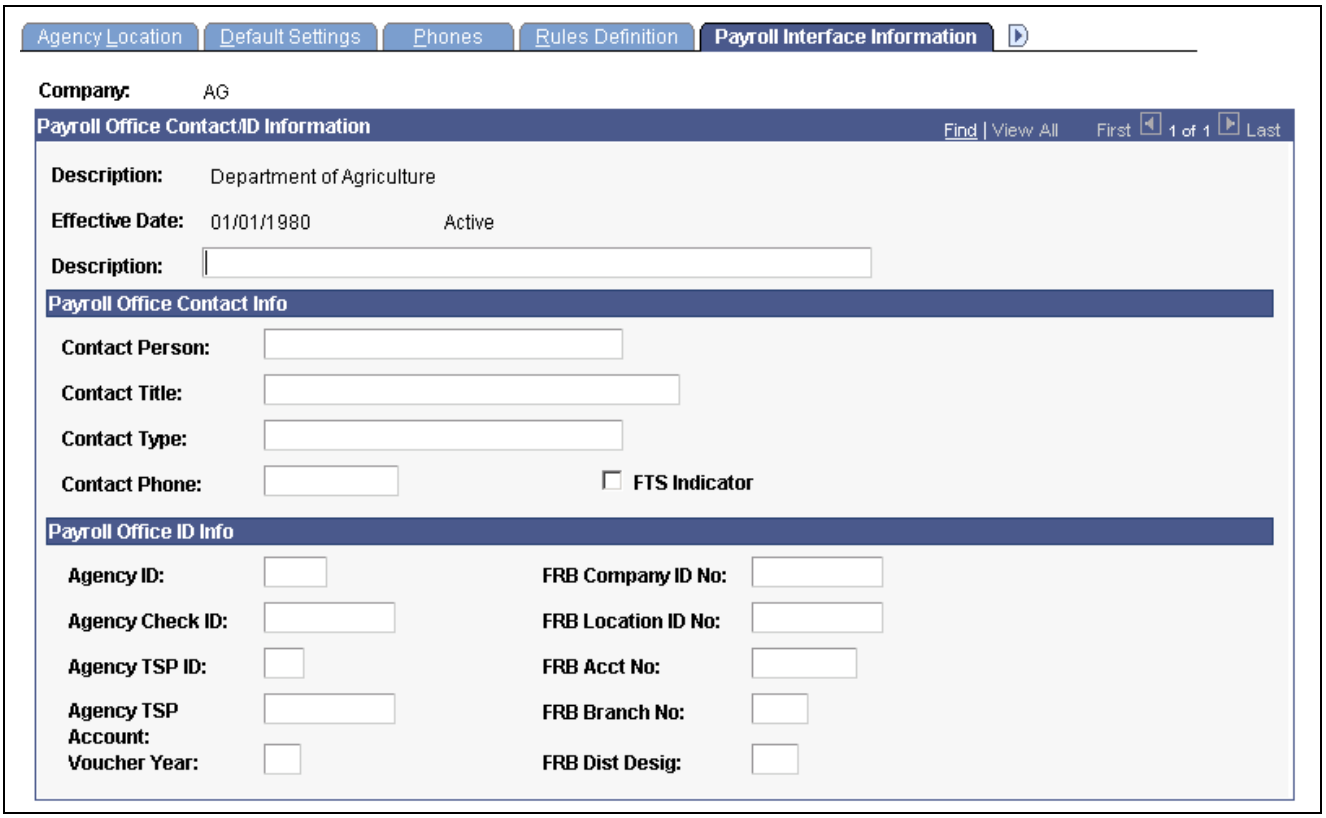
Page Name	Object Name	Navigation	Usage
Payroll Interface Information	GVT_COMPANY_TBL7	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Interface Information	Enter the agency's payroll interface information.
Payroll Office Address	GVT_COMPANY_TBL8	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Office Address	Enter the agency's payroll office address information.
ECS Address (electronic certification system address)	GVT_COMPANY_TBL9	Set Up HRMS, Foundation Tables, Organization, Agency USF, ECS Address	Enter the agency's ECS address information.
Agency Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Agency Table Report USF	Run the Agency Table report (FGPER803). This prints all agencies in the Agency component and default information, including name and address, agency code, and effective date.

See Also

Appendix C, "PeopleSoft Application Fundamentals for HRMS Reports," Basic HRMS Reports, page 829

Entering Payroll Information

Access the Payroll Interface Information page.



Payroll Interface Information page

FTS Indicator Select if the phone number is an FTS number.

FRB Company ID No. (FRB company ID number), **FRB Location ID No.** (FRB location ID number), **FRB Acct No.** (FRB account number), **FRB Branch No.** (FRB branch number), and **FRB Dist Desig.** (FRB district designation) If necessary, enter FRB information.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

Defining Establishments

To define establishments, use the Establishment component (ESTABLISHMENT_DATA) and Controlled Establishment Sumry component (CONTROLLED_ESTABS). Use the ESTABLISHMENT_DATA component interface to load data into the tables for the Establishment component.

This section provides an overview of establishments and discusses how to:

- Create an information profile for a business establishment.

- Set up establishment phone numbers.

Understanding Establishments

You use the Establishment component to define distinct physical places of business (establishments) within your company, to enter address information, and to enter regulatory reporting information. In PeopleSoft Human Resources, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.
- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

Note. (USA) To support AAP reporting, locations and establishments can have a many to many relationship. Set up the relationship between establishments to locations on the Location Profile page (LOCATION_TBL2_GBL). Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

See Also

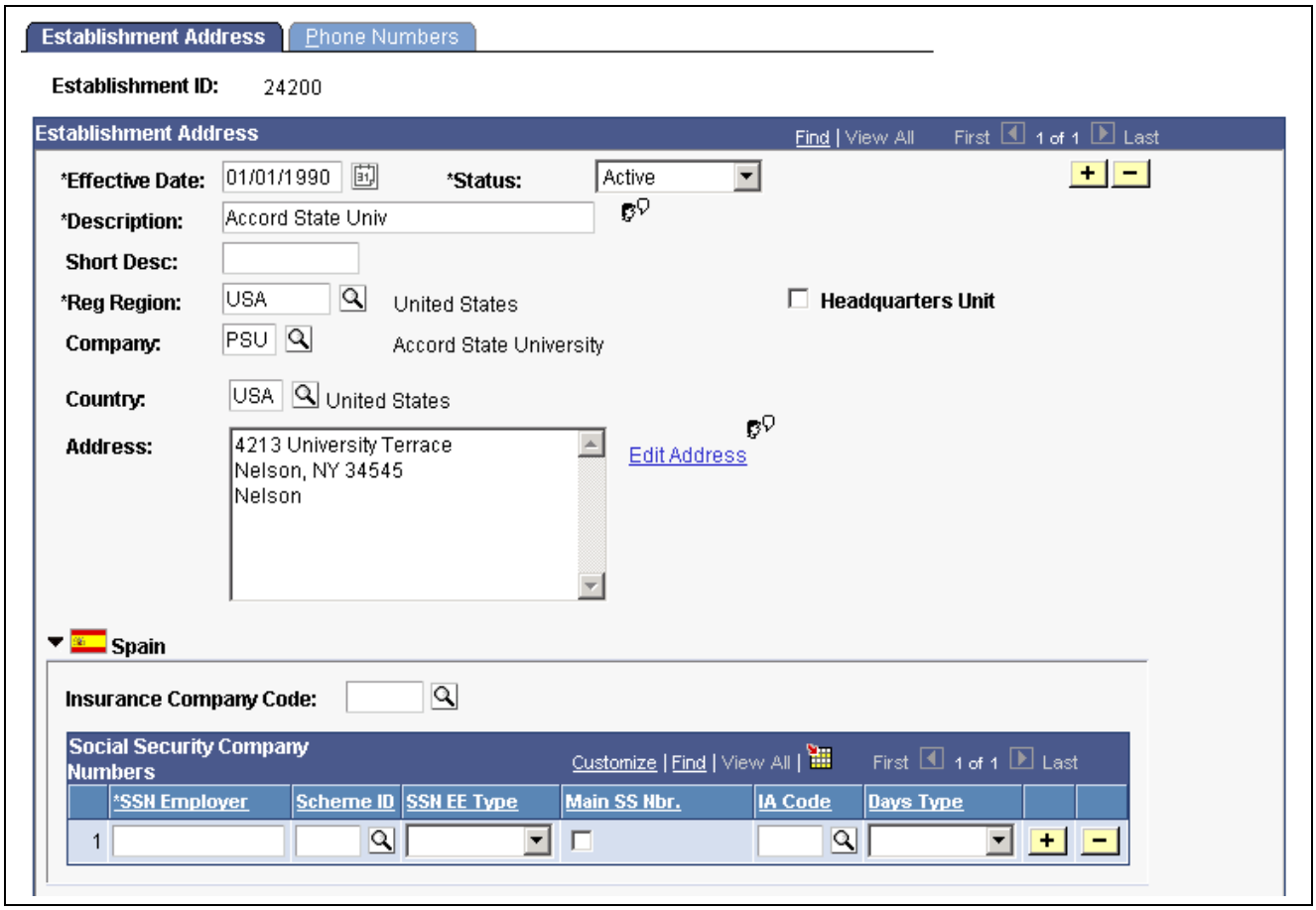
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Pages Used to Define Establishments

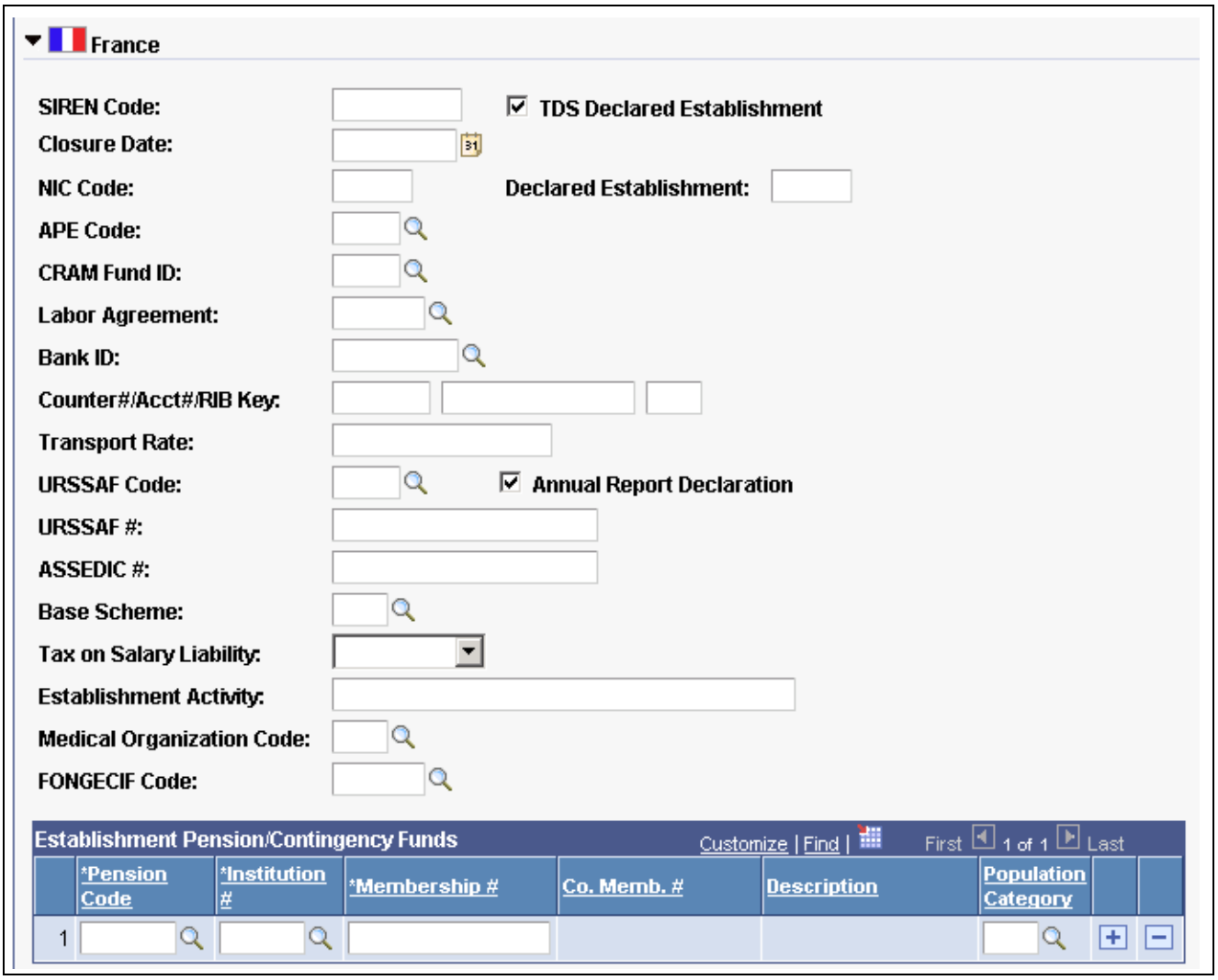
Page Name	Object Name	Navigation	Usage
Establishment Address	ESTAB_TBL1_GBL	• Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Phone Numbers	ESTAB_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Establishment, Phone Numbers	Enter the establishment's telephone, fax machine, and other related numbers.
Controlled Establishments	CONTROLLED_ESTABS	Set Up HRMS, Foundation Tables, Organization, Controlled Establishments Sumry, Controlled Establishments	Shows all establishments that have designated the selected Headquarters Unit as their Controlling Establishment.

Creating an Information Profile for a Business Establishment

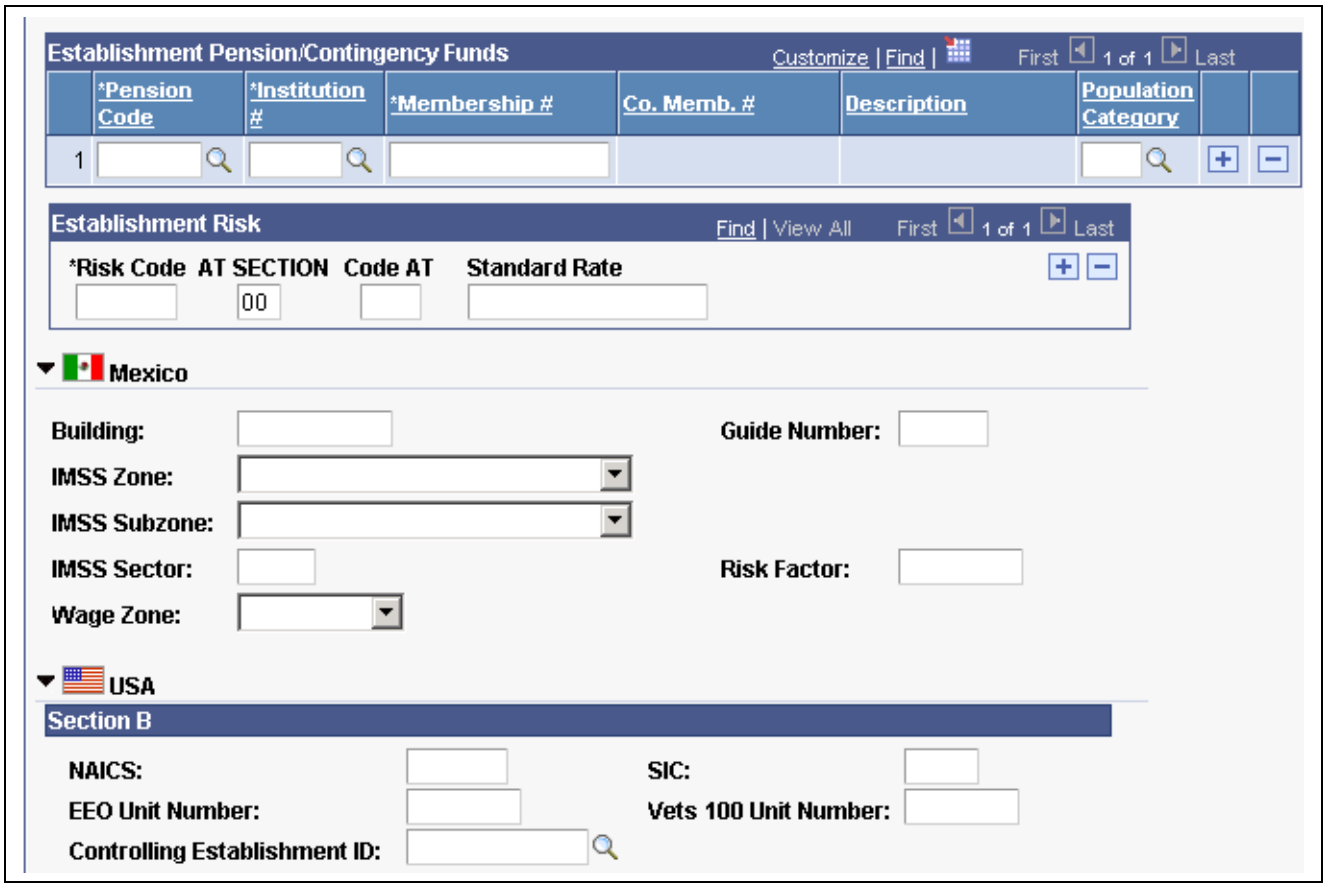
Access the Establishment Address page.



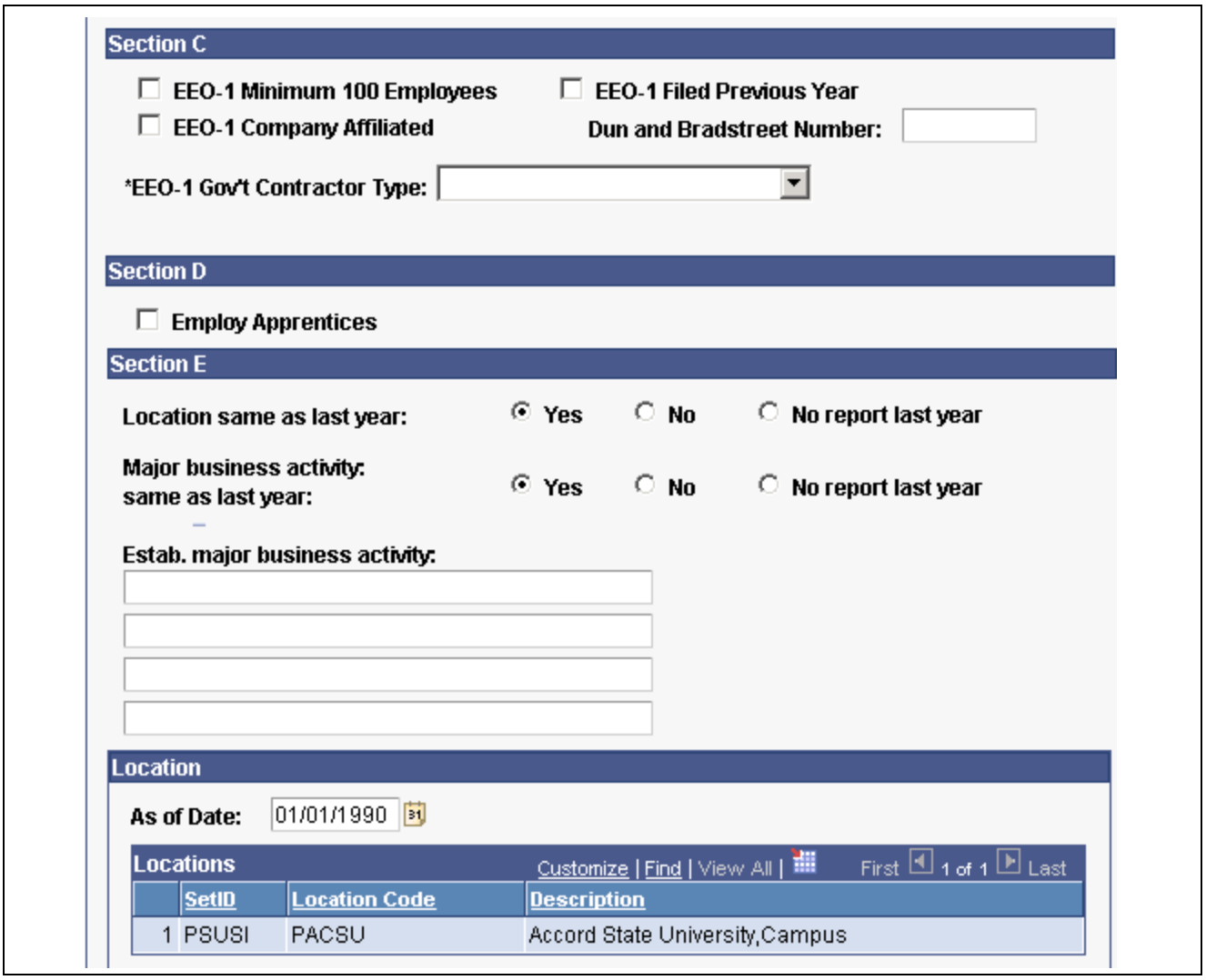
Establishment Address page (1 of 4)



Establishment Address (2 of 4)



Establishment Address page (3 of 4)



Establishment Address page (4 of 4)

Headquarters Unit Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters.

(ESP) Spain

Insurance Company Code Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the Insurance Company page (INSUR_COMP_CD_ESP).

SSN EE Type (social security number employer type) Select the SSN type— *Apprentice* , *Regular* , or *Training* —based on the type of contract you have with your employees.

SSN Employer Enter the social security number as assigned by the Spanish government.

Main SS Nbr. Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.

IA Code (industry activity code) Enter the IA code, which is maintained on the Industry Activity page (INDSTRY_ACT_CD_ESP).

(FRA) France

NIC Code (Numero Interne de Classement code). (Internal Number of Filing) Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise.

Note. The SIRET number (*Systeme Informatique pour le Repertoire des Etablissements,* or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE (*Institut National de la Statistique et des Etudes Economiques*, or National Institute of Statistics and Economics Information). INSEE is an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers and is used by the tax and social security authorities to identify a business enterprise and its entities.

CRAM Fund ID (Caisse Regionale d'Assurance Maladie fund ID) Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM *(Caisse Primaire d'Assurance Maladie)* offices that manage occupational health care coverage.

Counter#/Acct #/RIB Key (counter number/account number/RIB key) Enter the Counter#/Acct #/RIB Key information.

Transport Rate Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Global Payroll uses the transport rate that you enter here.

URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales code) and **URSSAF # (URSSAF number)** Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.

Base Scheme Enter the Social Security code for DADS.

Tax on Salary Liability Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.

Establishment Activity and Medical Organism Select an establishment activity and medical organism. Used for Single Hiring Statement reporting.

Establishment Pension/Contingency Funds

Pension Code and Institution # (institution number) Enter the pension code or the institution number of the pension companies used by this establishment.

Membership # Enter the membership number that the pension company assigned to this establishment when it registered the establishment.

Establishment Risk

Risk Code — Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

AT Section (Section Accident du Travail section) (Work Accident Section) — System-displayed information that you need to identify the risk code by establishment.

Standard Rate — Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Building — Enter the building for your establishment's address.

Guide Number — Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.

IMSS Zone, IMSS Subzone, and **IMSS Sector** — Select the IMSS zone, subzone, and sector for your establishment's location.

The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.

Risk Factor — Enter the risk factor that's used for IMSS tax calculation.

Wage Zone — Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are *A Zone, B Zone,* and *C Zone.*

(USA) USA

Enter information in the following USA-specific sections.

Section B

NAICS (North American Industrial Classification System), **Controlling Establishment ID, SIC** (Standard Industrial Classification), and **Vets 100 Unit Number** — Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

EEO-1 Minimum 100 Employees, EEO-1 Company Affiliated — Select if they apply to this establishment.

EEO-1 Filed Previous Year — Selected by default. If you didn't file an EEO-1 report for this establishment last year, clear this check box.

Section E

Location same as last year Select Yes or No to indicate whether your location is the same as last year, or select No Report if you made no report last year.

Major business activity same as last year Select Yes or No to indicate whether your business activity is the same as last year; or, select No Report if you made no report last year.

Estab. major business activity (establishment's major business activity) Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Locations

As of Date Select a date to view which locations are associated with this establishment at a certain point in time.

Location SetID, Location Code, and**Description** View the location codes associated with this establishment on the Location Profile page.

Go to Locations Click to access the Location component. The system will open the component with the same action you are in on the Establishments component.

When you save or cancel your changes on the Locations component, the system returns you to the Establishment component.

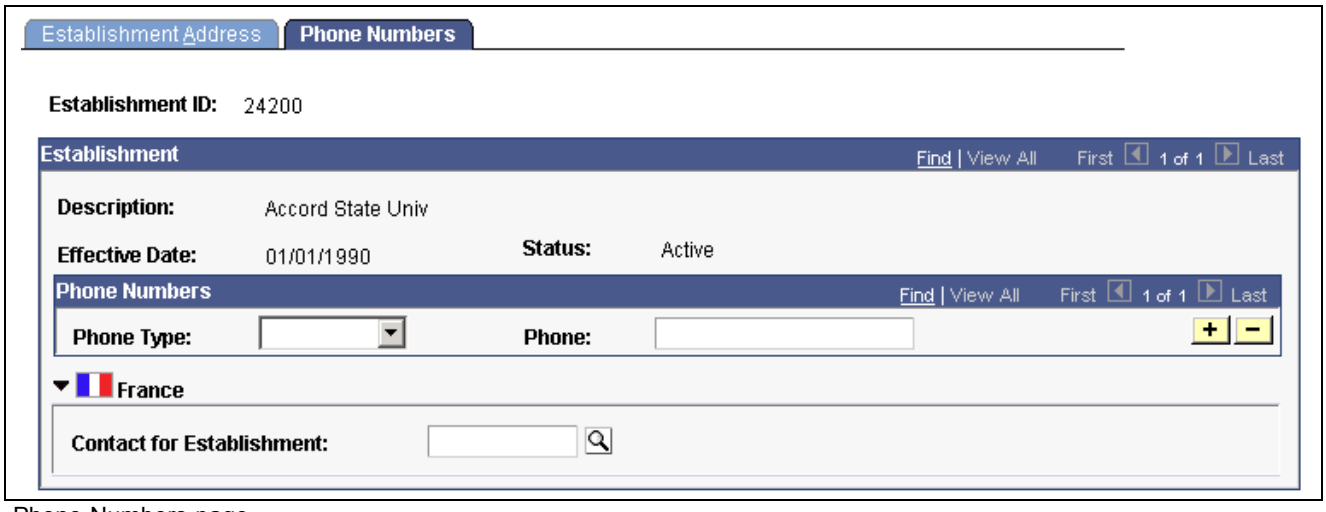
See Also

Chapter 12, "Setting Up Organization Foundation Tables," Establishing Locations, page 265

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Setting Up Establishment Phone Numbers

Access the Phone Numbers page.



Phone Numbers page

Phone Type and **Phone** Enter phone information for this establishment.

(FRA) France

Contact for Establishment Select the contact for this establishment.

Establishing Locations

To establish locations, use the Location component (LOCATION_TABLE) and the Location Table Report component (RUN_PER705). Use the LOCATION_TABLE component interface to load data into the tables for the Location component.

This section provides an overview of locations and discusses how to:

- Enter company locations.
- Set up a location profile.

Understanding Locations

Use the Locations component to establish physical locations in your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Global Payroll, you may want to report certain information by location, so consider this when planning your implementation of this information.

If you use PeopleSoft Pension Administration, you can create one or more locations specifically for pension payees. You can use a single *retiree location* for all retirees if you don't need to report on your payees based on more specific location information.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to locations.

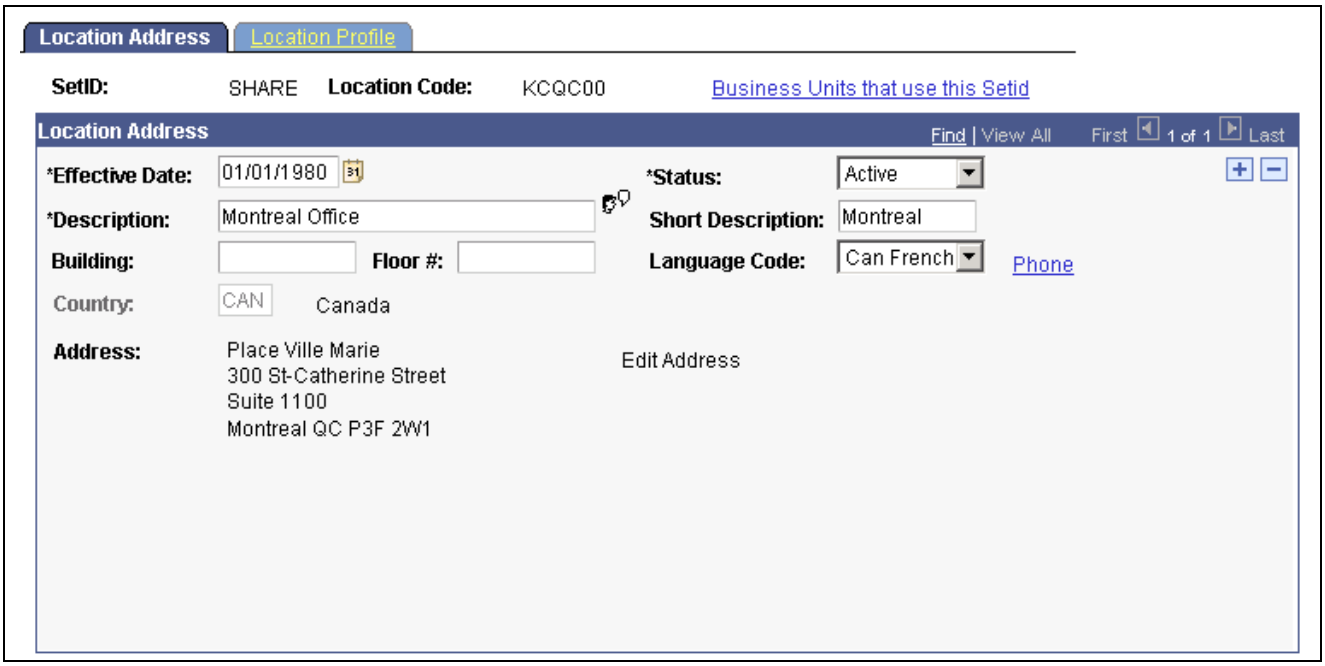
Note. (USA) To support AAP reporting, when you select a regulatory region with a country value of USA on the Location Profile page, the system enables you to establish a many to many relationship between locations and establishments. Set up the relationship on the Location Profile page in the USA section of the page. Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Location Address	LOCATION_TABLE1	Set Up HRMS, Foundation Tables, Organization, Locations, Location Address	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Business Units by Location	LOC_BU_SEC	Click the Business Units that use this SetID link on the Location Address page.	View a list of the business units that use this setID.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter phone numbers for the location addresses.
Location Profile	LOCATION_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Locations, Location Profile	Specify a salary administration plan for the location, as well as tax, establishments and local country information.
Location Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Location Table Report	Run the Location Table report (PER705). This report lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).

Entering Company Locations

Access the Location Address page.



Location Address page

Building Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.

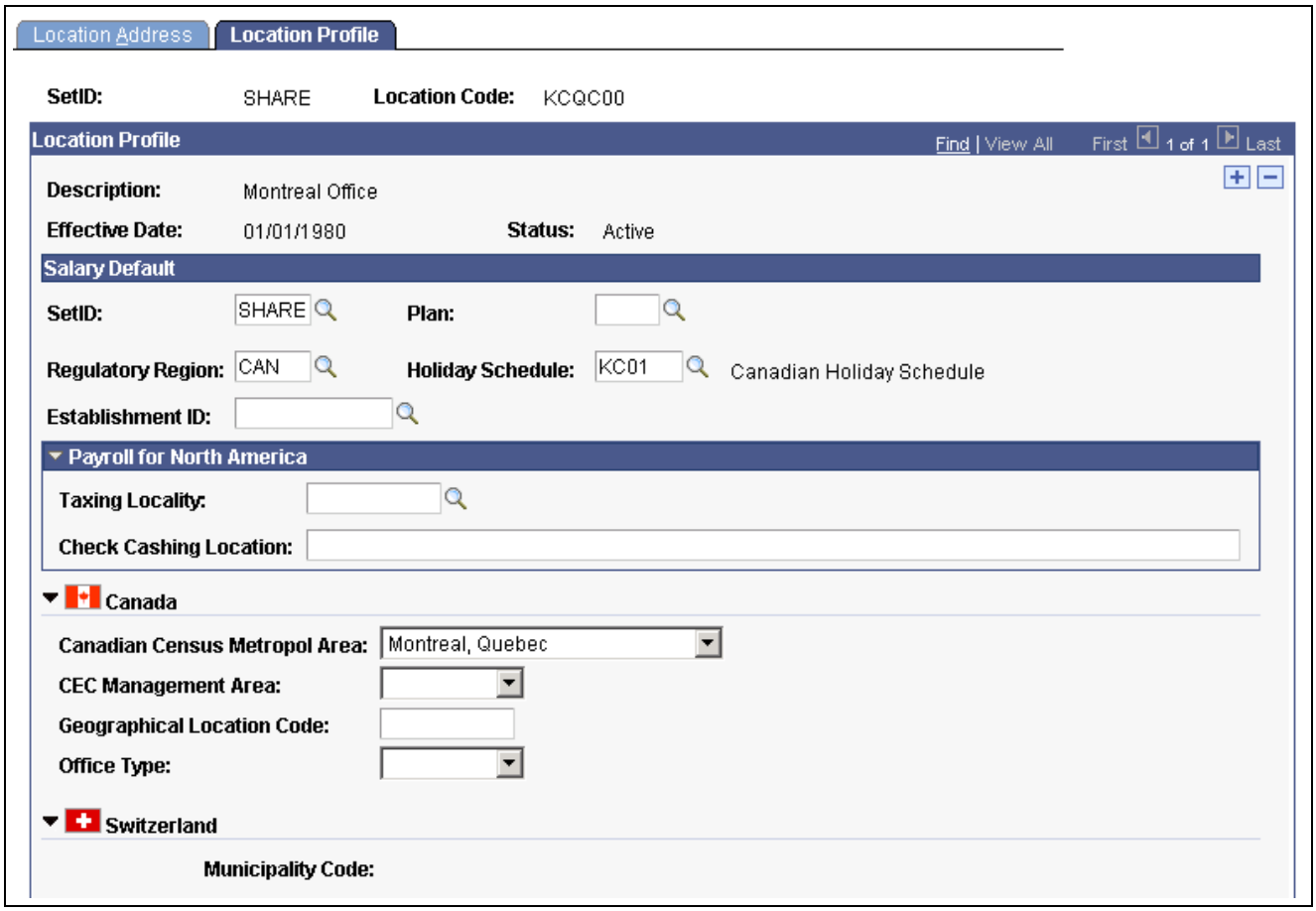
Floor # (floor number) Enter the floor number, if applicable.

Language Code Select the code for the official language used at this location.

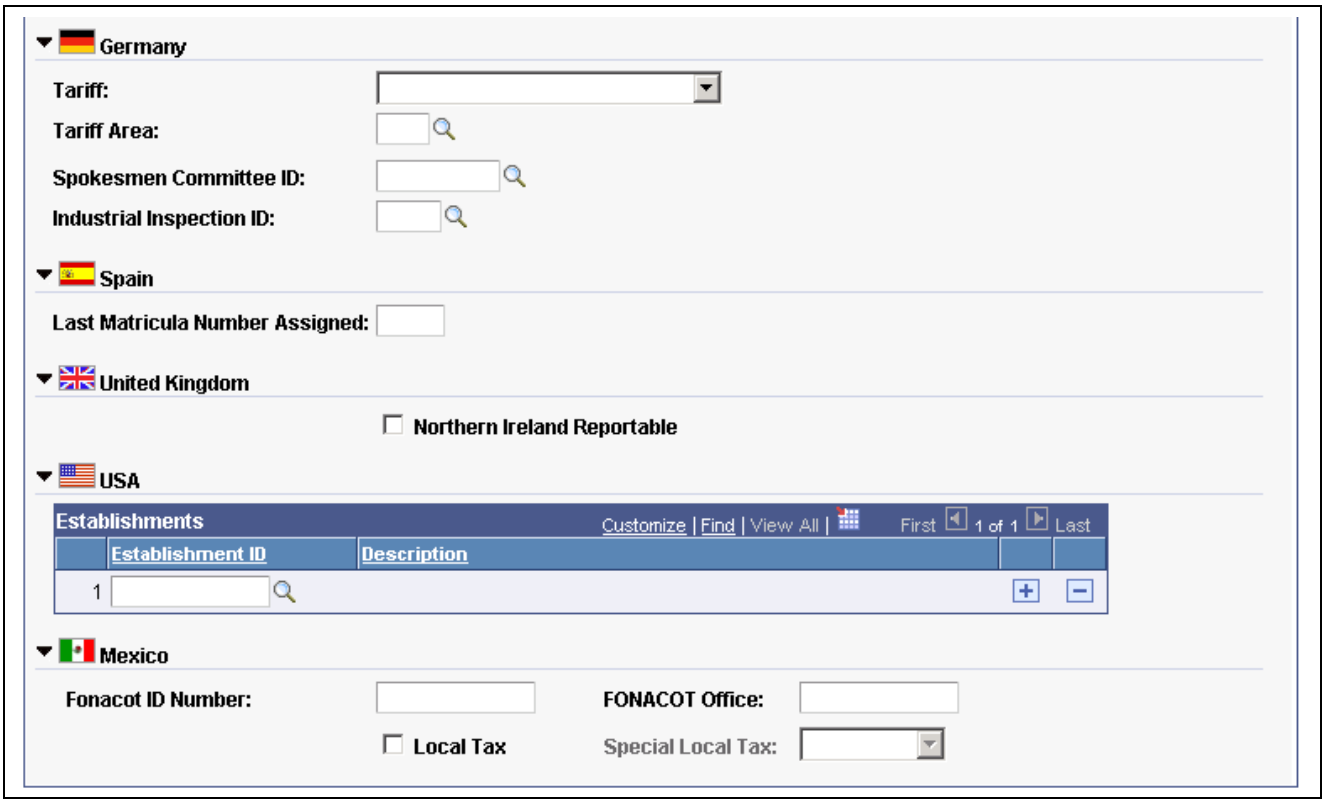
Phone Click this link to enter phone numbers.

Setting Up a Location Profile

Access the Location Profile page.



Location Profile page (1 of 2)



Location Profile page (2 of 2)

You enter U.S. tax information for Canadian and German locations on this page.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information, and PeopleSoft Pension Administration references the PeopleSoft Payroll for North America tax information. For more information about the relationship between the Locations component and the Tax Location Table in PeopleSoft Payroll for North America, see the PeopleSoft Payroll for North America documentation.

Plan

Select a salary administration plan from the values that you created on the Define Salary Plan component.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

Tying a salary administration plan for a location helps you distinguish currency and cost-of-living differences for workers with the same job code. If you don't need to distinguish salary administration plans by location, leave this field blank.

Note. Select only the plans that are associated with the setID that you selected on the Define Salary Plan component. If you select a salary administration plan on this page, the system uses that plan as the default value on the Job Data pages for the people in this location. Otherwise, it uses the salary administration plan that you enter on the Job Code Table.

See Chapter 14, "Setting Up Jobs," Classifying Jobs, page 312.

Regulatory Region

Enter the regulatory region that is associated with this location.

Note. (USA) If you select a regulatory region with a country value of USA, the system will hide the Estab ID field. To associate establishments with this location, use the Establishments fields in the USA section of this page.

Holiday Schedule Select a holiday schedule for this location.

Note. If you use PeopleSoft Payroll for North America, the holiday schedule you select here is the default holiday schedule assigned to workers on the Job Data – Payroll page (JOB_DATA2). If you leave this field blank, the default holiday schedule comes from the Pay Group component.

If you use PeopleSoft Global Payroll, the holiday schedule on this page is for informational purposes only; assigned pay groups control the default holiday schedule for processing.

See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 225.

Establishment ID Select an establishment ID to associate with this location.

Note. (USA) If you select a Reg Region value with a country value of USA, the system hides this field. Set up establishments for U.S. locations in the USA section of this page.

Payroll for North America

Taxing Locality and **Check Cashing Location** Select a taxing locality and check cashing location. This field is for information only.

(CAN) Canada

Canadian Census Metropol Area (Canadian Census Metropolitan Area) The system displays the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada according to the address information that you entered in Location Address page (you can override this information). CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.

CEC Management Area (Canada Employment Center Management Area) Select from the list of options.

Geographical Location Code Enter the geographic location code as defined by Statistics Canada.

Note. (CAN) If the Official Languages Act applies to your organization, use the information in the Geographic Location Code, Office Type, TBS Office Code, and National Capital Region fields as part of the Official Languages reports (PER102CN and PER108CN) that you submit to the Canadian government.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada".

(CHE) Switzerland

Municipality Code The default value is the municipality code that corresponds to the postal code of the location address. You can select a different code from the list of valid municipality codes for the canton that this location is in.

(GER) Germany

Tariff Enter the *tariff,* or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.

Industrial Inspection ID Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

Note. When you enter a person's location on the Job Data pages, the Tariff and Tariff Area values appear by default from the Locations component, based on the values that you entered on this component for the location.

When you enter a person's location and labor type on the Job Data pages, the system populates the Spokesman Committee ID and Works Council ID fields. These values are based on the person's location in the Work Location page (JOB_DATA1) and the value of the Labor Type (*Management* or *Non-Management)* in the Job Labor page (JOB_LABOR).

(ESP) Spain

Last Matricula Number Assigned The Spanish government requires employers to assign each people a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

(GBR) United Kingdom

Northern Ireland Reportable Select if this is a Northern Ireland reportable location. Indicates that people in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

USA

Establishments Select one or more establishment IDs for this location.

Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations.

Only establishments with an effective date as of the location's effective date are available.

Assign locations and establishments to people on the Job Data - Work Location page. The system will only enable you to select an establishment associated with the location you select.

Note. If an establishment's Description is blank, the establishment has become inactive since you initially assigned it to this location.

Note. You can view the locations associated with an establishment on the Establishment Address page.

(MEX) Mexico

Fonacot ID Number Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.

FONACOT Office Identify the nearest FONACOT office for your location.

Tax Local Select the Tax Local check box if the location of the state is Chihuahua.

Tax local Special If the location of the state is Chihuahua, the Tax Local Special field will default to Ciudad Juarez.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

(USF) Establishing Federal Locations

To establish Federal locations, use the Locality Pay Are USF component (GVT_LOCPAY_AREA_TB), the Geographic Location component (GVT_LOCATION_TBL), the Location USF component (LOCATION_TABLE), the Work Location Table component (RUN_FGPER817), the Geographic Location component (RUN_FGPER802), and the Locality Pay Area Rpt USF (RUN_FGPER807).

This section provides an overview of federal locations and discusses how to:

- Define regions for people who receive additional pay.
- Define geographic locations.
- Add work locations.

Understanding Federal Locations

Use the Locations USF component to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth.

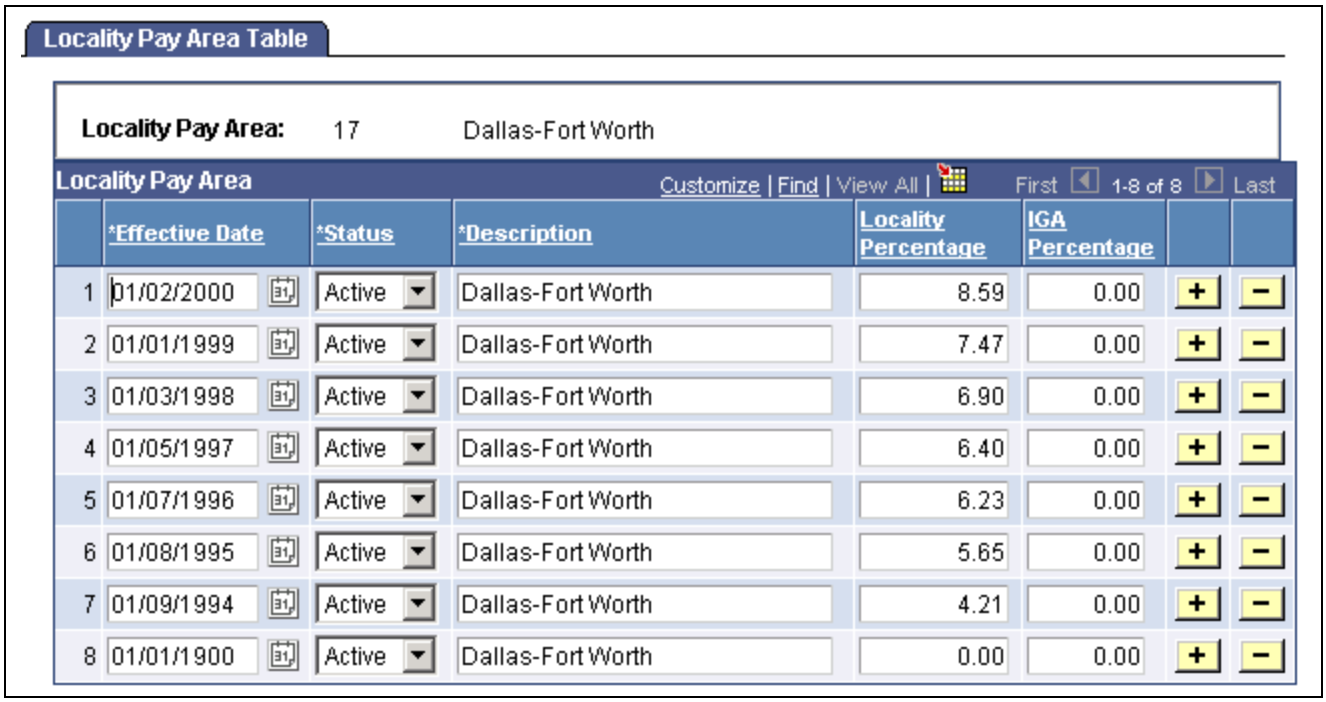
Various pages in PeopleSoft Human Resources reference the information that you define in the Locations USF component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to specific locations.

(USF) Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Locality Pay Area Table	GVT_LOCAREA_TABLE	Set Up HRMS, Product Specific, Compensation, Locality Pay Area USF, Locality Pay Area Table	Define the regions where federal workers receive additional pay above their base pay.
Geographic Location	GVT_LOCATION	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Geographic Location, Geographic Location	Define geographic locations.
Location Address	GVT_LOC_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location USF, Location Address	Add work locations.
Run Control	PRCSRUNCNTL	• Set Up HRMS, Product Specific, Workforce Administration, Workforce Reports USF, Work Location Table • Set Up HRMS, Product Specific, Workforce Administration, Workforce Reports USF, Geographic Location • Set Up HRMS, Product Specific, Compensation, Locality Pay Area Rpt USF	Use this page to run these reports: • Work Location Table report (FGPER817) prints a detailing of the Work Location Table. • Geographic Location Table report (FGPER802) produces a detailing of the Geographic Location Table. • Locality Pay Area Table report (FGPER807) prints information for every Locality Pay Area.

Defining Regions for Employees Who Receive Additional Pay

Access the Locality Pay Area Table page.



Locality Pay Area Table page

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Effective Date The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.

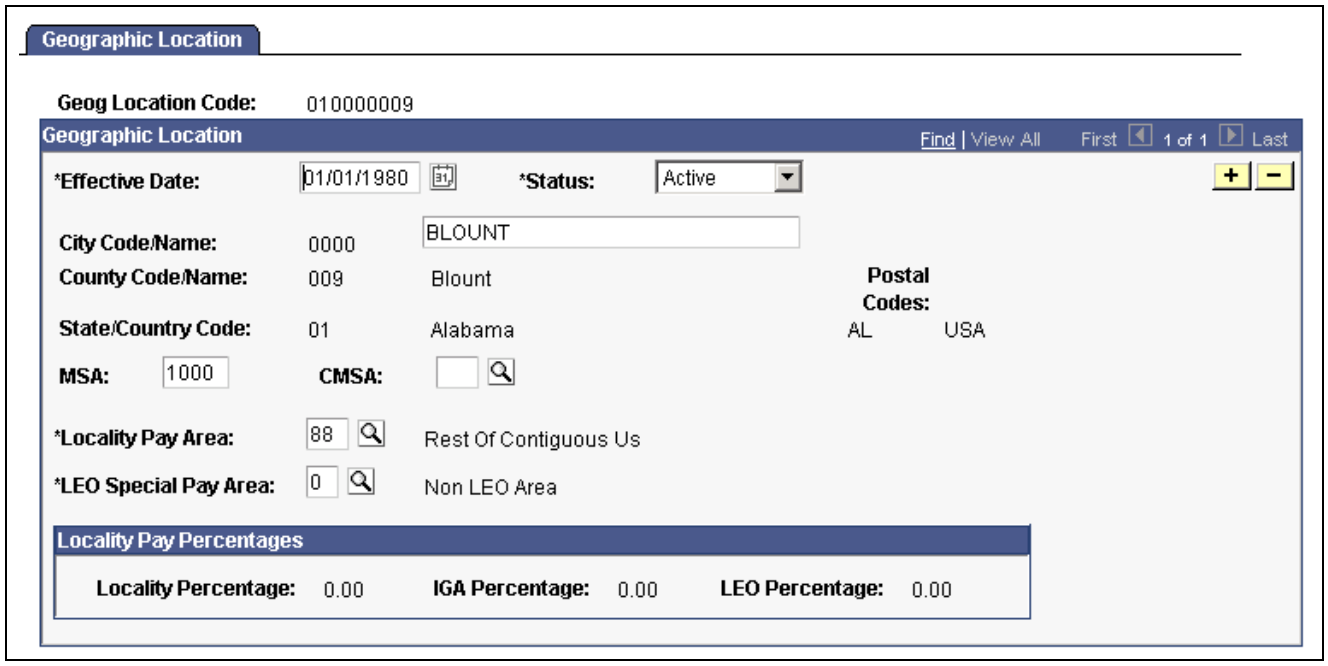
Status Select a status.

Note. Add data rows and use the scroll bar, the Effective Date field, and the Status field to maintain history data for information that changes over time. For example, to retire a Locality Pay Area, insert an effective-dated row with a status of *Inactive.*

Locality Percentage Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the person's Compensation page (JOB_DATA3) in Administer Workforce.

Defining Geographic Locations

Access the Geographic Location page.



Geographic Location page

City Code/Name The system assigns a city code. Enter the city name.

Locality Pay Area and LEO Special Pay Area (law enforcement officer special pay area) Select from the list.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

Adding Work Locations

Access the Location Address page.

Building Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.

Geoloc Cd (geographic location code) Select the geographical location code.

Designated Agt (designated agent) Select the designated agent code.

Country Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.

Setting Up Company Locations

To set up company locations, use the Company Location component (COMP_LOC_TBL).

This section discusses how to establish company locations.

Pages Used to Set Up Company Locations

Page Name	Object Name	Navigation	Usage
Company Location Table	COMP_LOC_TBL	Set Up HRMS, Foundation Tables, Organization, Company Location, Company Location Table	Associate Works Council IDs with companies and locations.

Establishing Company Locations

Access the Company Location Table page.



Company Location Table page

Works Council ID Select the ID of the Works Council representing workers at this company and location.

(GER) Germany

Spokesmen Committee ID Select the works council Spokesmen Committee ID.

Social Insurance ID Select a Social Insurance ID.

Maintaining Departments

To maintain departments, use the Departments component (DEPARTMENT_TBL) and the Department Table Report component (RUN_PER701). Use the DEPARTMENT_TBL component interface to load data into the tables for this component.

This section provides an overview of departments and discusses how to:

- Define basic information about a department.
- Enable and control department information for specified customers.

Understanding Departments

After you define company and location data for your enterprise, use the Departments component to define business entities in your organization. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll, you must set up department codes according to your cost centers where you charge wages. If you use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

PeopleSoft Human Resources offers two ways to access the Departments component to define and view departments:

- From the Set Up HRMS menu.
- From PeopleSoft Tree Manager.

This section discusses how to use the Departments component from within the Set Up HRMS menu.

Using Departments for Data Permission Security

PeopleSoft enables you to create a security hierarchy using PeopleSoft Tree Manager and use it to grant or deny users to person data, based on the department a person belongs to. If you decide to use a Department Security tree to control data access, you must attach each department you create, whether from the Set Up HRMS menu or Tree Manager, to an effective Department Security Tree.

PeopleSoft HRMS also enables you to use other fields for data permission security.

See Also

Chapter 6, "Setting Up and Administering HRMS Security," page 57

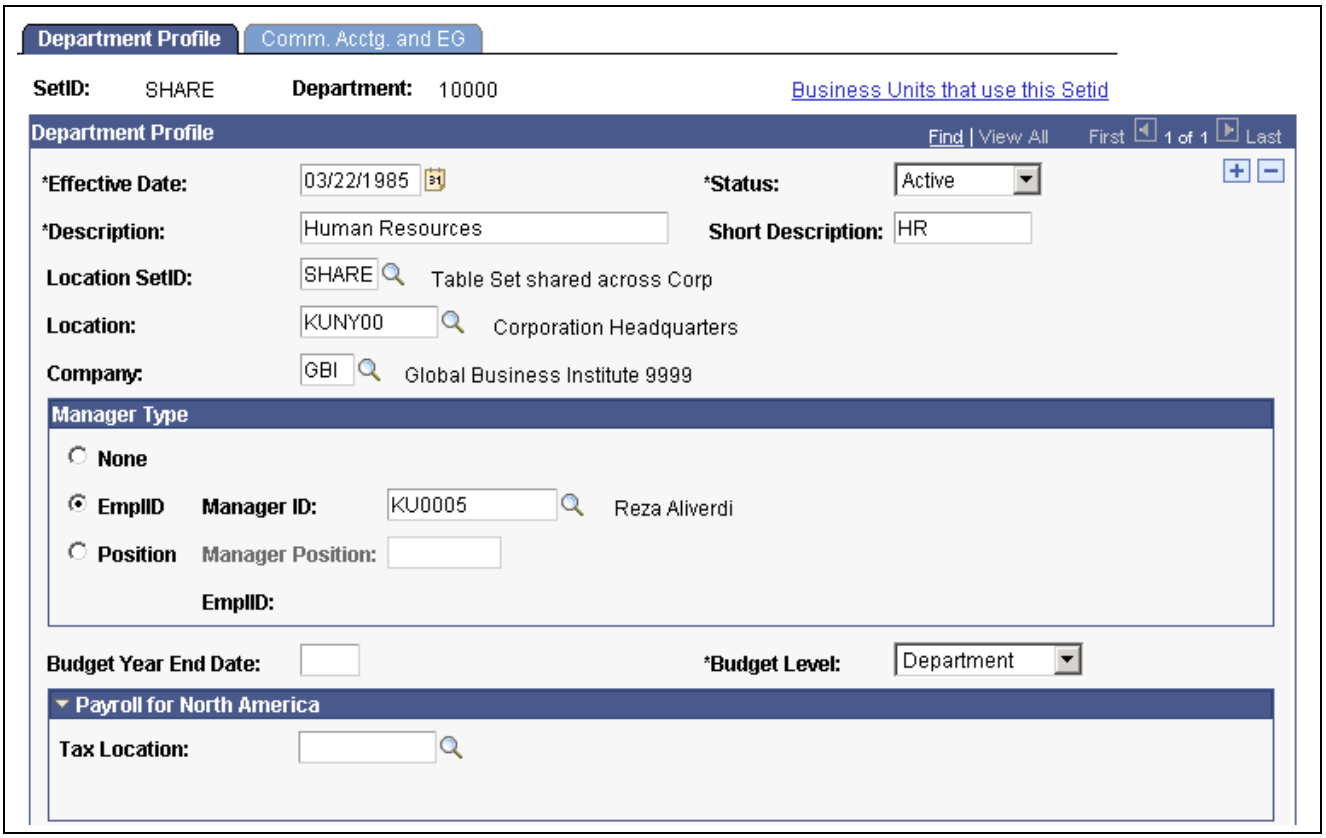
Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Maintain and Report on Departments

Page Name	Object Name	Navigation	Usage
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments, Department Profile	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	Set Up HRMS, Foundation Tables, Organization, Departments, Comm. Acctg. and EG	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.
Department Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Department Table Report	Use this page to run the Department Table report (PER701) that lists all departments by Department ID.

Defining Basic Information About a Department

Access the Department Profile page.



Department Profile page (1 of 3)



Department Profile page (2 of 3)



Department Profile page (3 of 3)

Effective Date If you add a new department to the Departments component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Description For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.

Location To associate a department with a physical location, select the location. Maintain these values in the Locations component.

Company Indicate the company to which this department belongs. The system uses the Company field value as the default company location on the job records for all people associated with this department. If you add a person to this department, the system assumes that they are also with the designated company. If you don't enter a company here, you can enter it on the Job Data pages. If you do enter a company here, you can't change it on the Job Data pages.

Note. If yours is a multicompany environment and you want more than one company to share the department, leave the *Company* field blank.

Manager Type

If you are not specifying managers for departments, select *None.* If you are specifying managers, indicated if the manager is a person (*EmplID*) or a position (*Position*). If you use partial position management, where you use positions for only a portion of your organization, select whichever option is appropriate for this department.

Manager ID If you selected *EmplID*, the system makes this field available for you to select the ID of the manager. The manager ID that you select becomes the default supervisor ID on the Job records of all people who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position If you selected *Position*, and you have created positions for this department, select a Manager Position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data.

The system displays the name and EmplID of the current position incumbent in the EmplID field.

Note. The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.

Budget Year End Date If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.

Budget Level Select *Department, Job Code, Line Item, Position Number,* or *None* to define budgeting for this department.

Payroll for North America

Tax Location Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution pages (TAX_DISTRIBUTION or TAX_DIST_CAN) of employees of this department. You can override this information for individual employees.

(BEL) Belgium

Industrial Committee Select the industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Canadian Industrial Sector Select the code that identifies the sector with which people in this department are associated for Canadian employment equity reporting purposes.

Stats-Can-Dept Code (Statistics Canada department code)
Enter a 3-character code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Stats-Can Faculty Code (Statistics Canada faculty code)
Select a code to associate a faculty with a department. Faculty codes are set up in the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Faculty Events*, "(CAN) Working with the Statistics Canada Academic Teaching Surveys Process".

(GER) Germany

Tax Location Code
Select a code.

Note. For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Note. The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

(FRA) France

Establishment ID
Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund.

This field is required for Global Payroll for France. The system will default this value into a worker's Job record when you use PeopleSoft Human Resources: Manage Positions.

Risk Code
Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.

(USA) USA

U.S. EEO4 Function (United States Equal Employment Opportunity 04 function)
Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand

Classification Unit
Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident

Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(AUS) Australia

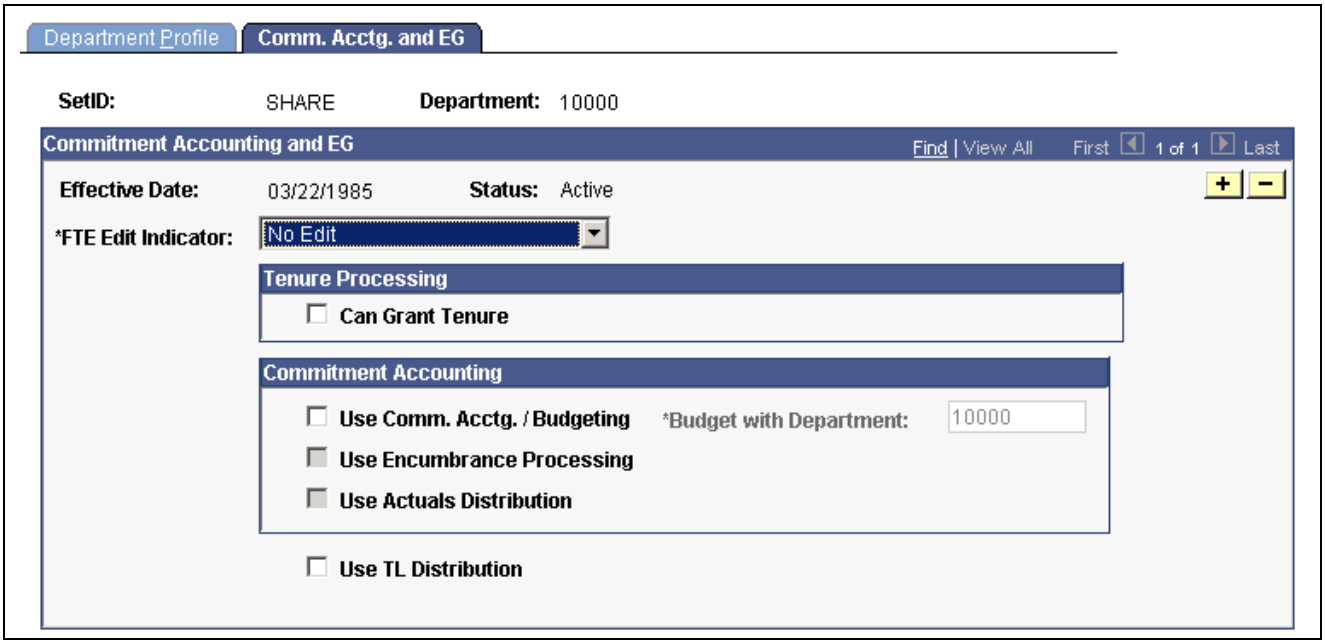
These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

Organizational Unit Enter the appropriate Higher Education organizational unit code.

Agency Code Enter the four-digit Australian Public Service code for this department.

Enabling and Controlling Department Information for Specified Customers

Access the Comm. Acctg. and EG page.



Comm. Acctg. and EG page

FTE Edit Indicator (full-time equivalency edit indicator) Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select *No Edit*.

Tenure Processing

Can Grant Tenure Select to be able to grant tenure to qualified people in this department.

Commitment Accounting

Use Comm. Acctg. / Budgeting? Select if you use Commitment Accounting processing for this department. When you select this check box, the Use Encumbrance Processing? and Use Actuals Distribution? check boxes become available for entry and are selected by default.

Use Encumbrance Processing? Select if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution? Select if you use Commitment Accounting's Actuals Distribution process for this department.

Budget with Department An accumulated budget for a group of departments rolls up to the department that you enter.

The department that you enter must be in the same SetID as the department that you are defining, and it must be higher on the security tree. For example, if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same SetID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005.

See Chapter 6, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 96.

Use TL Distribution? Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers.

If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Setting Up Tenure Tracking

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Commitment Accounting, "Defining Fiscal Year Budgets"

Running an SQR Audit to Cross-Check Departments

When you add new departments to the Departments component, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the Departments component but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Departments component. The latter situation can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator.

(USF) Setting Up Federal Departments

To set up Federal departments, use the Departments USF component (DEPARTMENT_TBL).

This section discusses how to:

- Set up departments.
- Run an SQR audit to cross-check departments.

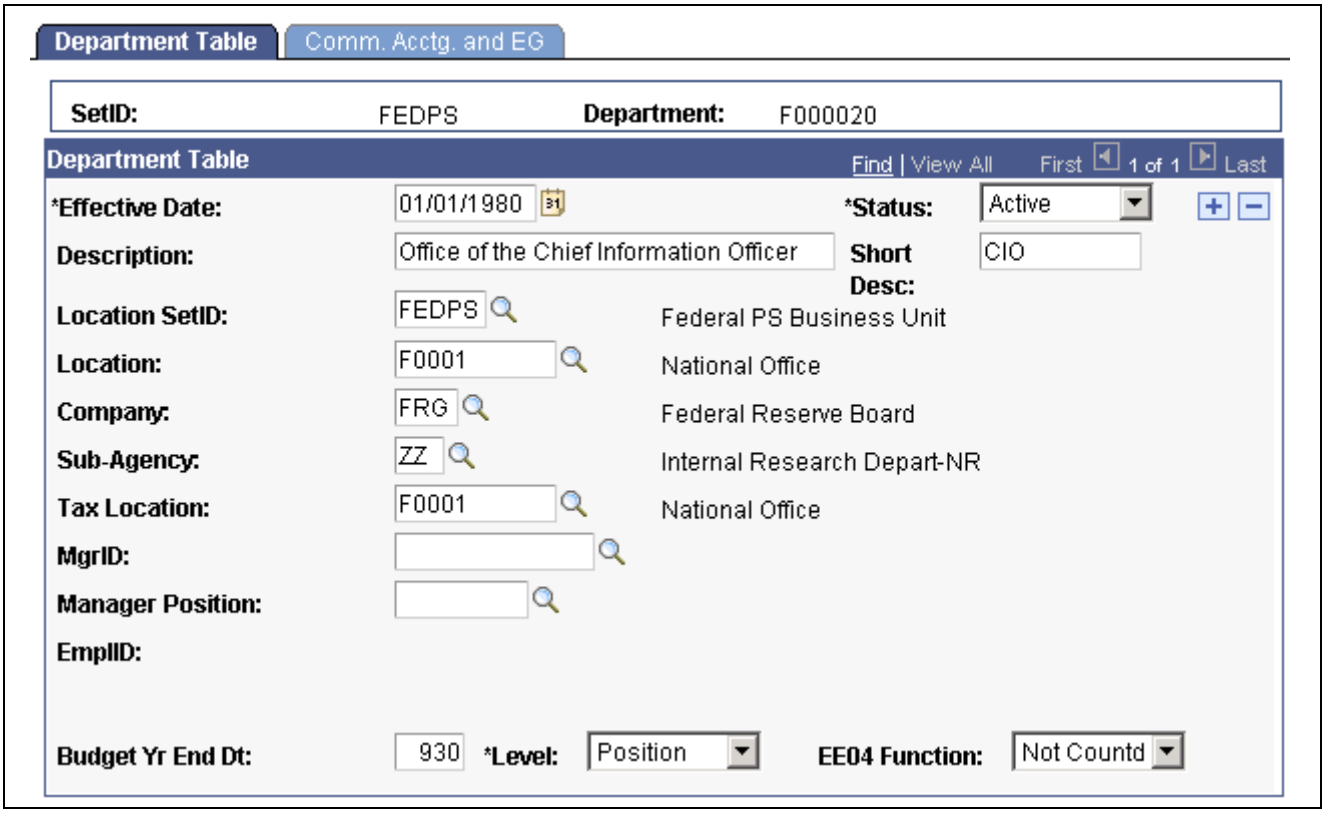
Page Used to Set Up Federal Departments

Note. The Department Profile and Comm. Acctg. and EG pages in the Departments USF component are identical to those in the Departments component and share the same object names.

Page Name	Object Name	Navigation	Usage
Department Table	GVT_DEPART_TBL_USA	Set Up HRMS, Foundation Tables, Organization, Departments USF, Department Table	Set up departments.

Setting Up Departments

Access the Department Table page.



Department Table page

Effective Date

Important! If you add a new department to this Departments USF component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Sub-Agency

Select the sub-agency to which this department belongs.

Note. The system uses the Company and Sub-Agency fields as the default agency/sub-agency location on the Job records for all people who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.

Manager ID The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position.

Note. You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.

If you use partial position management, where you use positions for only a portion of your organization, you can use either the Manager ID number or the Manager Position number. When you select either field, the system disables the remaining field.

Budget Year End Date If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.

Level Select *Department, Job Code, Line Item, Position Number,* or *None* to define budgeting for this department.

EEO4 Function Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission list preferences and discusses how to:

- Set tableset sharing defaults.
- Set payroll system defaults.

Understanding Primary Permission List Preferences

You use the Org Defaults by Permission Lst component to set predefined TableSet sharing and system-wide defaults and settings for each of your primary permission lists. Primary permission lists are assigned to the user on the User Profile - General page (USER_GENERAL). The system will default in the values you indicate for a particular permission list on the Org Defautls by Permission Lst component, such as Business Unit, SetID, Currency, Country, and/or Company Code when a user who is associated with that permission list logs in to PeopleSoft HRMS. Primary permission lists also control user access to country functionality, as determined on the Global Panels page (SCRTY_TBL_GBL)).

See Also

Chapter 6, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 131

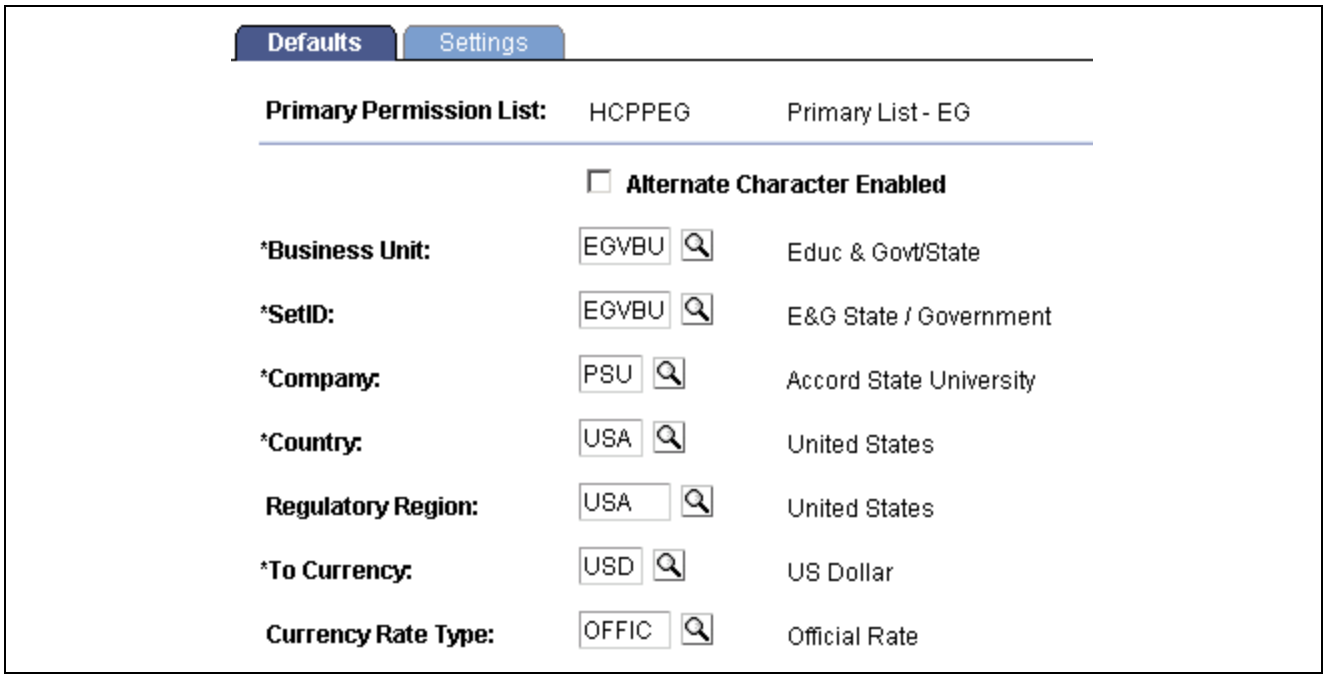
Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"

Pages Used to Set Defaults for Permission Lists

Page Name	Object Name	Navigation	Usage
Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Defaults	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Settings	Set Payroll System and system-wide defaults for each of your permission lists.

Setting TableSet Sharing Defaults

Access the Defaults page.



Defaults page

You can tailor your PeopleSoft HRMS system for each of your users, controlling the default values that users see on pages in the system.

Note. The TableSet Record - Group Control page regulates what users see on the prompt tables in PeopleSoft HRMS. These defaults override the defaults that you set for these options on the Installation Table for this permission list.

Alternate Character Enabled Select to enable alternate character searching for this permission list.

Warning! The SetID field value that you select affects the business unit and SetID defaults for this permission list throughout your PeopleSoft HRMS system.

See Also

Chapter 9, “Setting Up and Working with Languages,” Working with Double-Byte Characters, page 190

Chapter 2, “Understanding HRMS,” Business Units, Tablesets and SetIDs, page 6

Chapter 7, “Setting Up and Installing PeopleSoft HRMS,” Administering Country Codes, page 152

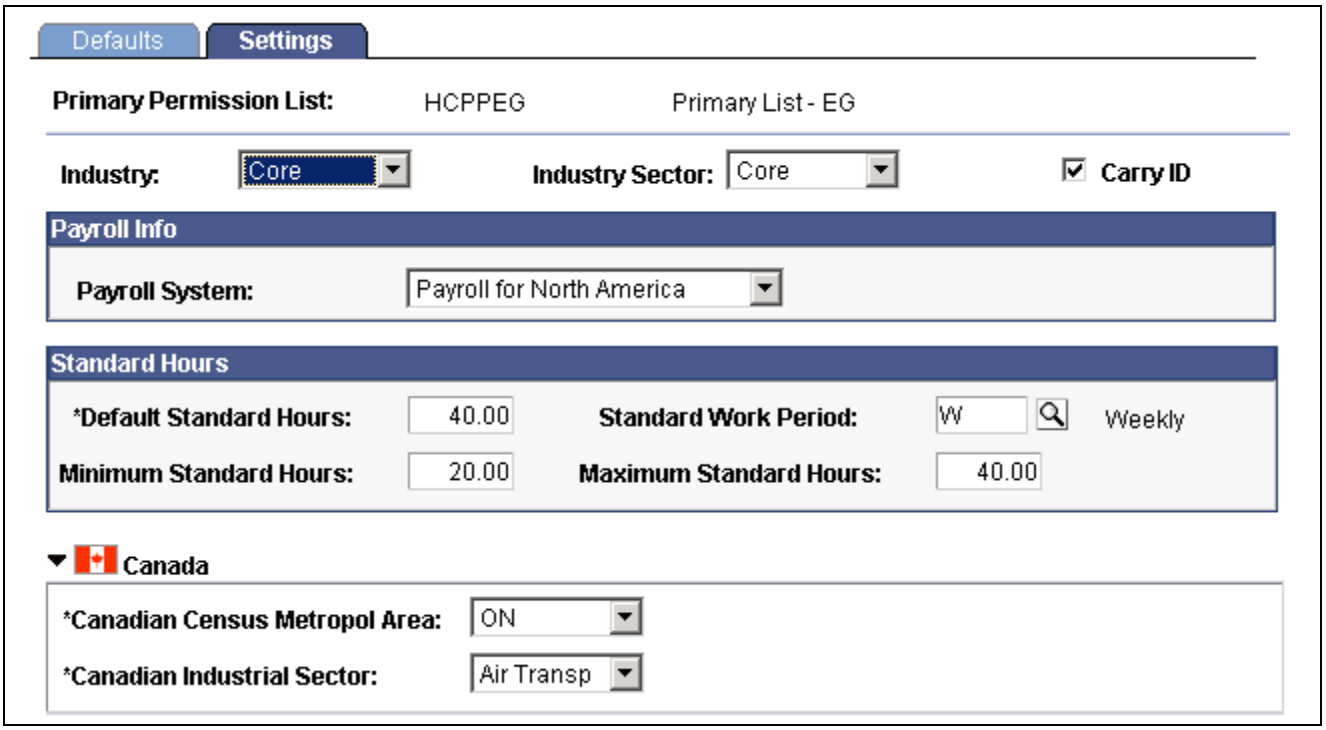
Chapter 5, “Working with Regulatory Regions,” Associating a Regulatory Region with a Transaction, page 49

Chapter 10, “Setting Up and Working with Currencies,” page 197

Enterprise PeopleTools PeopleBook: Security Administration, “Setting Up Permission Lists”

Setting Payroll System Defaults

Access the Settings page.



Settings page

You can tailor your PeopleSoft HRMS system for each permission list, thus controlling the default values that users see on the system pages.

Industry Select *Government* if this is a U.S. federal government database. The default value is *Core* .

Industry Sector Select *US Federal* if this is a U.S. federal government database. The default value is *Core* .

Carry ID Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

Note. You must select an Industry of *Government* and an *Industry Sector* of *US Federal* to fully use U.S. federal government functionality in your database. In addition, you need to select Federal on the Installation Table - Products page (ISTALLATION_TBL1).

Specifying a Default Payroll System

Payroll System Select the default payroll system. When you select a payroll system on a table or page in PeopleSoft HRMS, the system displays *North American*, *Global*, or neither one based on the choice you enter here for this permission list. The user can override this default, as necessary.

Setting Default Standard Hours

Default Standard Hours The default is *40* hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.

Standard Work Period Select a standard work period. The standard work period is the time period in which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).

Minimum Standard Hours and **Maximum Standard Hours** Enter the default minimum and maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(CAN) Canada

Canadian Census Metropol Area (Canadian census metropolitan area) Select from the metropolitan areas defined on the Translate table.

Canadian Industrial Sector Select from the list of values on the Translate table.

Note. (CAN) These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada".

See Also

Chapter 7, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 135

CHAPTER 13

Setting Up Personal Information Foundation Tables

This chapter discusses how to:

- Define citizen status codes.
- Define national ID types.
- Set up additional name information.
- Define address types.

Defining Citizen Status Codes

To define citizen status codes, use the Citizen Status component (CITIZEN_STATUS).

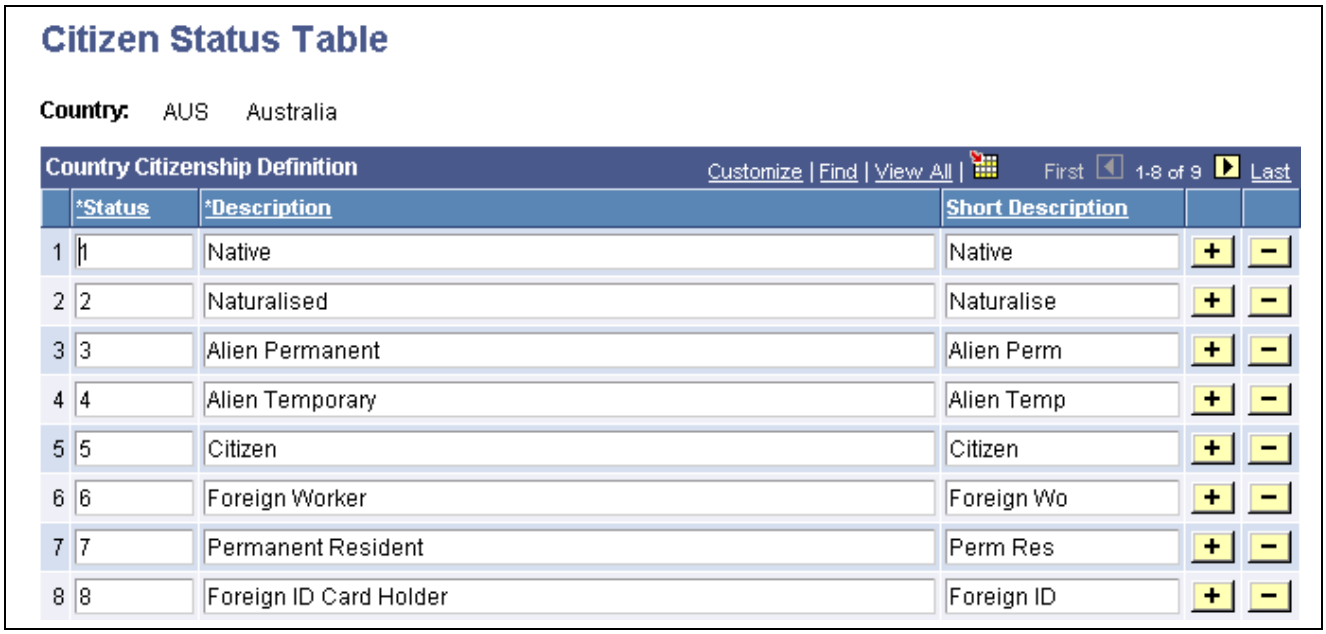
This section discusses how to define citizenship statuses.

Page Used to Define Citizenship Statuses

Page Name	Object Name	Navigation	Usage
Citizen Status Table	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status, Citizen Status Table	Define the citizenship statuses you'll need to track for various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Defining Citizenship Statuses

Access the Citizen Status Table page.



Citizen Status Table page

Country The system displays the country code you entered to access the page. Define citizenship status codes for this country.

Status Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Defining National ID Types

To define national ID types, use the National ID Type component (NID_TYPE_TABLE).

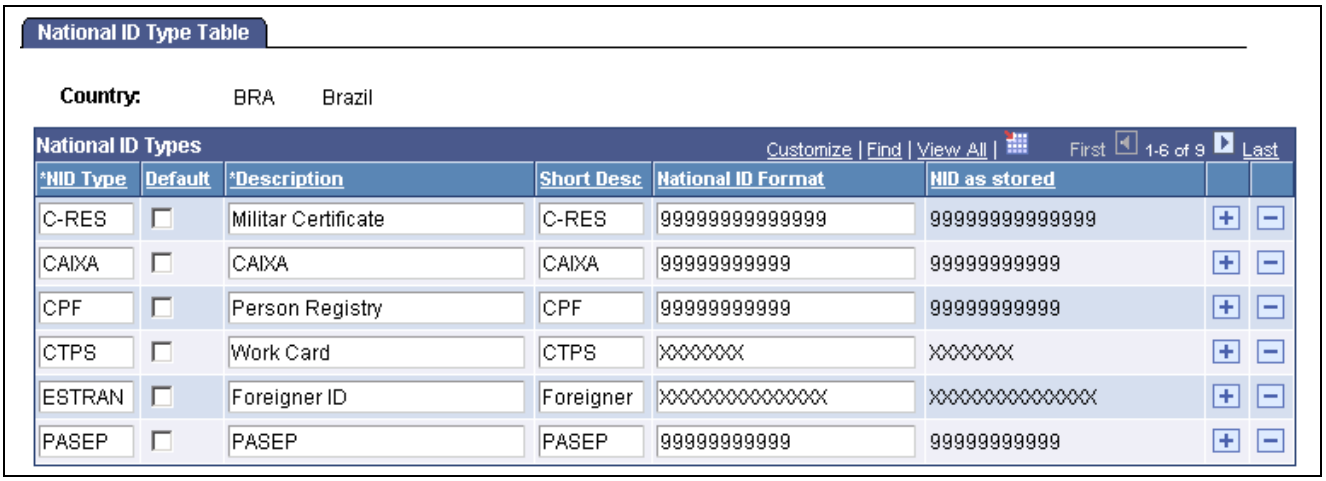
This section discusses how to assign a national ID type to a country code.

Page Used to Define National ID Type

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type, NID Type Table	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when a person or applicant ID is unavailable.

Assigning a National ID Type to a Country Code

Access the National ID Type Table page.



National ID Type Table

Country: BRA Brazil

National ID Types — Customize | Find | View All | First 1-6 of 9 Last

*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored
C-RES	☐	Militar Certificate	C-RES	99999999999999	99999999999999
CAIXA	☐	CAIXA	CAIXA	99999999999	99999999999
CPF	☐	Person Registry	CPF	99999999999	99999999999
CTPS	☐	Work Card	CTPS	XXXXXXX	XXXXXXX
ESTRAN	☐	Foreigner ID	Foreigner	XXXXXXXXXXXXX	XXXXXXXXXXXXX
PASEP	☐	PASEP	PASEP	99999999999	99999999999

National ID Type Table page

All countries track some form of national ID for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance number, UK workers have a National Insurance number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

When you select a country code on any global page where you are entering a national ID, the system refers to the information defined on this page to enter a default national ID type (if selected) or to ensure that you select a valid one. The system also validates the national ID you enter against the format you specify here. If you don't enter the correct number of digits or letters for a country's national ID, the system displays a warning message.

For example, when you enter national ID information for a new American person on the Biographical Details page the system uses the information set up on the National ID Type Table page to determine the valid national ID types for USA and enters PR as the default. It will validate the data you enter to make sure it matches the specific value types you set up for the National ID Type Format and format the data entered, if necessary. In this example, the system will reformat an entry of 999999999 to 999–99–9999.

Note. Application pages containing the National ID field perform an additional system check to determine the proper display by referring to the User Defined File (UDF) format. Specify these formats in PeopleSoft Application Designer.

Note. PeopleSoft delivers the National ID Type Table with the proper types for BEL, CAN, CHE, ESP, FRA, GBR, GER, ITA, JPN, MEX, NLD, and USA.

Note. (CAN, USA) The delivered proper national ID type for Canada and the United States is *PR* (which corresponds to the Canadian Social Insurance Number and the American Social Security Number, respectively). You cannot delete this value because it is required for payroll processing.

Note. (GER, JPN) Users in Germany and Japan aren't required to enter national ID data for workers, so PeopleSoft created a default value of *NO* .

NID Type (national ID type) Enter the types of national IDs you will use to identify people (for example, employees, dependents, and applicants).

If you do not require a national ID type for a country, create a value of *NO* and leave the National ID Format field blank. National ID Type is often a

required field on other PeopleSoft HRMS pages and this gives you a value to enter for individuals from this particular country.

Default Select to have the system use this NID Type as the default national ID type for individuals from this country. You do not have to designate a default national ID type for a country but without a designated default users will need to specify a type every time they enter a national ID in the system.

National ID Format Indicate the default format for the national ID. Use the following values:

- *X* or *Z* when the user can enter an alphanumeric or blank value.
- *A* and any lower case letter when the user must enter a letter.
- *9* when the user must enter a numeric value.
- If you leave this field blank, users can enter any value (or no value at all) for this national ID type.

Note. In addition to the general formatting you set up here, PeopleCode record logic performs special data validation on BEL, BRA, CAN, CHE, FRA, GBR, MEX, NLD, USA, DEU, ESP, MYS, and ITA national IDs.

Note. (USA) When reporting to U. S. federal government agencies, PeopleSoft Enterprise Payroll for North America converts the default for missing or unknown Social Security numbers to the format required by the agency.

NID as stored (national ID as stored) Shows how the NID is stored in the system. Match this value to the field display formats in the Application Designer.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data

Setting Up Additional Name Information

To set up additional name information, use the Name Format Types component (NAME_FORMAT_TBL), Name Type component (NAME_TYPE_TBL), Name Prefix component (NAME_PREFIX_TABLE), Name Suffix component (NAME_SUFFIX_TABLE), Royal Name Prefix component (NM_ROYAL_PREF), Name Royal Suffix (NM_ROYAL_SUFF), and Name Title component (TITLE).

This section provides an overview of additional name information and discusses how to:

- Enter name format types.
- Enter name types.
- Enter name prefixes.
- Enter name suffixes.
- Define royal name prefixes.
- Define royal name suffixes.

Understanding Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records. With the Name Prefix, Name Suffix, Name Royal Prefix, Name Royal Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.,* and suffixes like *Jr.* and *Sr.*

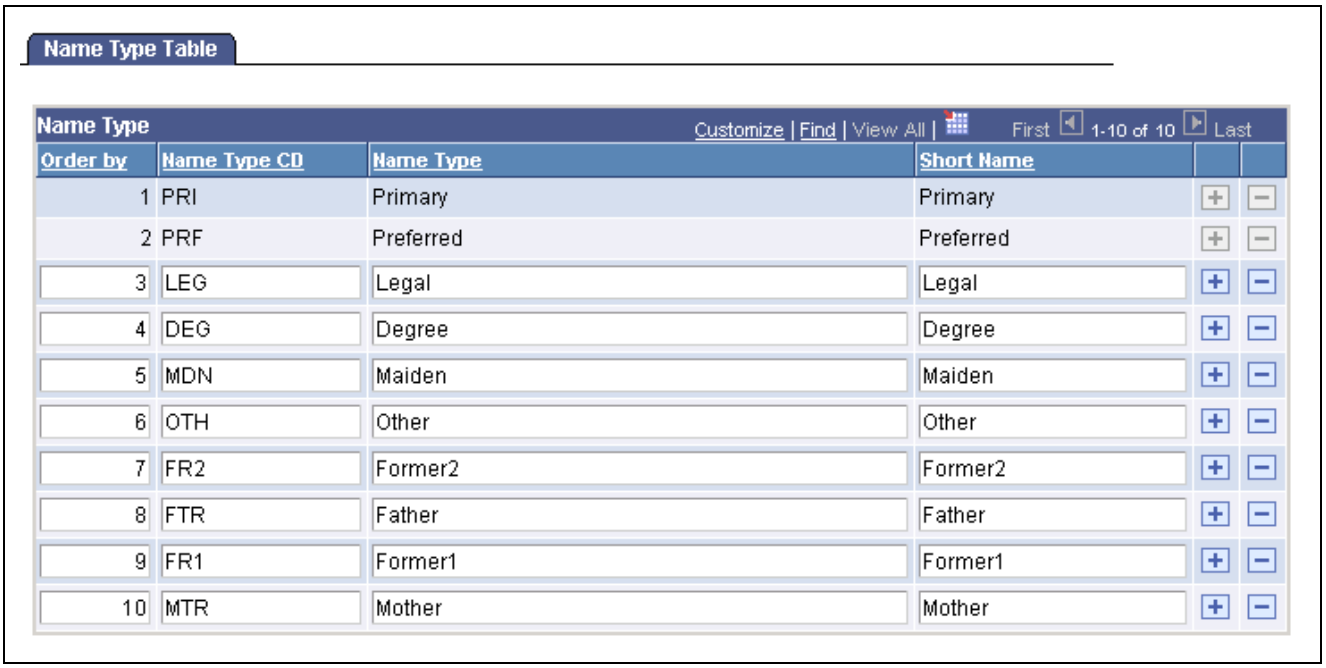
If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor, doctor,* or *count.* These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

Pages Used to Set Up Additional Name Information

Page Name	Object Name	Navigation	Usage
Name Format Tbl	NAME_FORMAT_TBL	Set Up HRMS, Foundation Tables, Personal, Name Format Types, Name Format Tbl	Define name format types to use on name pages throughout HRMS.
Name Type Table	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type, Name Type Table	Define name types and the order in which they are available.
Name Prefix Table	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix, Name Prefix Table	Enter name prefixes that you'll use when you record name information.
Name Suffix Table	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix, Name Suffix Table	Enter name suffixes to use to record name information.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix	Enter royal prefixes and descriptions. Name Royal Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Name Royal Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix	Define royal suffixes. The Name Royal Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names in the Personal Data pages, you can reference these standard name royal suffixes.
Name Title	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title	Enter titles for use with names. Track standard titles—from *professor* to *mijnheer*—for names in your human resources system.

Entering Name Types

Access the Name Type Table page.



Name Type Table

Name Type — Customize | Find | View All | First 1-10 of 10 Last

Order by	Name Type CD	Name Type	Short Name
1	PRI	Primary	Primary
2	PRF	Preferred	Preferred
3	LEG	Legal	Legal
4	DEG	Degree	Degree
5	MDN	Maiden	Maiden
6	OTH	Other	Other
7	FR2	Former2	Former2
8	FTR	Father	Father
9	FR1	Former1	Former1
10	MTR	Mother	Mother

Name Type Table page

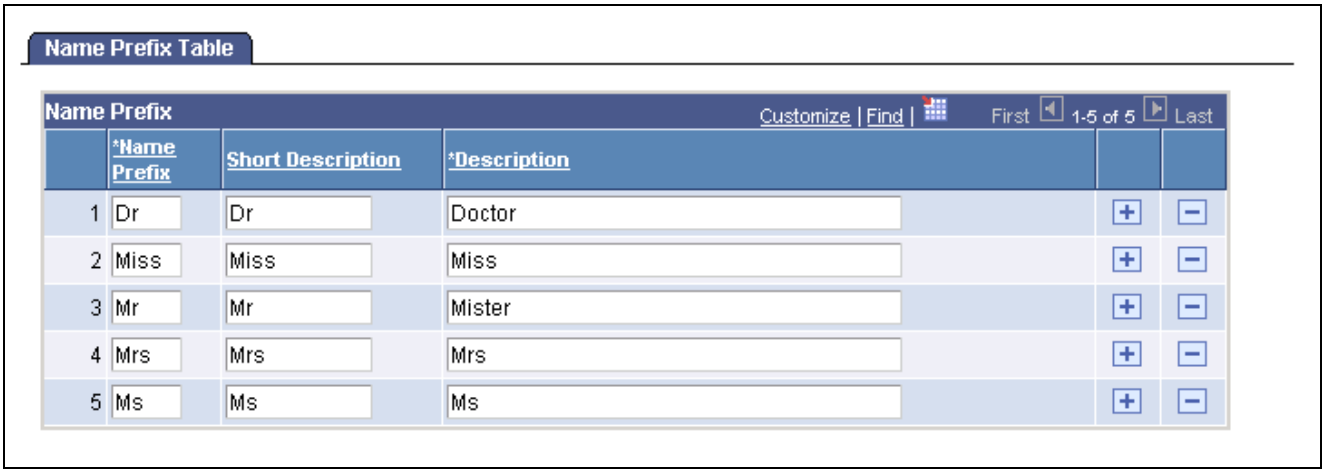
Order by Enter the order in which the system should make this name type available.

Name Type CD (name type code), **Name Type,** and **Short Name** Enter a code for the name type, the full name type name, and a short version of the name type.

Note. You cannot edit the Primary and Preferred name types because they are system data.

Entering Name Prefixes

Access the Name Prefix Table page.



Name Prefix Table

Name Prefix — Customize | Find | First 1-5 of 5 Last

	*Name Prefix	Short Description	*Description
1	Dr	Dr	Doctor
2	Miss	Miss	Miss
3	Mr	Mr	Mister
4	Mrs	Mrs	Mrs
5	Ms	Ms	Ms

Name Prefix Table page

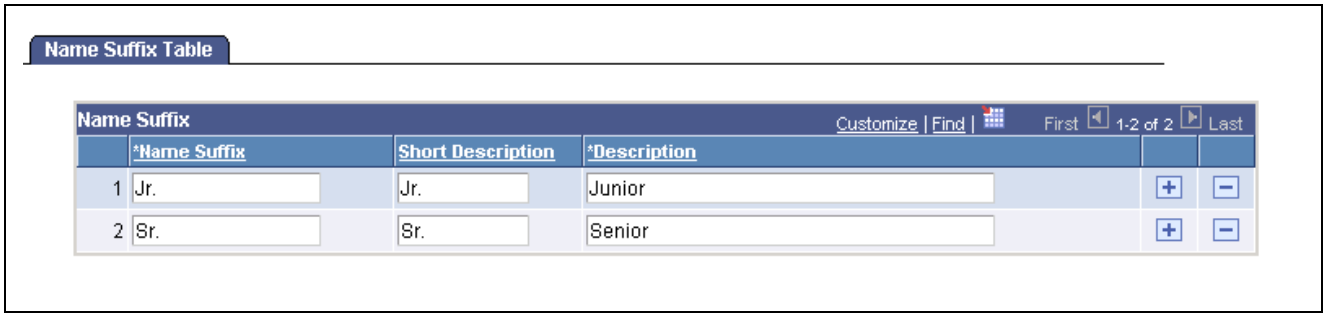
Name Prefix Enter the name prefix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name prefixes.

The system displays the prefixes you enter here as part of the person's name.

Note. Name prefixes aren't effective-dated, nor do they have a status associated with them.

Entering Name Suffixes

Access the Name Suffix Table page.



Name Suffix Table page

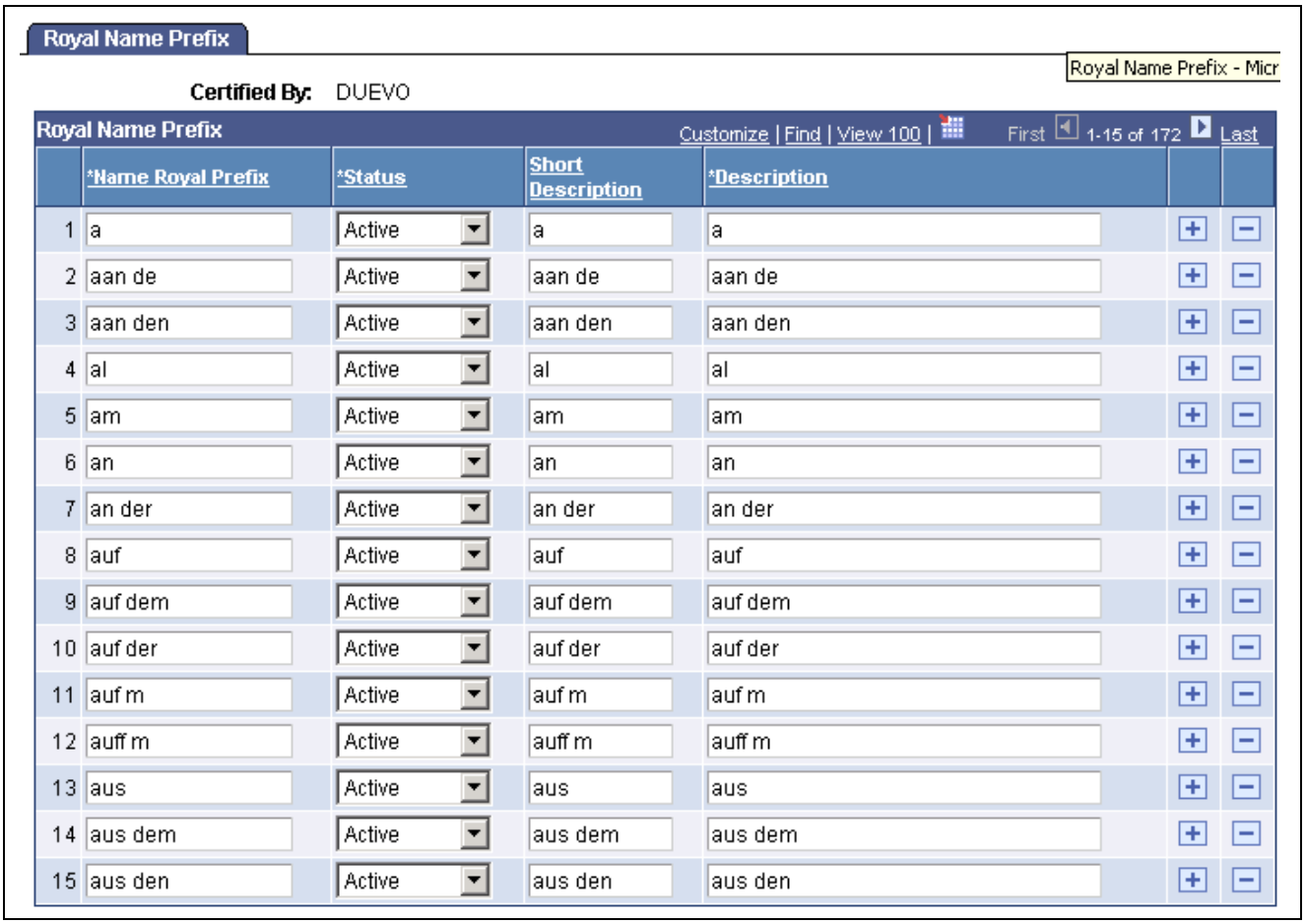
Name Suffix Enter the name suffix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name suffixes.

Short Description and **Description** Descriptions you enter for the prefix appear on the page as part of the person's name.

Note. Name suffixes aren't effective-dated, nor do they have a status associated with them.

Defining Royal Name Prefixes

Access the Royal Name Prefix page.



Royal Name Prefix page

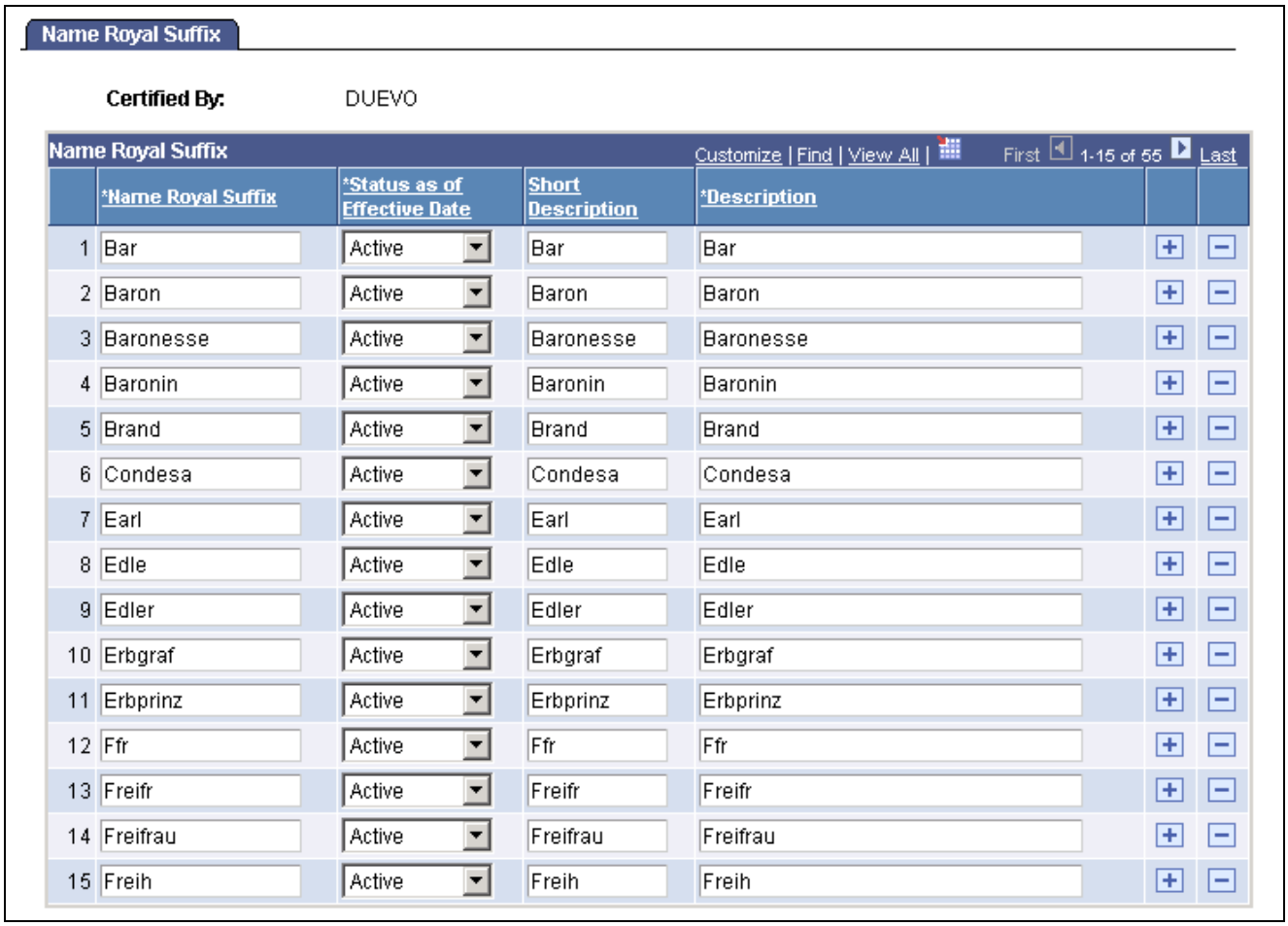
Certified By Displays the value you selected when you accessed the page: *DUEVO* for German prefixes or *NEN* for Dutch prefixes.

Name Royal Prefix Enter a royal prefix name, using up to 15 characters.

Status Name Royal Prefixes aren't effective-dated, so to retire a prefix code, change the status to *Inactive.*

Defining Royal Name Suffixes

Access the Name Royal Suffix page.



Name Royal Suffix page

Certified By The system displays the value you selected to access the page: *DEUVO* for German prefixes or *NEN* for Dutch prefixes.

Name Royal Suffix Enter a name royal suffix, using up to 15 characters.

Status as of Effective Date Name royal suffixes aren't effective-dated, so to retire a suffix code, change the status to *Inactive.*

Defining Address Types

To define address types, use the Address Type component (ADDR_TYPE_TBL).

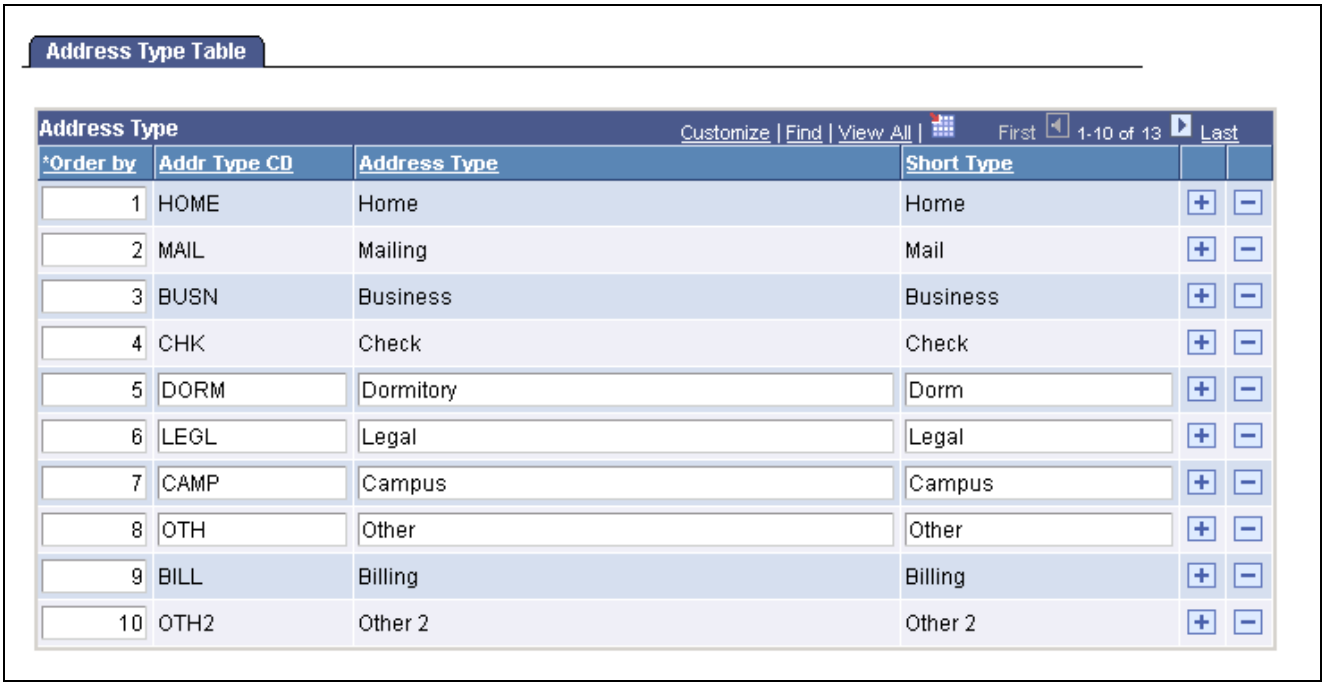
This section discusses how to enter address types.

Page Used to Enter Address Types

Page Name	Object Name	Navigation	Usage
Address Type Table	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type, Address Type Table	Enter address types and the order in which they are available.

Entering Address Types

Access the Address Type Table page.



Address Type Table page

Order by Enter the order in which the system should make this address available.

Addr Type CD (address type code), **Address Type,** and **Short Type** Enter a code for the address type, the full address type name, and a short version of the address type.

Note. You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

CHAPTER 14

Setting Up Jobs

This chapter discusses how to:

- Define job function codes.
- Define and clone job profiles.
- Define job families.
- Classify jobs.
- Define job tasks and responsibilities.
- Set up holiday schedules
- Set up pay groups.
- Run job code and pay group reports.

Defining Job Function Codes

To define job function codes, use the Job Function Table component (JOB_FUNCTION_TBL).

This section provides an overview of job function codes and discusses how to set up job function codes.

Understanding Job Function Codes

Use job function codes to create function categories that can then be assigned to job codes. For example, you can create a job function code of Finance to describe the function of all job codes that have financial responsibility, such as job codes in accounts payables, accounts receivables, and the controller's office

Page Used to Define Job Function Codes

Page Name	Object Name	Navigation	Usage
Job Function Table	JOB_FUNCTION_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Function, Job Function Table	Set up and define job function codes.

Setting Up Job Function Codes

Access the Job Function Table page.

INAIL Code (Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro code)	The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Defining and Cloning Job Profiles

To define and clone job profiles, use the Job Profile component (JOB_PROFILE_TBL) and Clone Job Profile component (CLONE_JOB_PROF). Use the CI_JOB_PROFILE_TBL component interface to load data into the tables for the Job Profile component.

This section provides an overview of job profiles, lists prerequisites, and discusses how to:

- Select competencies for a job profile.
- Select sub-competencies for a job profile.
- Select responsibilities for a job profile.
- Select document types and performance templates for a job profile.
- Determine where a job profile is used.
- Clone a job profile.

Understanding Job Profiles

A job profile identifies a set of competencies, sub-competencies, and responsibilities that apply to workers in the same job, job family, position, or salary grade.

If you use PeopleSoft Enterprise ePerformance, job profiles can provide a simple way to evaluate all workers with the same job code, job family, position, or salary grade against the same basic criteria. Performance documents can automatically include the competencies, sub-competencies, and responsibilities that are defined for the worker's job profile. Another advantage to using job profiles in ePerformance is that you can associate one or more performance templates with workers who have the same profile.

You can clone (copy) a job profile and modify it for another job code, position, salary grade, or job family. Job profiles are effective-dated.

Creating a job profile involves the following steps:

- Create a job profile ID and description.
- Select the competencies to associate with the job profile.
- Select the responsibilities to associate with the job profile.
- Select the document types and performance template that are valid for the job profile.
- Determine where a given job profile is being used.

Associating Job Profiles with Workers

You can associate a job profile with a group of workers by assigning the profile to a job code, job family, position, or salary grade. To do this, complete the Job Profile ID field on one of the following pages:

- Job Code Profile

- Job Family
- Position Data

  See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions.

- Salary Grade Table

  See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Grades.

See Also

PeopleSoft Enterprise ePerformance 8.9 PeopleBook, "Defining Basic Settings and Tables," (Optional) Creating Job Profiles

Prerequisites

Before you create job profiles, define the following items that you plan to associate with the profiles.

- Competencies
- Sub-competencies
- Competency clusters
- Responsibilities
- Document types

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Competencies.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Sub-Competencies.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Assigning Competencies and Accomplishments to Roles," Setting Up Clusters and Job Families.

See Chapter 14, "Setting Up Jobs," Defining Job Tasks and Responsibilities, page 328.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Assigning Competencies and Accomplishments to Roles," Setting Up Clusters and Job Families.

Common Elements Used in this Section

Weight — For ePerformance, if applicable, enter the weight of the competency in relation to the other competencies for which workers with this job profile can be evaluated.

Minimum Weight — For ePerformance, if applicable, enter the minimum weight for the competency. When performance reviews are conducted using PeopleSoft ePerformance, the manager or worker cannot adjust the weight below this minimum.

Mandatory — Select to have this item identified as mandatory on the ePerformance document, meaning that the item cannot be edited or deleted by a manager or worker.

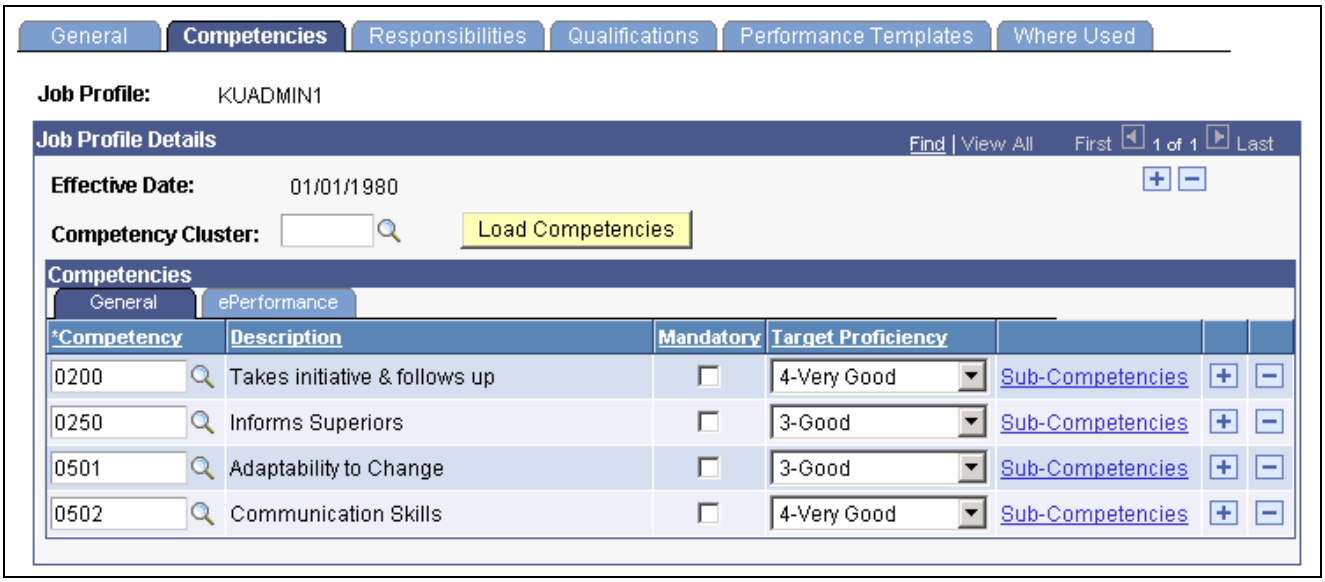
Critical — Select to have this competency identified as a critical performance factor on the ePerformance document. No special rules are applied to critical items.

Pages Used to Define Job Profiles

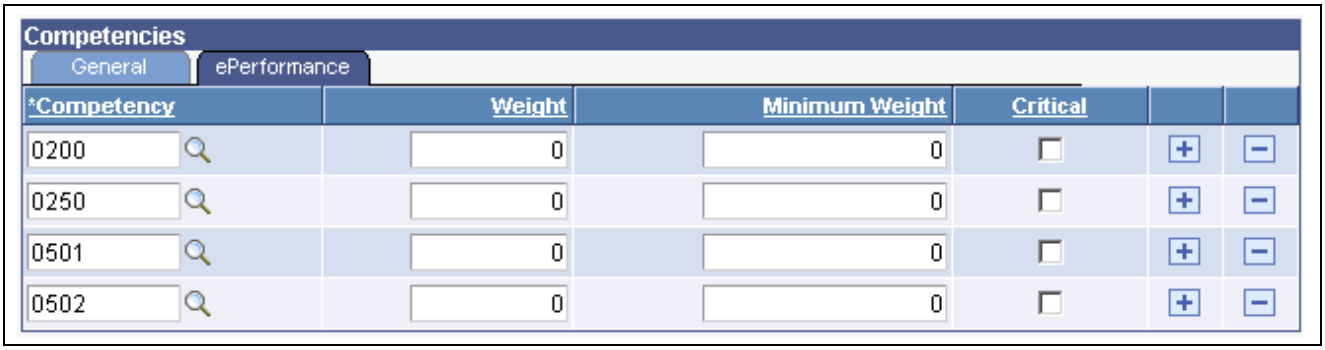
Page Name	Object Name	Navigation	Usage
Job Profile - General	JOB_PROFILE_TBL1	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, General	Create a job profile ID and description. IDs can be up to eight alphanumeric characters. **Note.** Job Profile IDs cannot be deleted.
Job Profile - Competencies	JOB_PROFILE_TBL2	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Competencies	Select competencies for a job profile. Click the tab to enter General or ePerformance specific information.
Job Profile - Sub-Competencies	JOB_PROF_COMP_SEC	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Competencies Click the Sub-Competencies link on the Competencies page.	Select sub-competencies for a job profile.
Job Profile - Responsibilities	JOB_PROFILE_TBL3	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Responsibilities	Select responsibilities for a job profile. Click the tab to enter General or ePerformance specific information.
Qualifications ,	JOB_PROFILE_TBL5	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Qualifications	Select the qualifications that are mandatory or desirable for a job profile.
Performance Templates	JOB_PROFILE_TBL4	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Performance Templates	Select the document types that are applicable to a job profile and identify the performance template for each document type.
Where Used	JOB_PROFILE_XREF	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Where Used	View the list of jobs, job families, positions, and salary grades to which the job profile has been assigned.
Clone Job Profile	CLONE_JOB_PROF	Set Up HRMS, Foundation Tables, Job Attributes, Clone Job Profile	Copy an existing job profile. Once copied, you can modify the new profile.

Selecting Competencies for a Job Profile

Access the Job Profile - Competencies page.



Competencies page (1 of 2)



Competencies page (2 of 2)

Competency Cluster

To load competencies from a competency cluster into this job profile, select the cluster ID and click Load Competencies. The system adds the competencies in the cluster to any competencies that are in the Competencies group box.

The system only adds competencies from the cluster that are not already associated with the Job Profile.

You define competency clusters through the Cluster Competencies page (CM_CLST_COMP_TABLE).

Competency

To associate a competency with a job profile, select the competency here.

Sub-Competencies

Click to access the Job Profile Sub-Competencies page where you can add to or delete from the job profile any sub-competencies that are linked to the selected competency. By default, all subcompetencies linked to the competency are associated with the job profile.

You will only need to select a sub-competency if:

- A sub-competency was added to a competency after the competency was loaded into the Job Profile.
- A sub competency was deleted from the Job Profile and then added again.

Selecting Sub-Competencies for a Job Profile

Access the Job Profile Sub-Competencies page.

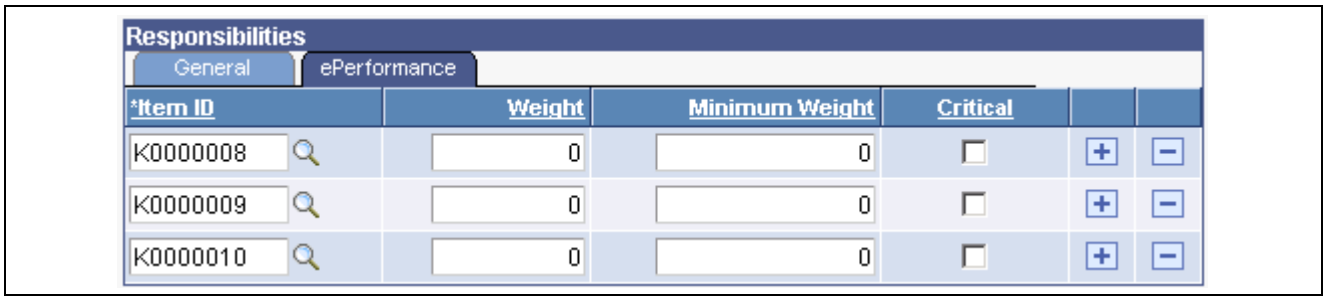
The first time you access this page, it displays all sub-competencies that are linked to this competency through the Sub-Competency component. To remove a sub-competency from this job profile, click the minus (-) sign. To add a sub-competency to the profile, click the plus sign (+). To delete all the sub-competencies, click the Delete All Competencies button.

Selecting Responsibilities for a Job Profile

Access the Job Profile - Responsibilities page.



Responsibilities page (1 of 2)



Responsibilities page (2 of 2)

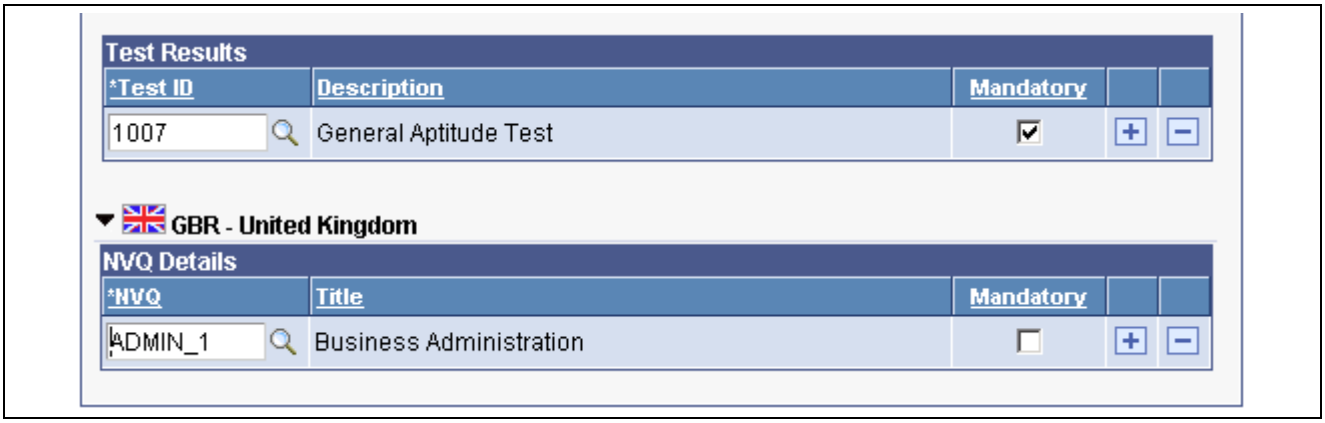
Item ID To associate a responsibility with a job profile, select the responsibility here. You define responsibilities on the Responsibilities page (EP_RESP_TBL).

Selecting Qualifications for a Job Profile

Access the Qualifications page.



Qualifications page (1 of 2)



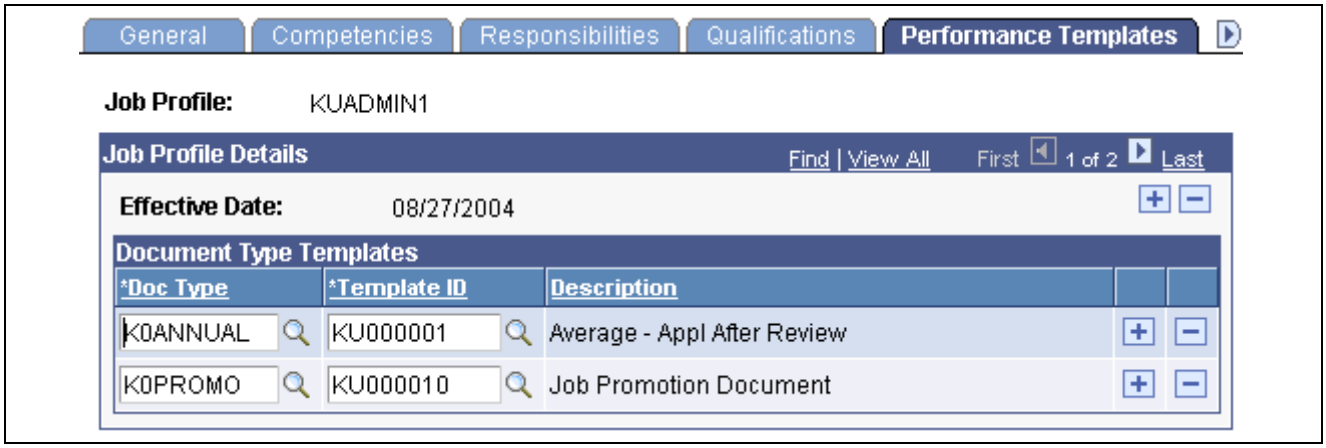
Qualifications page (2 of 2)

Select the qualifications required or desired for the job profile.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Educational Qualifications and Accomplishments.

Selecting Document Types and Performance Templates for a Job Profile

Access the Job Profile - Performance Templates page.



Performance Templates page

When a user generates documents for a document type that has the template source set to one of the Job Profile options, the system refers to the information you enter here to determine which template to use. For example, say you create a document type called Annual. On the document type definition, you indicate that the template source is *Job Code (Job Profile)*. When you generate performance documents the system checks this page to determine which template to use for workers that have a job profile ID associated with their job codes.

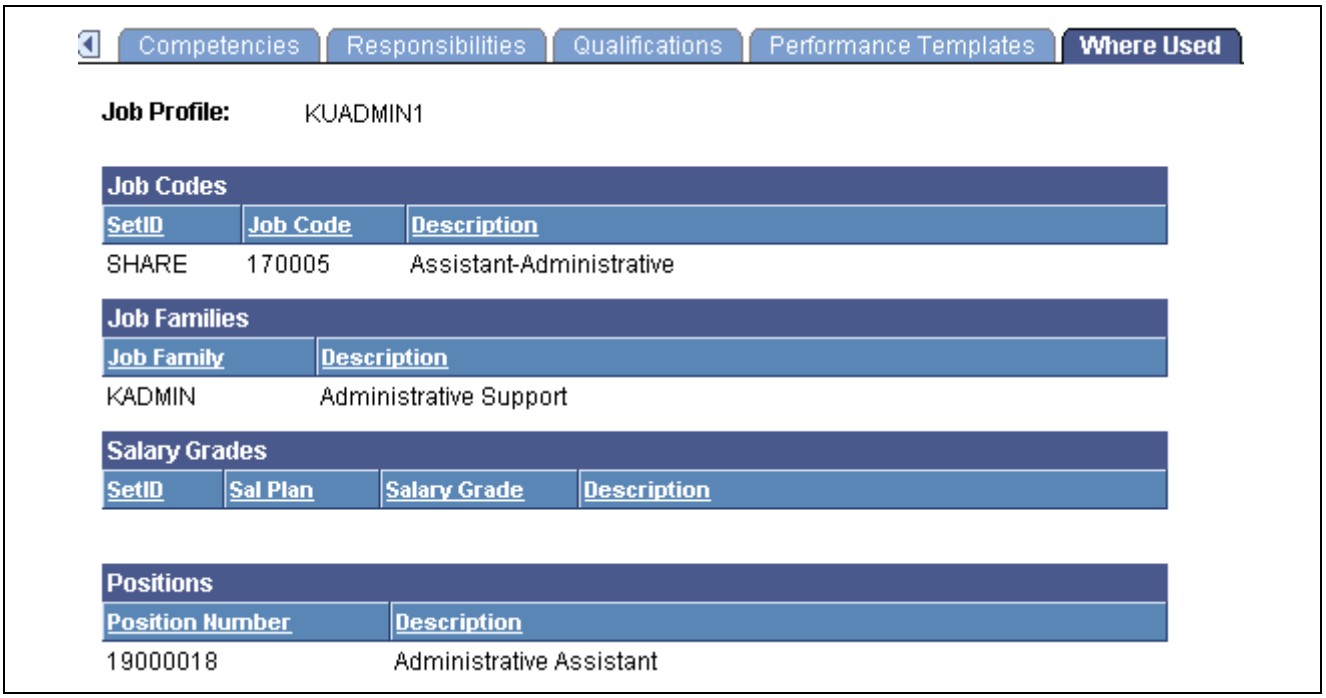
Doc Type (document type) Select a document type that is valid for workers who are associated with this job profile. Add a row for each document type that's valid for this job profile. You define document types on the Document Types page (EP_REVIEW_TYPE_TBL).

Template ID For the selected document type, identify the performance template. This is the template that PeopleSoft ePerformance uses when it generates performance documents of a given document type for workers with this job profile.

If you leave this field blank, the system uses the default template that is identified on the Document Type page.

Determining Where a Job Profile is Used

Access the Job Profile - Where Used page.



Where Used page

The system lists the Job codes, job families, salary grades, and positions to which this job profile has been assigned.

Cloning a Job Profile

Access the Clone Job Profile page.



Clone Job Profile page

To clone a job profile:

1. Select the ID of the job profile you want to clone.
2. Enter up to eight alphanumeric characters for the new job profile ID.
3. Click theSave button.

   The system moves you to the Job Profile component.
4. Make any necessary changes on the Job Profile component.

Defining Job Families

To define job families, use the Job Family Table component (JOB_FAMILY).

This section provides an overview of job families and discusses how to group jobs into families.

Understanding Job Families

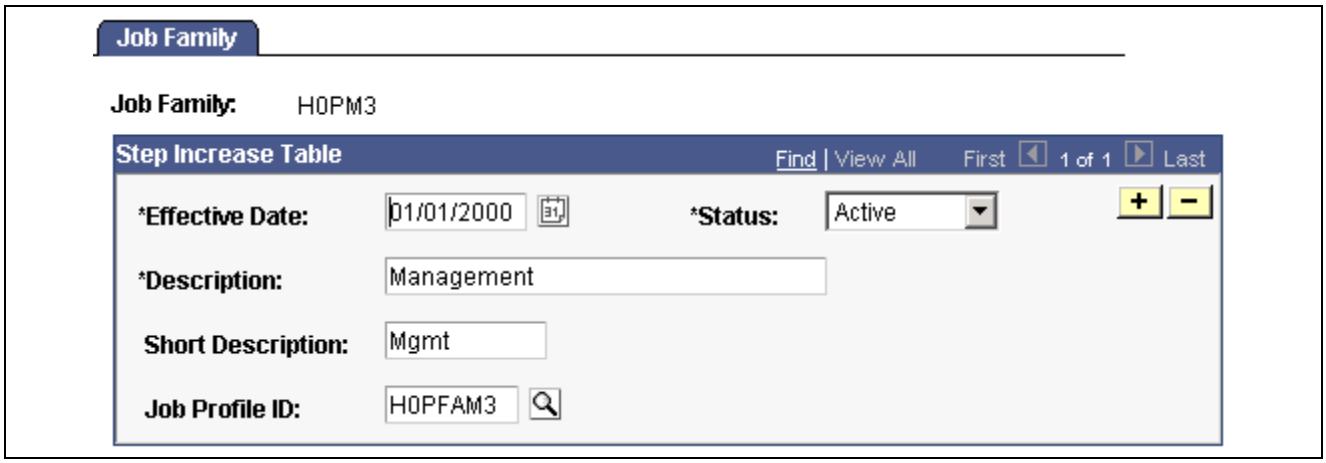
Group jobs to make it easier to assign a competency or competency cluster to similar jobs. You can assign a competency or cluster to all the jobs in a family at once.

Page Used To Set Up Job Families

Page Name	Object Name	Navigation	Usage
Job Family	JOB_FAMILY_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Family Table, Job Family	Create job families and assign them job profiles.

Grouping Jobs Into Families

Access the Job Family page.



Job Family page

Job Profile ID Assign a Job Profile ID to this job family.

Important! The job family effective date must be effective as of the relevant job code effective dates.

Classifying Jobs

To classify jobs, use the Job Code Table component (JOB_CODE_TBL). Use the CI_JOB_CODE_TBL component interface to load data into the tables for this component.

This section provides an overview of job codes and discusses how to:

- Add new job codes.
- Assign points to job evaluation criteria.
- Enter salary survey information.
- Associate salary plan information and base pay rate codes with a job code.
- Associate non-base pay rate codes with a job code.

Understanding Job Codes

In HRMS, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Job Codes and Positions in HRMS

In HRMS, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with workers. Job codes have a one-to-many relationship with workers.

You still use job codes to create general groupings or job classifications in your organization if you drive PeopleSoft Enterprise Human Resources by position in your organization, . You then use the Job Code groupings as the basis for default job data for positions.

Note. If you use PeopleSoft Enterprise Pension Administration, set up jobs, and not positions, for your pension payees.

(JPN) Using Job Codes and Capability Grade Management in Japan

The Job Code field on the Job Details Page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the Job Code field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

See Also

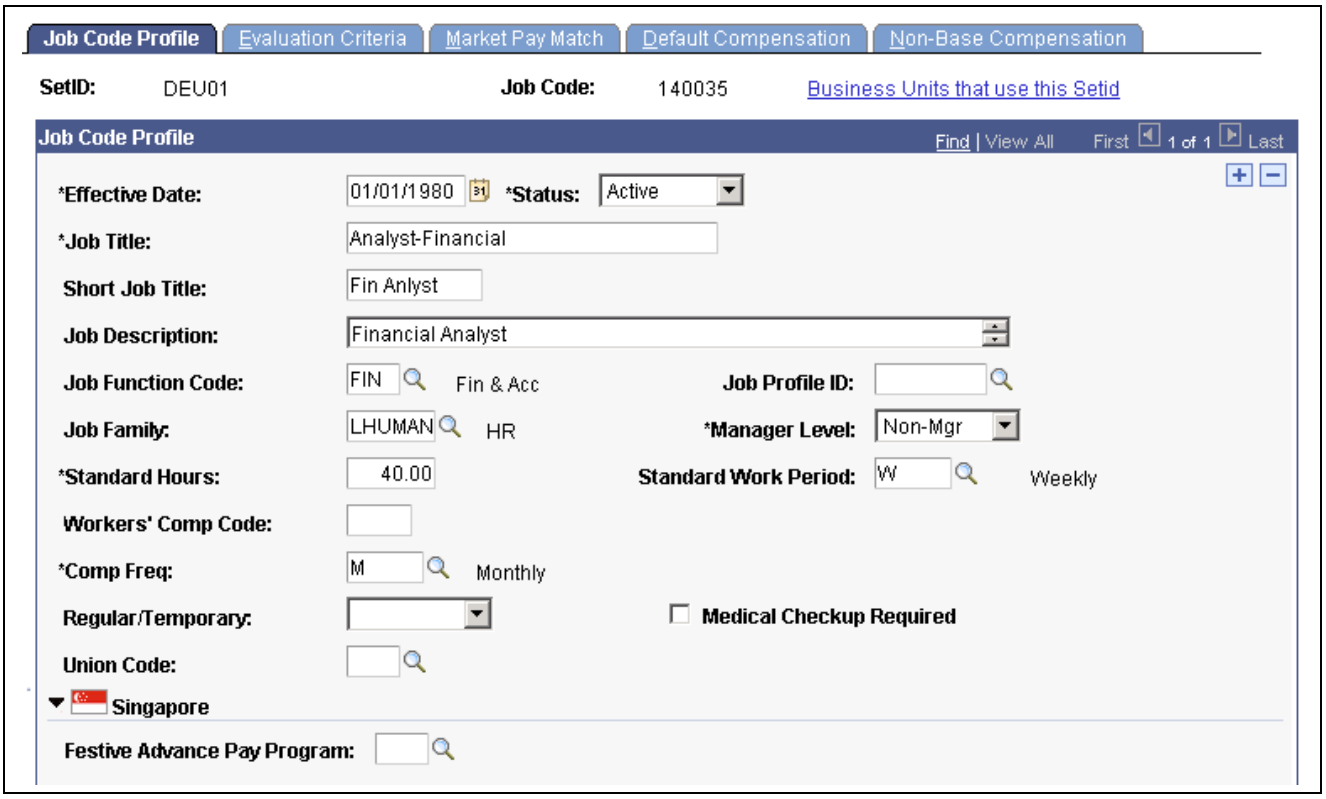
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, “Setting Up Positions”

Pages Used to Classify Jobs

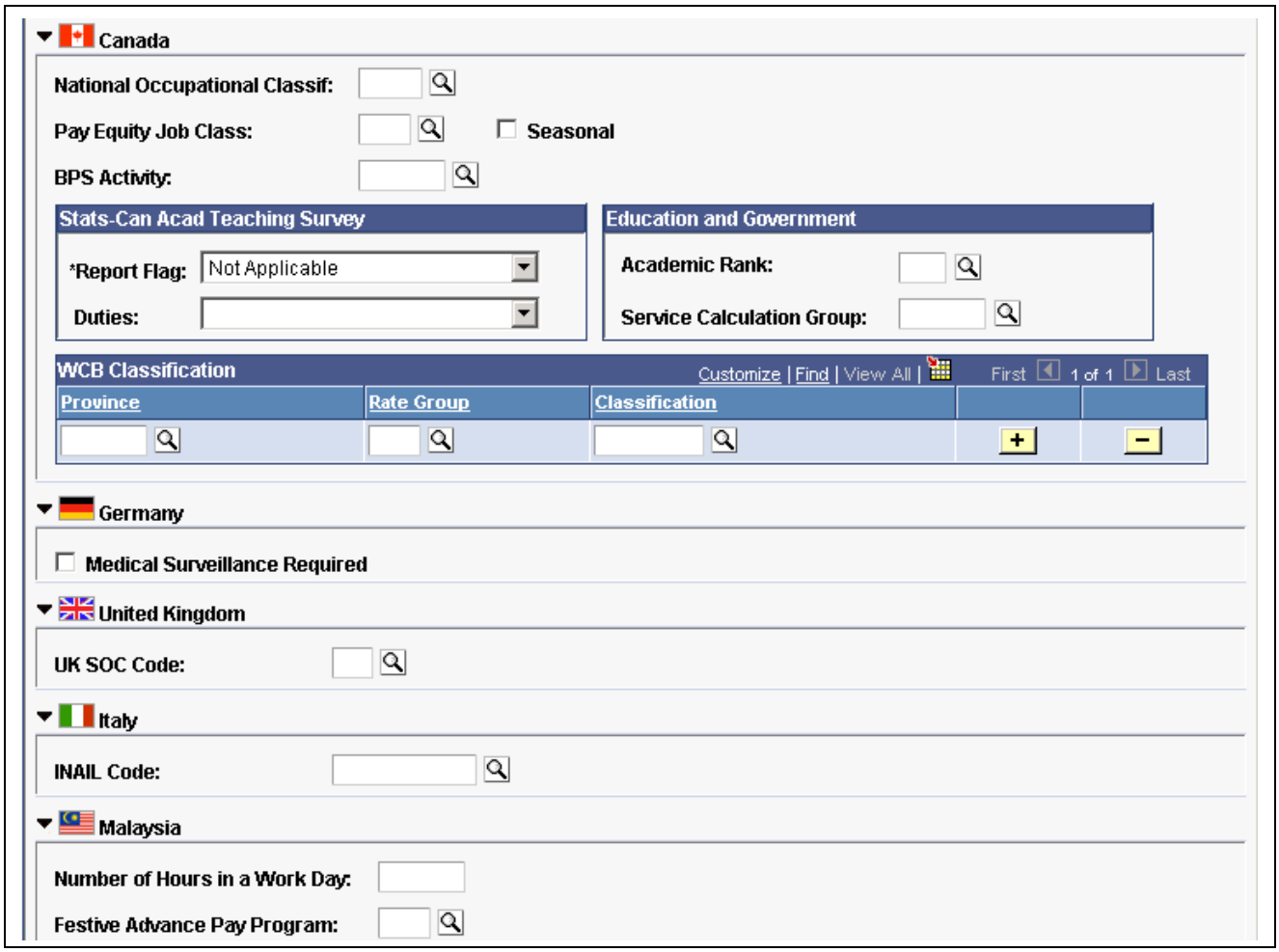
Page Name	Object Name	Navigation	Usage
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Business Units by Job Code	JOBCODE_BU	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile Click Business Units that use this setID on the Job Code Profile page.	View all business units associated with the SetID for this Job Code.
Evaluation Criteria	JOBCODE_TBL2_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Evaluation Criteria	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code.
Default Compensation	JOBCD_COMP_RATE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Default Compensation	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page.
Non-Base Compensation	JOBCD_NON_BASE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Non-Base Compensation	Associate non-base rate codes with a job code.

Adding New Job Codes

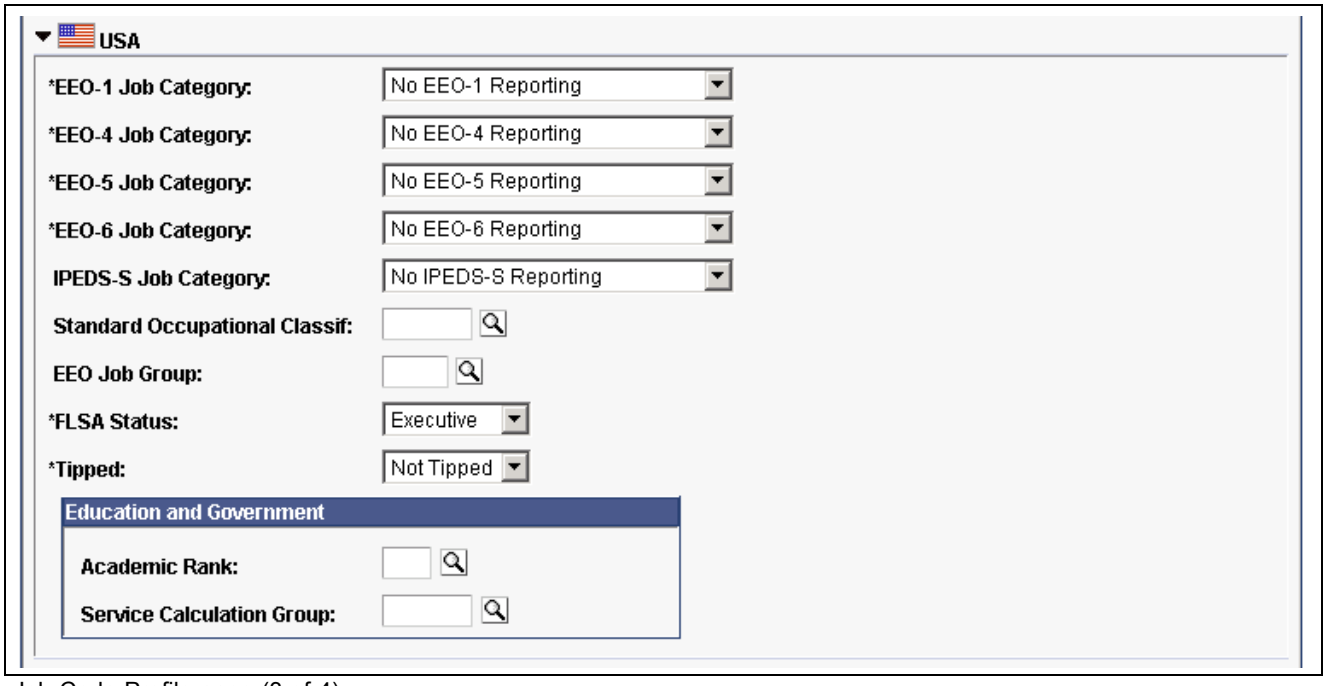
Access the Job Code Profile page.



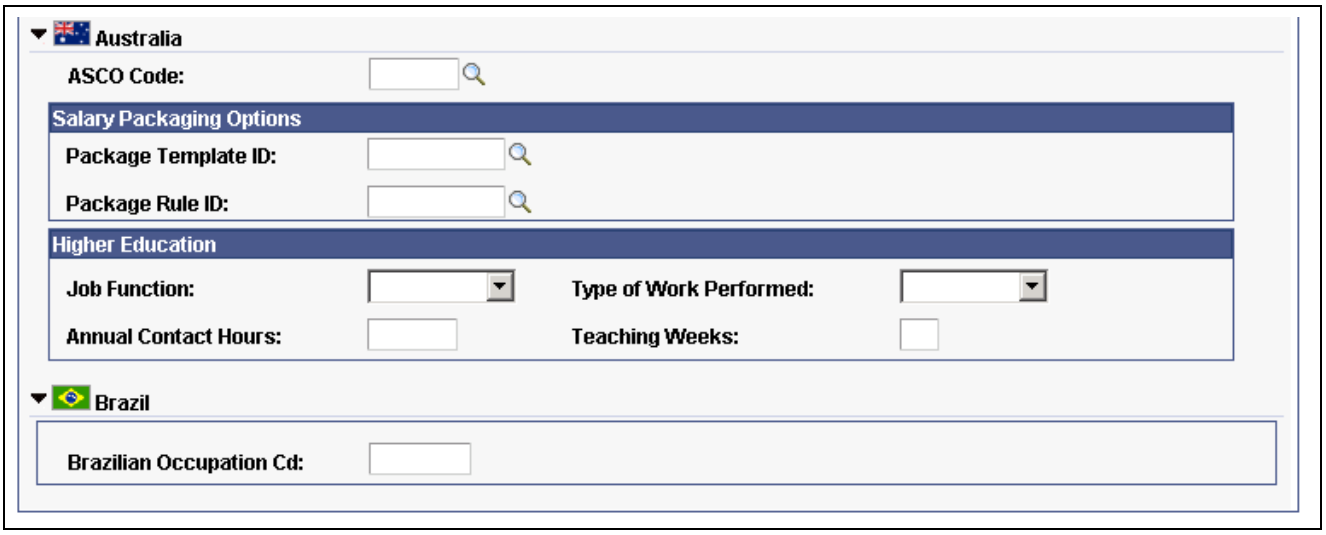
Job Code Profile page



Job Code Profile page (2 of 4)



Job Code Profile page (3 of 4)



Job Profile page (4 of 4)

Job Code A unique code that you associate with a specific job in your organization.

(USF) Occupation Series, Official Posn Title Code (official position title code), and **Organization Posn Title Cd** (organization position title code) Select from the list.

(GER) (CAN) Job Function Code Select the code that best categorizes the job by function, such as administrative, legal, or management. This information is used for German and Canadian reporting purposes.

Job Family Enter a job family to categorize a job code into a more general grouping. For example, you might group a trust analyst and an operations analyst into a job family called *Analyst.* Job families are also used in the Manage Competencies business process.

Standard Hours Enter the default number of hours in a standard work period for this job. The Standard Hours value that you enter on this page becomes the default for all workers who are associated with this job code. You can modify the standard hours for an worker on the worker's Job Data pages (JOB_DATA).

The value that you assign for Standard Hours must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences table. If no minimum standard hours and maximum standard hours are defined on the Primary Permission List Preferences table, the system uses the values on the Installation table.

Standard Work Period Select the time period in which workers must complete the standard hours. Maintain these values in the Frequency Table page (FREQUENCY_TBL).

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency).

See *PeopleSoft 8.9 Enterprise Components PeopleBook*

Workers' Comp Code (Workers' Compensation code)
Enter a code to specify the workers' compensation plan to which this job code belongs.

Comp Freq (compensation frequency)
Select the frequency in which the compensation is quoted. The default value is the frequency that you specified on the Installation table

Medical Checkup Required
Select if this job code requires a onetime medical checkup when the worker is hired into the job.

Note. If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.

Union Code
If you're defining a job code that is associated with a union, select a union code.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Educational Qualifications and Accomplishments.

(SGP) Singapore

Festive Advance Pay Program
If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(CAN) Canada

National Occupational Classif (National Occupational Classification)
Select a Canadian National Occupation classification code.

Seasonal
Select if the job is seasonal.

BPS Activity (Business Payrolls Survey activity)
If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.

Report Flag
Select the appropriate option if the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys.

This field is for Canadian higher education degree-granting institutions only.

Duties
Indicate whether the duties of the job code consist of *Teaching only, Teaching & other resp* (teaching and other responsibilities), or *Research.* This field is required if you selected the Report Flag check box.

This field is for Canadian higher education degree-granting institutions only.

Province Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.

Rate Group Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.

Classification Select a WCB classification for this job code. The classification indicates the industry that applies to this job code.

Note. The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.

(GER) Germany

Medical Surveillance Required Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code) Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Fair Employment reporting.

(ITA) Italy

INAIL Code Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Festive Advance Pay Program If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(USA) USA

Union Code If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations business process in PeopleSoft Human Resources.

EEO Job Categories Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC).

Standard Occupational Classif (Standard Occupational Classification) If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.

EEO Job Group To further classify the job categories, enter the EEO job group to which this job belongs.

FLSA Status (Fair Labor Standards Act status) Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all worker job records that are associated with this job code. Example values are *Administrative, Executive, Nonexempt,* and *Professional.*

(AUS) Australia

ASCO Code (Australian standard classification of occupation code) Select the ASCO code.

Package Template ID / Package Rule ID Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here.

By associating templates and rules with job codes, package components are automatically assigned to workers during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling.

Note. You set up package templates on the Package Template page. You set up package rules on the Package Rule page.

(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Job Function Select the default job function for the organization.

Type of Work Performed Select the default type of work performed for the organization.

Annual Contact Hours Enter the number of contact hours. This depends on the type of work performed. See “Determining Contact Hours” to calculate this value.

Teaching Weeks Enter the default number of teaching weeks.

(USF) U.S. Federal

Bargaining Unit If the job code is associated with a union, select a bargaining unit.

Pay Basis Enter the pay basis for which you quote salaries for this job code; for example, *Per Annum, Per Hour.*

Classification Authority and Classification Factor	The system displays the classification authority and the classification factors that are associated with the classification standard.
Target Grade	Enter the target grade, if applicable.
Factor Level	Enter a classification factor level for each classification factor that is associated with this classification standard.
Points, Grade Points, and **Total Points**	The system displays the points that are associated with the classification standard.
Weight (%)	The system displays the weight percentage of the points that are associated with the classification standard.
OPM Certification Number (Office of Personnel Management certification number)	Enter the OPM certification number that is associated with this job code.
Position Classification Stds (position classification standards)	Enter the position classification standards that are used.

(BRA) Brazil

Brazilian Occupation Cd(Brazilian occupation code)	Enter the appropriate Brazilian Code of Occupation (CBO - Código Brasileiro de Ocupações) from the official table. Codes effective before December 31, 2002 should be in the format 99999. Codes effective from January 1, 2003 onward should be in the format 9999–99. **Note.** Go to www.mte.gov.br to view a list of CBOs.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Festive Advance, "Setting Up Festive Advance"

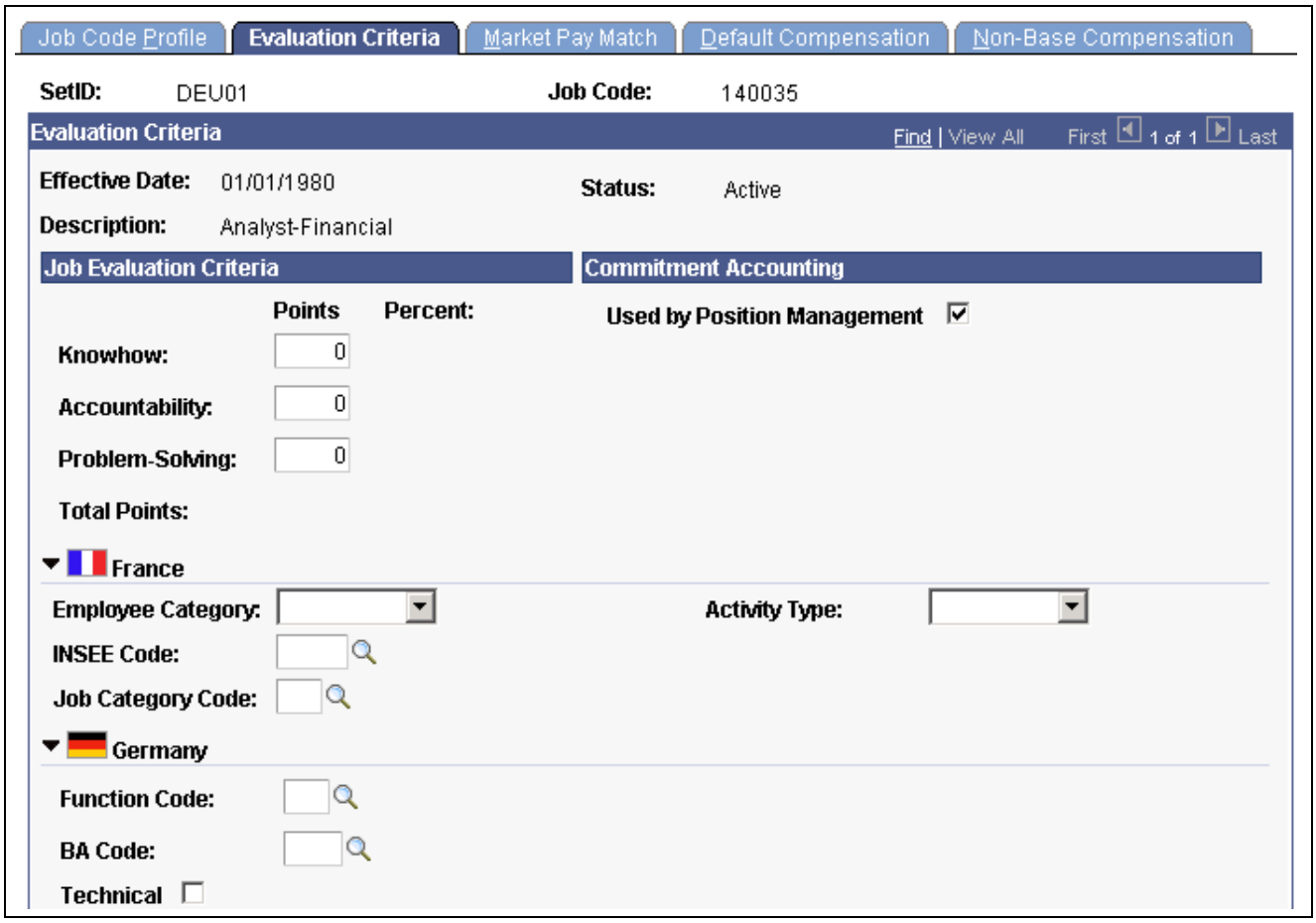
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Faculty Events, "(AUS) Reporting DETYA for the Australian Higher Education Sector," Understanding DETYA Calculations and Reference Dates

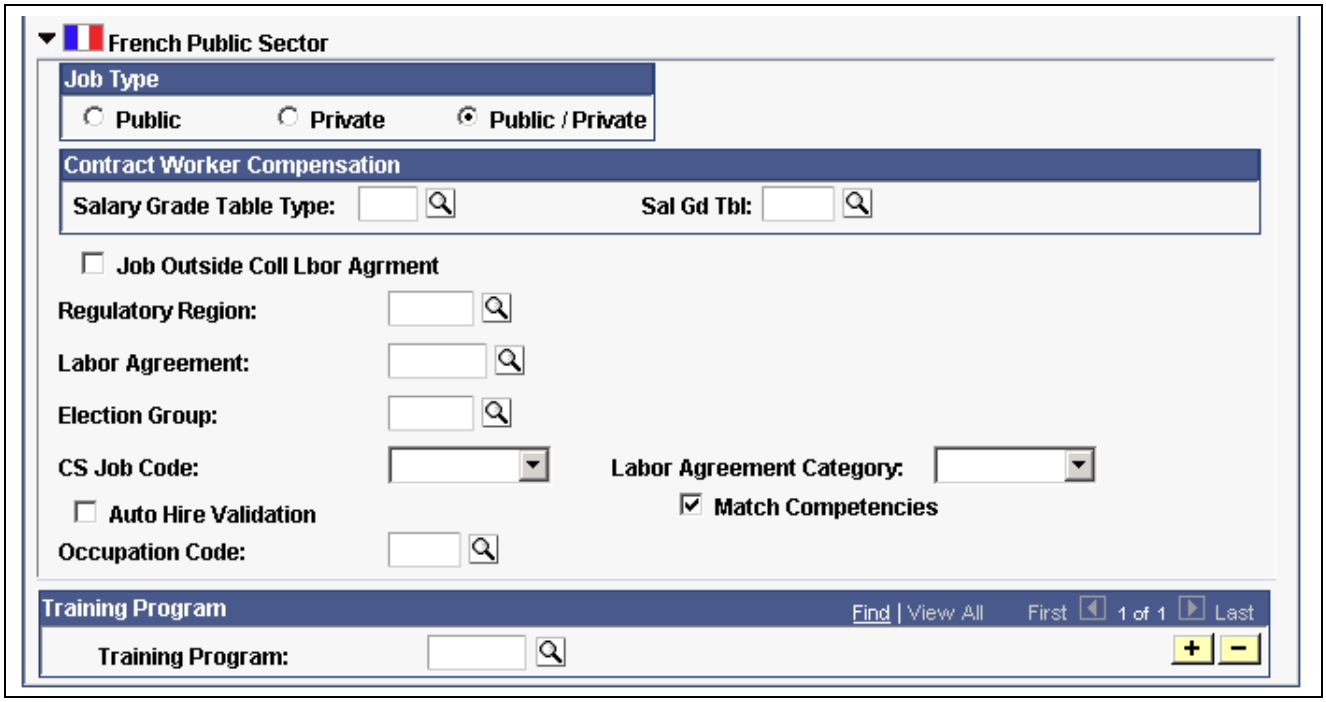
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

Assigning Points to Job Evaluation Criteria

Access the Evaluation Criteria page.



Evaluation Criteria page (1 of 2)



Evaluation Criteria page (2 of 2)

Knowhow Enter points that represent the worker's knowledge required to perform the job.

Accountability Enter points that represent the worker's ability to do the assigned job.

Problem-Solving Enter points that represent the worker's ability to work out solutions despite obstacles.

Total Points You determine the points by comparing each of these factors to every other job in your company. The greater the know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility.

The system calculates Total Points and the Percent, or relative importance, of each factor. For example, if Knowhow receives 33.2 percent of the total points, Accountability receives 33.7 percent, and Problem-Solving receives 33.1 percent, then all three factors are almost equally important.

However, if Knowhow receives 54.4 percent of the total points, Accountability receives 9.2 percent, and Problem-Solving receives 36.4 percent, then Knowhow is of greater importance than Accountability or Problem-Solving, and Accountability is of little significance.

Used by Position Mgmt? (used by position management?) Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default.

A selected check box tells the system that you're budgeting for the job code at the position level. It does not restrict your ability to attach positions to a job code or attach workers to a job code. If this check box is clear, you can still set up a position with the job code. If the check box is selected, you can still enter the job code on the worker's job data record.

When you clear this check box, the Pre-Encumbrance Indicator and Encumber Salary Option fields appear.

Pre-Encumbrance Indicator Indicate if you want the system to encumber this job code immediately (*Immediate*), not at all (*None*), or upon requisition (*Requistn*).

Encumber Salary Option If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.

Encumber Salary Amount If you select *User Spec*as the Encumber Salary Option, enter the salary amount to encumber.

(FRA) France

Employee Category Select the employee category for the job code. This code is required for these statutory reports:

- Personal Register
- Annual Survey by Nationality
- French Accident report

INSEE Code Link this job code to an INSEE code for use in the French Disability report.

Job Category Code Select a job category code, required for the Single Hiring Statement report.

(GER) Germany

BA Code (Bundesanstalt fuer Arbeit code) Select this job code's BA code, if applicable.

Technical Select if this job code is technical.

(FRA) French Public Sector

Job Type Select whether this job is public, private, or public private combination.

Contract Worker Compensation Select the salary grade table type and salary grade table that apply to contract workers in this job.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector*, "Setting Up French Public Sector Tables," Setting Up Salary Grades.

Job Outside Coll Lbor Agrment Select this check box if the job code is not covered by a collective labor agreement.

Regulatory Region Select the job code's regulatory region.

Note. Labor agreements are grouped by regulatory region. If you are assigning a labor agreement to this job code, ensure that the regulatory region matches that of the labor agreement.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreements.

Labor Agreement Select the labor agreement that covers this job code.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreements.

Labor Agreement Category Select the labor agreement category for this job code.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreement Categories.

Auto Hire Validation Select to have the system automatically validate the newly hired person's qualifications with the job requirements.

Match Competencies Select to have the system match the competencies associated with this job code with the qualifications of the person assuming the job.

Occupation Code Select an occupation code for this job code.

Training Program

Training Program You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for workers in this job code, you can use the default training program as the basis for an individual career-training plan.

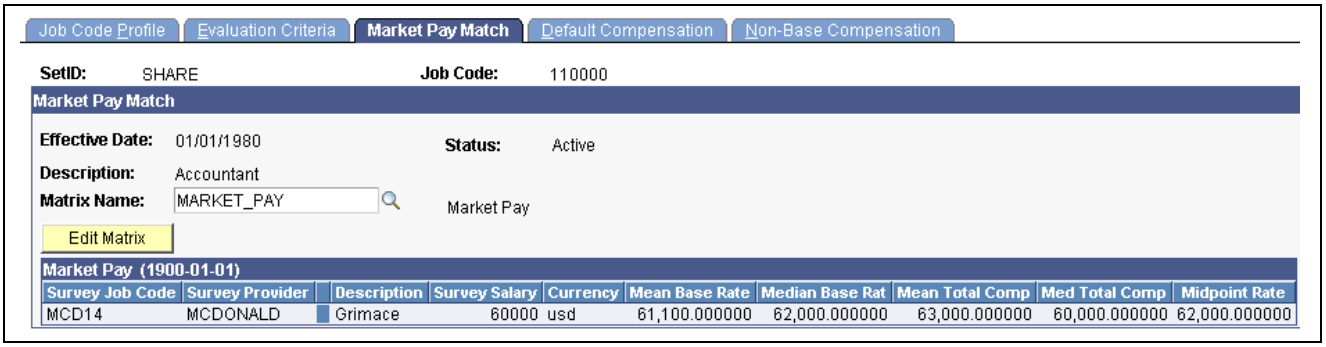
See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

Associating Market Pay Matrices to Job Codes

Access the Market Pay Match page.



Market Pay Match page

Matrix Name Select the market pay matrix that you want to associate with this job code. The effective date of the matrix must be less than or equal to the effective date of the job code.

Edit Matrix Click this button to access the Data Content page where you can view and edit values associated with this matrix. Any other job code linked to this same matrix will be impacted as well.

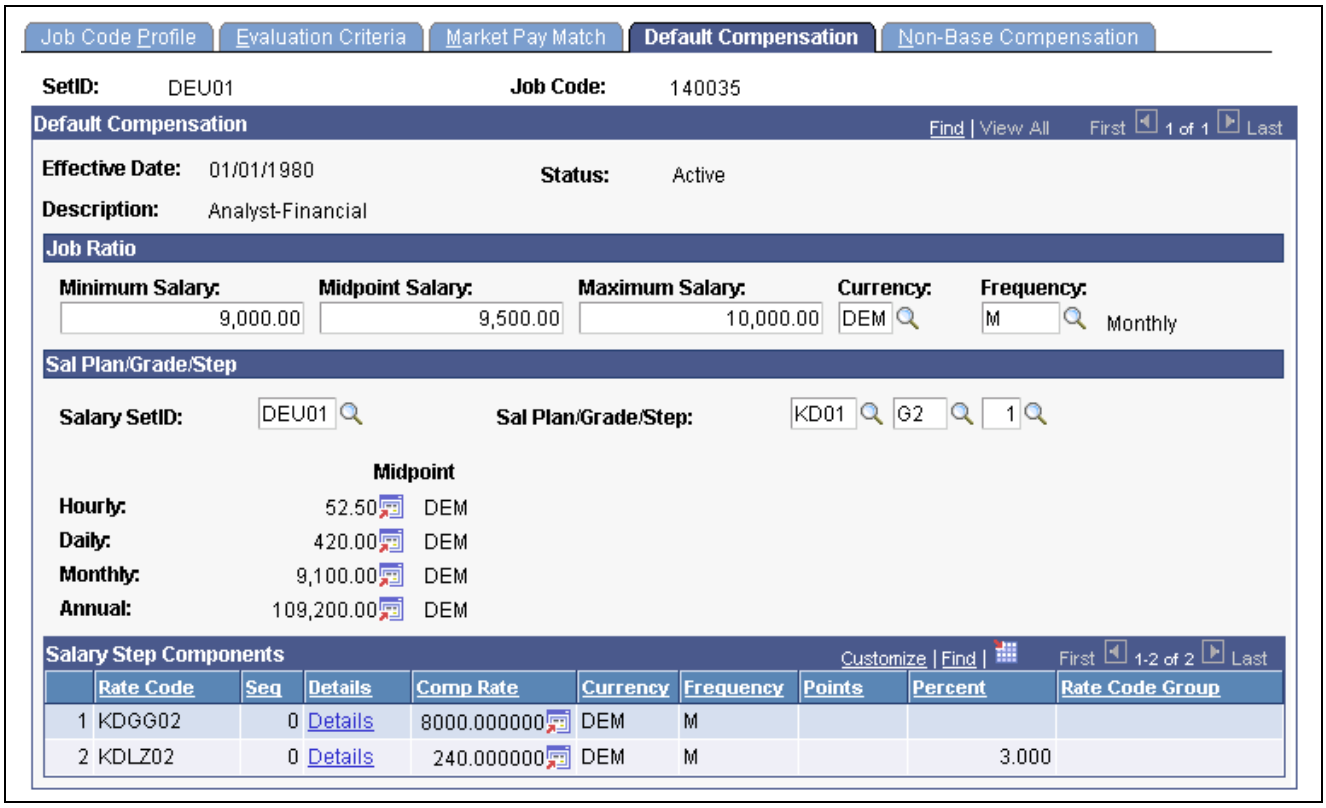
See Also

PeopleSoft 8.9 Enterprise Components PeopleBook, "Using Configurable Matrices"

Chapter 20, "Setting Up and Working with Market Pay," page 421

Associating Salary Plan Information and Base Pay Rate Codes with a Job Code

Access the Default Compensation page.



Default Compensation page

By associating rate codes with job codes, you define default compensation packages that will be associated with a worker's job record on the Job Information page.

Job Ratio

The job ratio calculates comparative salary information for workers who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The worker's compensation rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

Minimum Salary, Midpoint Salary, Maximum Salary, Currency, and **Frequency** — Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Sal Plan/Grade/Step — Select a salary plan , grade and step. Note that all three fields are optional. If you do set defaults, the system populates the rest of the Salary Administration Plan fields on the page and the Salary Step Components grid with hourly, monthly, and annual midpoint pay rates that are associated with the grade.

When you assign a worker to a job code on the Job Information page (JOB_DATA_JOBCODE), the system enters these values as a default on the Salary Plan page (JOB_DATA_SALPLAN).

Note. If you have associated a salary plan with the location code assigned to the worker on the Work Location page (JOB_DATA1), the system will use the location salary plan as a default on the Salary Plan page instead of the job code salary plan.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Administering Salary Plans, Grades, and Steps," Tying Salary Plans to Job Codes, Locations, or Labor Agreements.

Salary Step Components

Details Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.

Frequency The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page.

See Chapter 11, "Setting Up and Working with Frequencies," page 203.

Apply FTE (apply full-time equivalency) Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.

Points The system displays the points that are associated with this rate code, if applicable.

Percent If the rate code type for this rate code is *Percent,* the system displays the percent that is to be applied to the job compensation rate or to a rate code group.

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

Job Code Base Components

Select one or more rate codes that will make up default base compensation for this job code. The default values for compensation rate, currency, and frequency come from the Rate Code Definition page, but you can set different values if required.

Note. If a rate matrix is associated with the rate code, the compensation rate field will be unavailable. In this case, the rate will be set dynamically based on employee data when this rate code is added to the employee's compensation record.

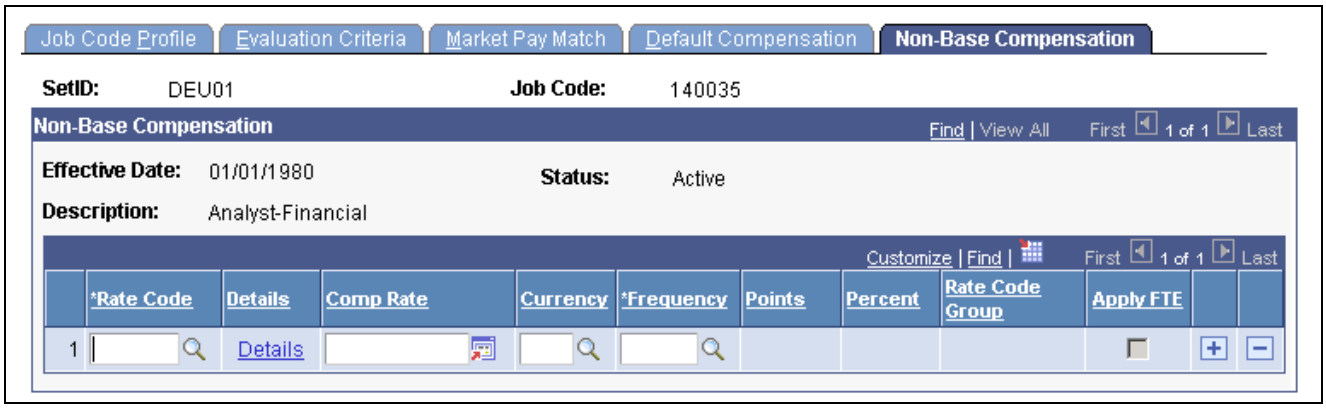
See Also

"PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface," page xliii

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

Associating Non-Base Pay Rate Codes with a Job Code

Access the Non-Base Compensation page.



Non-Base Compensation page

The system doesn't use non-base pay rate codes as default values on any HRMS pages. The codes are used for payroll processing.

Defining Job Tasks and Responsibilities

To define job tasks and responsibilities use the Job Task Table component (JOB_TASK_TABLE) and Responsibilities component (EP_RESP_TBL). Use the JOB_TASK_TABLE component interface and CI_EP_RESP_TBL component interface to load data into the tables for these components.

This section provides an overview of job tasks and discusses how to define job task codes.

Understanding Job Tasks

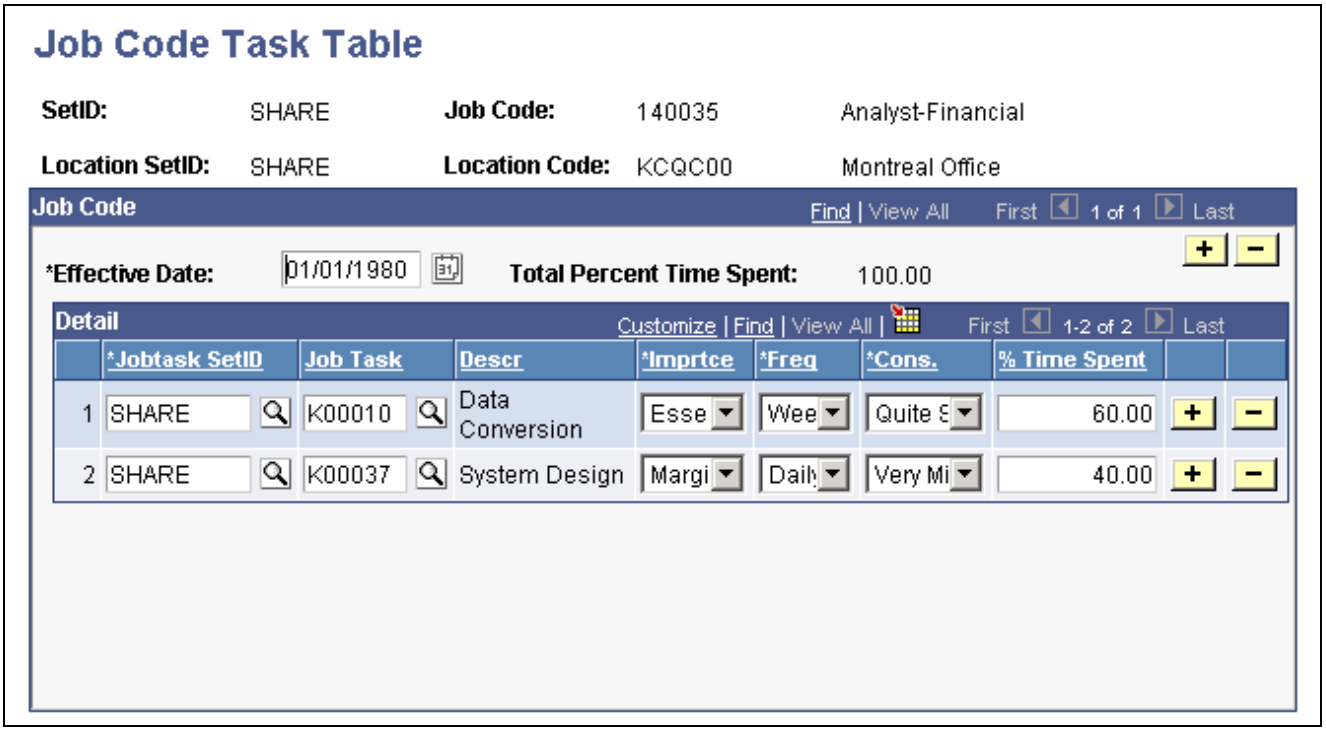
Define job task codes, such as *Data Entry*, and assign it to a Job Code on the Job Code Task Table. On the Job Code Task Table, indicate the importance and frequency of the task.

Pages Used to Define Job Tasks and Responsibilities

Page Name	Object Name	Navigation	Usage
Job Task Table	JOB_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Task Table	Define job task outcomes. For example, if a job requires an worker to pick up heavy boxes and move them, then define moving heavy boxes as the essential job task. Because an worker with a disability could use a forklift to move them, do not define the job task as *lifting* heavy boxes.
Job Code Task Table	JOBCODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table	Define job tasks associated with each job code.
Responsibilities	EP_RESP_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Responsibilities	Define job responsibility codes.

Defining Job Task Codes

Access the Job Code Task Table page.



Job Code Task Table page

Jobtask SetID Select a job task setID from the available options. Valid values are stored on the TableSet ID page.

Job Task	Select a job task from the available options. Valid values are stored on the Job Task Table page.
Imprtce (importance)	Select the importance of the job task to the particular job code. Valid values are in the Translate Table.
Freq (frequency)	Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.
Cons (consequence)	Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.
% Time Spnt (percentage time spent)	Enter the percentage of time that is spent on the job task.
Total Percent Time Spent	The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed *100%*.

Note. Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

Setting Up Pay Groups

To set up pay groups, use the Pay Group Table component (PAYGROUP_TABLE).

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

- Set up and describe pay groups.
- Set up process controls for pay groups.
- Set up payroll calculation parameters for pay groups.
- (USA) Specify the FLSA period definition.
- (E&G) Enter additional E&G earnings codes.

Understanding Pay Groups

When implementing a payroll system for use with HRMS, one of your major tasks is to set up pay groups. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While pay groups may seem specific to payroll processing, you also need this information for Human Resources, to set up job records and benefit programs. Many of the default field values on the Administer Workforce pages are based on the pay group values that you specify on the Pay Group Table component (PAYGROUP_TABLE). Set up at least one pay group for each company that you established in the Company component (COMPANY_TABLE) or the Agency USF component (AGENCY_TABLE) for U.S. federal users.

See Chapter 12, "Setting Up Organization Foundation Tables," Entering Company Information, page 234.

See Chapter 12, "Setting Up Organization Foundation Tables," (USF) Entering Agency Information, page 253.

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- PeopleSoft Enterprise Payroll for North America.

  If you use PeopleSoft Payroll for North America, use the Pay Group table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook.*

  See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Setting Up Pay Groups".

- PeopleSoft Enterprise Payroll Interface

  If you use PeopleSoft Payroll Interface, use the Pay Group Table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook.*

  See *PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook*, "Setting Up Payroll Schedules".

- PeopleSoft Enterprise Global Payroll.

  If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

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

- Pay system other than a PeopleSoft payroll application.

  If you are not using a PeopleSoft payroll application, use the Pay Group table pages discussed in this section.

- PeopleSoft Enterprise Pension Administration.

  If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. Pension Administration doesn't use pay groups for paying pension benefits.

  See *PeopleSoft Enterprise Pension Administration 8.9 PeopleBook*

Note. If you use more than one payroll application (for example, Payroll for North America and Global Payroll), set up the pay groups required for both applications. Otherwise, set up only the pay groups required for the application you are using.

Using the Pay Group Table

The Pay Group Table component consists of nine pages. For Human Resources, enter information only on the first three pages of the component, because that information is used across all HRMS applications. The last six pages in the component are used with Payroll for North America, and to a lesser extent, with Payroll Interface.

Pages Used to Set Up Pay Groups

Note. Do not use this component with PeopleSoft Global Payroll. Additional pages of the Pay Group Table component are documented in the *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook* and the *PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook*. The pages listed below are also documented in the *PeopleSoft Enterprise Human Resources: Administer Salaries for the Netherlands 8.9 PeopleBook.*

Page Name	Object Name	Navigation	Usage
Definition	PAYGROUP_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Set up and describe pay groups.
Process Control	PAYGROUP_TABLE2	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Establish employee type options for a particular pay group.
Calc Parameters	PAYGROUP_TBL3	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Define further payroll processing parameters for pay groups.
FLSA Period Definition	FLSA_PERIOD_SBPNL	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table Click FLSA Period Definition on the Calc Parameters page. • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table Click FLSA Period Definition on the Calc Parameters page.	(USA) Specify FLSA period definition and other parameters for the pay group's FLSA calculation.

Page Name	Object Name	Navigation	Usage
Education and Government Additional Earnings Codes	PAYGRP_TBL3_HP_SEC	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table Click Addl Educ/Govt Earnings Codes on the Calc Parameters page • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table Click Addl Educ/Govt Earnings Codes on the Calc Parameters page	(E&G) Add earnings codes for education and government

See Also

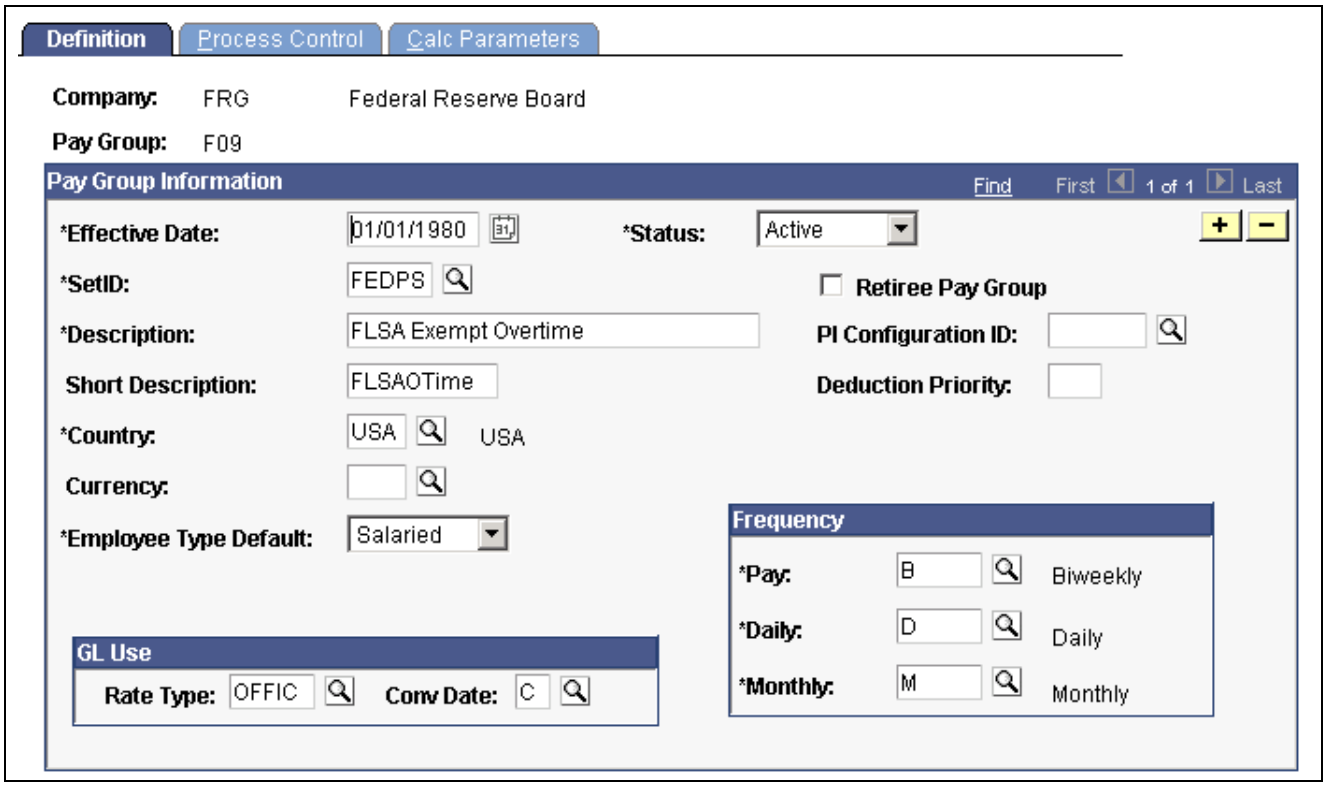
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Setting Up Pay Groups"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salaries for the Netherlands, "Setting Up Administer Salaries for the Netherlands," Creating and Maintaining Pay Groups

Setting Up and Describing Pay Groups

Access the Definition page.

Note. This page is not required for USF users.



Definition page

Pay Group The Pay Group value that you specified in the entry dialog box is displayed.

Note. On employee job records, the Pay Group default is from the company level.

SetID Select a setID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic setID.

Retiree Pay Group Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.

PI Configuration ID (Payroll Interface configuration ID) Select, if appropriate. The PI Configuration ID is set up using the Configuration Table component (INTRFC_CONFIG) in Payroll Interface. You must set up that component first, or leave this field blank for now.

Note. You *must* enter a value for Payroll Interface. If the PI Configuration ID is not set up correctly, payroll processing in Payroll Interface will not function properly. Refer to the *PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook* for more information.

Deduction Priority Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

Employee Type Default Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit Program

table. You need either to set up that table first or leave this field blank for now. Values are as follows:

- *Salaried:* Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets.
- *Hourly:* Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets.
- *Exep Hrly* (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets.
- *Not Appl* (not applicable): Select if this field isn't applicable.

(CAN) Wage Loss Plan Default Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency

Pay Select the pay period frequency.

Note. If the employee's compensation rate on the Compensation page is quoted with the same frequency type as the pay period (for example a monthly frequency), you must use the same frequency ID (same annualization factor) for both the pay frequency and the compensation frequency.

Daily Select the frequency used by Payroll for North America to calculate the daily pay rate. Only frequencies on the Frequency table with a frequency type of daily are available for selection.

Monthly Select the frequency used by Payroll for North America to calculate a monthly pay rate. Only frequencies on the Frequency table with a frequency type of monthly are available for selection.

General Ledger Use

PeopleSoft Enterprise General Ledger uses these fields.

Rate Type Select the appropriate value from the list provided.

Conv Date (conversion date) Values are *Check Date, Pay End Date,* and *Today's Date.*

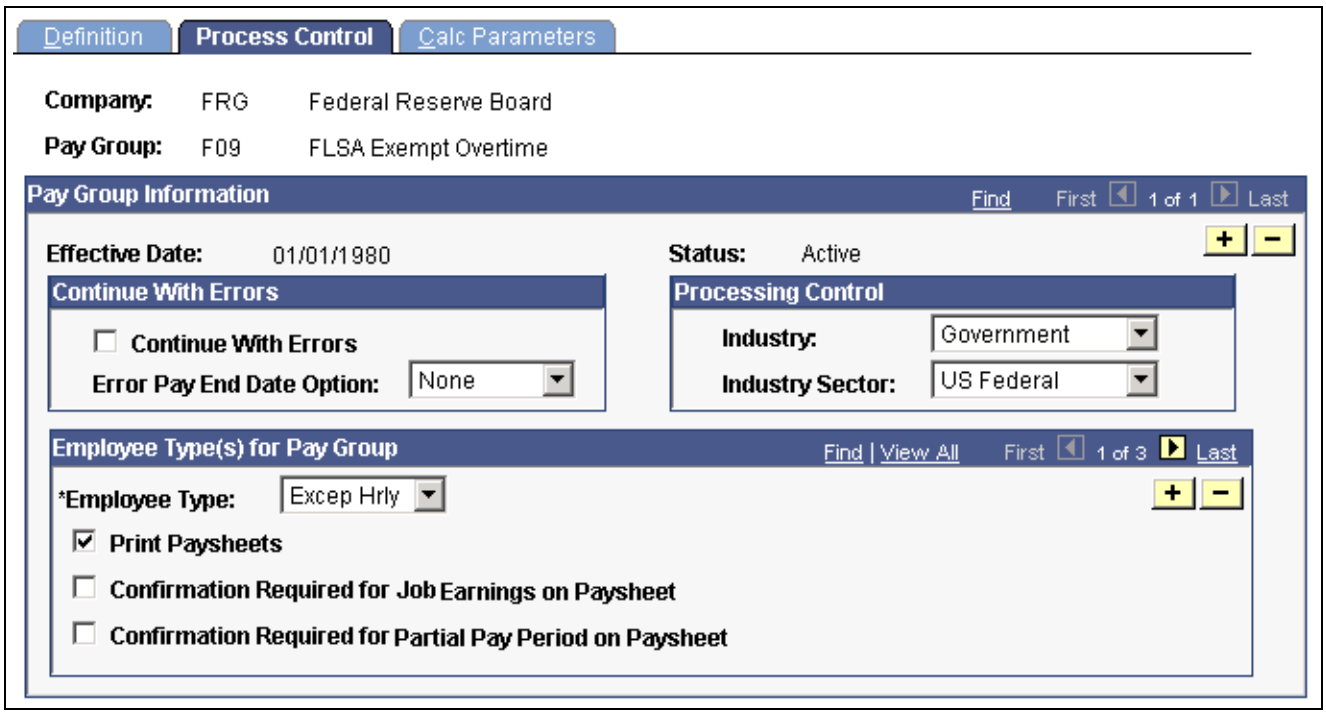
See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Deductions," Setting Up Deductions

Chapter 11, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 215

Setting Up Process Controls for Pay Groups

Access the Process Control page.



Process Control page

You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

Continue with Errors

Continue With Errors Select to enable the Pay Confirmation process to continue processing even if it encounters calculation errors. The system moves the items in error to off-cycle paysheets to be corrected in a separate off-cycle run.

Error Pay End Date Option This value is used by the Pay Calendar build process to set up the pay calendar. Select the date of the off-cycle calendar to which erred paysheets are moved.

If you select *Next Day,* the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st.

Warning! If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Industry Sector Select *None, Core, Public Sct* (public sector), or *US Federal.*

Employee Type(s) for Paygroup

Employee Type

Select the options—*Hourly, Exception Hourly,* or *Salaried*—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave Print Paysheets selected as the default.

Note. If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.

Print Paysheets

If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is cleared still appear on the paysheet pages.

Note. You must check this box if either of the confirmation required check boxes is selected.

Confirmation Required for Job Earnings on Paysheet

If you are using PeopleSoft Payroll for North America, select this box to clear the OK to Pay field on the paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected.

Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid.

For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

Confirmation Required for Partial Pay Period on Paysheet

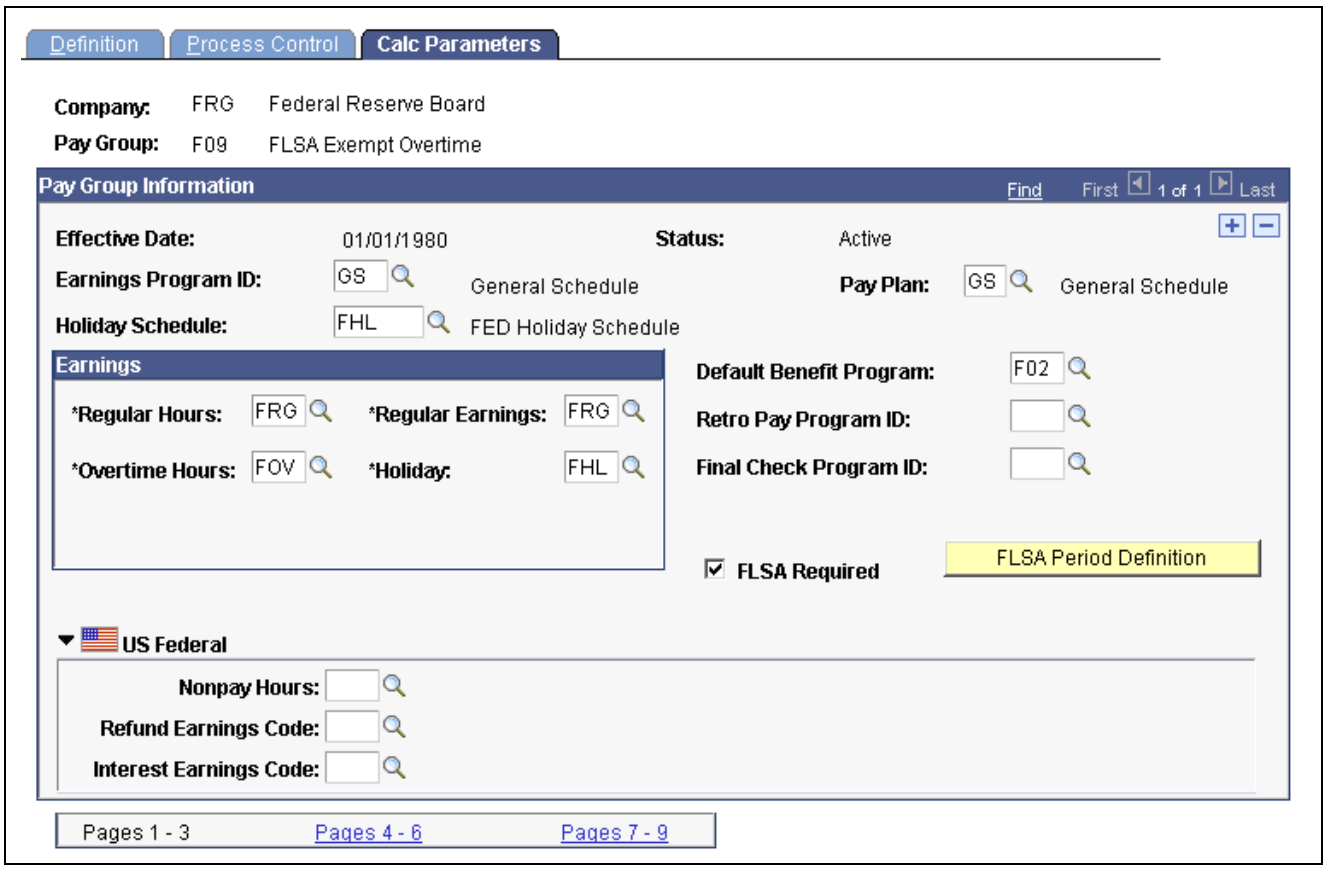
If you are using PeopleSoft Payroll for North America, select this box to control the OK to Pay check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should clear this check box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Working with Paysheets"

Setting Up Payroll Calculation Parameters for Pay Groups

Access the Pay Group Table - Calc Parameters page.



Pay Group Table - Calc Parameters page

Pay Group Information

Earnings Program ID Select a default value for the employee records in this pay group. Earnings Program IDs are set up using the Earnings Program Table component (EARNS_PROGRAM_TBL) in either Payroll for North American or Payroll Interface. You must set up that component first or leave this field blank for now.

(USF) Pay Plan Select the pay plan to assign to this pay group.

Holiday Schedule Select the holiday schedule for the pay group. If you left the Holiday Schedule field blank on the Location Profile page, the system uses the holiday schedule you specify on this page as the default for the worker's job record. You must set up the Holiday Schedule table before making a selection or leave this field blank for now.

Note. In Payroll Interface, if you want the third-party payroll system to process holiday pay, on the Holiday Schedule component set up a holiday schedule called NONE.

Default Benefit Program Select the default benefit/deduction program for the pay group. The system uses this default benefit/deduction program as the default for the

employee's job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Benefits menu. You must set up that table first, or leave this field blank for now.

Retro Pay Program ID Select a retro pay program ID to assign the pay group to a retro pay program. Specify a retro pay program ID that identifies the earnings codes used in retro pay calculations.

Note. You define Retro Pay Programs on the Retro Pay Program Table and earnings codes on the Earnings Tables. In each Retro Pay Program you define, you can specify any number of earnings codes as earnings for which Retro Pay can be calculated. For each of these earnings codes, you can specify an earnings code to be used for paying the Retro Pay earnings.

Final Check Program ID To specify a default final check program for the pay group, select the final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

(USA) FLSA Required Select this check box if FLSA regulations are to be applied to this pay group. When you select this check box, the *FLSA Period Definition* button appears. If you do not select this check box, the button does not appear and you cannot define FLSA pay periods.

FLSA is for U.S. Payroll only; this check box appears on the page if you have enabled FLSA processing on the Fica/Tax Details page (access through the Company Table − Default Settings page) and on every pay group when applicable.

Note. If FLSA is not selected for a company, it cannot be selected for a pay group within that company. After it has been selected at the company level, it does not have to be selected at the pay group level. However, if FLSA is required for a pay group, it must be selected at both the company and pay group levels.

Note. (USF) If FLSA is required for a whole agency or for most pay groups in an agency, you should clear the *FLSA Required* check box and define FLSA requirements on the Agency Table. Remember that if the *FLSA Required* check box isn't selected on the Agency Table, the FLSA Rule for a pay group is set by default to *Higher of FLSA Contractual.*

Note. To be included in FLSA calculation, an employee must have non-exempt status and belong to an FLSA pay group.

Note. When setting up pay groups, do not use the same pay group ID in two separate companies if the companies use different overtime earnings codes for FLSA.

(USA) FLSA Period Definition Click to access the FLSA Period Definition page.

Earnings

Use this group box to define earnings codes for each earnings type.

Regular Hours	Select the appropriate earnings code for the regular hours earnings type.
Overtime Hours(overtime hours earnings type)	Select the appropriate earnings code for the overtime hours earnings type.
Regular Earnings	Select the appropriate earnings code for the regular earnings type.
Holiday	When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with this field. If Holiday Type on the Holiday Schedule Table is Canadian, the system uses this earnings code to set up the statutory holiday earnings on the paysheet.

(USF) US Federal

Select the appropriate earnings code for Nonpay hours, Refund, and Interest.

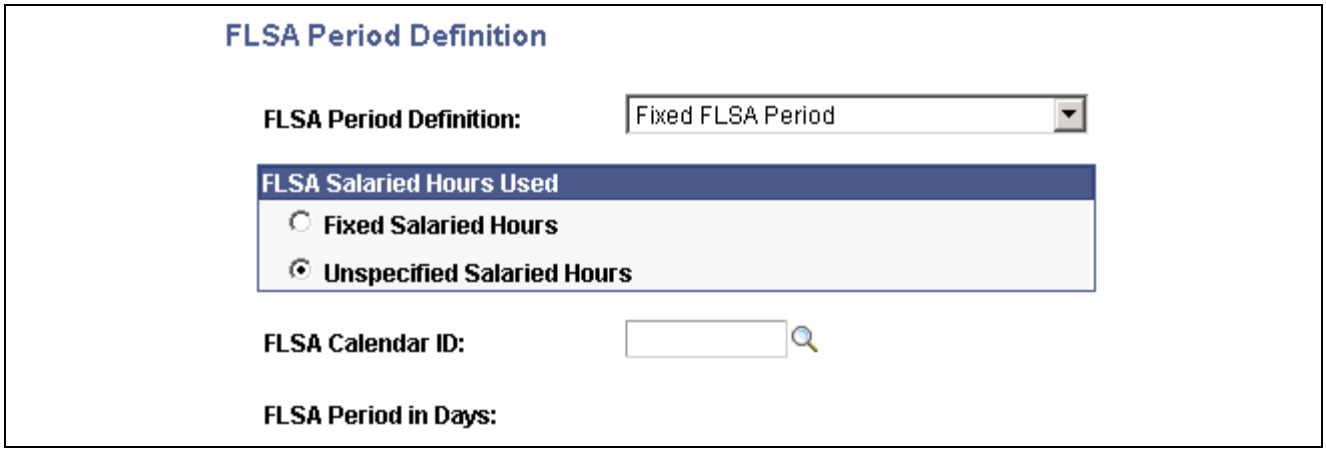
See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Processing Retro Pay," (USF) Managing Interest Calculations on Retro Pay.

See Also

Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 225

(USA) Specifying the FLSA Period Definition

Access the FLSA Period Definition page.



FLSA Period Definition page

The FLSA Period Definition page changes, depending on which options you select. The following table shows which fields are visible on the page, depending on the FLSA Period Definition you select:

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X	X	X	
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula selected	X	X			
Fixed FLSA Period with Unspecified Salaried Hrs selected	X		X	X	
Law Enforcement			*X*	X	X
Fire Protection			X	X	X

FLSA Period Definition Select the appropriate FLSA period definition:

- *Fixed FLSA Period:* 7 or 14 days. 7 is the default.
- *Fire Protection:* 7 to 28 days.
- *Law Enforcement:* 7 to 28 days.
- User-defined FLSA period definitions are also available in the list.

If you select *Fixed FLSA Period,* the period can only be for 7 or 14 days. There are no FLSA Threshold Hours for employees in the *Fixed FLSA Period,* because threshold hours only apply to law enforcement and fire protection employees.

FLSA Salaried Hours Used

Fixed Salaried Hours (Hours per Week) Select this option to use the standard hours you entered on the employee's Job record. If you select this option, the *Use Basic Formula* check box appears.

Use Basic Formula If you select this check box, the *FLSA Calendar ID* and *FLSA Period in Days* check boxes disappear. Basic formulas are used only for monthly and semi-monthly pay periods. The FLSA period is assumed to be the same as the Pay Calendar period; hence, no FLSA Calendar ID is required. If you select this check box, you must enter information into the Work Day Hours field on the Job Information page.

Unspecified Salaried Hours Select this option to use the actual number of hours worked per week by salaried employees to determine their FLSA rate.

FLSA Calendar ID Select a FLSA calendar ID. The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA Calendar ID to define the FLSA periods. This field is not applicable if you select *Basic Rate Formula.* If you select *Fixed FLSA Period,* the prompt list contains only FLSA Calendar IDs with 7 or 14 FLSA Periods in Days. For Fire Protection or Law Enforcement, the prompt list contains FLSA Calendar IDs from 7 to 28 days.

FLSA Period in Days The length of the FLSA pay period, or the days from the FLSA Begin Date to the FLSA End Date. The system displays it automatically. It is based on the FLSA Period in Days you define on the FLSA Calendar Table. This field is display-only.

FLSA Threshold Hours The number of hours worked before the FLSA rate applies to Fire Protection and Law Enforcement employees. Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in the FLSA Period Table. You can create user-defined FLSA period definitions with different threshold hour schedules if necessary.

See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "(USA) FLSA and Alternative Overtime Calculations".

(E&G) Entering Additional E&G Earnings Codes

Access the Education and Government Additional Earnings Codes page.

Select the appropriate earnings code for each field.

Running Job Code and Pay Group Reports

To run job code and pay group reports, use the Job Code Table Report component (RUN_PER_709C) and Pay Group component (RUN_PAY711).

This section lists the page used to run job code and pay group reports.

Page Used to Run Job Code and Pay Group Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	Job Code Table report (PER709C) lists all job codes.
Pay Group Report	PRCSRUNCNTL	• Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Group • Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Pay Group Table	The Pay Group report (PAY711) prints each pay group and the processing characteristics that apply to that group.

CHAPTER 15

(USF) Setting Up Human Resources Management Tables

This chapter discusses how to:

- Set up federal HRMS control tables.
- Run federal HRMS setup reports.
- View the project costing and general ledger business unit tables.

Setting Up Federal HRMS Control Tables

To set up federal HRMS control tables, use the Handicap Table component (GVT_HANDICAP_TBL), Legal Authority component (GVT_LEGAL_AUTH_TBL), U.S. County Table component (GVT_COUNTY_TABLE), Nature of Action Table component (GVT_NOAC_TBL), LEO Pay Area USF component (GVT_LEOPAY_AREA_TB), NOA/Legal Authority Table component (GVT_AUTH_VAL_1), Sub Agency component (GVT_SUB_AGENCY_TBL), Personnel Office ID component (GVT_POI_TABLE), and Personnel Action Rqst Rmks component (GVT_SF50_RMK_TBL).

This section provides an overview of federal HRMS control tables and discusses how to:

- Set up disability codes.
- Set up legal authority codes.
- Set up nature of action codes.
- Set up LEO pay areas.
- Associate nature of action codes with legal authority codes.
- Set up sub-agencies.
- Set up personnel office IDs.
- Specify PAR approving officials.
- Set up PAR remarks.

Understanding Federal HRMS Control Tables

This section discusses the set up of control tables that are specific to federal agencies and tells you how to set up HRMS control tables specific to Federal needs and view PeopleSoft Enterprise Project Costing and PeopleSoft Enterprise General Ledger business units.

When creating personnel action requests, you search fields using information from the Legal Authority Table, the Nature of Action Table, the PAR Remarks Table, and the NOA/Legal Authority 1 Table.

When you enter employee-specific information, you use values from the Handicap and the LEO Pay Area Table.

In PeopleSoft HRMS, you use values from the U.S. County Table, the Personnel Office ID Table, and the Sub-Agency Table.

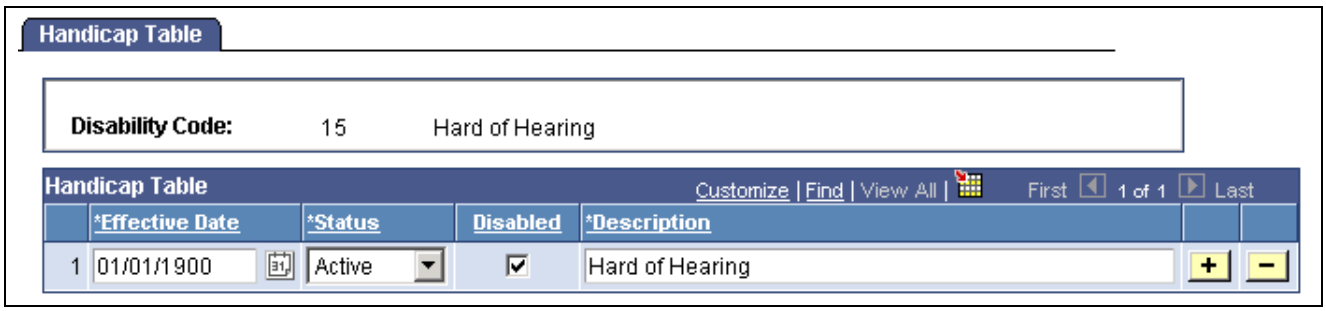
Pages Used to Set Up Federal HRMS Control Tables

Page Name	Object Name	Navigation	Usage
Handicap Table	GVT_HANDICAP_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Handicap Table	Assign codes to the types of disabilities a person might have. You can set up the table with the disabilities that your agency is likely to use and add more as needed.
Legal Authority Table	GVT_LEGAL_AUTH_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Legal Authority, Legal Authority Table	The Legal Authority Table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.
U.S. County Table	GVT_COUNTY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, U.S. County Table	Contains a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.
Nature of Action Table	GVT_NOAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Nature of Action Table	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources. Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code. PeopleSoft delivers the NOA codes, but you can add or update entries as needed. When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series.

Page Name	Object Name	Navigation	Usage
LEO Pay Area Table	GVT_LEOAREA_TABLE	Set Up HRMS, Product Related, Compensation, LEO Pay Area USF, LEO Pay Area Table	Set up special pay areas in the LEO Pay Area Table. Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.
NOA/Legal Authority 1 Table	GVT_AUTH_VAL_1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NOA/Legal Authority 1, NOA/Legal Authority 1 Table	Connect the NOA codes that are defined in the Nature of Action Table with the Legal Authorities that are defined in the Legal Authority Table. You must have set up Nature of Action codes and Legal Authority codes.
Sub-Agency Table	GVT_SUBAGCY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Sub-Agency, Sub-Agency Table	Set up sub-agencies. If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.
Personnel Office ID Table	GVT_POI_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, Personnel Office ID Table	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the personnel action requests.
PAR Approving Officials Table	GVT_POI_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, PAR Approving Officials Table	Enter the names that appear in the routing process section of the PAR.
PAR Remarks Table	GVT_SF50_RK_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Action Rqst Rmks, PAR Remarks Table	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert person-specific information into other remarks when you attach the remark at the person level.

Setting Up Disability Codes

Access the Handicap Table page.

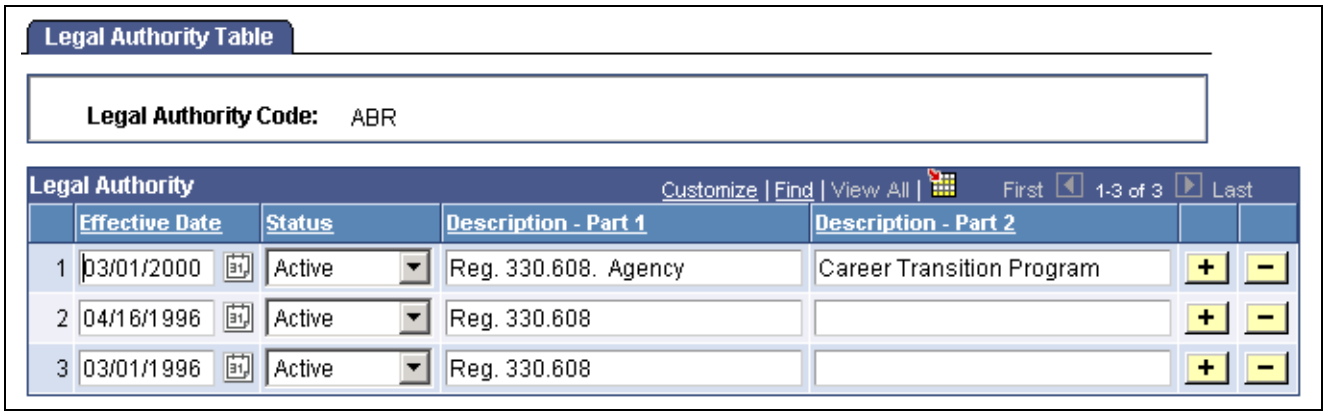


Handicap Table page

Disabled Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a disability code to indicate that a person has no disability, leave this check box cleared.

Setting Up Legal Authority Codes

Access the Legal Authority Table page.



Legal Authority Table page

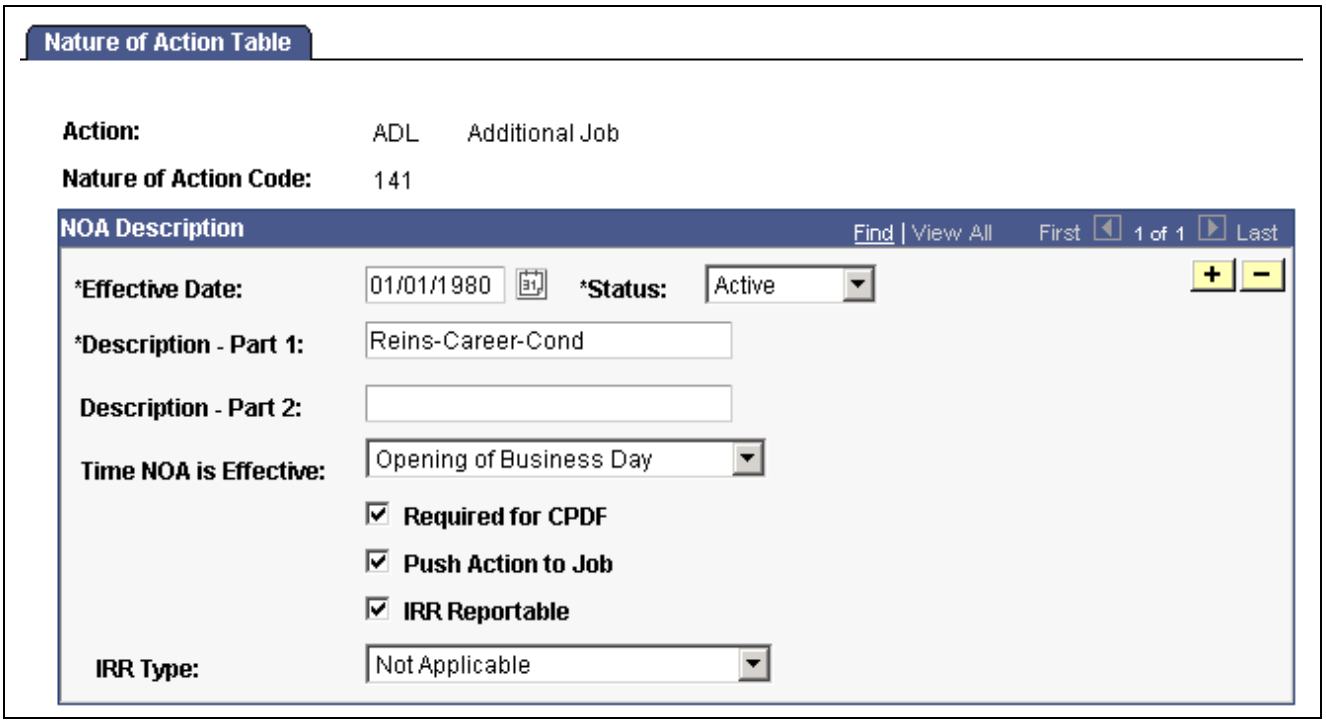
A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority Table.

When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

Enter a Description - Part 1 and a Description Part - 2. These descriptions appear on the Data Control page (GVT_JOB0) when you process personnel actions for a person.

Setting Up Nature of Action Codes

Access the Nature of Action Table page.



Nature of Action Table page

Nature of Action Code

When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

Time NOA is Effective (time nature of action is effective)

This field designates when the personnel action should take effect. Select *Opening of Business Day* (the default) or *Close of Business Day.*

If you select *(none),* the system uses the default, *Opening of Business Day.*

In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With *Termination/Non-Pay* actions (NOAs that are in the 300 series and 400 series), the action is effective at *Close Of Business Day* on the effective date.

Required for CPDF (required for central personnel data file)

Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.

Push Action to Job

Select if the nature of action is to be applied to the core PeopleSoft job record (JOB) from the federal government side after saving the personnel action.

IRR Reportable (individual retirement record reportable)

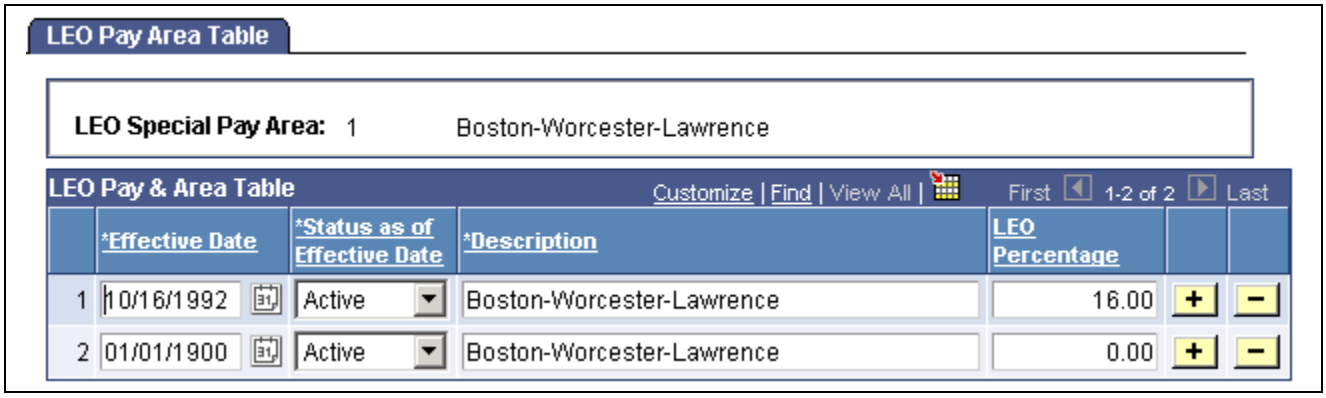
Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.

IRR Type

Select the type of IRR to be generated. Values are *Retirement, Transfer/Resignation,* and *Supplemental.*

Setting Up LEO Pay Areas

Access the LEO Pay Area Table page.



LEO Pay Area Table page

LEO Percentage (law enforcement officer percentage) Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page (JOB_DATA3) in Administer Workforce.

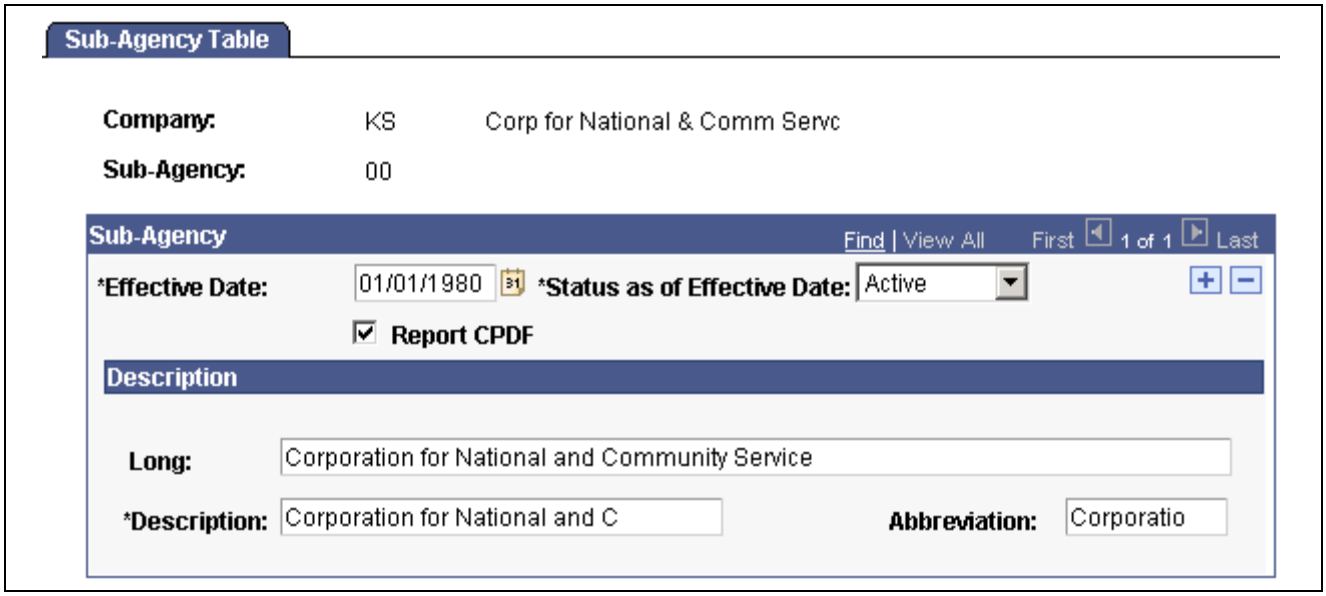
Associating Nature of Action Codes with Legal Authority Codes

Access the NOA/Legal Authority 1 Table page.

When you enter an NOA (nature of action) code on the PAR Data Control page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority Table.

Setting Up Sub-Agencies

Access the Sub-Agency Table page.



Sub-Agency Table page

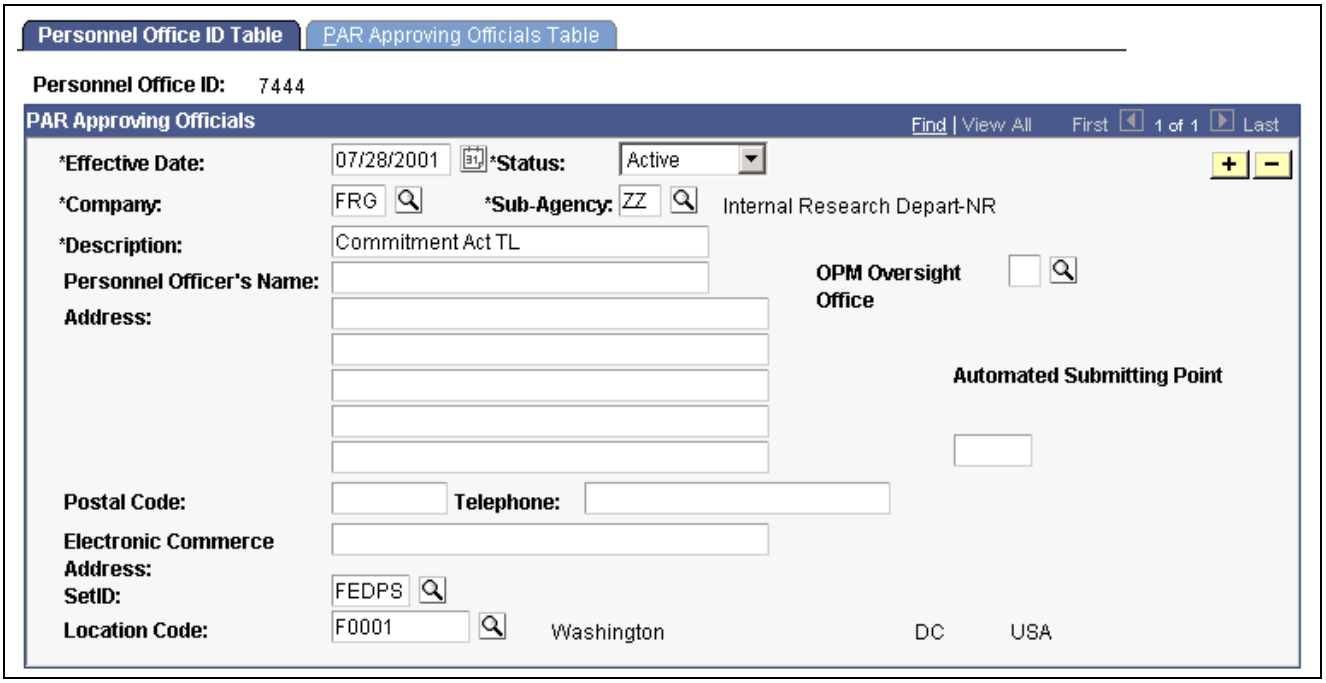
Report CPDF (report central personnel data files) Select if this sub-agency reports CPDF on a regular basis.

Long Enter a long description of the sub-agency.

Abbreviation Enter an abbreviated description of the sub-agency.

Setting Up Personnel Office IDs

Access the Personnel Office ID Table page.



Personnel Office ID Table page

Sub-Agency Select the sub-agency code.

Personnel Officer's Name Enter the name of the person who is responsible for personnel actions for this office.

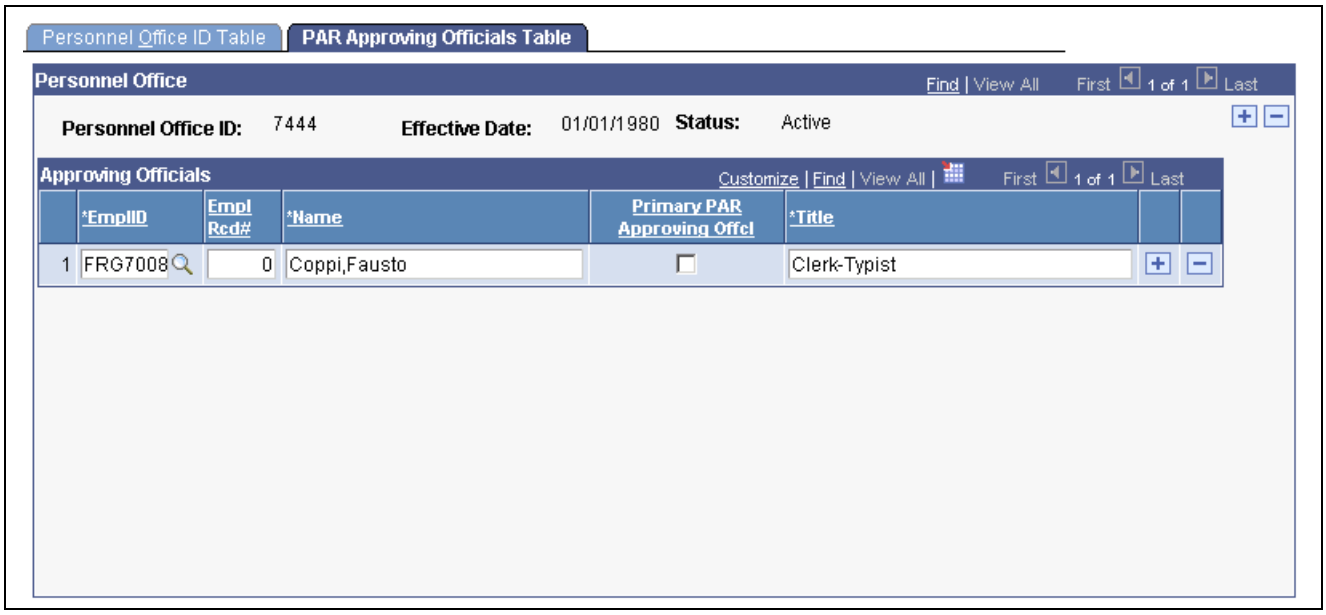
OPM Oversight Office (Office of Personnel Management Oversight Office) Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.

Electronic Commerce Address This address is for your agency's information only. For example, this might be an email address or a government network ID.

Automated Submitting Point The automated submitting point is an informational field and isn't used during PeopleSoft HRMS processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.

Specifying PAR Approving Officials

Access the PAR Approving Officials Table page.



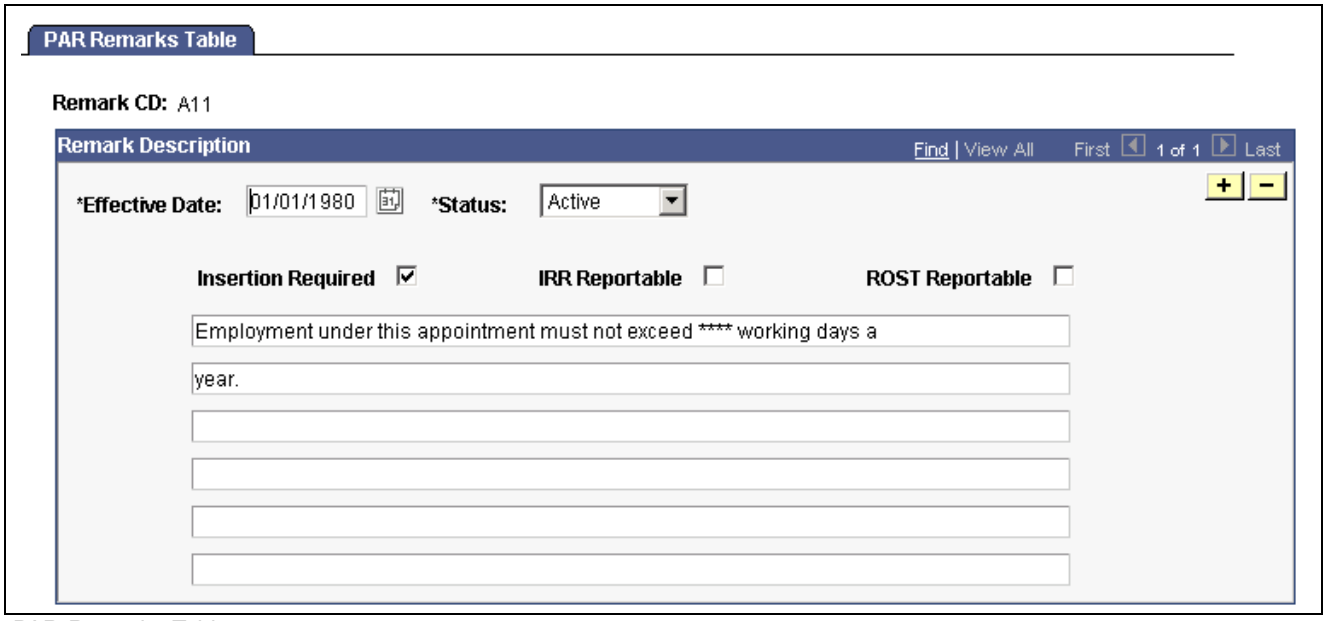
PAR Approving Officials Table page

EmplID (employee ID) Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the *Empl Rcd#, Name,* and *Title* fields. You can edit these fields.

Primary PAR Approving Offcl (primary personnel action request approving official) Select if applicable. This check box is for your information only.

Setting Up PAR Remarks

Access the PAR Remarks Table page.



PAR Remarks Table page

The Office of Personnel Management (OPM) designates remark codes that begin with *A* through *X*. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with *Y* or *Z*. When you upgrade PeopleSoft HRMS, retain your agency-specific remarks.

Insertion Required — Select if this remark needs employee-specific information. When you select this remark at the person level, this check box is unavailable for entry.

PeopleSoft uses an asterisk (*) to denote person-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the person level.

IRR Reportable (individual retirement record reportable) — Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.

ROST Reportable (Register of Separations and Transfers reportable) — Select to have this remark printed on the ROST.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Generating IRR and ROST Reports"

Running Federal HRMS Setup Reports

This section lists the pages used to run the federal HRMS setup reports.

Pages Used to Run the Federal HRMS Setup Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table • Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA/Authority 1 • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	Use this page to run these reports: • Handicap Table report (FGPER811) prints all disabilities and their associated codes. • Legal Authority Table report (FGPER812) prints information about the legal authorities you set up in the Legal Authority table. • Nature of Action Table report (FGPER813) generates a list of the codes in the Nature of Action Table. • LEO Pay Area Table report (FGPER808) lists each LEO Special Pay Area and associated percentage. • NOA Authority 1 report (FGPER814) generates a list of the information in the Nature of Action/Authority 1 Table. • Personnel Office ID Table report (FGPER805) prints information about all Personnel Offices in your agency. • Sub-Agency Table report (FGPER804) prints all sub-agencies in the Sub-Agency Table and their associated agencies.

Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages. The PC Business Unit Table is part of the Project Costing process in PeopleSoft Enterprise Financials, which interacts with the Time and Labor process. If you don't use project costing, you don't need to import the values for this table. The GL Business Unit Table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don't need to import the values for this table.

See Also

For more information about the PC Business Unit Table, see *PeopleSoft Time and Labor PeopleBook*

For more information about the GL Business Unit table, see *PeopleSoft General Ledger PeopleBook*

CHAPTER 16

Setting Up Banks and Bank Branches

This chapter provides an overview of bank and bank branch setup and discusses how to:

- Set up banks and bank branches.
- Set up IBAN information.
- Specify source banks.
- Report on banks and bank branches.

Understanding Bank and Bank Branch Setup

This section discusses:

- Banking setup.
- (GBR) Bank and building society setup in the UK.
- The CI_BANK_EC component interface.

Banking Setup

To set up banks in HRMS:

1. Set up bank information on the Bank Table page (BANK_EC).
2. Specify bank branch information on the Branch Table page (BANK_BRANCH_EC).

   Note. There is some additional banking setup required for UK customers.

   See Chapter 16, "Setting Up Banks and Bank Branches," (GBR) Bank and Building Society Setup in the UK, page 357.
3. Specify source banks for payroll processing on the Source Bank Accounts page.

(GBR) Bank and Building Society Setup in the UK

This section discusses how to set up the pages in the Bank/Branch component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

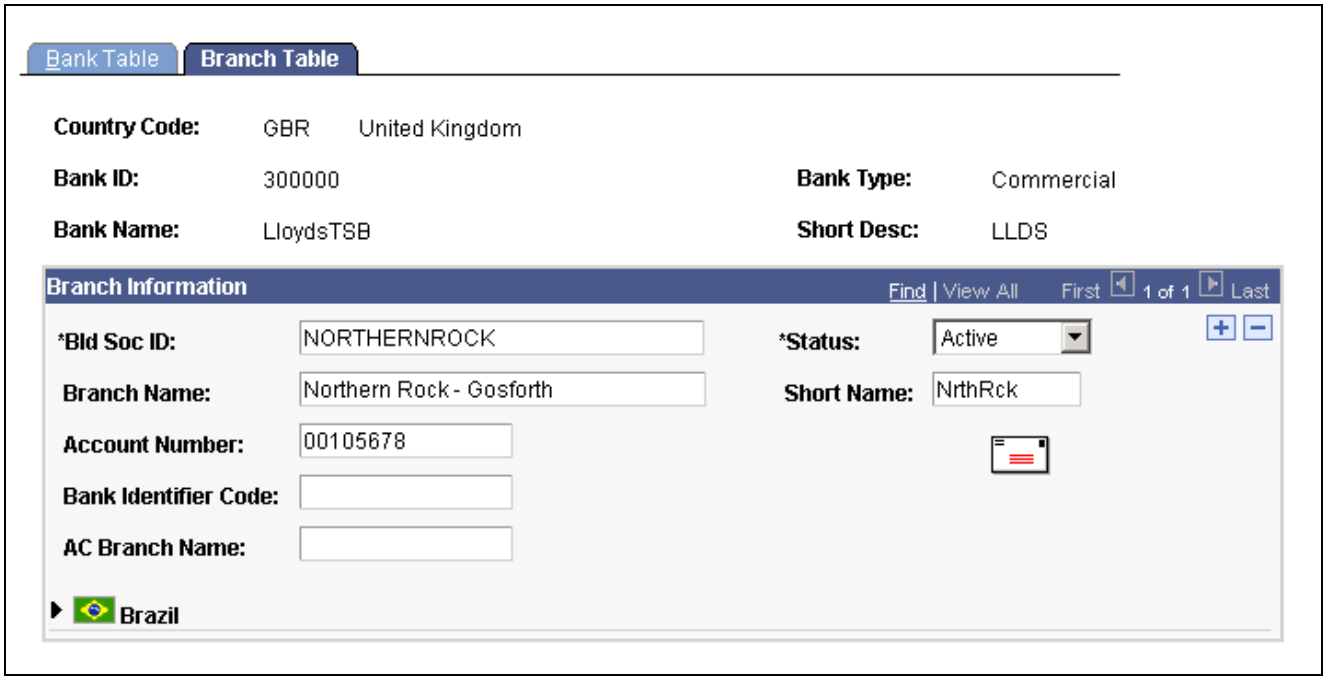
You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your payee's bank and building society accounts.

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society. Use the Branch Table page and its associated Building Society Address page, to enter the building society details. This table shows how to complete these pages:

Type of Account	Bank Table Page	Branch Table Page and Building Society Address Page
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning! You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

This example shows how a building society is defined on the Branch Table page:



Example Building Society Setup

In the example, the building society is linked to LloydsTSB bank (bank ID 30000) that handles clearing for the building society. The building society's clearing account is shown in the Account Number field.

The CI_BANK_EC Component Interface

Because there may be a large volume of bank information to set up, you can simplify the process by importing bank information from a Microsoft Excel spreadsheet into the bank setup tables with the use of the CI_BANK_EC component interface that PeopleSoft provides.

You download bank information from a website or service that provides bank information to an Excel spreadsheet and then import the information from the Excel spreadsheet to the CI_BANK_EC component interface, using the Excel to Component Interface utility. The CI_BANK_EC component interface loads the bank information into the BANK_EC table and BANK_BRANCH_TBL in PeopleSoft HRMS.

Note. It is your responsibility to determine which rows to update and which rows to add to the PeopleSoft HRMS database when using the Excel to Component Interface utility.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Setting Up Banks and Bank Branches

To set up banks, use the Bank (BANK_EC) component. To set up bank branches, use the Bank Branch (BANK_BRANCH_TBL) component. Use the CI_BANK_EC component interface to load the banking data into the tables for this component interface.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces*

This section discusses how to:

- Identify banks.
- Define bank branches.

Pages Used to Set Up Banks and Bank Branches

Page Name	Object Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Address	BANK_BRA_ADR_SP	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table Click the Address Information button on the Branch Table page.	Enter the address for a bank branch.

Identifying Banks

Access the Bank Table page.



Bank Table page

Bank ID System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.

Bank Type Select the type of bank. Values are *Commercial,Community,General,Post Bank,*and *Savings*.

Alternate Bank ID Enter the bank's national ID, if applicable. If the bank participates in an international banking consortium or system, it is given an alternate bank ID that is used in international transactions.

Bank Name Enter the name of the bank.

Bank Identifier Code Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.

Country Select the country where the bank is located.

Address The bank's address is displayed.

Edit Address Click the Edit Address link to change address information for a bank.

Phone Enter the phone number for the bank.

AC Bank Name (alternate character bank name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK bank branches enter the following information:

Country Code Enter *GBR*.

Bank ID Enter the sort code for the bank branch.

Note. If you're setting up a building society, enter the sort code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.

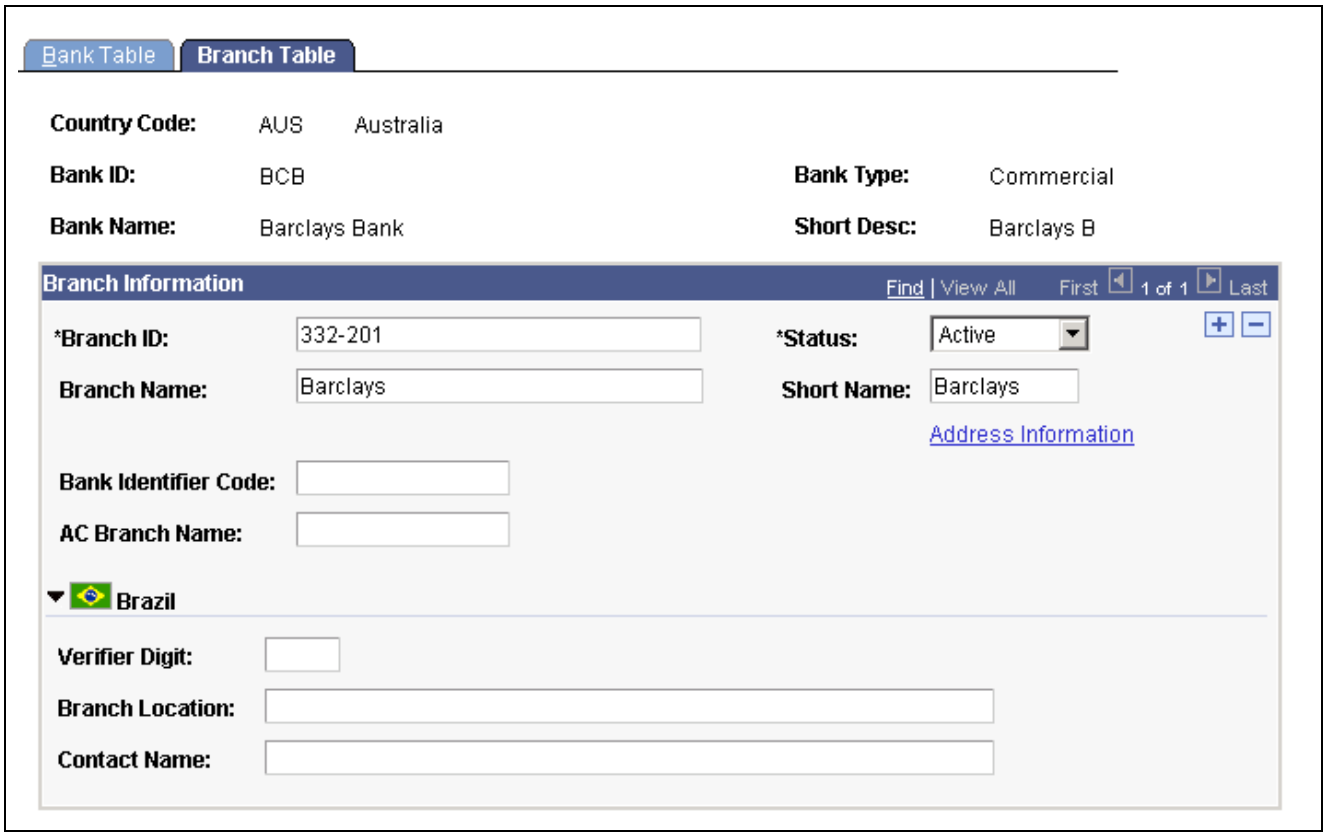
Bank Type Optional for UK banks.

Alternate Bank ID Leave blank for UK banks.

Bank Name Enter a description of the branch. Include the location of the branch, not just the bank name.

Defining Bank Branches

Access the Branch Table page.



Branch Table page

Branch ID Enter the branch ID for the bank. Branch ID formats vary by country.

Branch Name Enter the name of the bank branch.

Bank Identifier Code Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.

AC Branch Name (alternate character branch name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.

Address Information Click the Address Information link to access the Bank Branch Address page.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK building societies enter the following information on the Branch Table page:

Bld Soc ID (building society ID) Enter a unique identifier for the building society.

Status You can enter employee account details only for building societies with an active status.

Branch Name Enter the full name of the building society.

Account Number Enter the number of the building society's account at the clearing bank.

Address Information Click the Address Information link to access the Building Society Address page, where you enter the building society's head office address.

(BRA) Brazil

Verifier Digit Enter the bank-assigned verifier digit. File transfers may require the verifier digit.

Branch Location Enter the bank branch location.

Contact Name Enter the contact name for the bank branch.

Setting Up IBAN Information

To set up IBAN Information, use the IBAN Country Setup (SETUP_IBAN_TBL) component.

This section provides an overview of IBAN setup and discusses how to set up IBAN information.

Understanding IBAN Setup

The International Bank Account Number (IBAN) is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders. PeopleSoft applications can include this information at the bank account level.

To set up IBAN functionality you must select the IBAN enabled field on the IBAN Country Setup page. You can also establish the rules used to create the Basic Bank Account Number (BBAN) on this page. Once the IBAN feature is enabled you will see the IBAN field on the Source Bank Account page and the Bank Account Information page for the country you indicated.

See Also

Chapter 16, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 365

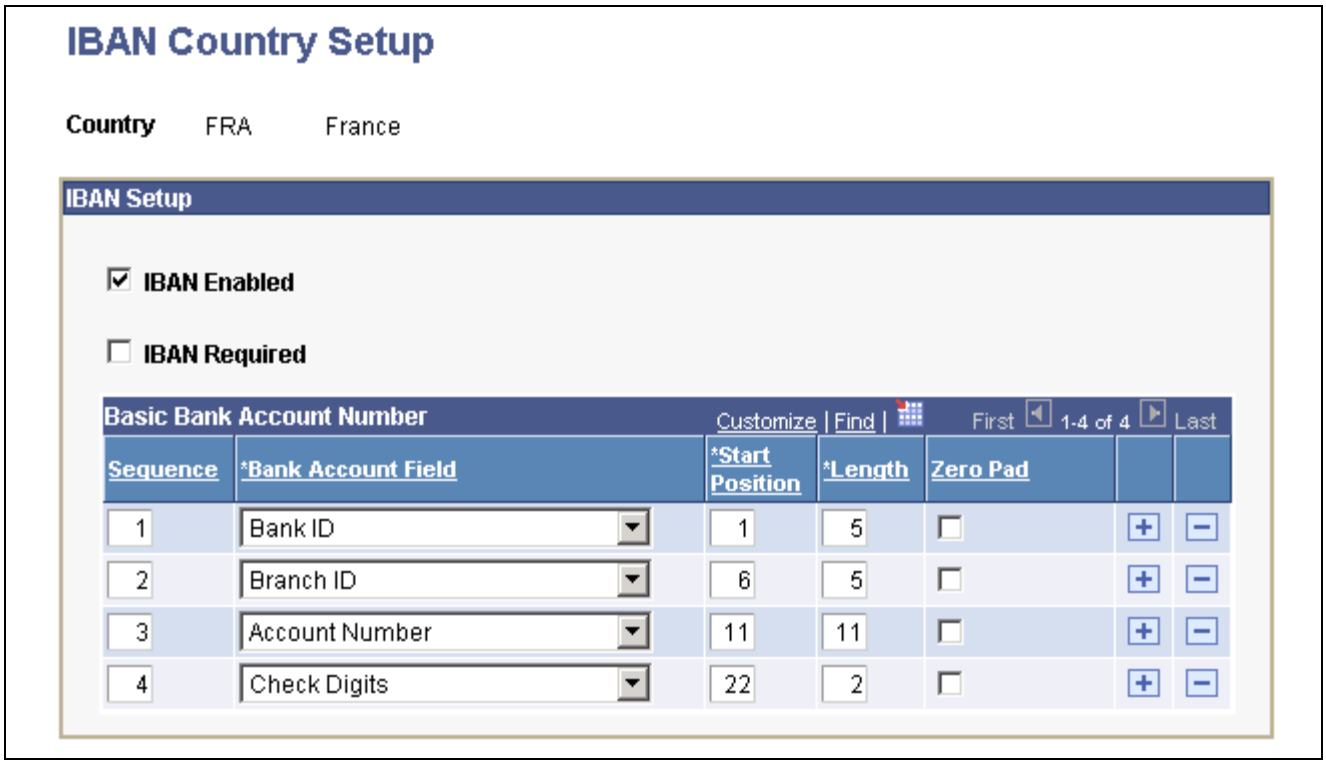
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Entering Bank Account Information

Page Used to Set Up IBAN Information

Page Name	Object Name	Navigation	Usage
IBAN Country Setup	SETUP_IBAN_TBL	Set Up HRMS, Common Definitions, Banking, IBAN Country Setup	Enable the IBAN feature for a specific country. Create BBAN validation rules.

Setting Up IBAN Information

Access the IBAN Country Setup page.



IBAN Country Setup page

IBAN Enabled Select this check box to enable the IBAN functionality for this country. If you enable IBAN, the IBAN field and the Edit IBAN link appears when you set up a source bank account page or a payee bank account with this country code.

IBAN Required Select this check box to require an IBAN value for accounts in this country. If you select this check box, you must complete the IBAN fields when you set up a source bank account or a payee bank account with this country code.

See Chapter 16, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 365.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

Basic Bank Account Number

Sequence Enter the order in which the value will appear in the Basic Bank Account Number (BBAN).

Bank Account Field Select the field used to compose the BBAN.

Start Position Enter the position where the Bank Account Field will begin.

Length Enter the number of characters allotted for this Bank Account Field.

Zero Pad Select this option to fill any difference between Length and the actual Bank Account Field value with zeroes.

Specifying Source Banks

To specify source banks, use the Source Bank Accounts (SRC_BANK) component .

This section provides an overview of source banks and discusses how to:

- Define source banks.
- Edit IBAN information.
- (CAN) (USA) Specify data for banks in Canada or the U.S.
- (JPN) Specify the account type and company code.

Understanding Source Banks

Source banks are the money sources that payroll disbursements are drawn from. For each source bank, you identify the appropriate bank and bank branch, account number, and EFT formats.

For certain countries, such as the U.S., Canada, and Japan, you need to set up additional information for source banks, accessed through the Other Required Information link on the Source Bank Accounts page. For countries in Europe, you'll need to define International Bank Account Number (IBAN) information, accessed through the Edit IBAN link on the Source Bank Accounts page.

PeopleSoft Enterprise Global Payroll users also need to link source banks to a pay entity. This is discussed in the PeopleSoft Global Payroll core documentation.

See Also

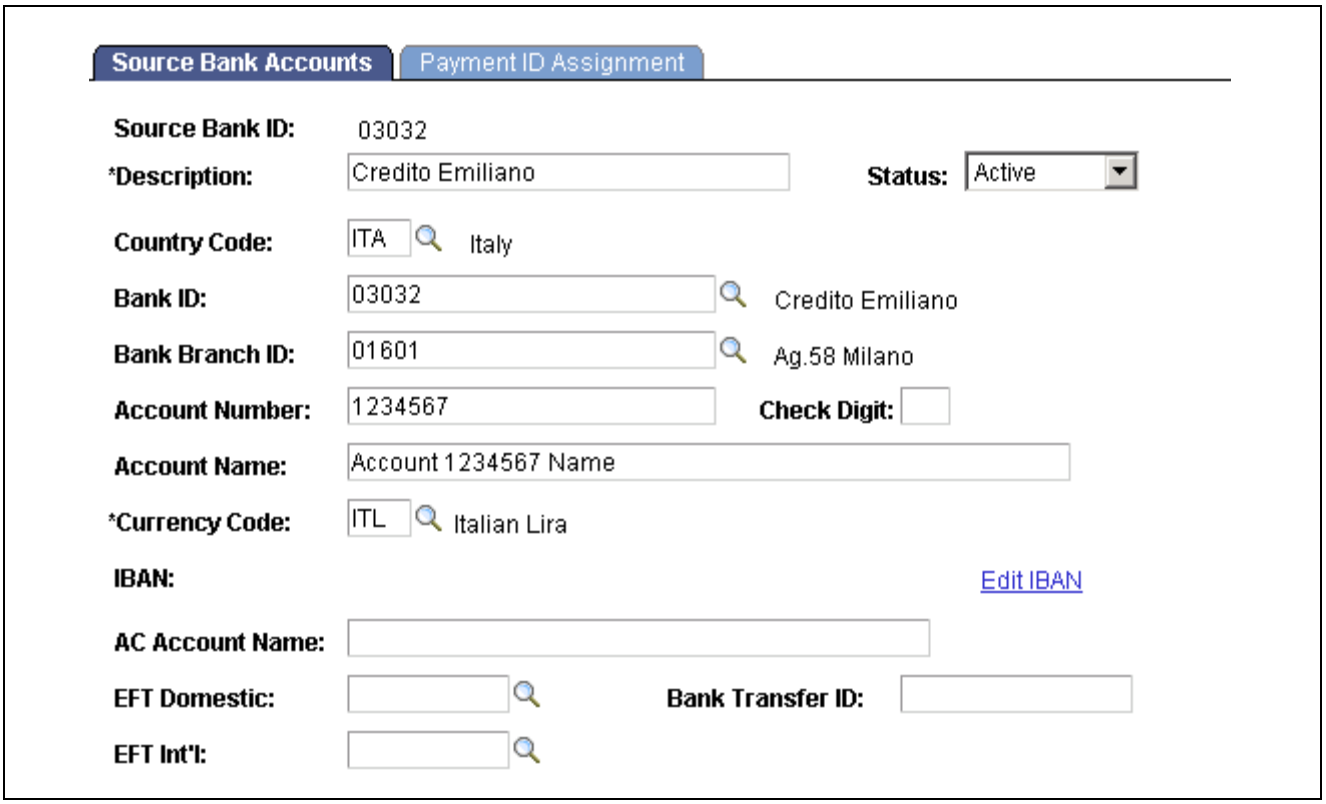
PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, "Defining Banking Instructions"

Pages Used to Specify Source Banks

Page Name	Object Name	Navigation	Usage
Source Bank Accounts	SRC_BANK	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts	Assign a source bank ID and define information about the banks that pay out money.
International Bank Account Nbr	BANKACCT_IBAN_SEC	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Edit IBAN link on the Source Bank Accounts page.	(BEL)(FRA)(DEU)(CHE)(ITA)(ESP)(NLD)(GBR) Enter or edit the International Bank Account Number. Generation of the IBAN is the responsibility of the bank or bank branch servicing the account. This page is only available if you select *BEL, FRA, DEU, CHE, ITA, ESP, NLD,* or *GBR* as the Country Code. on the Source Bank Accounts page.
Canada Bank Additional Data page, US Bank Additional Data page	SRC_BANK_PY_SP	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Other Required Information link on the Source Bank Accounts page.	(CAN)(USA) Specify data for banks in Canada or the U.S. This page is only available if you select *CAN* or *USA* as the Country Code on the Source Bank Accounts page.
Japan Bank Additional Data page	GPJP_SRC_BANK_SEC	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Other Required Information link on the Source Bank Accounts page.	(JPN) Specify the account type and company code for Japanese banks.

Defining Source Banks

Access the Source Bank Accounts page.



Source Bank Accounts page

Description Enter the name of the bank.

Country Code Select the country code where the bank is located.

Bank ID Select the bank ID.

Bank Branch ID Select the bank branch ID, if applicable.

Account Number Enter the bank account number. Each country has its own account number format.

Check Digit Enter the value used to validate the bank ID, bank branch ID (if applicable), and account number. This field only appears for countries where check digits are used.

Note. This field is not for IBAN accounts. You enter the IBAN check digit on the International Bank Account Nbr page that you access when you click the Edit IBAN link on this page.

Account Name Enter the name of the bank account.

Currency Code Select the currency code.

IBAN Displays the IBAN. This only appears if the country code is *BEL, FRA, DEU, CHE, ITA, ESP, NLD,* or *GBR.*

Edit IBAN Click this link to access the International Bank Account Nbr (number) page where you can edit the IBAN.

Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

Depending on the country that you select, you may not have this page. It is used to record information for companies that operate in Europe.

See Chapter 16, "Setting Up Banks and Bank Branches," Editing IBAN Information, page 368.

Other Required Information Click this link to access the Additional Data page. Depending on the country that you select, you may not have this page. It is used to record information for companies that operate only in the U.S., Canada, or Japan.

See Chapter 16, "Setting Up Banks and Bank Branches," (CAN) (USA) Specifying Data for Banks in Canada or the U.S., page 369.

See Chapter 16, "Setting Up Banks and Bank Branches," (JPN) Specifying the Account Type and Company Code, page 370.

AC Account Name (alternate character account name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

EFT Domestic (electronic funds transfer domestic) Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the EFT Domestic field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation.

Note. Not applicable in the U.S. or Canada.

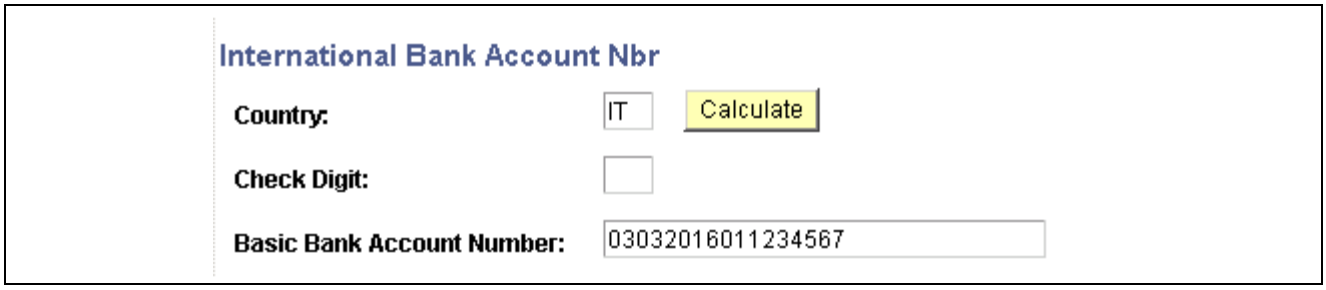
Bank Transfer ID Enter the bank transfer ID that is used to identify banks to clearing systems.

EFT Int'l (electronic funds transfer international) Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name is taken from the EFT Int'l field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

Note. The Payment ID Assignment page, found in this component, is specific to PeopleSoft Global Payroll and is documented in the PeopleSoft Global Payroll documentation.

Editing IBAN Information

Access the International Bank Account Number page.



International Bank Account Nbr page

Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

Note. While saving, the system validates the data. The page will not be saved if any invalid values appear.

Country Enter or edit the country code used to generate the IBAN.

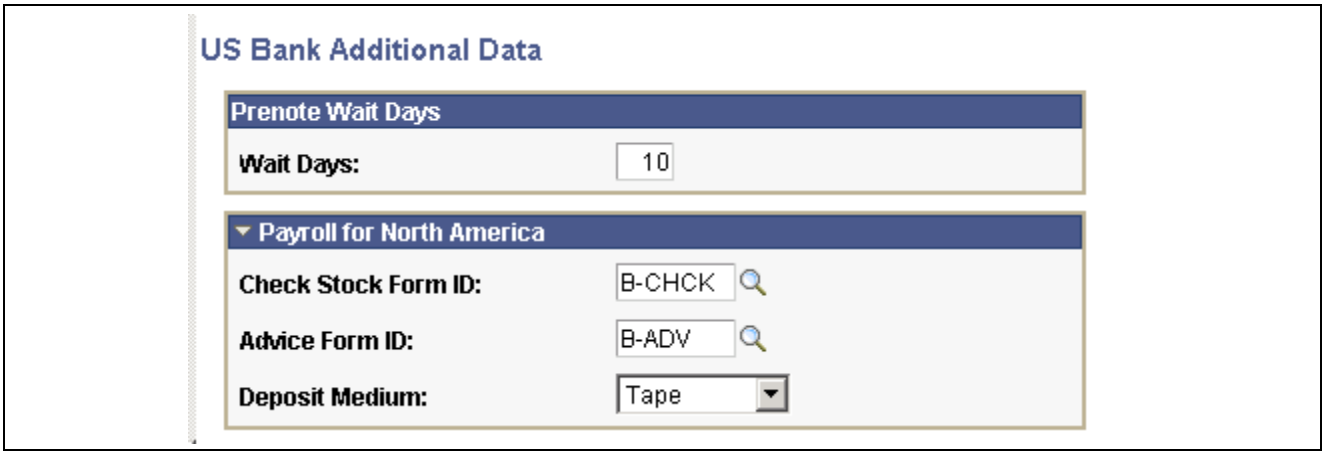
Calculate Click this button to generate the IBAN. The system populates the Country and Basic Bank Account Number fields using data from the Source Bank Accounts page. You must complete the Check Digit field and correct the defaulted values if necessary.

Check Digit Enter the number used to validate the IBAN.

Basic Bank Account Number Enter or edit the account number used to generate the IBAN.

(CAN) (USA) Specifying Data for Banks in Canada or the U.S.

Access the Canada Bank Additional Data page or the US Bank Additional Data page.



US Bank Additional Data page

(USA) Prenote Wait Days

Wait Days Enter the number of prenote wait days. What you enter here at the source bank level determines whether the prenotification process is required or not. If you enter *0* in this field, there won't be a prenote generated at the payee level. If you enter any number other than *0* in this field, a prenote is required.

When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks require an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days*.

Note. enable the prenote process to validate the transit numbers, which you specify at the employee level.

Payroll for North America

The Payroll for North America group box only appears if you have PeopleSoft Payroll for North America installed. You only have to define this group box if you have PeopleSoft Payroll for North America.

Check Stock Form ID If your company generates checks, select the form ID for this source bank account.

Advice Form ID If your company generates direct deposits, select the form ID for this source bank account.

When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Form IDs are defined in the Form Table.

Deposit Medium Specify how transactions are transferred to the bank for processing. Options are *Tape,EFT,* (electronic funds transfer), *Diskette,* and *Report.*

For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the payroll process in any way.

(CAN) Routing Format Enter the routing number.

The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first.

Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees' paychecks directly into their personal bank accounts. Valid values are:

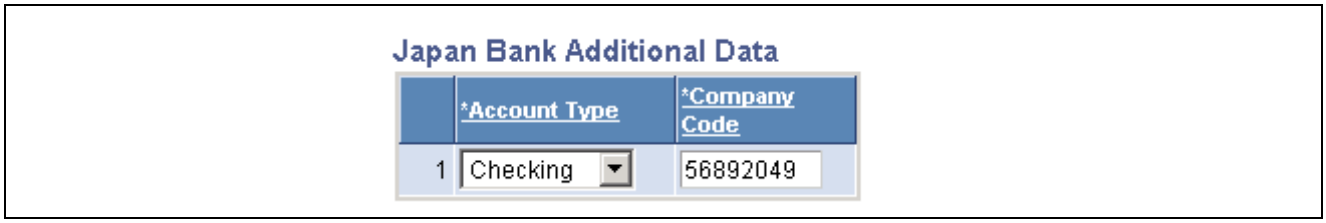
- *Lead 0, Bank ID, Branch ID.*
- *Lead 0, Branch ID, Bank ID.*
- *Bank ID, Branch ID* (no leading zero).
- *Branch ID, Bank ID* (no leading zero).

Direct Deposit Account Number For PeopleSoft Payroll for North America: This field is visible only when an Alternate Bank ID field is present on the Bank Table page. Enter the account number to use for making direct deposits.

See Chapter 16, "Setting Up Banks and Bank Branches," Identifying Banks, page 360.

(JPN) Specifying the Account Type and Company Code

Access the Japan Bank Additional Data page.



Japan Bank Additional Data page

Account Type The source bank account type. Values are *Checking* and *Regular*.

Company Code Enter the ID that is assigned to the company by the banking institution.

Reporting on Banks and Bank Branches

To report on banks and bank branches, use the Bank/Branch Report (RUN_PAY701) component.

This section lists the page used to report on banks and bank branches.

Page Used To Report on Banks and Bank Branches

Page Name	Object Name	Navigation	Usage
Bank/Branch Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	Run the Bank/Branch report that lists information from the bank and bank branch table.

CHAPTER 17

Setting Up General Ledger Interface Tables

This section provides an overview of GL Interface tables and discusses how to:

- Use General Ledger business units in HRMS.
- Map PeopleSoft HRMS and PeopleSoft General Ledger business units.
- View or Create Journal Generator templates.
- Configure the target product and system for PeopleSoft EnterpriseOne General Ledger.
- Configure General Ledger business units for PeopleSoft EnterpriseOne General Ledger.

Before You Begin

To set up an interface between PeopleSoft Enterprise General Ledger and PeopleSoft Enterprise Human Resources, select the PS/GL Product check box on the Installation Table.

Note. If you are interfacing with PeopleSoft Enterprise Financials 8.4 or higher, set up these tables in Financials and update them using application messaging. The components will be unavailable for entry in HRMS; use them to review the Financials values.

Note. If you are not interfacing with PeopleSoft Financials 8.4 or higher, set up these tables in HRMS.

See Also

Chapter 7, "Setting Up and Installing PeopleSoft HRMS," Entering Application- and Industry-Specific Installation Information, page 141

Using PeopleSoft General Ledger Business Units in PeopleSoft HRMS

To use PeopleSoft General Ledger business units in PeopleSoft HRMS, use the Review GL Business Units component (BUS_UNIT_TBL_GL).

Customers Using PeopleSoft General Ledger

If you're using PeopleSoft General Ledger, set up General Ledger business units in the general ledger using the General Ledger Definition component. PeopleSoft HRMS subscribes to the General Ledger business unit data and displays it using the Business Unit GL component.

Customers Not Using PeopleSoft General Ledger

Customers not using PeopleSoft General Ledger must set up a General Ledger business unit directly in PeopleSoft HRMS, using the Business Unit GL component.

Note. Payroll companies must post data to at least one PeopleSoft General Ledger business unit so you need to set up at least one business unit.

See Also

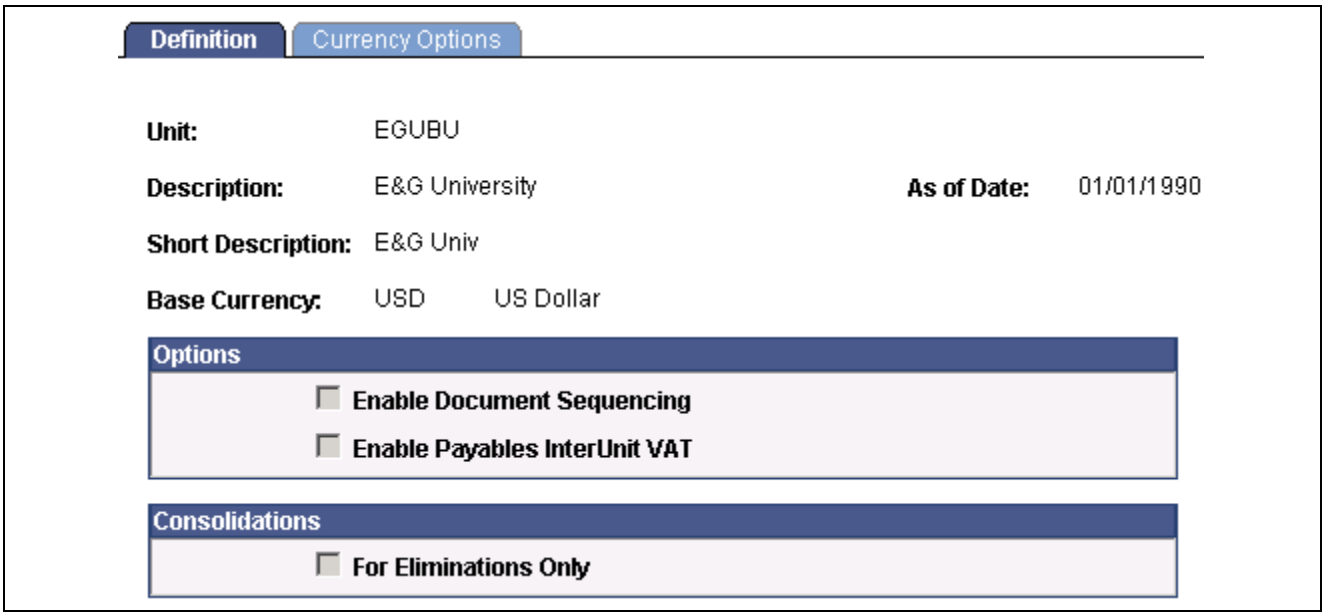
PeopleSoft General Ledger PeopleBook, "Defining Your Operational Structure"

Pages Used to View the General Ledger Business Unit Definition

Page Name	Object Name	Navigation	Usage
Review GL Business Units - Definition	BUS_UNIT_TBL_GL1	Set Up HRMS, Product Related, Payroll for North America, GL Interface, Review GL Business Units, Definition	If you are using PeopleSoft General Ledger, this page is display only. Use it to view the definition of PeopleSoft General Ledger business units. PeopleSoft HRMS processes use the information in the Unit and Base Currency fields only. If you are not using PeopleSoft General Ledger, the fields on this page are editable. Use this page to set up GL business units.
Review GL Business Units - Currency Options	BUS_UNIT_TBL_GL2	Set Up HRMS, Product Related, Payroll for North America, GL Interface, Review GL Business Units, Currency Options	View the currency options of PeopleSoft General Ledger business units. PeopleSoft HRMS processes do not use the information on this page. This page is display-only.

Viewing the General Ledger Business Unit Definition

Access the Review GL Business Units - Definition page.



Review GL Business Units - Definition page

Unit The PeopleSoft General Ledger business unit you selected to access the page.

Base Currency The base currency for this PeopleSoft General Ledger business unit. A General Ledger business unit supports one base currency per ledger. This is usually the local currency for the organization, but accounting rules or other circumstances might dictate that it be different.

Options

Enable Document Sequencing This check box is selected if document sequencing is required for this business unit.

Enable Payables InterUnit VAT (enable Payables interunit value added taxes) This check box is selected if payables interunit value added taxes (VAT) is required for transactions between related parties.

Consolidations

For Eliminations Only This check box is selected if this business unit is an eliminations entity for consolidations processing.

Viewing or Creating Journal Generator Templates

To view the journal generator template, use the Review Journal Generator Templ component (JRNLGEN_APPL_ID).

This section provides an overview of journal generator templates and describes how to:

- View journal generator templates.
- View the templates summarization options.

Understanding the Journal Generator Templates

PeopleSoft Enterprise Journal Generator uses the defaults set up in Journal Generator templates to create journals. Most organizations define templates for each application that distributes to the general ledger. If you're using PeopleSoft General Ledger, set up and maintain Journal Generator templates in PeopleSoft Financials. PeopleSoft HRMS subscribes to the Journal Generator template data in Financials and displays it using the Review Journal Generator Templ component in PeopleSoft HRMS.

Customers not using PeopleSoft Enterprise General Ledger must set up a Journal Generator template directly in HRMS, using the Journal Generator Templates component. The system requires that a template ID be assigned, but it does not use the template.

Note. You must enter a value in the Last Journal Number Assigned field on the PeopleSoft Financials Installation Table to use the Journal Generator.

See Also

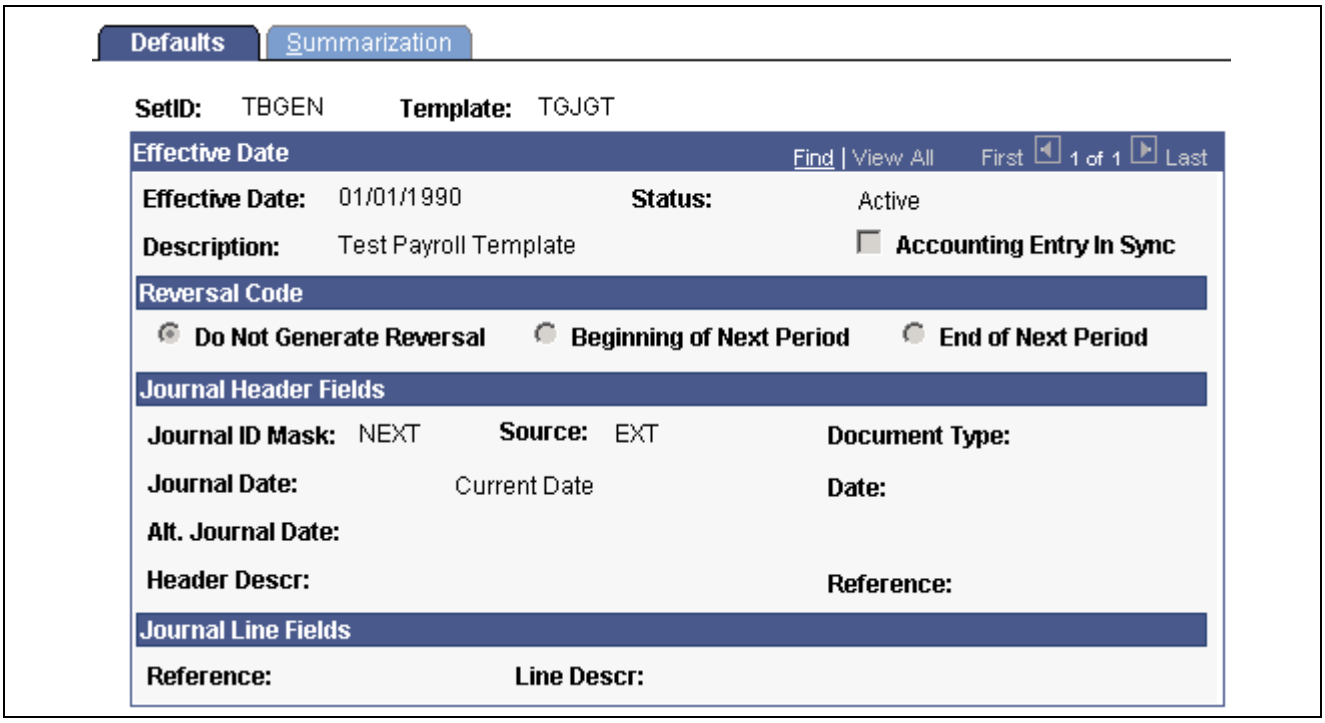
PeopleSoft Application Fundamentals for Financials and Supply Chain Management PeopleBook

Pages Used to View or Create Journal Generator Templates

Page Name	Object Name	Navigation	Usage
Review Journal Generator Templ - Defaults	JRNL_GEN_DEFAULTS	Set Up HRMS, Product Related, Payroll for North America, GL Interface, Review Journal Generator Templ, Defaults	View Journal Generator defaults. PeopleSoft HRMS processes use only the SetID and Template fields.
Review Journal Generator Templ - Summarization	JRNL_GEN_SUM	Set Up HRMS, Product Related, Payroll for North America, GL Interface, Review Journal Generator Templ, Summarization	View the template's summarization options. PeopleSoft HRMS processes do not use the information on this page.

Viewing Journal Generator Defaults

Access the Review Journal Generator Templ - Defaults page.



Review Journal Generator Templ - Defaults

If you are not interfacing with PeopleSoft Enterprise Financials, this page is editable. To set up a journal generator template enter a:

1. Template ID.
2. SetID.

   The setID needs to match the setID of the General Ledger business units you created on the Review GL Business Units component (BUS_UNIT_TBL_GL) for the business unit to use a journal generator template.

The remaining fields are not required, so you can enter dummy information or leave them blank.

If you are using PeopleSoft General Ledger, the system displays data in the following fields:

Accounting Entry In Sync This check box is selected if a PeopleSoft application that supports the multibook feature has generated in-sync accounting entries for this template.

Reversal Code The reversal code for this Journal Generator template.

Journal Header Fields

Journal ID Mask The journal naming convention.

Journal Date The date journals are created; for example, *Accounting Date on Transaction* or *Process Date.*

Alt. Journal Date (alternate journal date) The journal date used for journals created outside of the open accounting periods range.

Header Descr (header description) Descriptive information about the journal.

Source Identifies the originating entity responsible for the journal entries.

Document Type The default general ledger document type assigned to the journal header.

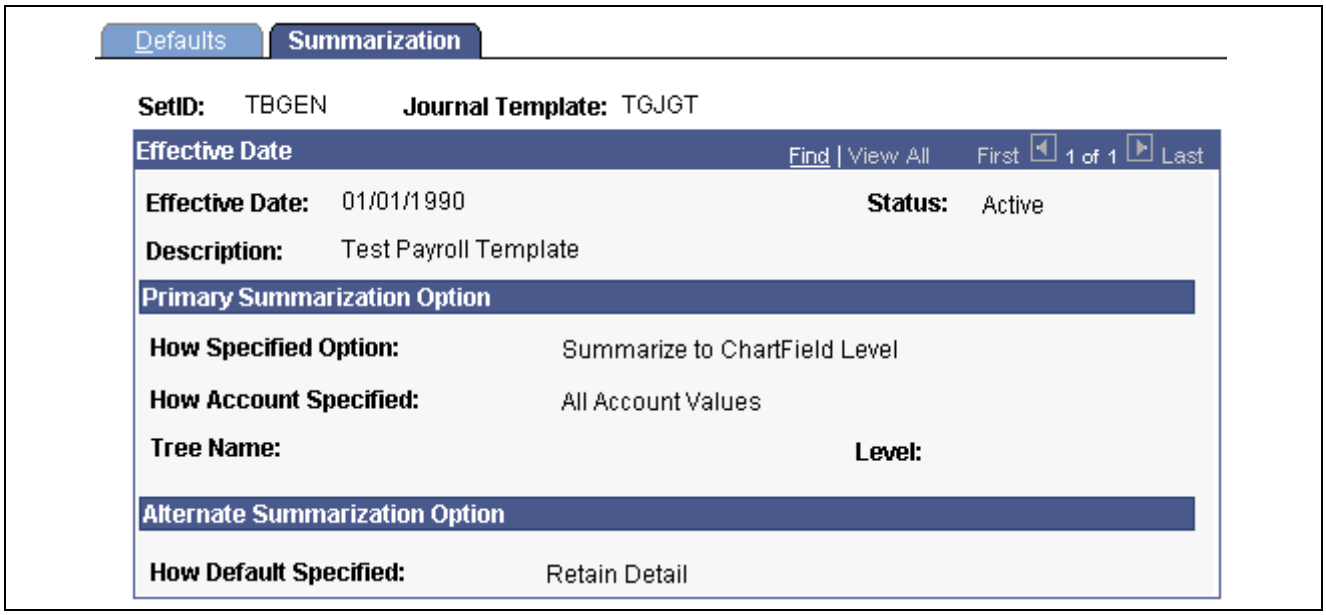
Reference The transaction source of the journal.

Journal Line Fields

Reference Refers each journal line back to a document, person, invoice, date, or any other piece of information helpful for tracking the source of the transaction.

Viewing the Template's Summarization Options

Access the Review Journal Generator Templ - Summarization page.



Review Journal Generator Templ - Summarization page

If you are using PeopleSoft General Ledger, review the primary and alternate summarization options for the template on this page.

Mapping PeopleSoft HRMS and PeopleSoft General Ledger Business Units

To map PeopleSoft HRMS and PeopleSoft General Ledger, use the GL/HR Business Unit Mapping component (BU_GL_HR_LNK).

This section provides an overview of mapping PeopleSoft HRMS and PeopleSoft General Ledger business units and describes how to check General Ledger business unit and HRMS business unit mapping.

Understanding PeopleSoft HRMS and PeopleSoft General Ledger Business Unit Mapping

To share information successfully with PeopleSoft General Ledger, confirm that you've correctly associated (or mapped) your PeopleSoft HRMS business units to General Ledger business units. The system uses this mapping information to determine which General Ledger business unit to use when generating accounting transactions for actuals and encumbrances. General Ledger business units are associated with HRMS business units on the Business Unit Reference page (BUS_UNIT_TBL_HR2).

Use the GL/HR Business Unit Mapping page to check if a specific PeopleSoft General Ledger business unit is correctly mapped to the appropriate PeopleSoft HRMS business unit. Also use the GL/HR Business Unit Mapping page to associate a journal template and calendar ID with each General Ledger business unit.

See Also

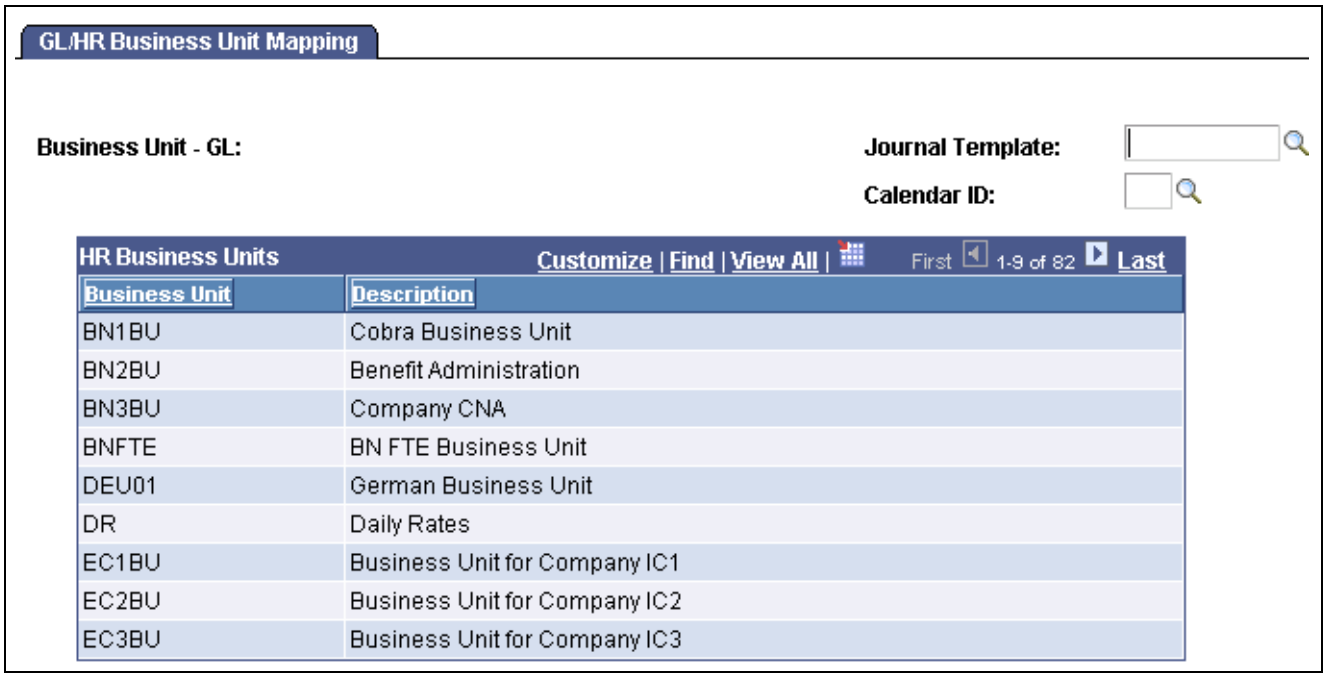
Chapter 12, "Setting Up Organization Foundation Tables," Defining Business Units, page 227

Page Used to Review Business Unit Mapping

Page Name	Object Name	Navigation	Usage
GL/HR Business Unit Mapping	BU_GL_HR_LNK	Set Up HRMS, Common Definitions, ChartField Configuration, GL/HR Business Unit Mapping, GL/HR Business Unit Mapping	Check if a specific PeopleSoft General Ledger business unit is associated with the correct PeopleSoft Human Resources business unit. Associate a journal template and calendar ID with each PeopleSoft General Ledger business unit.

Mapping Business Units

Access the GL/HR Business Unit Mapping page.



GL/HR Business Unit Mapping

Business Unit - GL The PeopleSoft General Ledger business unit and description.

Journal Template Select the journal template to associate with this PeopleSoft General Ledger business unit from the list of available options. Journal templates are used during the Actuals and Encumbrances processes (PAYGL02 and PAYGL03).

Calendar ID Select a calendar ID to associate with this PeopleSoft General Ledger business unit. The system uses calendar IDs to distribute actuals over accounting periods. Review calendars on the Detail Calendar page (DETAIL_CALENDAR1).

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Commitment Accounting*, "Setting Up GL Interface Tables for Commitment Accounting," Reviewing Detail Calendars and Budget Periods.

HR Business Units

The HR Business Units scroll area displays the PeopleSoft Human Resources business units and descriptions currently associated with the PeopleSoft General Ledger business unit.

If the PeopleSoft Human Resources and PeopleSoft General Ledger business units aren't correctly mapped, correctly associate them on the Business Unit Reference page. After mapping Human Resources business units to the appropriate General Ledger business units, return to the GL/HR Business Unit Mapping page to associate a journal template and calendar ID with each General Ledger business unit.

Configuring the Target Product and System for PeopleSoft EnterpriseOne General Ledger

This section provides overviews of target product and system configuration and account balancing defaults, lists common elements, and discusses how to:

- Configure the target product.
- Configure the target system.

Understanding Target Product and System Configuration

This table defines the terminology used in this section:

Target system	A specific GL installation that is represented by a message node. It indicates to what target system the payroll accounting lines are to be sent, which is the database that runs the general ledger application.
Target product	The target general ledger product to which payroll data is to be posted on the specified target system.

Here is a summary of the configuration steps:

1. Assign processing defaults for a target product on the Configure Target Product page.
2. Associate the target product with a target system by selecting the target product on the Configure Target System page.

   You can update the processing options for the target product on this page.
3. Associate the target system with the general ledger business unit by selecting the message node (target system) on the Configure GL Business Unit page.

   This step associates accounting lines with the target system because each accounting line has the general ledger business unit as a required field.

Understanding Account Balancing Defaults

You specify two default configuration options related to account balancing:

- Balance Accounting Lines

  Specify whether or not to balance accounts for the business unit before posting them to general ledger.

  - Selected:

    If you select the balancing option, the posting process calculates whether the debits equal the credits for each business unit.

  - Not selected:

    If you do not select the balancing option, the system does not perform balancing calculations before posting the accounts.

- Book to Suspense Account

  If you select the Balance Accounting Lines option, you further specify whether or not to post unbalanced amounts to a suspense account when the credits do not equal debits for a general ledger business unit.

- Selected:

  If you select this option, you must specify a suspense account number on the Configure GL Business Unit page. When the debits and credits are not equal, the system creates a new accounting line containing the unbalanced amount and the specified suspense account.

- Not selected:

  If you did not select this option and the accounts do not balance, no accounts are posted for the entire run ID and an error message informs you that the amounts for the general ledger business unit do not balance.

Note. If you select this option but do not specify a suspense account for the general ledger business unit, the system will issue an error message and no accounts will be posted if the accounts do not balance.

You select the default processing options for the general ledger system on the Configure Target Product page. You can modify the defaults on the Configure Target System page. You can override the target system processing options on the run control page when you run the process to post the accounting lines.

Common Elements Used in this Section

Consolidate Accounting Lines If you're processing accounting lines in Payroll for North America, select this check box if you want the system to consolidate accounting lines before posting. With consolidation, the data is summarized for lines that are identical other than amount and line number.

Accounting lines are automatically consolidated for Global Payroll.

Balance Accounting Lines Select this check box if you want the system to calculate whether the debits equal the credits for each general ledger business unit.

Book to Suspense Account This field is available for entry if you select *Balance Accounting Lines.*

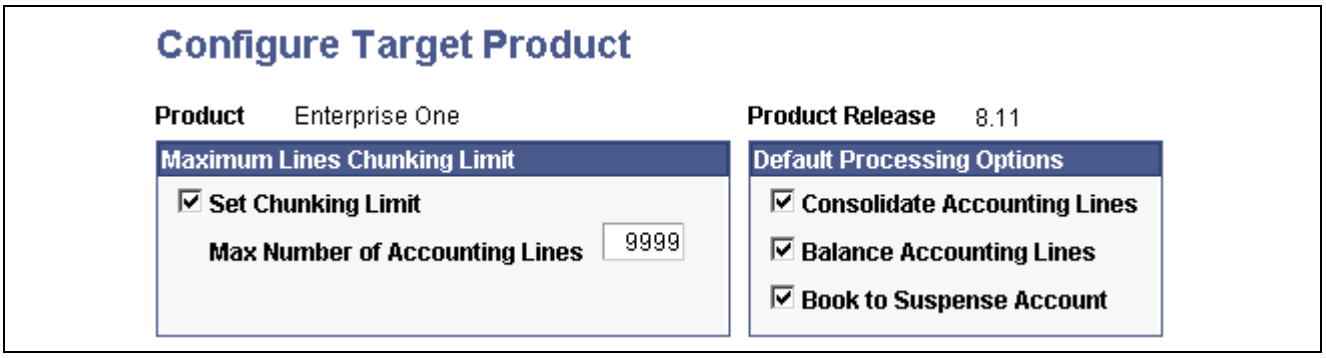
Select *Book to Suspense Account* to post unbalanced amounts to a suspense account when the credits do not equal debits. If selected, you must specify a suspense account number on the Configure GL Business Unit page.

Pages Used to Configure the Target Product and System

Page Name	Object Name	Navigation	Usage
Configure Target Product	HPIP_CONFIG_PRD	Set Up HRMS, Common Definitions, GL Integrations, Common GL Objects, Configure Target Product, Configure Target Product	Assign processing defaults for the target product.
Configure Target System	HPIP_TGT_SYS_GL	Set Up HRMS, Common Definitions, GL Integrations, Common GL Objects, Configure Target System, Configure Target System	Select the target product for the target and update the processing options for the target product.

Configuring the Target Product

Access the Configure Target Product page.



Configure Target Product page

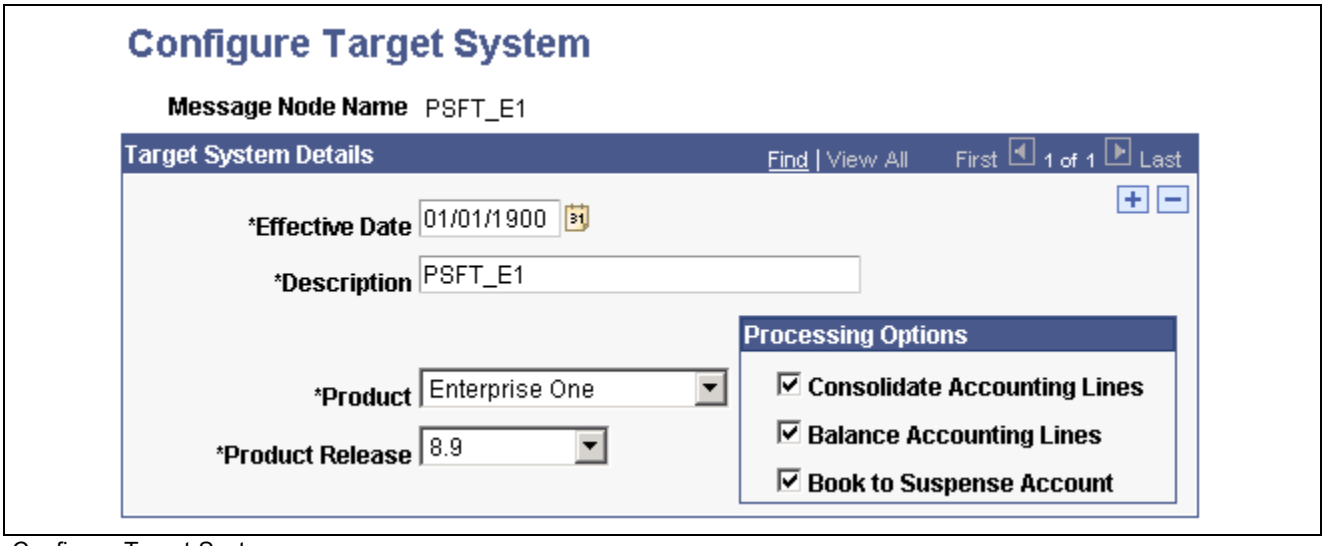
Maximum Lines Chunking Limit

Set Chunking Limit Select if you want the system to chunk the data when the number of accounting lines exceeds the maximum of the target product.

Max Number of Accounting Lines (maximum number of accounting lines) This field is available for entry if you select *Set Chunking Limit.* Enter the maximum number of accounting lines that the target product can accept.

Configuring the Target System

Access the Configure Target System page.



Configure Target System page

When you access the page, select the PeopleSoft Integration Broker node that you defined for the integration with EnterpriseOne. The node represents the target system.

Target System Details

The default processing options that you selected on the Configure Target Product page are the default values on this page. You can update the processing options here. You can also override the processing options on the process run control page when you post the accounting lines.

Product Select EnterpriseOne as the target general ledger product to which payroll data is to be posted on this target system.

Product Release Select the release number of the product.

Configuring and Mapping Business Units for PeopleSoft EnterpriseOne General Ledger

This section lists a prerequisite and discusses how to:

- Configure GL business units.
- Map GL business units to HR business units.

Note. In this integration, GL business units are the EnterpriseOne companies that you loaded into the BUS_UNIT_TBL_GL table.

Prerequisite

For each GL business unit (EnterpriseOne company), create a distinct setID that you want to use for the accounts that are received from EnterpriseOne for that company (GL business unit).

See Also

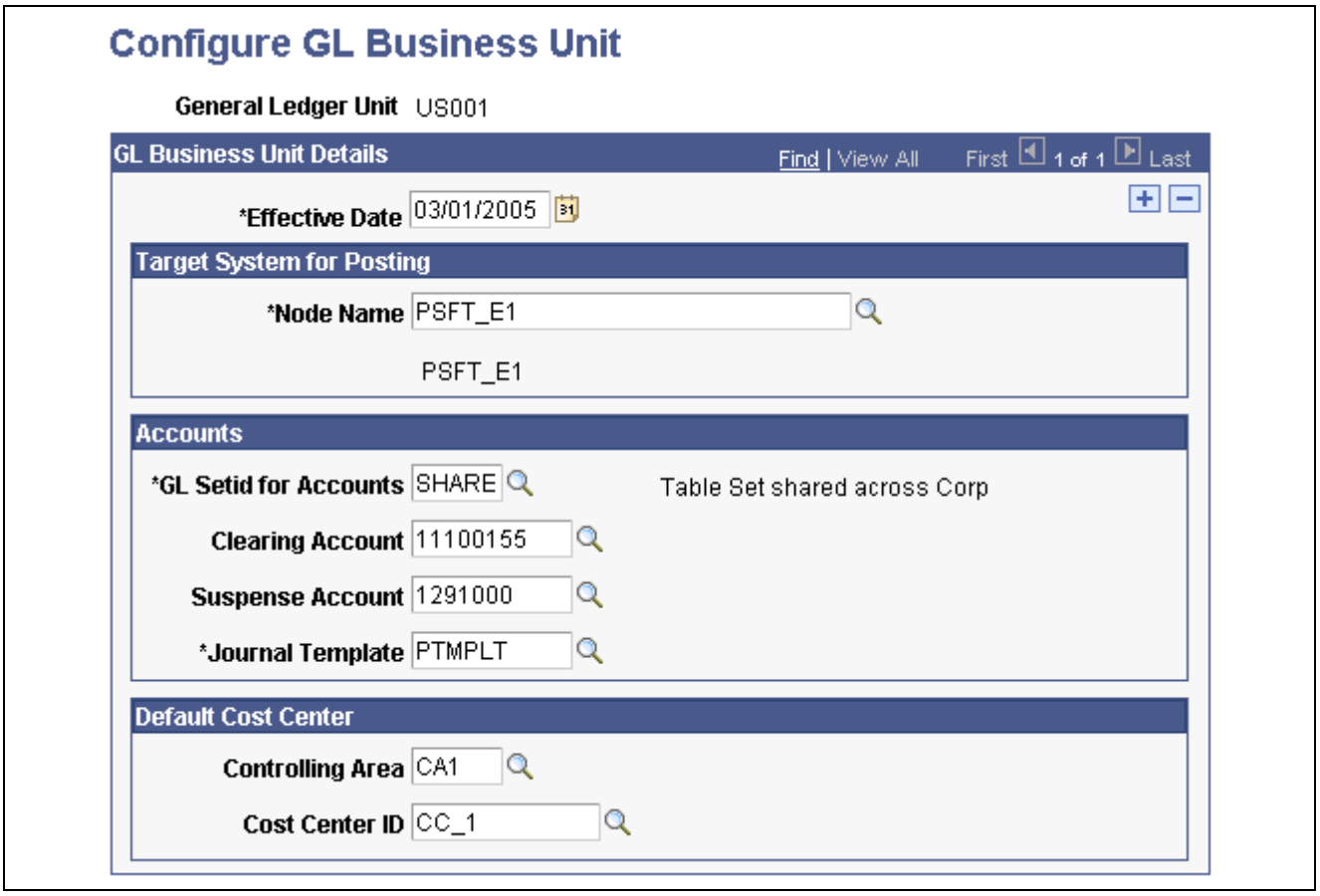
Chapter 4, "Working with System Data Regulation in HRMS," Understanding PeopleSoft HRMS System Data Regulation, page 29

Pages Used to Configure and Map Business Units for PeopleSoft EnterpriseOne General Ledger

Page Name	Object Name	Navigation	Usage
Configure GL Business Unit	HPIP_ADMIN_GL	Set Up HRMS, Common Definitions, GL Integrations, Common GL Objects, Configure GL Business Unit, Configure GL Business Unit	Set up additional parameters for the general ledger business unit.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Enter the general ledger business unit that corresponds to each of the HR business units.

Configuring GL Business Units

Access the Configure GL Business Unit page.



Configure GL Business Unit page

General Ledger Unit Each company that you imported from EnterpriseOne is available as a general ledger unit in the search page.

Target System for Posting

Node Name Select the PeopleSoft Integration Broker node that you defined as the target system for this integration.

Accounts

GL SetID for Accounts (general ledger setID for accounts) Enter the setID that you want to use for the accounts that are received from EnterpriseOne for this company (GL business unit).

Clearing Account Enter the account to be used for balancing the account when the data must be sent in chunks due to exceeding the maximum lines (9999) that can be sent per posting. The deltas per chunk are held in this clearing account and must balance when all chunks of the posting are posted.

Suspense Account Enter the account to be used for posting the delta amount if the debits and credits do not balance for each general ledger business unit. The delta is posted to an additional general ledger line with the suspense account code. Available accounts are only those with account type Expense.

Journal Template You can select a valid template ID or enter a new value. When you save this page:

- If the journal template ID did not exist previously, it is generated in the Journal Generator Template table (JRNLGEN_APPL_ID) using the value that you enter here.
- In the GL Journal Template table (GL_JRNL_TMPLT), the journal template ID is associated with the GL business unit and effective date that you enter on this page.

Default Cost Center

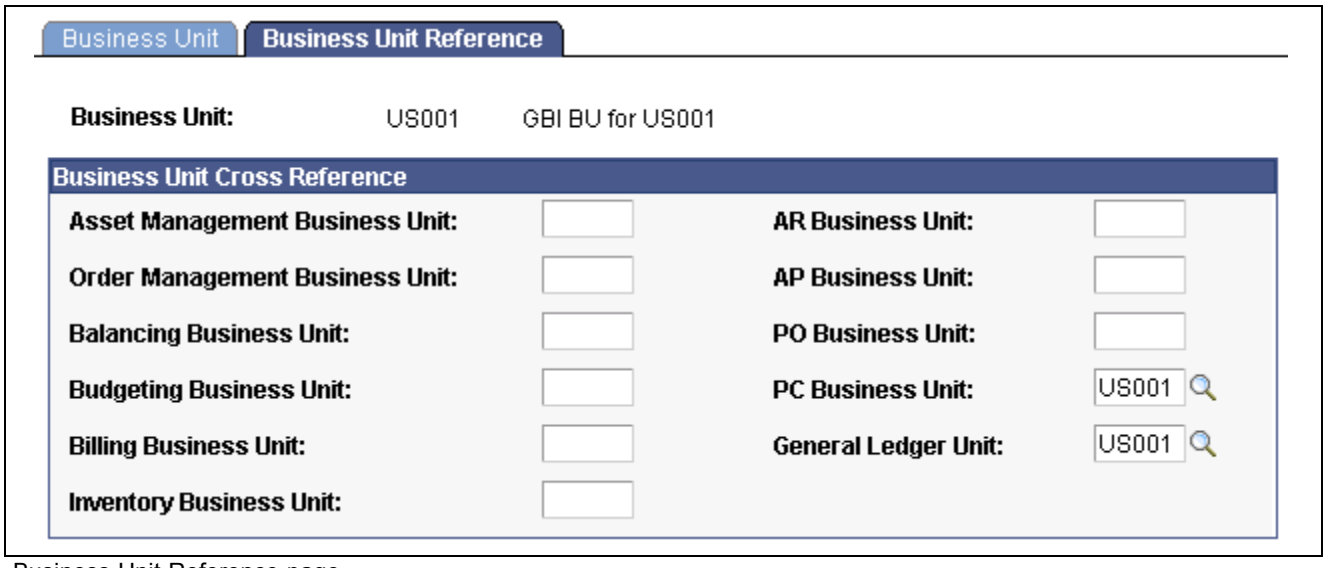
Select the default cost center to be assigned when the accounting line does not contain sufficient data to identify the correct cost center.

Controlling Area Select the controlling area. Available values are the company codes entered into the Enterprise Controlling Area table when EnterpriseOne companies were imported into the Enterprise Business Unit GL table.

Cost Center ID Select a cost center. The available values are the EnterpriseOne business units that you imported into the Enterprise Cost Center table.

Mapping GL Business Units to HR Business Units

Access the Business Unit Reference page.



Business Unit Reference page

General Ledger Unit Select the general ledger business unit that corresponds to the HR business unit that you selected when you accessed the page. Available GL business units are from the BUS_UNIT_TBL_GL table.

See Also

Chapter 12, “Setting Up Organization Foundation Tables,” Defining Business Units, page 227

CHAPTER 18

Setting Up and Working with ChartFields and ChartField Combinations

This chapter provides an overview of PeopleSoft ChartFields, lists prerequisites, and discusses how to:

- Enter and maintain ChartField values.
- Set up ChartFields in HRMS.
- Populate HRMS with valid ChartField combinations.
- Review and maintain ChartField transactions.
- Enter or Review ChartFields in PeopleSoft HRMS transactions.
- Report on ChartField combinations.

Note. For customers integrating with PeopleSoft Enterprise 8.4 Financials or higher, most of the components described in this chapter will be display only.

Understanding PeopleSoft ChartFields

In PeopleSoft applications, the fields that store your charts of accounts and provide your system with the basic structure to segregate and categorize transactional and budget data are called ChartFields. Each ChartField has its own attributes for maximum efficiency and flexibility in recording, reporting and analyzing its intended category of data. While a particular ChartField always represents only one category of data, it stores many values that you use to further categorize that same data.

In addition to this basic categorization of a transaction amount using the account ChartField, you can simultaneously record the same transaction by product, project, investment portfolio, policy, endowment, fund, service, or any number of categories by using other ChartFields with appropriate values. This creates additional subsets of that same transactional data.

PeopleSoft delivers a set of ChartFields and associated functionality that fully covers most accounting and reporting requirements. ChartFields are designed to be configured by you to meet your specific requirements.

Setting Up ChartFields in HRMS

To set up ChartFields in HRMS, use the following components:

- Standard Configuration (STANDARD_CF_TMPLT)
- ChartField Values (DEFINE_CF_VALUE)
- Account (GL_ACCOUNT)

- Department (DEPARTMENT)
- Project/Grant (PROJECT)
- Product (PRODUCT)
- Fund Code (FUND_DEFINITION)
- Program Code (PROGRAM_DEFINITION)
- Class Field (CLASS_PNL)
- Operating Unit (OPERATING_UNIT)
- Alternate Account (ALTACCOUNT)
- Budget Reference (BUDREF_PNL)
- Chartfield 1 (CHARTFIELD1)
- Chartfield 2 (CHARTFIELD2)
- Chartfield 3 (CHARTFIELD3)

This section provides an overview of ChartField values and discusses how to:

- Import ChartField values from PeopleSoft Financials.
- Load data into the ChartField components using component interfaces.
- Configure the ChartField template.
- Access ChartField components.
- Add account values.
- Add department values.
- Add project/grant values.
- Add product values.
- Add fund code values.
- Add program code values.
- Add class field values.
- Add operating unit values.
- Add alternate account values.
- Add budget reference values.
- Add ChartField 1 values.
- Add ChartField 2 values.
- Add ChartField 3 values.

Note. Some ChartFields are delivered inactive. You must activate the ChartFields on the Standard Configuration component.

Understanding ChartField Values

If you use the ChartFields as delivered by PeopleSoft, sample ChartField values are already set up and in many cases are populated with sample amounts. All PeopleSoft sample or model values are entered with the 01/01/1900 effective date. To distinguish your data you may want to avoid using this date and use instead another early date, such as 01/01/1901.

Note. PeopleSoft recommends that you not use special characters and embedded blanks in ChartField values. Use the generally accepted alphanumeric characters and the underscore. In general avoid special characters such as apostrophes and do not include embedded blanks when defining ChartField values. Special characters and embedded blanks can be problematic and in particular can cause problems in some background processes, such as those in allocations, combination editing and open item accounting. (This caveat also applies to such things as business units, ledgers and journal IDs.)

Because all changes to the definition of a ChartField value are effective-dated, you can establish when you want to *activate* a department, *introduce* a product line, or *close* an account. Use effective dating with activation and inactivation functionality to maintain a full history of all changes or additions, to provide a complete audit trail and to make possible historical comparisons with past, present, or future conditions. When you no longer use a certain ChartField value, add a row to create an effective-dated *inactive* entry, instead of inactivating the original row. If you simply make the existing row *inactive,* you will have no history of its time as an active ChartField value.

After you initially populate the ChartField tables, you can maintain them from the ChartField Values page.

Importing ChartField Values from PeopleSoft Financials

If you are using PeopleSoft 8.4 Financials or higher, configure ChartFields and combination codes in PeopleSoft Financials and import ChartField values from Financials into HRMS and keep them up to date using application messaging.

To import ChartField values from Financials:

- Confirm if you HRMS system is integrated with PeopleSoft Financials 8.4 or higher.

  Review the General Ledger group box on the Installation Table - Product Specific page (INSTALLATION_TBL1A). If the GL Version field shows a value other than *N/A*, you are integrated with PeopleSoft Financials and can import the ChartField values.

  Note. If you are integrated, you can also use the synchronous message in PeopleSoft Financials to determine if the combination of ChartFields you are attempting is valid.

- Import the ChartField configurations from Financials using PeopleSoft Integration Broker.

  Note. Review the ChartField values in PeopleSoft HRMS by accessing the ChartField components from the ChartField Values component (DEFINE_CF_VALUE). The ChartField components are unavailable for entry.

Note. Customers who are not integrated with PeopleSoft Financials need to set up the Standard Configuration component and enter ChartField values in the HRMS ChartField components.

This table lists the messages subscribed to by the ChartFields:

Label Long Name	Subscribes to Message
Account	ACCOUNT_CHARTFIELD_FULLSYNC ACCOUNT_CHARTFIELD_SYNC
Department	DEPT_CF_FULLSYNC DEPT_CF_SYNC
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC
Product	PRODUCT_CHARTFIELD_FULLSYNC PRODUCT_CHARTFIELD_SYNC
Fund Code	FUND_LOAD FUND_CF_SYNC
Program Code	PROGRAM_CF_FULLSYNC PROGRAM_CF_SYNC
Class Field	CLASS_CF_FULLSYNC CLASS_CF_SYNC
Operating Unit	OPER_UNIT_CF_FULLSYNC OPER_UNIT_CF_SYNC
Alternate Account	ALTACCT_CF_FULLSYNC ALTACCT_CF_SYNC
Budget Reference	BUDGET_REF_CF_FULLSYNC BUDGET_REF_CF_SYNC
ChartField 1	CHARTFIELD1_FULLSYNC CHARTFIELD1_SYNC

Label Long Name	Subscribes to Message
ChartField 2	CHARTFIELD2_FULLSYNC CHARTFIELD2_SYNC
ChartField 3	CHARTFIELD3_FULLSYNC CHARTFIELD3_SYNC

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Financials, Enterprise Service Automation, and Supply Chain Management Application Fundamentals PeopleBook

Pages Used to Set Up and Review ChartFields

Page Name	Object Name	Navigation	Usage
Standard ChartField Configuration	STANDARD_CF_TMPLT	Set Up HRMS, Common Definitions, ChartField Configuration, Standard Configuration, Standard ChartField Configuration	Activate ChartFields to make them available on the ChartField Values page. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Action Status	STANDARD_CF_LOG	Click the Configuration Status button on the Standard ChartField Configuration page.	View the status of ChartField changes. The report is produced by the PAY_CONFIG report.
ChartField Values	DEFINE_CF_VALUES	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Values, ChartFIeld Values	Displays the links to the components of the *active* ChartFields Click the link of the component you want to access. **Note.** This page only displays links to the components of those ChartFields you activated on the Standard ChartField Configuration page.

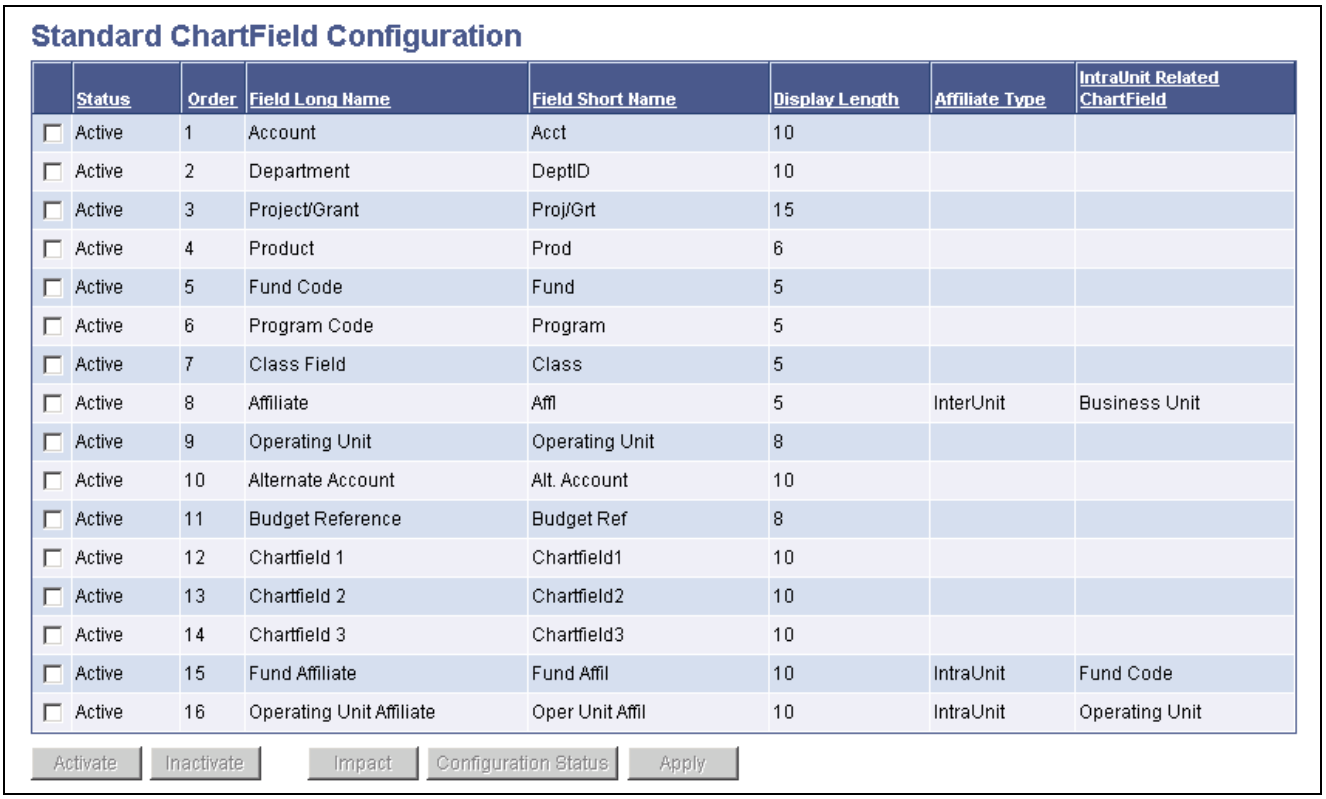
Page Name	Object Name	Navigation	Usage
GL Account Table	GL_ACCOUNT	Click the Account link on the ChartField Values page.	Set up new account ChartField values. Account values are used in combination with other ChartField values to create journal entries. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Department	DEPT_CHARTFIELD	Click the Department link on the ChartField Values page.	Add a department representing an operational unit. It is often associated with responsibility accounting. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Project/Grant	PROJECT_CF	Click the Project/Grant link on the ChartField Values page.	Add project values, set up project start and end dates, and project status. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher or if PeopleSoft Enterprise Time and Labor interferes with PeopleSoft Enterprise Projects.
Product	PRODUCT	Click the Product link on the ChartField Values page.	Add product codes. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher or if PeopleSoft Time and Labor interferes with PeopleSoft Projects.
Fund Code	FUND_DEFINITION	Click the Fund Code link on the ChartField Values page.	Define fund values for all types of funds. Funds are primary structural units for education and government accounting. Funds are maintained as a balanced set of accounts and are used to present financials statements. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.

Page Name	Object Name	Navigation	Usage
Program Code	PROGRAM_DEFINITION	Click the Program Code link on the ChartField Values page.	Set up codes to enable financial tracking of programs. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Class Field	CLASS_PNL	Click the Class Field link on the ChartField Values page.	Set up codes to enable financial tracking of class amounts, such as salaries or bonuses. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Operating Unit	OPERATING_UNIT	Click the Operating Unit link on the ChartField Values page.	Set up codes to identify a unit of operation for financial tracking. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Alternate Account	ALTACCT	Click the Alternate Account link on the ChartField Values page.	Set up new alternate account ChartField values. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
Budget Reference	BUDREF_PNL	Click the Budget Reference link on the ChartField Values page.	Set up unique budgets where budgets share budget keys and overlapping periods. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
ChartField 1	CHARTFIELD1	Click the ChartField 1 link on the ChartField Values page.	Set up new account ChartField 1 values. ChartField 1 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.

Page Name	Object Name	Navigation	Usage
ChartField 2	CHARTFIELD1	Click the ChartField 2 link on the ChartField Values page.	Set up new account ChartField 2 values. ChartField 2 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.
ChartField 3	CHARTFIELD1	Click the ChartField 3 link on the ChartField Values page.	Set up new account ChartField 3 values. ChartField 3 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoft 8.4 Financials or higher.

Choosing Affiliate ChartField Values

Access the Standard ChartField Configuration page.



Standard ChartField Configuration

	Status	Order	Field Long Name	Field Short Name	Display Length	Affiliate Type	IntraUnit Related ChartField
☐	Active	1	Account	Acct	10		
☐	Active	2	Department	DeptID	10		
☐	Active	3	Project/Grant	Proj/Grt	15		
☐	Active	4	Product	Prod	6		
☐	Active	5	Fund Code	Fund	5		
☐	Active	6	Program Code	Program	5		
☐	Active	7	Class Field	Class	5		
☐	Active	8	Affiliate	Affl	5	InterUnit	Business Unit
☐	Active	9	Operating Unit	Operating Unit	8		
☐	Active	10	Alternate Account	Alt. Account	10		
☐	Active	11	Budget Reference	Budget Ref	8		
☐	Active	12	Chartfield 1	Chartfield1	10		
☐	Active	13	Chartfield 2	Chartfield2	10		
☐	Active	14	Chartfield 3	Chartfield3	10		
☐	Active	15	Fund Affiliate	Fund Affil	10	IntraUnit	Fund Code
☐	Active	16	Operating Unit Affiliate	Oper Unit Affil	10	IntraUnit	Operating Unit

Activate | Inactivate | Impact | Configuration Status | Apply

Standard ChartField Configuration page

Customers Integrating with PeopleSoft Financials	Customers *Not* Integrating with PeopleSoft Financials
Receive the ChartField configuration rules from Financials using the Integration Broker and use this page to activate ChartFields. **Note.** The Standard ChartField Configuration page may vary depending on which version of PeopleSoft Financials you are using.	Use this page to configure and activate ChartFields.

Note. You cannot change field names or length or delete or add ChartFields in HRMS.

Activate or **Inactivate** — Activate or inactive the ChartFields by selecting or clearing the Active check box next to the ChartField and then click the Activate or Inactivate button (depending on the action) to implement the action.

Only ChartFields activated on this page are available on the ChartField Transactions page.

Impact — Click the Impact button to launch the configuration report (PAY_CONFIG) to analyze the company ChartFields to determine the impact of applying the new template.

Configuration Status — Click to launch the Action Status page displaying the standard ChartField activity log.

Apply — Click to apply the ChartField configurations using PAY_CONFIG.

Using Affiliate ChartFields

Use affiliate ChartField values when interunit or intraunit transactions are maintained using the same account ChartField values among several related entities (such as business units, funds, or operating units). For example, each entity might use account 140000 as both an interunit receivables and payables account. Each entity could have a different account. However, in each instance an affiliate ChartField value must be assigned to the accounting line or journal line to identify the entity with which the receivable or payable is shared.

PeopleSoft delivers the following affiliate ChartFields:

- Affiliate ChartField.

  Used only for *interunit* accounting in association with business unit.

- Fund affiliate ChartField.

  Used for *intraunit* accounting between entities.

- Operating unit affiliate ChartField.

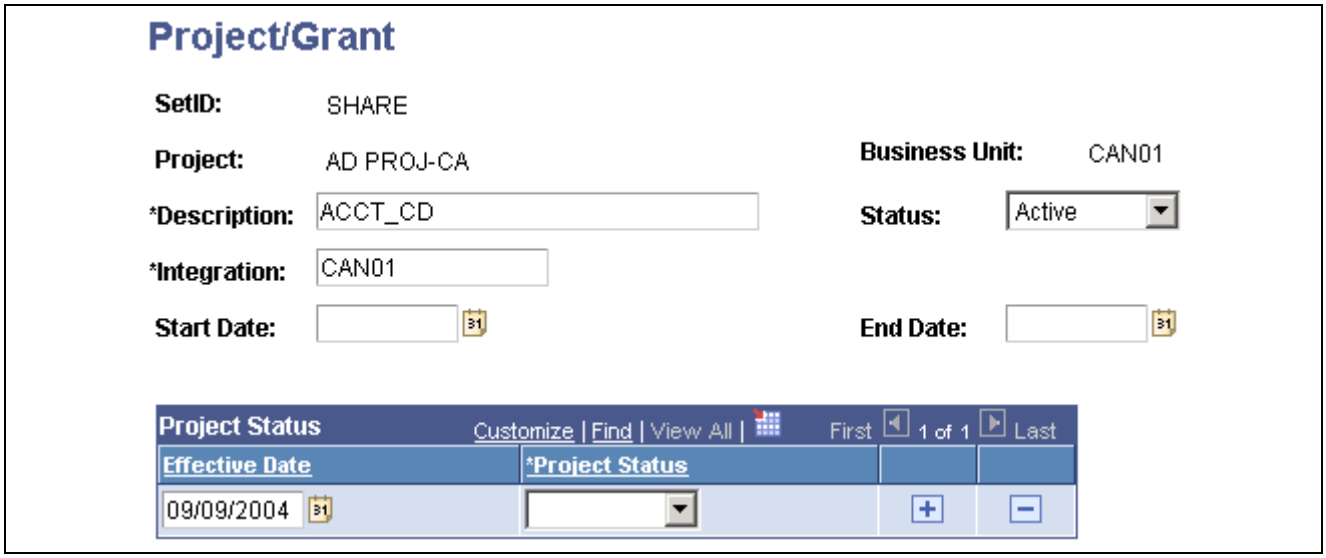
  Used for *intraunit* accounting between entities.

Affiliate ChartField values are the values of the related ChartField. In other words, there is no separate affiliate ChartField page where you enter affiliate values as with the stand alone ChartFields, such as account or department.

Business unit is required as the interunit-related ChartField for affiliate. It provides the values available in the list box for the Affiliate field on the Journal Entry page.

Adding Project and Grant Values

Access the Project/Grant page.



Project/Grant page.

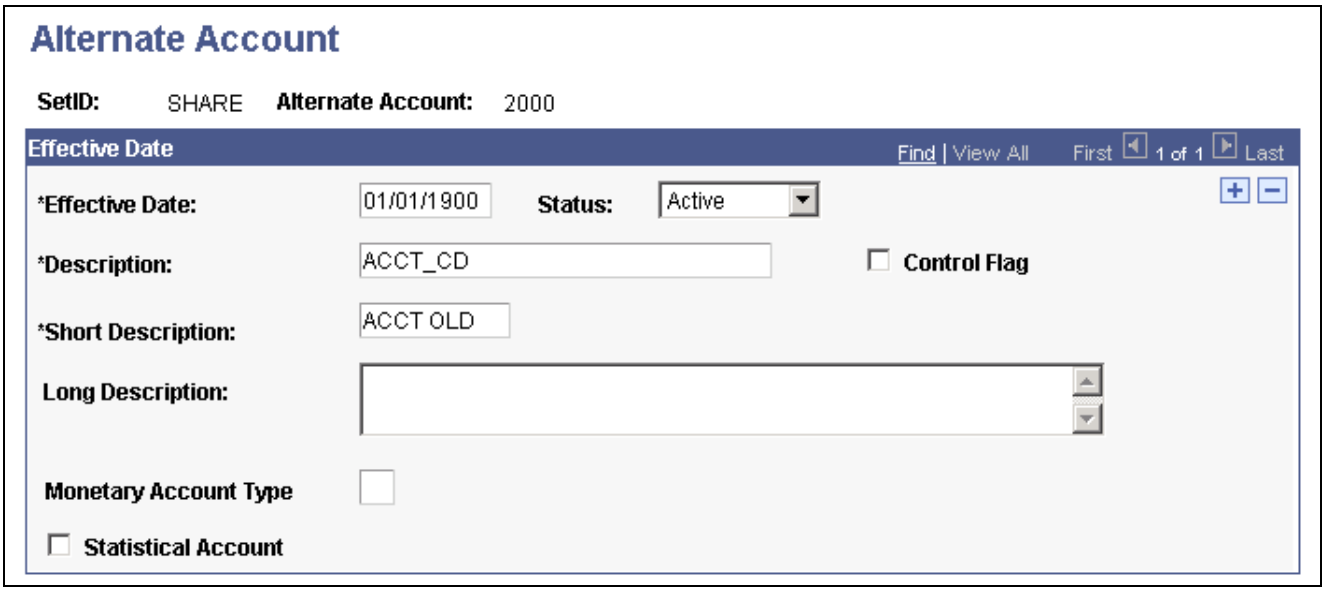
Integration	Use to select an integration template for the project and project level.
Start Date and **End Date**	These fields are for information only. There is no processing behind them.
Project Manager	Specify the project manager ID, display the manager name, and effective date of the entry.

Project Status Enter the effective date and select a project status to indicate the various stages of the life cycle for the project.

Note. These fields are for information only. Do not confuse them with ChartField editing that uses the ChartField status that is set up on this page.

Adding Alternate Account Values

Access the Alternate Account page.



Alternate Account page

The PeopleSoft alternate account feature enables you to enter a statutory chart of accounts as well as analytic or primary accounts at the detail transaction level. The alternate account produces journal line or transaction level balances for statutory reporting requirements. The primary account ChartField contains the corporate accounts, and alternate account ChartField contains the statutory accounts. This is useful for organizations that have two different reporting requirements—one for internal management or a corporate parent, and another for a local jurisdiction or national government.

In PeopleSoft applications, the analytic or primary account ChartField is ACCOUNT.

Local regulatory authorities often require *statutory* accounts. In PeopleSoft applications, this is termed the alternate account ChartField (ALTACCT).

You link alternate account ChartField values with account ChartField values. When you enter values for the account ChartField, the system enters the associated alternate account value. When you enter values for the alternate account ChartField, the system enters the associated account value. You can override the default values by selecting another value from the prompt list. The system displays only account values that you have mapped to the account or alternate account ChartField.

Note. You can map alternate account ChartFields only to account ChartFields with the same attributes unless they have a different SetID.

Monetary Account Type Select from the types previously defined on the Account Types page.

Statistical Account Used for statistical amounts, not monetary amounts. If you select the check box, you must specify a unit of measure.

Control Flag Select to indicate that you can update this alternate account only by using the Journal Generator. A control account represents a summarization of detail from an application.

Populating HRMS with Valid ChartField Combinations

To populate HRMS with valid ChartField combinations, use the Load Combination Code Table component (RUN_BUD003) and the Combination Code Table component (VALID_COMBO_TABLE).

A combination code (also referred to as a funding source and an account code in prior versions) is a key that defines a combination of ChartFields. Use these codes to indicate the funding source the system should attribute to each expense. When you run processes to post transactions to the general ledger, the combination code is used to determine the ChartFields to include on each transaction.

A valid combination code is a combination of ChartFields that are valid in general ledger. Store valid combination codes in the Combination Code Table. When you enter a combination of ChartFields on a transaction page, either by selecting a combination code or by selecting each ChartField value individually, the system checks the Combination Code Table to see if it's valid.

Note. If you are not using valid combinations codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Combination Code Table. The system will populate the ChartField Transaction Table (ACCT_CD_TABLE) with the ChartField combinations you use so you can track them and reuse them.

Populate the Combination Code Table:

- Automatically, using the Load Combination Code Table process (BUD003.SQR) if you are using PeopleSoft 8.4 General Ledger or higher.

  Note. The Combination Code Table component will be unavailable for entry. Use it to review valid ChartField combinations but make changes to them in the PeopleSoft Financials components.

- Manually, if you are not using an integrated Financials application and are using valid combinations in HRMS.

Note. Track direct charge, prorate liability indicators, encumbrance accounts, and pre-encumbrance accounts for valid combination codes on the ChartField Transaction Table.

See Chapter 18, "Setting Up and Working with ChartFields and ChartField Combinations," Reviewing and Maintaining ChartField Transactions, page 402.

Using the Load Combination Code Table Process

The Load Combination Code Table process retrieves valid ChartField combinations from PeopleSoft General Ledger and inserts that data into the Combination Code Table component. There are two ways to prepare ChartField information in general ledger for export to HRMS: the Batch Integration Method and the Online Integration Method.

- Use the batch integration method when you are completely replacing your ChartField combinations.
- Use the online integration method for ongoing maintenance of ChartField combinations.

Note. Do not use the batch integration method (and the Load Combination Code Table process) for incremental updates because the process will create records with multiple effective dates.

Batch Integration Method

Use batch integration to import valid ChartField combinations from PeopleSoft General Ledger. The batch integration method requires that you complete the following steps in PeopleSoft General Ledger:

1. Run the Combination Build Request process to build valid ChartField combinations into the PS_COMBO_DATA_TBL.
2. Initiate the ChartField Interface to extract valid HRMS ChartField combinations, as defined on HR Process Groups page in PeopleSoft General Ledger, and to create a flat file for HRMS.

Once you complete these steps in PeopleSoft General Ledger, initiate the Load Combination Code Table process from within the PeopleSoft HRMS application. The Load Combination Code Table process retrieves the flat file and inputs the data into the Combination Code Table.

Note. The batch integration method easily accommodates large volumes of data. This method is best if you are supporting a high volume of ChartField combination updates on a daily or pay period basis.

Online Integration Method

The online integration method of importing valid ChartField combinations from PeopleSoft General Ledger takes advantage of the existing SpeedTypes component (SPEEDTYPE) within PeopleSoft Financials.

The SpeedTypes component captures ChartField values based on a user-specified SpeedType key. For example, a SpeedType key could be the DeptID-account or the account and a sequential number. To specify a SpeedType key to be attached to HRMS-specific ChartField combinations, enter HRMS as the user ID when accessing the SpeedTypes component in PeopleSoft Financials.

When you save the SpeedTypes component, the system populates an integration point message (HR ChartField Combo) with the HRMS-specific ChartFields that are published to the HRMS subscriber.

Customers who are integrating with PeopleSoft 8.4 Financials or later receive the integration point message through the PeopleCode Subscribe method, which automatically updates the Combination Code Table within HRMS.

Customers who are integrating with earlier versions of PeopleSoft Financials or a third-party system should go into the inbound file rules to ensure that the path and file name for the inbound file reflects the file they want to publish and subsequently subscribe to.

Use online integration alone or in addition to batch integration. The online integration method easily accommodates a smaller volume of data exchange and enables the entry of a smart key value to correspond with a ChartField combination.

See Also

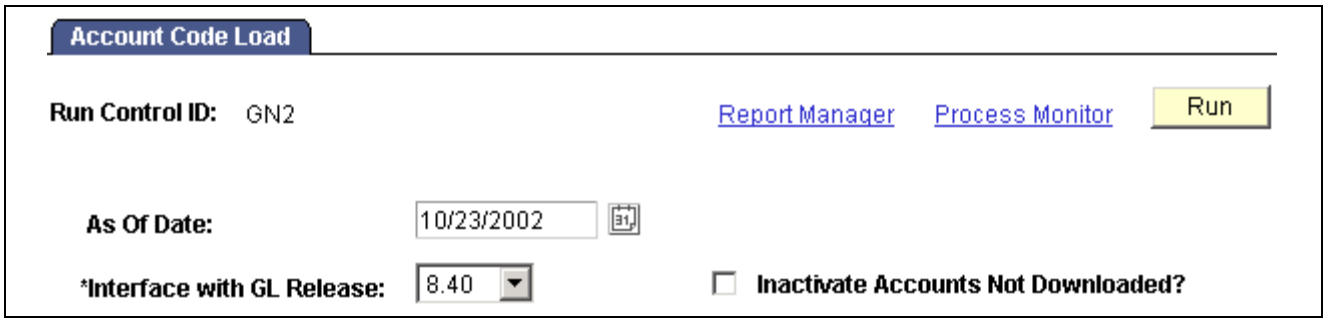
PeopleSoft Application Fundamentals for Financials and Supply Chain Management PeopleBook, "Editing for ChartField Combinations" and "Defining and Using ChartFields," Defining and Using SpeedTypes

Pages Used to Populate HRMS with Valid ChartField Combinations

Page Name	Object Name	Navigation	Usage
Load Combination Code Table	RUNCTL_FILEPATH	Set Up HRMS, Common Definitions, ChartField Configurations, Load Combination Code Table, Load Combination Code Table	Load the Combination Code Table with ChartField combinations from PeopleSoft Financials using the Load Combination Code process. This page launches a subscribe message that receives the valid ChartField combinations that were published in the general ledger. **Note.** This process is intended to completely replace your account codes. Do not use this process to maintain incremental changes.
Combination Code Table	VALID_COMBO_TBL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Table, Combination Code Table	Define valid combinations of ChartField values to be used to identify funding sources for expenses and liabilities. Also review all combination codes, including those you set up automatically.

Running the Account Code Load Process

Access the Account Code Load page.



Account Code Load page

As of Date Enter the as of date for the ChartField combinations you are importing from PeopleSoft General Ledger.

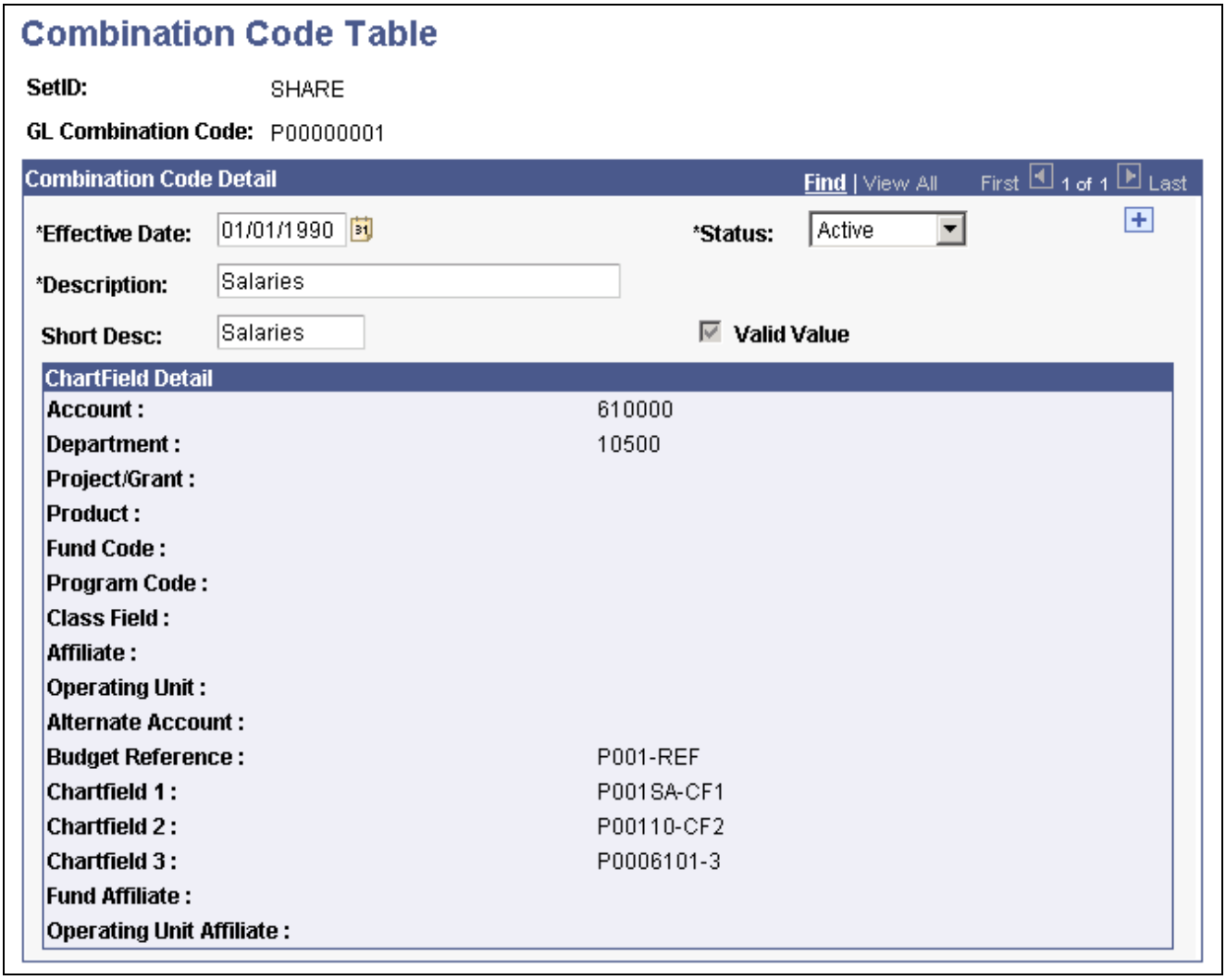
Interface with GL Release (interface with general ledger release) Select the general ledger version number of the PeopleSoft General Ledger system with which you are interfacing.

Inactivate Accounts Not Downloaded? When this option is selected, the system inactivates account codes for which it doesn't find matches in the current fiscal year.

When this option is blank, old account codes remain active for the current fiscal year.

Defining Combination Codes

Access the Combination Code Table page.



Combination Code Table page

GL Combination Code Use this code on the HRMS pages to use this combination of ChartFields in a transaction.

Note. Track direct charge, prorate liability indicators, encumbrance accounts, and pre-encumbrance accounts for valid combination codes on the ChartField Transaction Table.

You cannot change the ChartField values for combination codes imported from Financials, but you can change the description and make it active or inactive.

ChartField Detail

If you're setting up your account codes manually, enter the ChartField information for each of the fields if they are applicable to the ChartField combination associated with your Human Resources account codes.

Once you save and exit the page, these fields again become unavailable, even in the action of *Correction.* For accuracy and ease of updating, it's best to use the automated Load Combination Code Table process.

Note. Inactivate account codes that you are no longer using. This enables the system to keep records.

Select the ChartFields for this ChartField combination.

See Chapter 18, "Setting Up and Working with ChartFields and ChartField Combinations," Setting Up ChartFields in HRMS, page 387.

Reviewing and Maintaining ChartField Transactions

To review and maintain ChartField transactions, use the ChartField Transaction Table component (ACCT_CD_TABLE).

This section discusses how to review and maintain ChartField transactions.

The system creates a record whenever you use a new combination of ChartFields in an HRMS transaction, whether it is a valid combination code or combination of individual ChartField values you selected on the transaction page. It stores that combination here to maintain a history of ChartField combinations used in transactions.

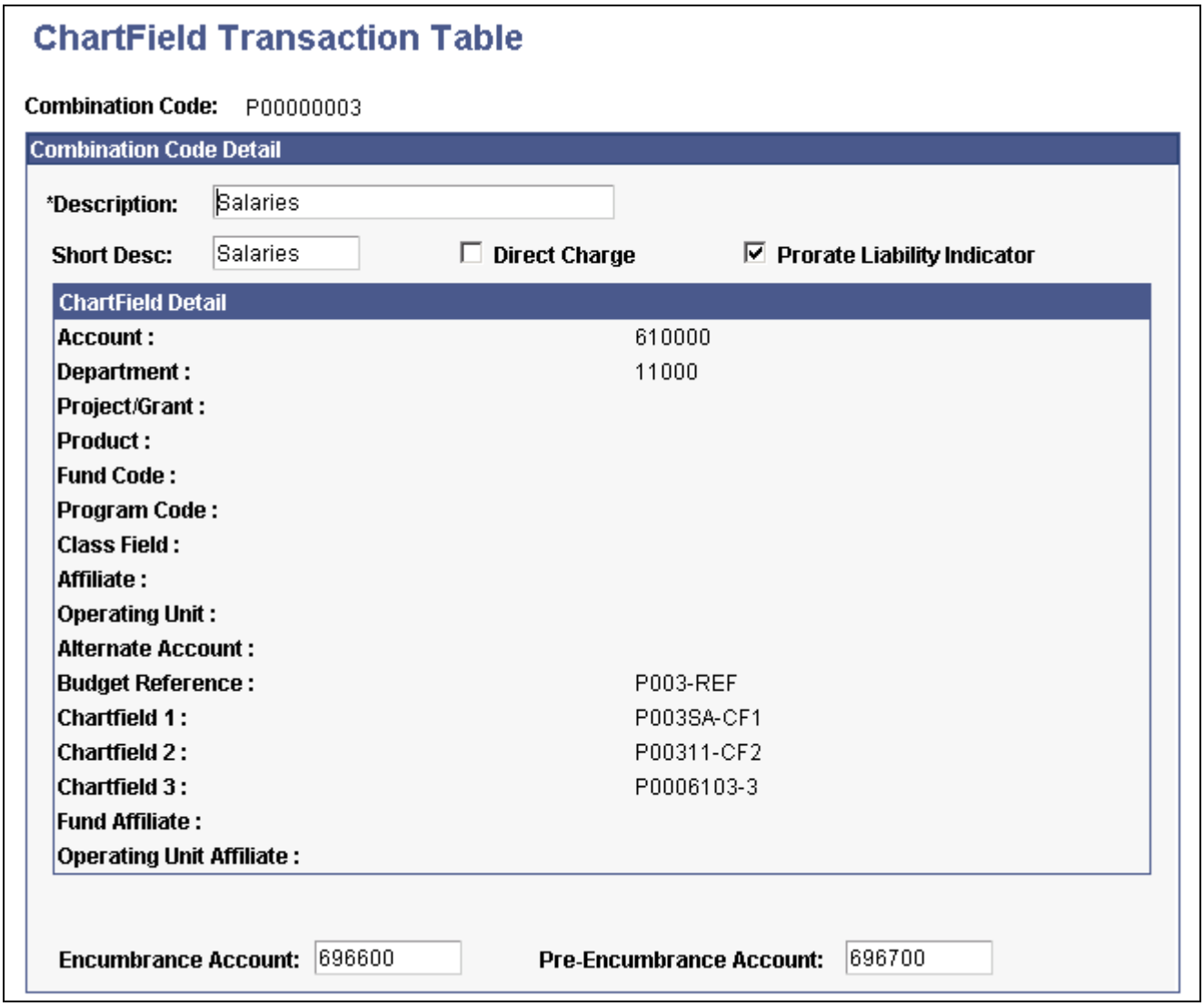
The ChartField information on this page is unavailable for entry, but you can maintain information about the combination.

Page Used to Review and Maintain ChartField Transactions

Page Name	Object Name	Navigation	Usage
ChartField Transaction Table	ACCT_CD_TABLE	• Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Table, ChartField Transaction Table • Set Up HRMS, Product Related, Commitment Accounting, Budget Information, ChartField Transaction Table, ChartField Transaction Table	The system populates the ChartField Transaction Table with ChartField combinations once they've been used in processing. Maintain additional information about combination codes on this page.

Reviewing and Maintaining ChartField Transactions

Access the ChartField Transaction Table page.



ChartField Transaction Table page

Combination Code If this is not a valid combination code imported into or created in the Combination Code Table, the system assigns this unique combination of ChartFields a combination code. You can use the combination code on the transaction pages to reuse this particular combination of ChartFields.

Combination Code Detail

Direct Charge Select this check box to indicate if you'll use this combination code during the Actuals Distribution process. This field is for information only; it has no affect on processing.

Prorate Liability Indicator If you want to prorate liabilities, select this check box.

The system looks for the Prorate Liability Indicator flag when it runs the Actuals GL Interface process. If you select this flag, employee paid taxes and deductions are prorated back across the earnings expenses.

Encumbrance Account Enter combination code to be used as an encumbrance funding source for each Combination Code. When the system writes an encumbrance transaction

for PeopleSoft General Ledger (using either the Fiscal Year or the Nightly Encumbrance process), it uses the encumbrance combination code specified here instead of the Combination Code

Pre-Encumbrance Account Enter combination code to be used as a pre-encumbrance funding source for each Combination Code. When the system writes an encumbrance transaction for PeopleSoft General Ledger (using either the Fiscal Year or the Nightly Encumbrance process), it uses the encumbrance combination code specified here instead of the Combination Code

Entering or Reviewing ChartFields in PeopleSoft HRMS Transactions

To enter or review ChartFields in PeopleSoft HRMS transactions, use the ChartField Details component (HMCF_ACCNT_CHRTFLD).

When an HRMS transaction uses ChartFields, the ChartFields associated with the transaction can be entered or viewed on the ChartField Details subpage (HMCF_HRZNTL_CFLD). For example, click the ChartField Details link on the Dept Budget Date page (DEPT_BUDGET_DATE) to select a valid combination code or individual ChartFields for the system to use as the suspense account for the department budget.

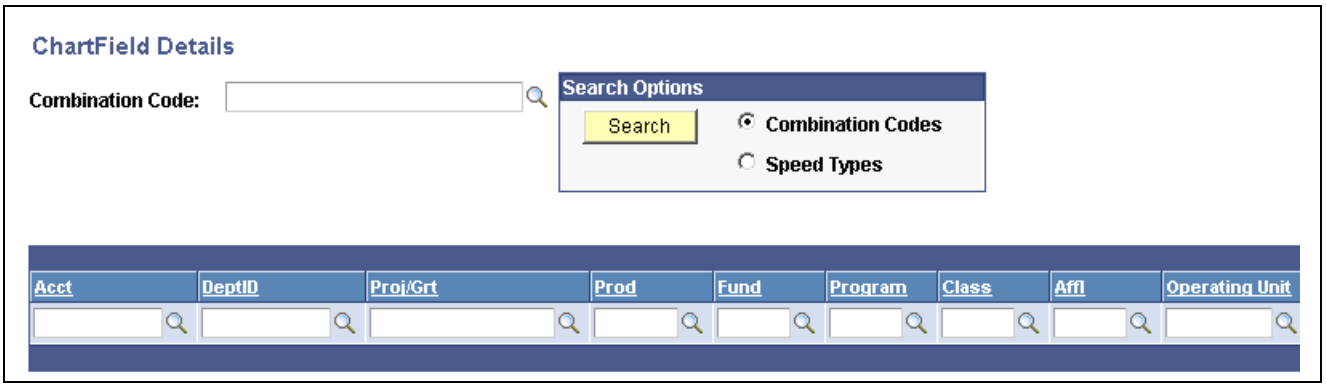
This section discusses how to enter or review ChartField Details.

Pages Used to Enter or Review ChartFields in PeopleSoft HRMS Transactions

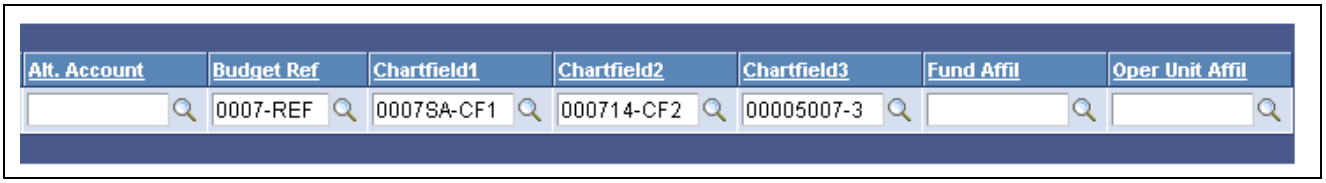
Page Name	Object Name	Navigation	Usage
ChartField Details	HMCF_HRZNTL_CFLD	Click the ChartField Details link or button on HRMS transaction pages.	Enter or review ChartFields or Combination Codes in PeopleSoft HRMS transactions.
Search Speed Types	HMCF_SPD_TYP_SRCH	Select the Speed Types search option and click the Search button on the ChartField Details page.	Search for chartfields using PeopleSoft Financials speedtypes.
Search Valid GL Combo Codes	HMCF_VLD_CMBO_SRCH	Select the Combination Codes search option and click the Search button on the ChartField Details page.	Search for chartfields using valid combination codes.
Search Combo Codes	HMCF_CMBO_CD_SRCH	Select the ChartField Transactions search option and click the Search button on the ChartField Details page.	Select ChartFields individually.

Entering or Reviewing ChartField Details

Access the ChartField Details page.



ChartField Details page (1 of 2)



ChartField Details page (2 of 2)

Review the ChartFields associated with the transaction. If the ChartFields are grouped under an existing combination code, the system displays that value in the Combination Code field.

To associate an existing combination of ChartFields with a transaction, select the combination code that identifies the ChartField grouping.

Search Options

Select to search for an existing ChartField combination by:

- *Speed Types*

  SpeedType values are set up in and imported from PeopleSoft General Ledger.

- *Combination Codes*

  Search for valid combination codes.

Reporting on ChartField Combinations

Run the Combination Code Report (PAY760) to report on the on the Combination Code Table and the ChartField Transaction Report (PAY710) to report on the ChartField Transaction Table.

Pages Used to Report on ChartField Combinations

Page Name	Object Name	Navigation	Usage
Combination Code Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Report	Use to run the Combination Code report.
ChartField Transaction Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Report	Use to run the ChartField Transaction report.

CHAPTER 19

Setting Up Local Country Functionality

This chapter provides an overview of local country functionality set up and discusses how to:

- (CHE) Maintain Swiss postal codes.
- (FRA) Set up French control tables.
- (GER) Set up the German control table.
- (ITA) Set up Italian city tables.
- (JPN) Set up Japanese control tables.
- (NLD) Load Dutch postal codes.
- (ESP) Set up Spanish control tables.

Understanding Local Country Functionality set up

If you're administering a local or multinational workforce, you must set up certain tables that are referenced in the core control tables to support local country requirements. Do this before you set up core control tables, such as for pay groups, or define companies, locations, departments, and job codes.

(CHE) Maintaining Swiss Postal Codes

To maintain Swiss postal codes, use the Load Postal Codes CHE component (POSTAL_LOAD_CHE).

This section provides an overview of Swiss postal code maintenance and discusses how to update Swiss valid addresses.

Understanding Swiss Postal Code Maintenance

To update postal codes:

1. Download the latest update of postal codes from the website of the Swiss Post and note the path to the file in which you save it.
2. Download the latest update of alternate names from the website of the Swiss Post and note the path to the file in which you save it.
3. Use the Load Valid Addresses CHE page to enter the file paths and load the valid addresses and alternate names files to the Valid Addresses table.

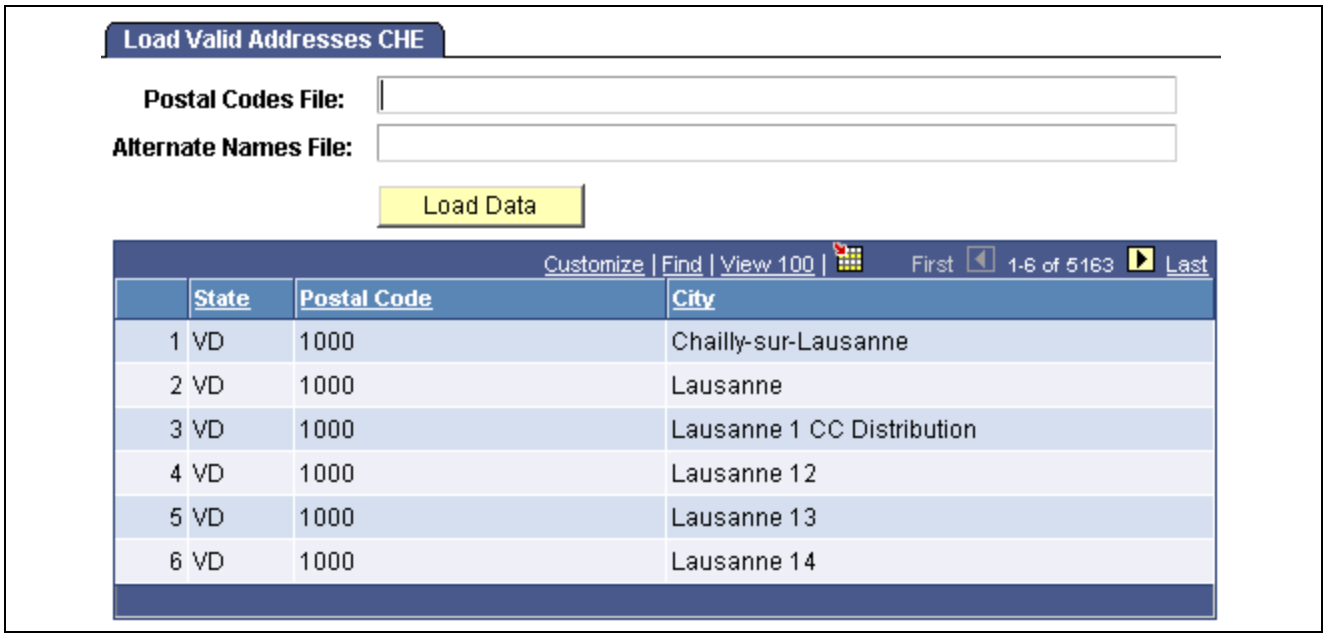
The system uses the information on the Valid Addresses table to validate municipalities against the postal code.

Page Used to Maintain Swiss Valid Addresses

Page Name	Object Name	Navigation	Usage
Load Valid Addresses CHE	POSTAL_LOAD_CHE	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes CHE	Load Swiss postal code information into the Valid Addresses table.

Updating Swiss Valid Addresses

Access the Load Valid Addresses CHE page.



Load Valid Addresses CHE page

Postal Codes File Enter the complete path to the Postal Code file that you downloaded from the Swiss Post.

Alternate Names file Enter the complete path to the Alternate Names file that you downloaded from the Swiss Post.

Load Data Click to load the postal code data into the Valid Addresses table.

State, Postal Code, and **City** Initially, these fields display the current data from the Valid Addresses table. After you run the load process, the updated information appears.

(FRA) Setting Up French Control Tables

To set up French control tables, use the APE Table component (APE_TABLE_FRA), the INSEE Table component (INSEE_TABLE_FRA), the External Variables component (EXTERNAL_VARIABLES), the Pension/Cont. Funds Table component (PENS_FUNDS_TBL), and the URSSAF Table component (URSSAF_TABLE_FRA).

This section provides an overview of enterprise integration points and discusses how to:

- Maintain APE codes.
- Maintain INSEE codes.
- Enter salary and Social Security ceiling information.
- Enter the institution type and describe pension companies.
- Set up URSSAF codes.

Pages Used to Set Up French Control Tables

Page Name	Object Name	Navigation	Usage
APE Table	APE_INDSTRY_CD_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, APE Table	Maintain APE codes for your French organization.
Insee Table Fra	INSEE_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, INSEE Tabl	Maintain INSEE codes for your French organization.
Insee Table FRA - Detail	INSEE_DSCRLONG_SEC	Select the Details link on the Insee Table Fra page.	Record additional information or comments about an INSEE code.
External Variables	EXT_PARM_CD_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, External Variables	Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.
Institution Type	PENS_FUNDS_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Pension/Cont. Funds Table, Institution Type	Enter the institution type and describe the pension companies to which your workers make their pension contributions.
Institution Add. (institution address)	PENSION_FUND_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Pension/Cont. Funds Table, Institution Add.	Enter the insurance company's address information and describe the insurance company to which your workers make pension contributions. **Note.** This information doesn't roll into PeopleSoft Enterprise Pension Administration, which is a U.S. application.
URSSAF Table	URSSAF_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, URSSAF Table	Set up URSSAF codes.

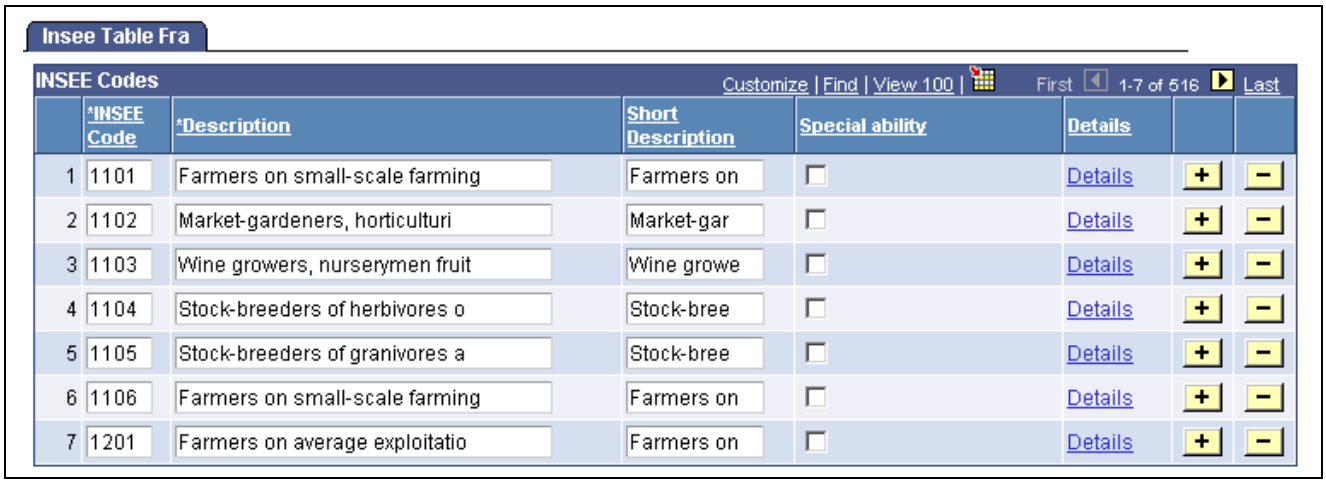
Maintaining APE Codes

Access the APE Table page.

APE codes are used to classify the type of industry (such as software, banking, and insurance) that a company represents. APE codes are a normalized set of codes that are required by law and are used on Training Report 2483 (TRN029).

Maintaining INSEE Codes

Access the Insee Table Fra page.



Insee Table Fra page

The system displays the description that you enter for this code on pages or reports in PeopleSoft Enterprise Human Resources that reference the INSEE code.

These values are set by the INSEE and classify job codes. Link INSEE codes to all defined job codes that are used in French organizations.

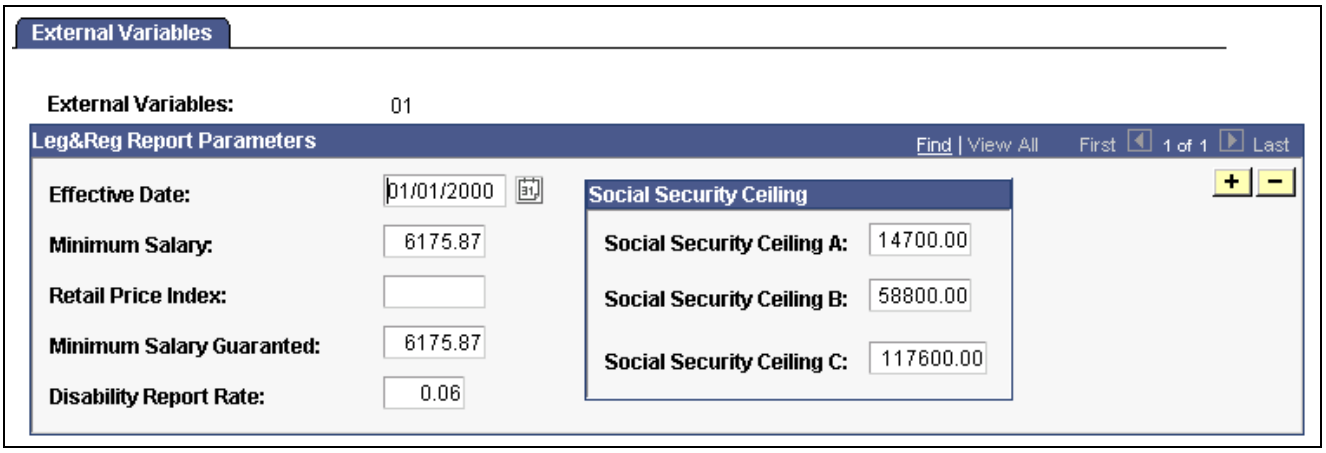
Special ability Select if this INSEE code represents a job that requires a special ability.

An worker who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.

Details Select to record additional information or comments concerning this INSEE code on the Detail page.

Entering Salary and Social Security Ceiling Information

Access the External Variables page.



External Variables page

The values that you enter act as a reference for salary and payroll processing in PeopleSoft Human Resources.

Leg&Reg Report Parameters (legislative and regulatory report parameters)

Minimum Salary, Retail Price Index, and **Minimum Salary Guaranteed** — Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.

Disability Report Rate — Prior to launching the Disability report (DIS001), enter a disability report rate. The rate is set by the French government, and the current rate is 6 percent (a field value of *0,06*). The disability report rate is set up in the External Variables Table.

Social Security Ceiling

These ceiling values are determined every year by the French Social Security Administration; the values that you enter are the ceiling values that define different income brackets for French workers. They are also used as a reference for payroll calculations for French workers because many types of Social Security contributions are calculated based on the Social Security income bracket into which an worker's salary falls.

For example, if you enter the following Social Security ceilings for Social Security Ceiling A, B, and C, and the tax rates for each bracket of income are as shown:

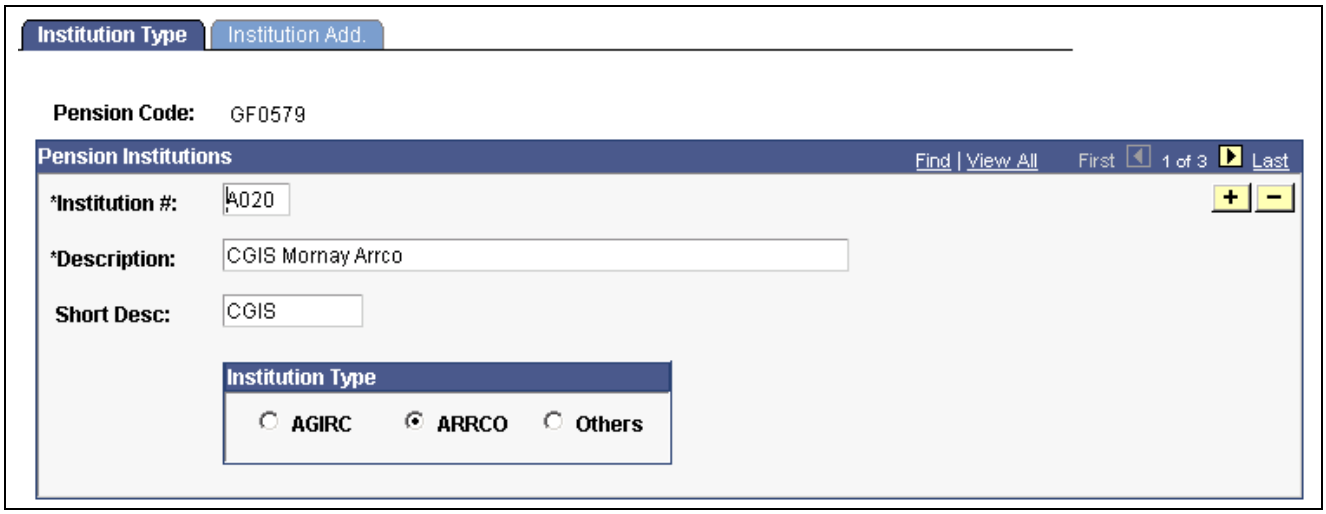
	Bracket A	Bracket B	Bracket C	Above
Ceiling	2279 EUR	9116 EUR	18233 EUR	
Tax Rate	10%	15%	18%	20%

Then an worker whose salary is 31000 EUR per month, based on this Social Security and tax rate scenario, is required to pay the following Social Security premium:

(2,279 X 10%) + (9,116 X 15%) + (18,233 X 18%) + (1,372 X 20%)

Entering the Institution Type and Describing Pension Companies

Access the Institution Type page.



Institution Type page

Institution Type Only one institution of each type is used in PeopleSoft Enterprise Global Payroll. This field indicates which class of worker an institution is for. Values are:

- AGIRC: Pension funds for managers (cadres).
- ARRCO: Pension funds for non-managers (non-cadres).
- Others: Contingency funds.

Setting Up URSSAF Codes

Access the URSSAF Table page.

URSSAF Code The URSSAF is a French administration that collects the worker and employer contributions for Social Security. This table stores the codes for the local URSSAF offices.

(GER) Setting Up the German Control Table

To set up the German control table, use the Industrial Inspection component (IDUST_INSPEC_GER).

This section provides an overview of enterprise integration points and discusses how to set up German industrial inspections codes.

Page Used to Set Up German Industrial Inspection Codes

Page Name	Object Name	Navigation	Usage
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization.

Setting Up German Industrial Inspection Codes

Access the Industrial Inspection page.

You must set up information in the German control table to track German industrial inspection codes.

Industrial inspection codes aren't effective-dated and have no status.

City Specify the city that is associated with this industrial inspection code according to the German *Berufsgenossenschaft.*

(ITA) Setting Up Italian City Codes

To set up Italian city codes, use the Load Cities ITA component (RUNCTL_CITYUPDATE).

This section lists the page used to load Italian city data.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables"

Page Used to Load Italian City Data

Page Name	Object Name	Navigation	Usage
ITA City Update	RUNCTL_CITYUPDATE	Set Up HRMS, Install, Product and Country Specific, Load Cities ITA, ITA City Update	After downloading the city code data file from the Ministero delle Finanze, run the ITA City Update process to update Italian city data.

(JPN) Setting Up Japanese Control Tables

To set up Japanese control tables, use the Postal Code Table JPN component (POSTAL_CODE_TBL), the Education Level component (EDLVLAG_TBL_JPN), and the Calculation Rules Settings component (SETUP_SALCOMP_JPN).

This section discusses how to:

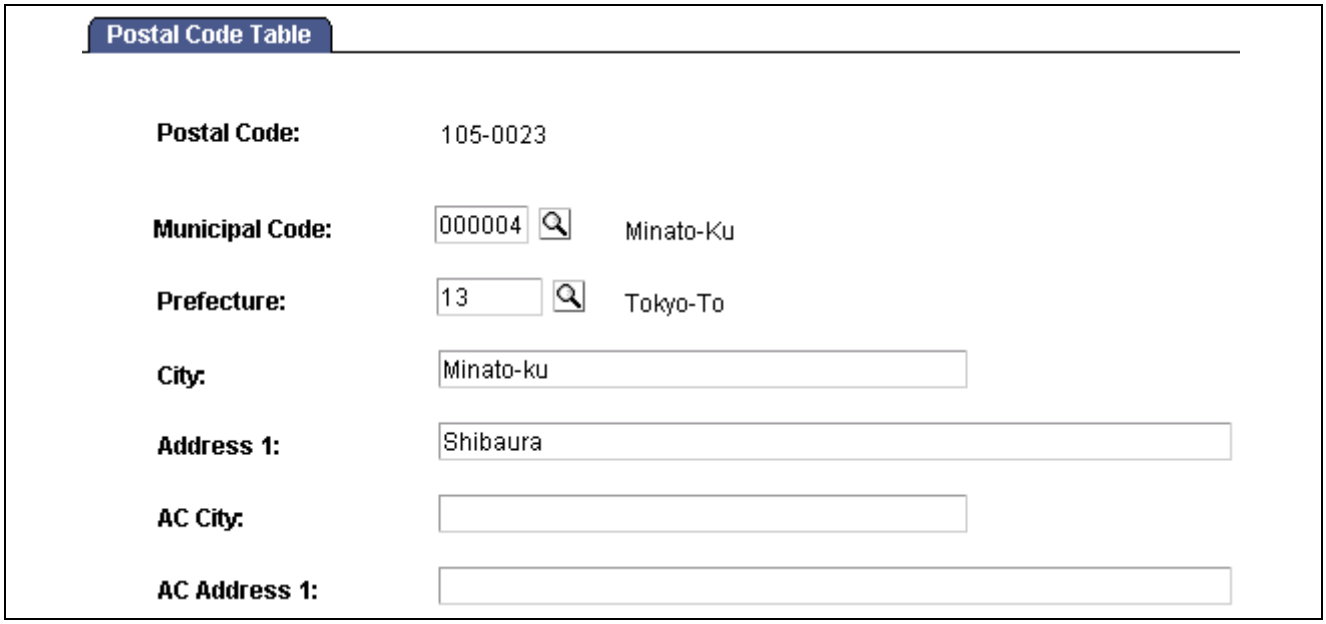
- Set up the Postal Code table.
- Set up education level ages.
- Set up the Education Level Age table.
- Establish Japanese salary component settings.

Pages Used to Set Up Japanese Control Tables

Page Name	Object Name	Navigation	Usage
Postal Code Table	POSTAL_TBL_JPN	Set Up HRMS, Install, Product and Country Specific, Postal Code Table JPN	Enter information for Japanese postal codes.
JPN Education Level Age Tbl (Japan education level age table)	EDLVLAG_TBL_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Education Level, Education Level Age Tbl JPN	Set up your company's education level age bases.
Salary Components Settings JPN	SETUP_SALCOMP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Calculation Rule Settings	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.

Setting Up the Postal Code Table

Access the Postal Code Table page.



Postal Code Table page

Municipal Code Enter the code for the Japanese municipality that this postal code belongs to.

Prefecture Select the prefecture for this postal code from the list.

Note. Japanese postal data is stored in both the Postal Code Table and the Valid Address table (EO_ADDR_VALIDAT). To keep the Valid Address table in sync with the Postal Code Table, you must enter new postal data in the Postal Code Table page. The system will not update the Postal Code Table with values you enter on the Valid Address page.

See Chapter 7, "Setting Up and Installing PeopleSoft HRMS," Specifying the Address Format for a Country, page 154.

Setting Up Education Level Ages

The Education Level Age Table enables you to link highest education levels—already in the system—to what we call the Education Level Age Basis (as of hire). The system uses the Education Level Age Basis in the calculation of an worker's Education Level - Adjusted Birth Date, which is in turn used in the calculation of an worker's Education Level Age at any point in time. The system uses an worker's Education Level Age in education level age-related pay calculations. Education level age-related pay is a form of seniority pay.

Calculating an Worker's Education Level Age

This section discusses how the system uses the Education Level Age Basis in the eventual determination of an worker's education age-related pay. This section uses many acronyms, so here's a quick reference:

Acronym	Meaning
ELABa	Education Level Age Basis (as of Hire)
AELABa	Adjusted Education Level Age Basis (as of Hire)
ELABi	Education Level - Adjusted Birth Date
SCB	Standard Calculation Birthday
CSD	Company Seniority Date
ELA	Education Level Age

Company A has set the Education Level Age Basis (ELABa) for four years of college at 22. The company also set the Standard Calculation Birthday (SCB)—the anniversary for incrementing years of service—to April 1.

Hiroshi was born on February 6, 1972 and graduated after four years of college on March 23, 1994 at age 22. He then spent two years travelling around the world. Company A hired him on June 1, 1996. He is not hired on April 1 because he didn't get back from his travels until May 1996. At the time he is hired, he is 24 years old.

For the purpose of calculating Hiroshi's education age-related pay, each year the system needs to calculate Hiroshi's Education Level Age. It will use his Education Level - Adjusted Birth Date to do this.

In calculating an worker's ELABi, the system uses the ELABa, the Company Seniority Date (CSD), and the company's SCB.

The relationship between the worker's CSD and the company's SCB may result in an adjustment to the worker's ELABa, called the Adjusted Education Level Age Basis or AELABa. If the month/day of an worker's hire date (as determined by the CSD field) is after the company's SCB (that is, CSD is greater than SCB), the worker's ELABa is decreased by 1.

In Hiroshi's case, because his June 1 month/day hire date (also his CSD) falls after the company's April 1 SCB, his ELABa is decreased by 1. If he had been hired on or before April 1, there would be no adjustment to his ELABa.

This is how to get Hiroshi's AELABa:

- Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
- Using this -1 you get:

  ELABa – 1 = AELABa

  Which in Hiroshi's case is:

  22 – 1 = 21

The system now uses the AELABa (21) to determine Hiroshi's ELABi year.

This formula is:

Year of Hire – AELABa = ELABi (year)

or

1996 – 21 = 1975

So for education age-related pay calculations, Hiroshi's ELABi is April 1, 1975, the combination of the company's SCB month/day and Hiroshi's ELABi year (remember, he was born February 6, 1972).

Now we can look at how important that ELABi is.

One year later, 1997, the system needs to know Hiroshi's ELA. This is the calculation:

SCB (including Year of Calculation) – ELABi = ELA

or

April 1, 1997 – April 1, 1975 = 22

This is the same ELA as a graduate who started with the company immediately after college. This set of calculations has, then, effectively adjusted Hiroshi's ELA, upon which education age-related pay is based, to take into account the two years that he spent traveling and the fact that he started work after the company's SCB.

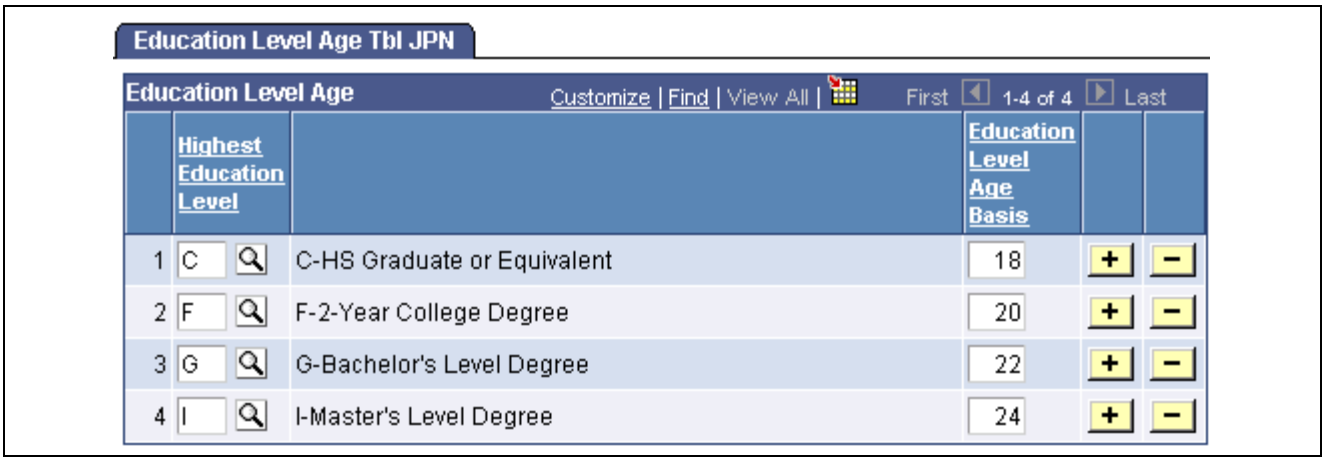
Note. If your company considers that the lapse of two months from April to June is not significant, you can adjust Hiroshi's ELABi from April 1, 1975 to April 1, 1974. Then, for the same 1997 calculation, Hiroshi's ELA is 23 (April 1, 1997 to April 1, 1974), the same as a new graduate who has worked for one year.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Administering Seniority Pay"

Setting Up the Education Level Age Table

Access the Education Level Age Tbl JPN page.



Education Level Age Tbl JPN page

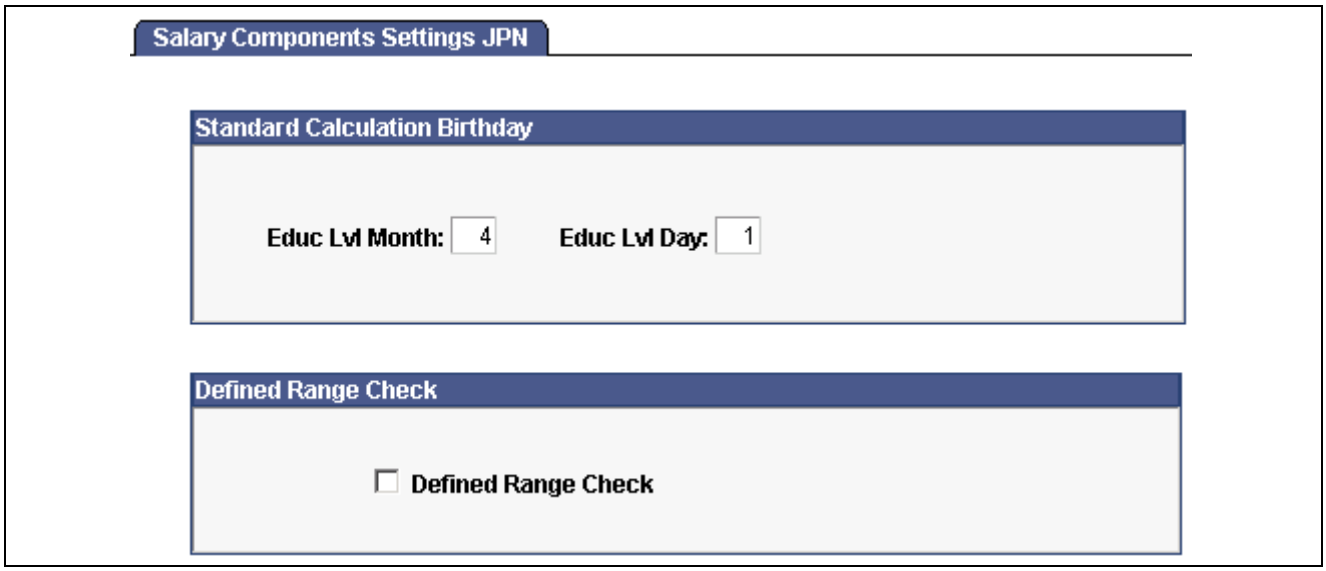
The system uses these age bases in the calculation of an worker's Education Level-Adjusted Birth Date, which is, in turn, used in the calculation of the worker's Education Level Age and education level age-related pay.

Education Level Age Basis This is the value you associate with the Highest Education Level that you selected in the first field. The system uses this in calculating an worker's Education Level-Adjusted Birth Date, which is used in the calculation of an worker's education level age.

Note. The Highest Education Level values are translate values from the Highest Education Level Table. You access the table to put workers' highest education levels on their Personal History page in Personal Information. If you change any of these translate values (inactivate them, for example), you will need to change any worker records that were using the value to use another value. If you add a translate value and you want to associate an education level age basis with it, you must also add it to this page and allocate an Education Level Age Basis to keep it synchronized with the Highest Education Level table. If you don't add it, and you use the new Highest Education Level value—in Personal Data, Personal Profile, for example—the system will not be able to calculate the worker's Education Level - Adjusted Birth Date (it will remain blank). Consequently, the system will not be able to calculate the worker's Education Level Age.

Establishing Japanese Salary Component Settings

Access the Salary Components Settings JPN page.



Salary Components Settings JPN page

Standard Calculation Birthday

This is the single date, or anniversary, on which your workers' education level ages increment by one.

Educ Lvl Month (education level month) — Enter the month, where January = 1, February = 2 and so on. This sets the month of your organization's Standard Calculation Birthday, the date on which all workers' company years of seniority increment by one year. It is used in the calculation of each worker's Education Level Age.

Educ Lvl Day (education level day) — This is the day of the month of the Standard Calculation Birthday. For example, Month 4, Day 1 sets the Standard Calculation Birthday as April 1.

Defined Range Check — Select to ensure the system checks that any record added to a Job Data - Compensation page with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table.

The check applies to both a manually added record and an automatically added record.

Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on an worker's Compensation page.

See Also

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

(NLD) Loading Dutch Postal Codes

To load Dutch postal codes, use the Postal Codes NLD component (RUN_POSTAL_NLD).

This section discusses how to import postal codes into the Postal Code table.

Page Used to Load Postal Codes

Page Name	Object Name	Navigation	Usage
Load Postal Codes NLD	RUNCTL_POSTAL_NLD	Set Up HRMS, Install, Product and Country Specific, Postal Codes NLD	Import postal codes into the NLD Postal Code Table in your human resources system.

Importing Postal Codes Into the Postal Code Table

Access the Load Postal Codes NLD page.



Load Postal Codes NLD page

The Dutch postal authority provides a ZIP code table to which customers can subscribe. The Load Postal Code Table process loads all of the ZIP codes provided in a source file by the Dutch Post (PTT Post) into your human resources system.

Report Request Parameters

Initial Postal Code Loadfile Enter the initial ZIP code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.

Update Postal Code File Enter the updated ZIP code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.

Run Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

(ESP) Setting Up Spanish Control Tables

To set up Spanish control tables, use the Insurance Company Table component (INSUR_COMPANY_ESP) and the Industry Activity Table component (INDUSTRY_ACT_ESP).

If you do business in Spain, enter the information that is required by the Spanish government concerning your organization's primary industry activity and the insurance company that you use for workplace accidents or illnesses.

The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the work center number information to report worker information to the Spanish Social Security National Institute *(Instituto Nacional de la Seguridad Social)*.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

Pages Used to Set Up Spanish Control Tables

Page Name	Object Name	Navigation	Usage
Insurance Company	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company	Enter information about your organization's insurance company.
Industry Activity	INDSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity	Define the codes that are needed by your organization.

CHAPTER 20

Setting Up and Working with Market Pay

This chapter gives an overview of the market pay functions and discusses how to define and maintain market pay information.

Understanding Market Pay

In today's environment, it is crucial that companies pay their workers in a competitive manner. One way of ensuring that you are paying your workers competitively is to conduct salary surveys to determine where the salaries being paid to their workers fall. These salary surveys are typically conducted by contracting with survey providers and purchasing existing surveys, or participating in an upcoming survey. Another method is contacting similar companies and inquiring as to their pay scales for specific positions. After you have gathered and analyzed this information, you may decide that it is useful for your salary and budgeting purposes.

Because salaries can and do vary based on where a company does business or has workers, it is useful to be able to categorize the salaries paid in different geographical areas.

With PeopleSoft Enterprise Human Resources, you can use this salary data to act as a guide for your awarding competitive compensation to your workers. The market pay functionality can assist you in this endeavor. Market pay is a range of compensation information, including the different elements of compensation such as base, variable, and total compensation which may vary by geography. By using this functionality, you can define market pay by geography.

When you use the market pay functionality, you can:

- Define geographic areas to relate finalized market data to workers.

  You can further distinguish geography by country, state, province, and city.

- Associate a market pay matrix with one or multiple job codes.

  The market pay matrix can be accessed through the Market Pay Match page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table) or through the Associate Market Pay to Job Codes page (Set Up HRMS, Product Related, Compensation, Market Pay).

- Upload data from the old Salary Survey tables into the new market pay tables using the Define Salary Survey Mapping page (Set Up HRMS, Product Related, Compensation, Market Pay) which preserves the existing functionality.

  This data can be used to perform an analysis of competitive information on compensation elements

- Store conclusion market data in the form of a matrix.

Prerequisites

Before you can use the market pay functionality, you should:

1. Create job codes for jobs in your company.

   See Chapter 14, "Setting Up Jobs," page 303.

2. Assign job codes to workers during the hiring process.

   See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "(USF) Hiring Employees".

3. Conduct salary surveys, and analyze salary data.

4. Create salary market pay matrices using the Configurable Matrices component.

   See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices".

Defining and Maintaining Market Pay Information

To define and maintain market pay information, use these components:

- Define Geographical Areas (GEOGRAPHY_TBL)
- Define Matrices (WCS_LK_TBL_DEFN)
- Report Market Pay by Job Code (SP_MPAY_RPT_TBL)
- Load Market Pay Data From File (SP_SURVLOAD_TBL)
- Define Salary Survey Mapping (SP_SURV_MAP_TBL)
- Associate Market Pay to Job Codes (SP_SAL_SURV_TBL)

This section provides an overview of the market pay functionality and discusses how to:

- Define geographical areas for market pay matrices.
- Define a market pay matrix.
- Define inputs for market pay surveys.
- Define outputs for market pay surveys.
- Define search keys.
- Define data content.
- View matrix results.
- Map salary survey data.
- Associate market pay data to job codes.
- Associate market pay data to job codes using the Job Code Table.
- Load market pay data from a file.
- Load market pay data from Workforce Rewards.

- Load market pay data manually.
- Report market pay data by job code.

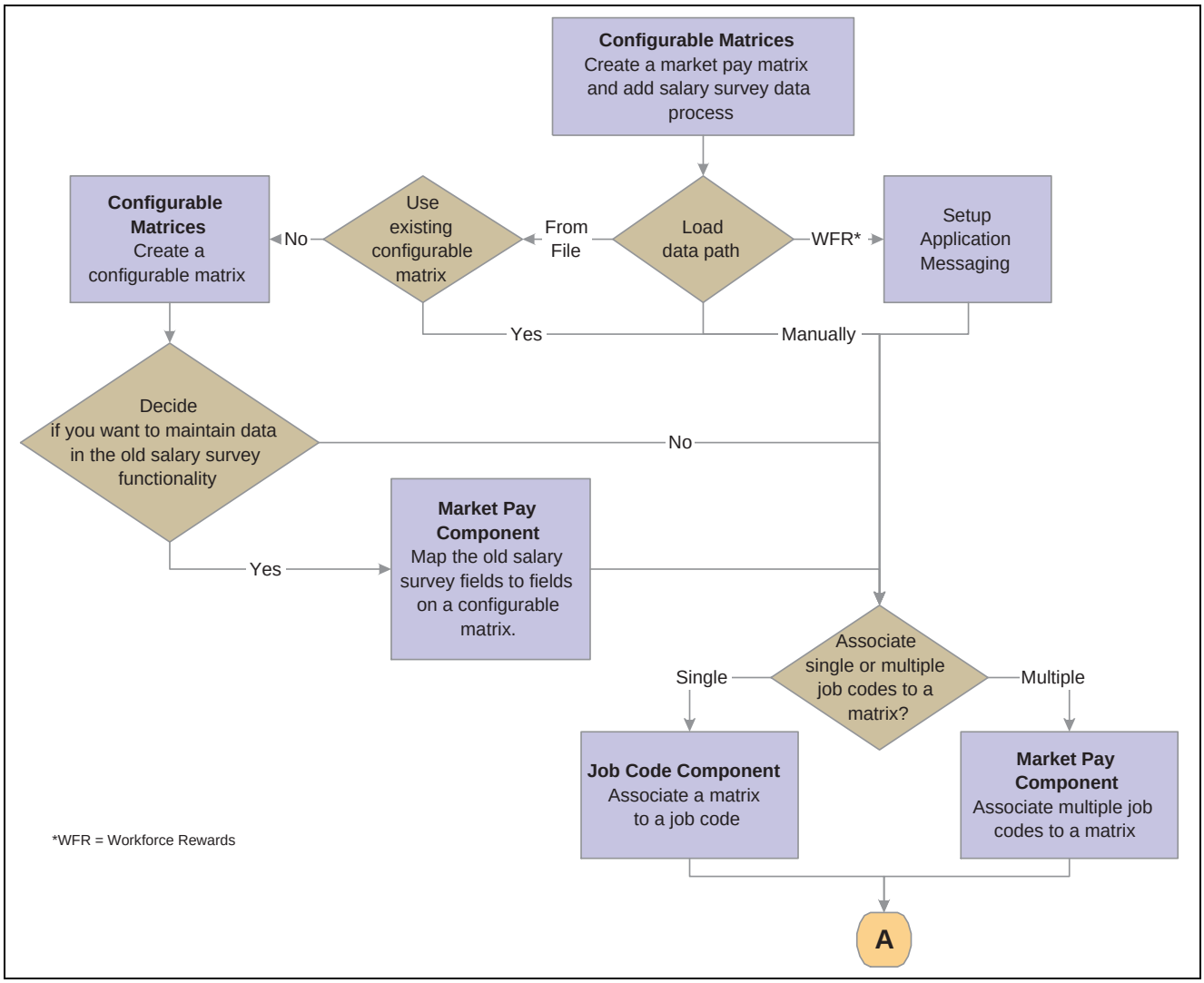
Understanding the Market Pay Process Flow

Follow these steps to set up the market pay functionality:

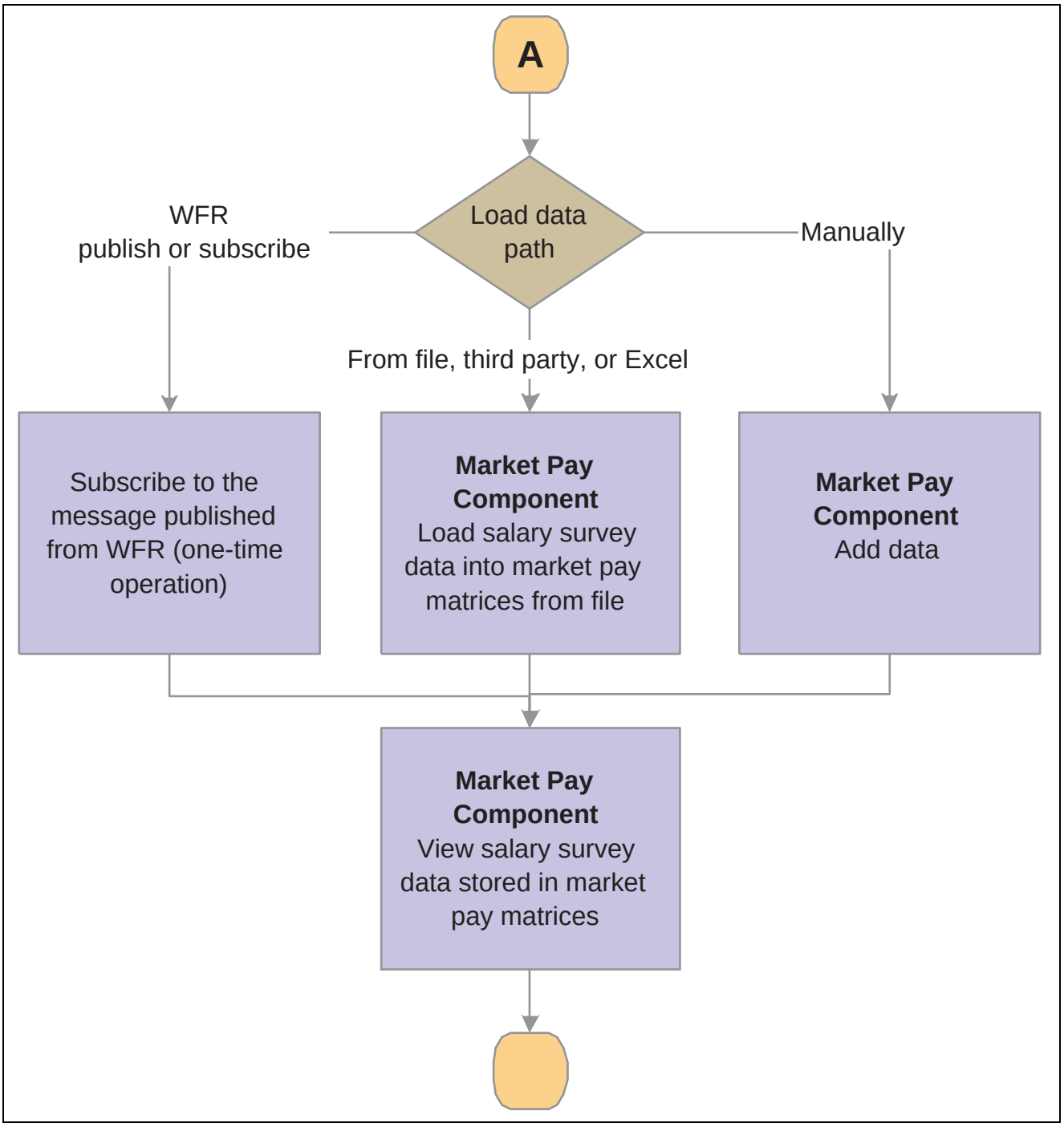
1. Define geographical areas.
2. Select an existing configurable market pay matrix, or create a new one.

   Workforce Rewards customers may set up Application messaging.
3. (Optional) Map existing salary survey data fields to a configurable matrix definition.
4. Associate market pay matrix to job codes.
5. Load market pay data.
   - Load data from file using automated process.
   - (Workforce Rewards customers only): Subscribe to message published from Workforce Rewards.
   - Manually enter data.
6. Report market pay data online by job code.

These diagrams illustrate the market pay process flow.



Market Pay process flow (1 of 2)



Market Pay process flow (2 of 2)

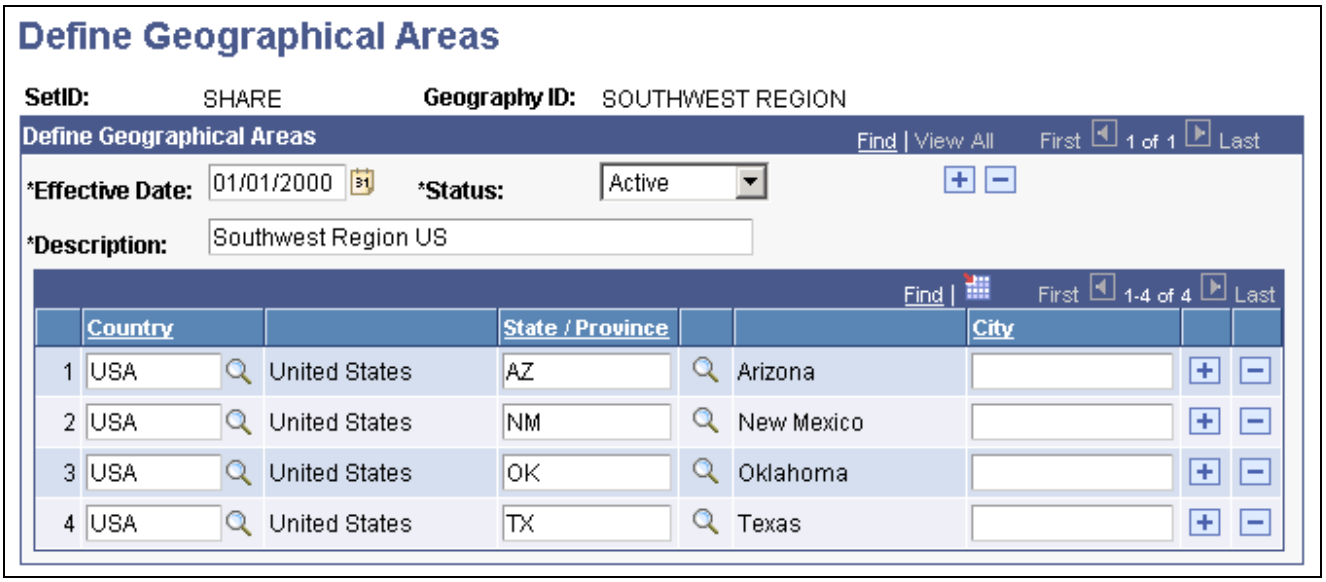
Pages Used to Define and Maintain Market Pay Information

Page Name	Object Name	Navigation	Usage
Define Geographical Areas	GEOGRAPHY_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Geographical Areas	Define geographical areas by city, state, province, and country. Use these areas to organize market pay data.
Matrix Definition	WCS_LK_TBL_DEFN	Set Up HRMS, Common Definitions, Configurable Matrices, Matrix Definition	Define a configurable matrix.
Inputs	WCS_LK_TBL_INPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Matrix Definition, Inputs	Define inputs for market pay surveys.
Outputs	WCS_LK_TBL_OUTPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Matrix Definition, Outputs	Define outputs for market pay surveys.
Search Keys	WCS_LK_TBL_KEYS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys	Specify the search keys to be used to match worker data used in market pay surveys.
Load Configurable Matrix Keys	WCS_LK_TBL_KEY_SEC	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys Click the Load Values from Prompt link.	Automatically load search keys for specific sources using a prompt table.
Data Content	WCS_LK_TBL_DATA	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content	Enter values for the output data.
View	WCS_LK_TBL_VIEW	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View	View the matrix as of the *last* saved version.
Define Salary Survey Mapping	SP_SURV_MAP_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Salary Survey Mapping	Map market pay matrix fields to prior salary survey fields.
Associate Market Pay to Job Codes	SP_SAL_SURV_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Codes	Associate market pay matrices to specific job codes.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code using the Job Code Table.

Page Name	Object Name	Navigation	Usage
Load Market Pay Data From File	SP_SURVLOAD_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Load Market Pay Data From File	Load market pay data from files to overwrite existing data or add new data.
Report Market Pay by Job Code	SP_MPAY_RPT_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Report Market Pay Data by Job Code	This effective-dated report displays all the market pay definitions ever associated with a particular job code.

Defining Geographical Areas for Market Pay Matrices

Access the Define Geographical Areas page.



Define Geographical Areas page

You can enter a geography as broad as an individual country, or you may target a specific country, state, province, or city. You can have one or more rows of country, state, province, or city data. However, you cannot list the same combination of country, state, province, or city within the same geographical area.

Warning! Use care when listing the same combination of country, state, province, or city in different geographies, as this may result in conflicting information when combined with worker data.

Effective Date You may change geographic definitions.

Status Select *Active* or *Inactive*.

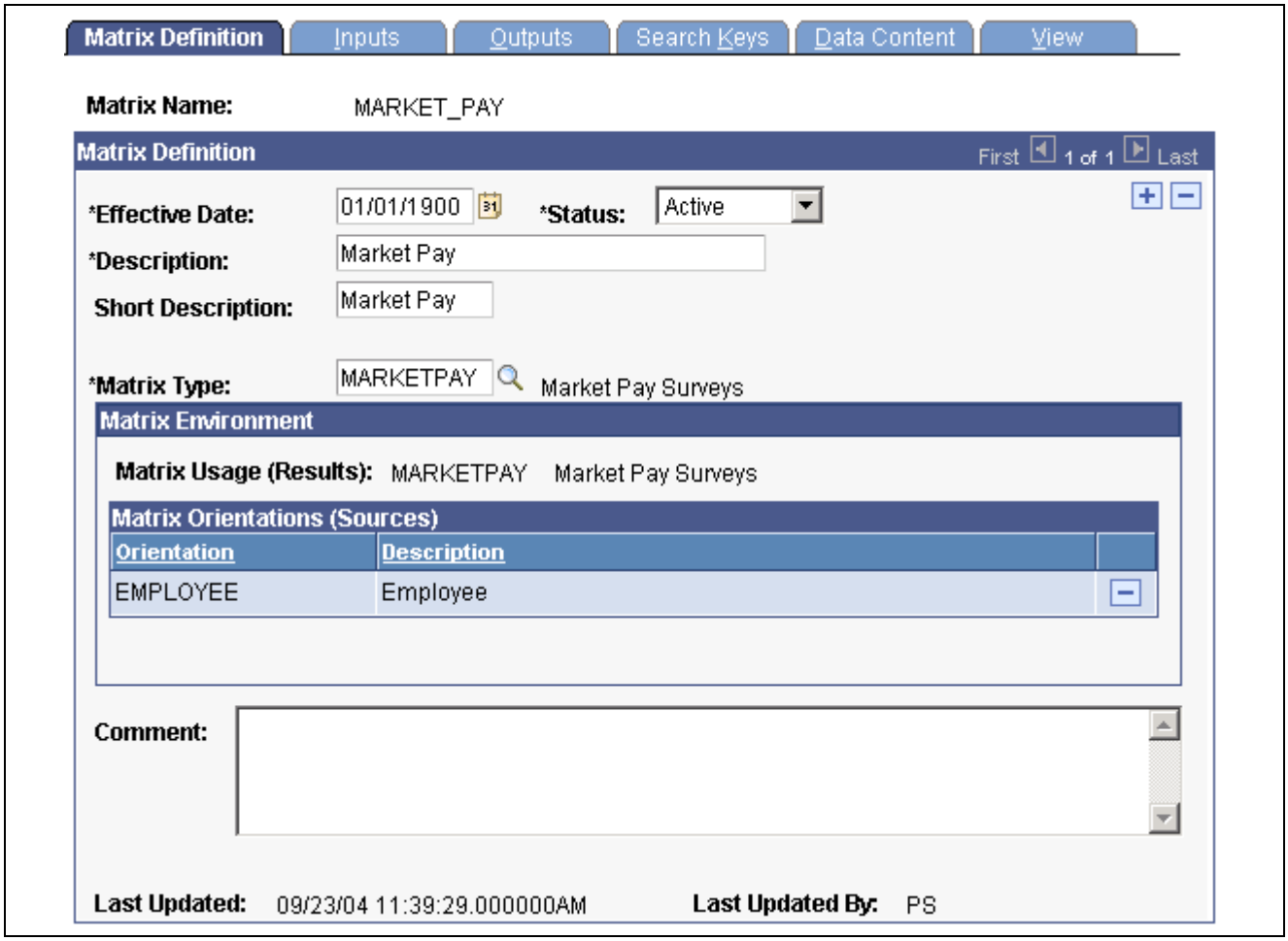
Description Enter your company-defined name.

Country and **State/Province** Select a value from the available listing.

City Enter the name of the specific city. The spelling is not validated so you will need to enter the name with capitalization and punctuation.

Defining a Market Pay Matrix

Access the Matrix Definition page.



Matrix Definition page

Note. If you have maintained survey matches in PeopleSoft, you can continue to do so by selecting the delivered Market Pay matrix, or creating a new matrix with fields such as Survey Provider and Survey Job Code. These fields allow you to create ad hoc survey participation reports at any time. You create the reports based on the requirements of your survey providers.

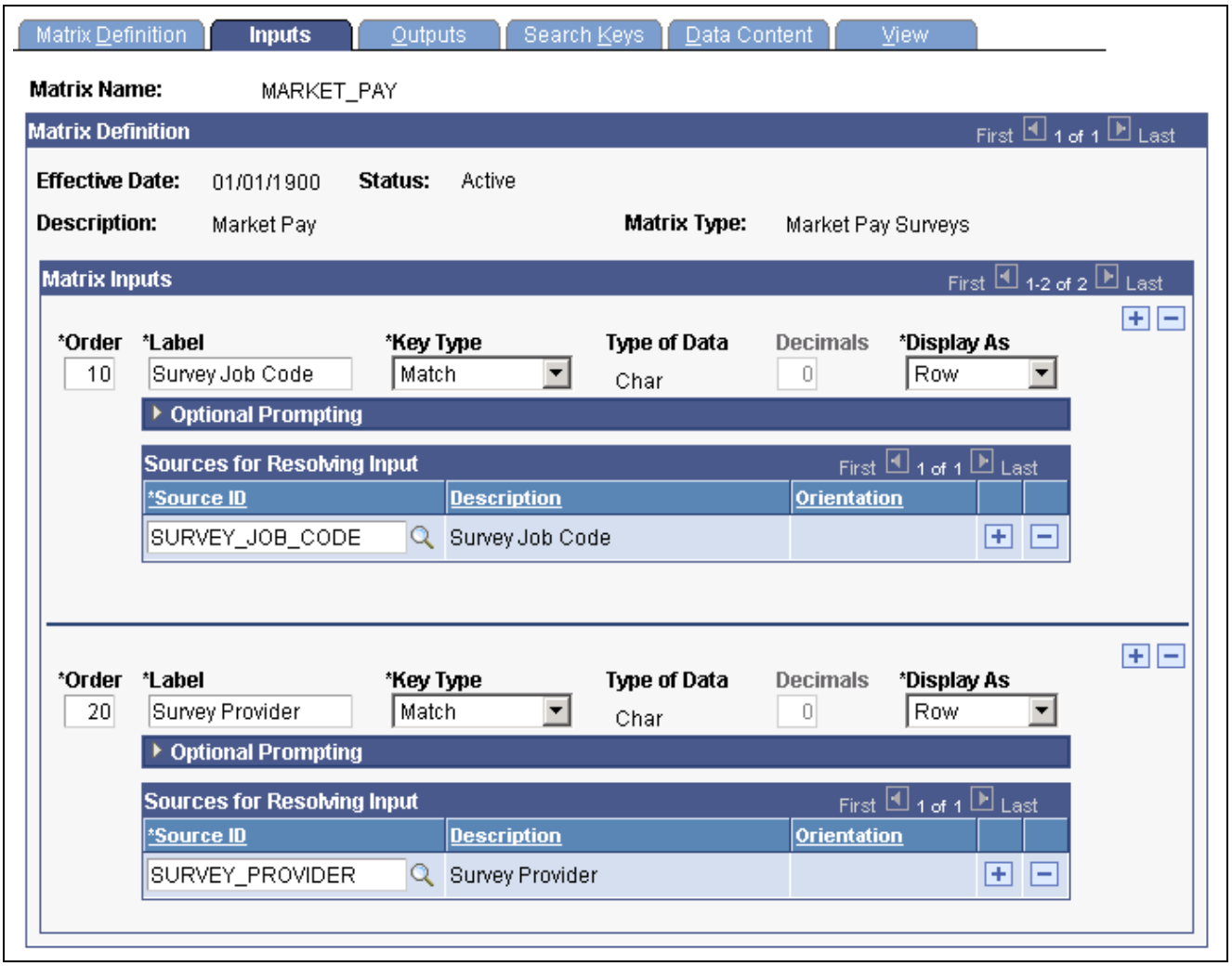
Status Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to Active in order to use the matrix.

Effective Date Enter a date that is equal to or less than the date you want to link it to one or more job codes.

Matrix Type Select *MARKETPAY*.

Defining Inputs for Market Pay Surveys

Access the Inputs page.



Inputs page

Source ID Select the source for the market pay data. The maximum number of inputs for each matrix is 15. Common types of inputs include:

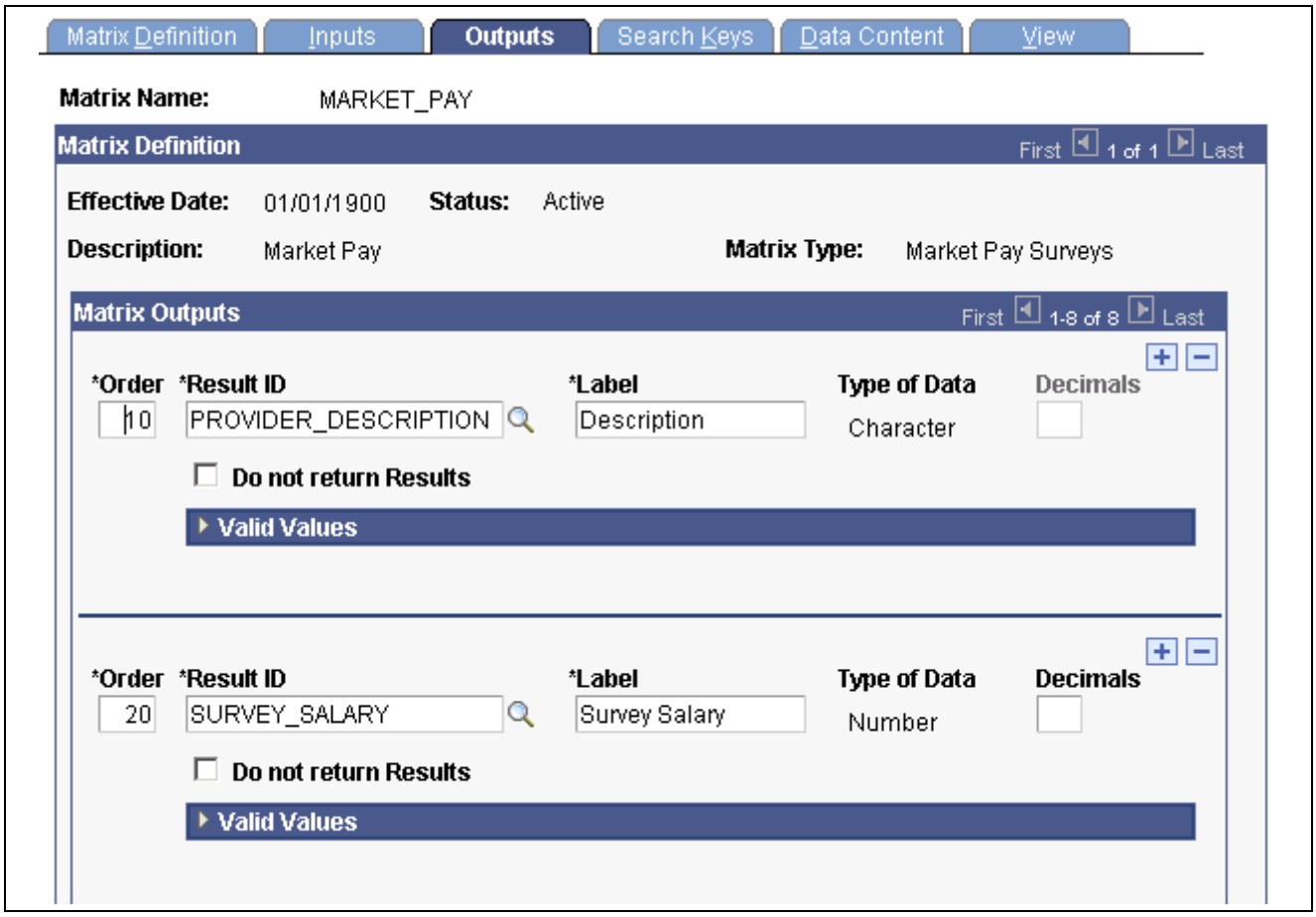
- Geographical Area
- Survey Provider
- Survey Job Code

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Predefined Source IDs and Result IDs for Configurable Matrices"

Defining Outputs for Market Pay Surveys

Access the Outputs page.



Outputs page

Result ID

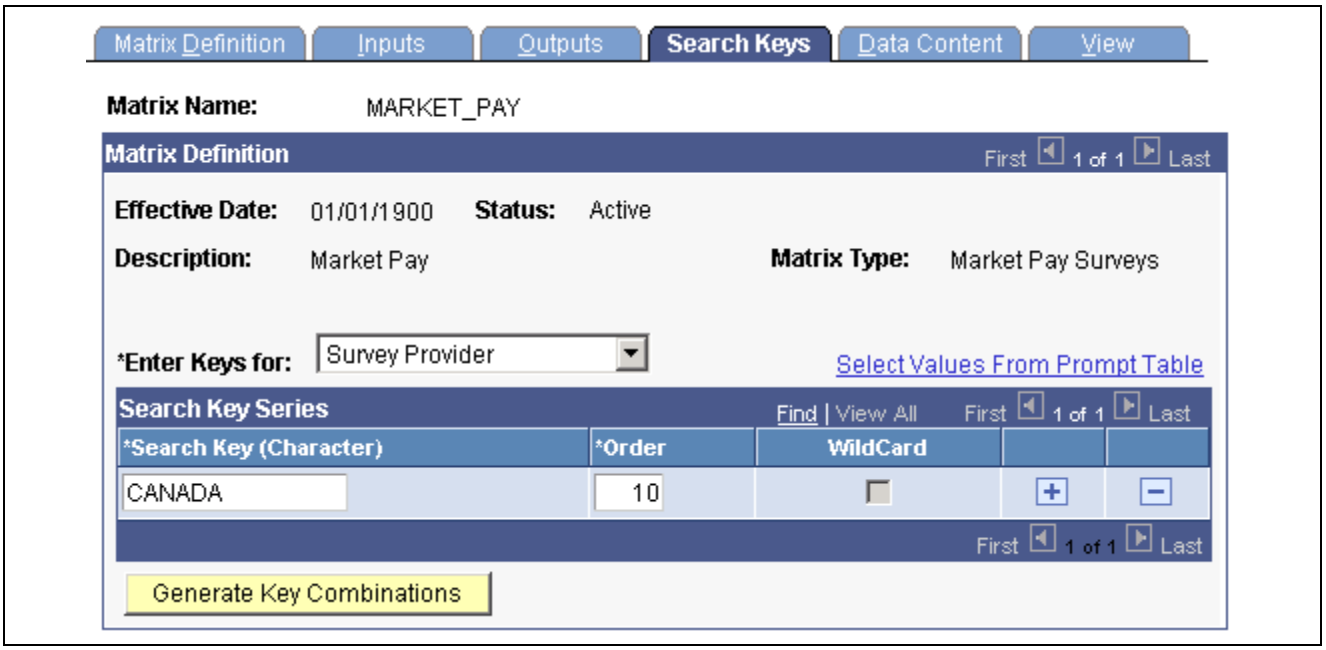
Select an output for the market pay matrix. Typical outputs include currency, base, variable, and total compensation. You can have a maximum of 30 outputs for each matrix.

These system-delivered values have default names, however, you can edit them to the label that best suits your business.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Predefined Source IDs and Result IDs for Configurable Matrices".

Defining Search Keys

Access the Search Keys page.



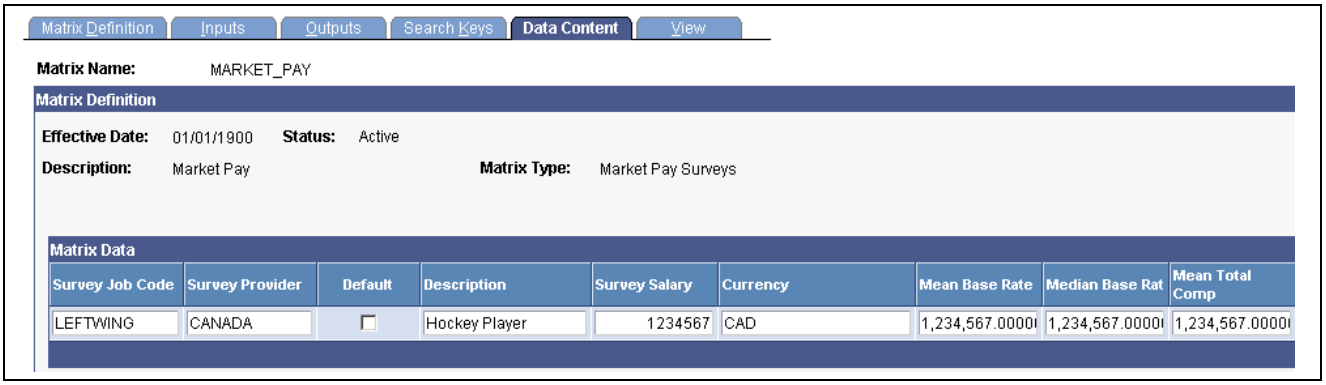
Search Keys page

Use this page to enter the key values against which worker data will be matched. Suitable search keys for a market pay matrix are *Geographical Area* or *Survey Provider*.

Note. You can create a matrix without specifying any search keys and output data values. For example, you may want to define a template for a matrix and then load values from other sources such as a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you will receive a warning.

Defining Data Content

Access the Data Content page.

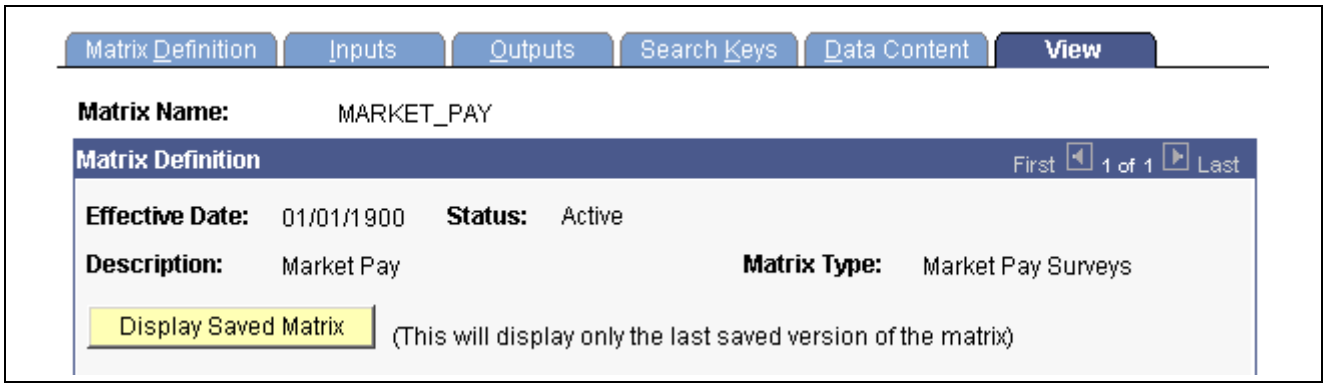


Data Content page

Use this page to view input and output fields. You may leave the data values blank for the loading of market pay data from a file or Workforce Rewards. You may also enter the data manually.

Viewing Matrix Results

Access the View page.



View page

After you have entered all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

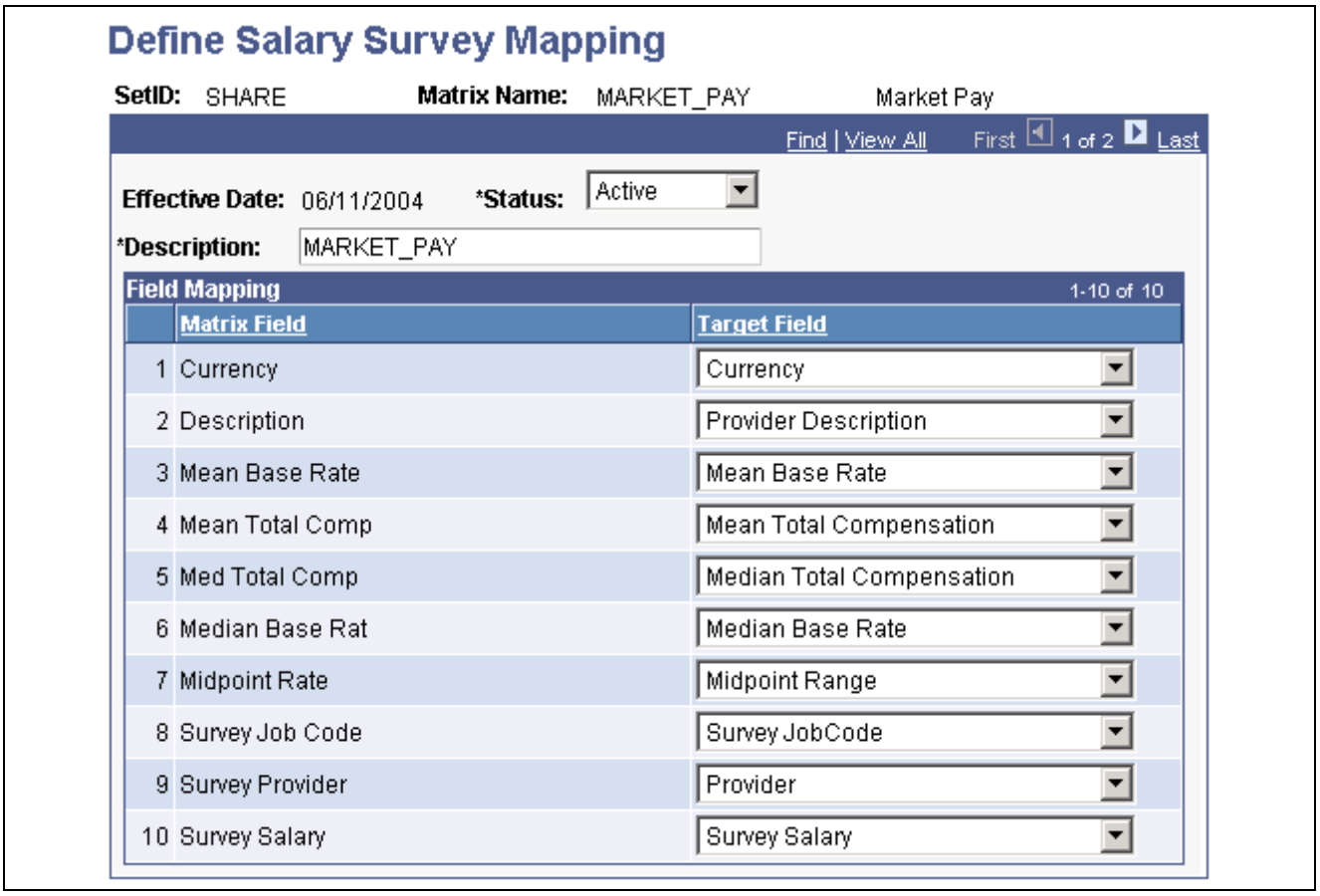
When you click the Display Saved Matrix button, the results generated are from the *last saved* version of the matrix.

Important! This page will display only the *last saved* version of the matrix.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices".

Mapping Salary Survey Data

Access the Define Salary Survey Mapping page.



Define Salary Survey Mapping page

Note. The MARKET_PAY and WFR_SURVEY_DATA matrices are delivered with the system. You can also define configurable matrices to include market pay survey data.

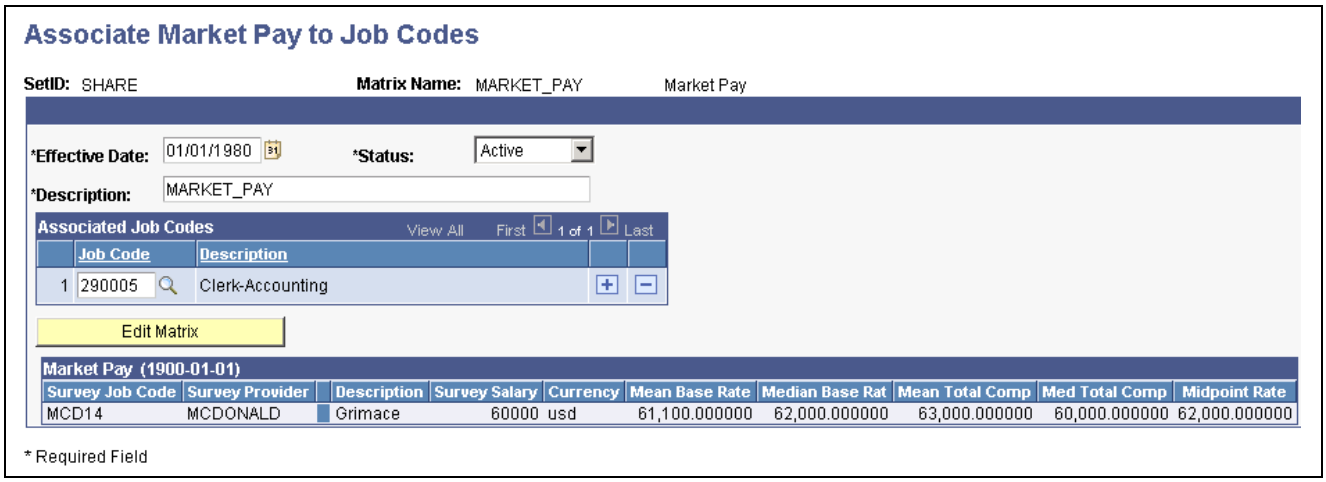
See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Defining and Maintaining Configurable Matrices.

Matrix Field Select a value. These values come from the Matrix Definition page.

Target Field Select a value. These values come from the Job Code Table.

Associating Market Pay Data to Job Codes

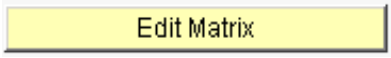
Access the Associate Market Pay to Job Codes page.



Associate Market Pay to Job Codes page

Click the Add button to create a new association between market pay data and job codes. Click Search to find existing values.

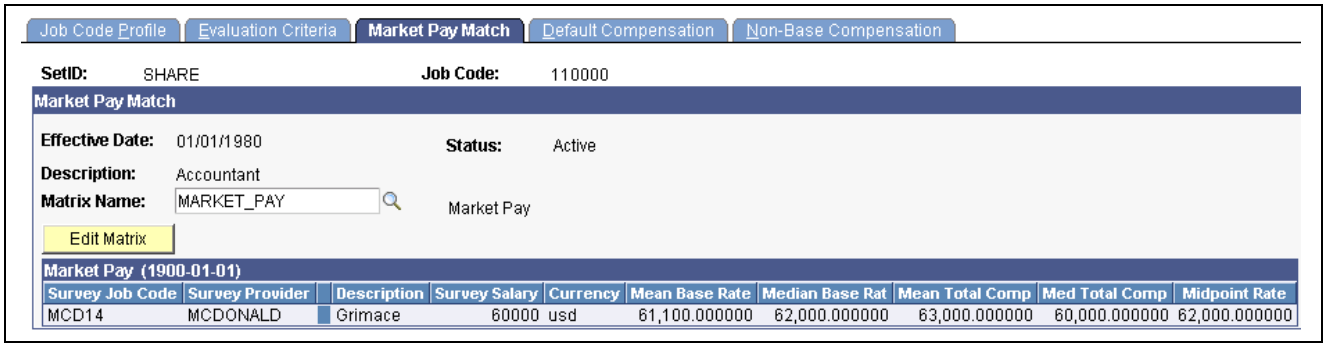
Job Code Select the job codes to which you want to associate the market pay matrix. You may link multiple job codes to one market pay matrix. However, a single job code can only be associated to one market pay matrix at a given time.



Click this button to access the Data Content page in the Matrix Definition component. You can add, modify, or delete the Matrix Data field information here.

Associating Market Pay Data to Job Codes Using the Job Code Table

Access the Market Pay Match page.



Market Pay Match page

Note. You must be in Correct History mode to see new effective–dated matrix data for a job code. You can have only one market pay matrix associated with a single job code at a given time.

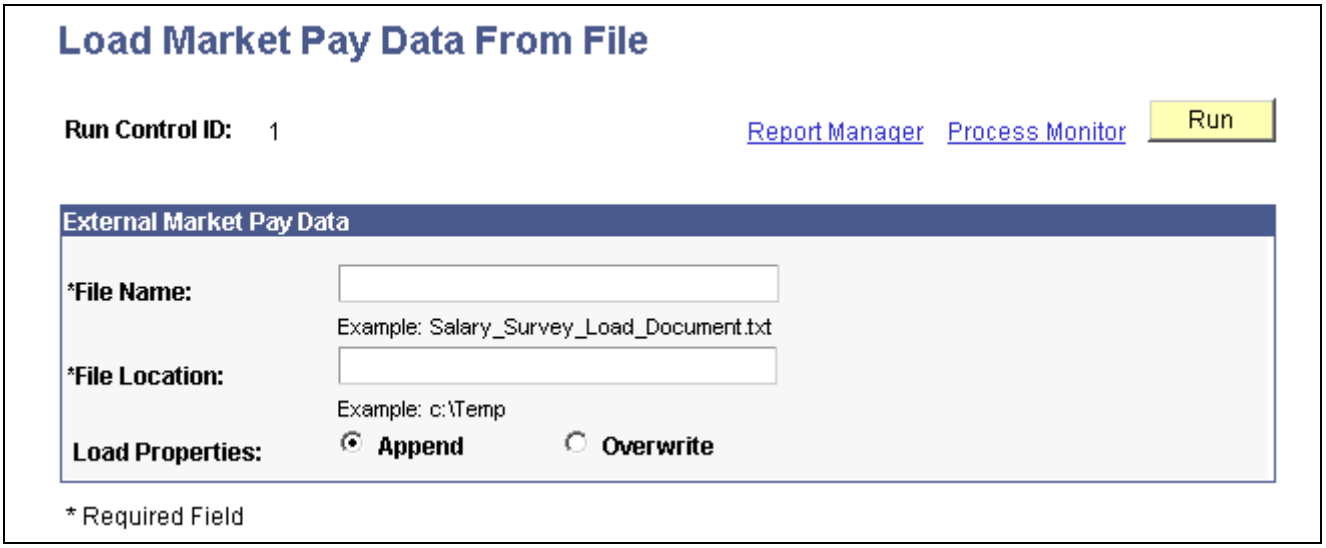
Matrix Name Select the market pay matrix that you want to associate with this job code.

Edit Matrix Click this button to access the Data Content page on the linked Matrix, where you can view and edit values associated with this matrix.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Entering Data Content Fields.

Loading Market Pay Data from a File

Access the Load Market Pay Data From File page.



Load Market Pay Data From File page

Required fields for the *input file* are SETID, EFFECTIVE DATE (date in the format yyyy-mm-dd), EFFECTIVE STATUS, DESCRIPTION, JOBCODE, MATRIX ID, The fields must be in the order shown. Also the fields in the matrix must follow the matrix ID and also be in the same order as they are in the matrix. You may want to open the file and verify the date format, as some utilities such as Excel may reformat your date differently than is displayed. You can format the date the correct way by defining it manually in Excel.

***File Name** Enter the name of the file from which you want to import the market pay data.

***File Location** Enter the location of the import file. You can also specify a machine name for a location in the format "\\machinename\directory".

Load Properties Select Append or Overwrite. Append will add the market pay information to the existing file. Overwrite will replace the data that is already in the system with the data that is in the file.

Loading Market Pay Data From Workforce Rewards

You can load market pay data by using the application message published from Workforce Rewards.

These new target market rates will come from the WA_MKT_RATE_TBL. Use the message named COMP_MKT_RATE_SYNC.

See *PeopleSoft 8.8 SP2 Workforce Rewards PeopleBook: Managing Market Compensation, Approving Compensation Target Rates, Approving Market Compensation Target Rates*

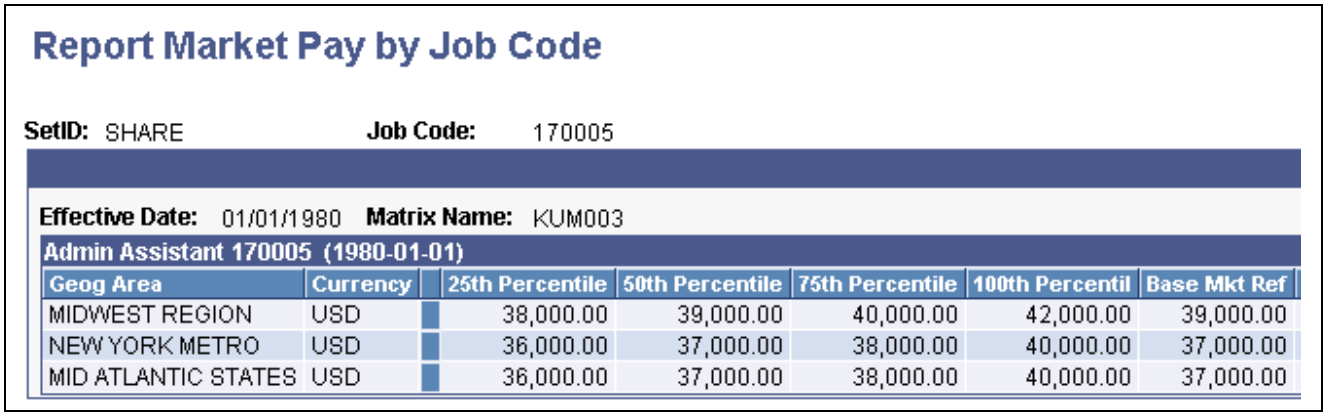
Loading Market Pay Data Manually

Access the Data Content page of the appropriate matrix.

Manually enter the market pay data into the Matrix Data group box.

Reporting Market Pay Data by Job Code

Access the Report Market Pay Data by Job Code page.



Report Market Pay by Job Code page

This page displays the current market pay data, and previous and future market pay data, when available.

CHAPTER 21

Setting Up Pay Calendars

This chapter discusses how to:

- Create balance IDs.
- Create pay run IDs.
- Create pay calendars and FLSA calendars.

Note. The information in this chapter applies to PeopleSoft Enterprise Payroll for North America and PeopleSoft Enterprise Payroll Interface. The information in this chapter does not apply to PeopleSoft Enterprise Global Payroll.

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook

Creating Balance IDs

To create balance IDs, use the Balance ID Table (BALANCE_ID_TABLE) component.

This section provides an overview of balance IDs and discusses how to:

- Create cycles and define your balance year.
- View setIDs established for each company.
- Define the quarter by company and year for each Balance Year ID.

Understanding Balance IDs

You can maintain balances by calendar year, fiscal year, benefit year, or any other method you want. You specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

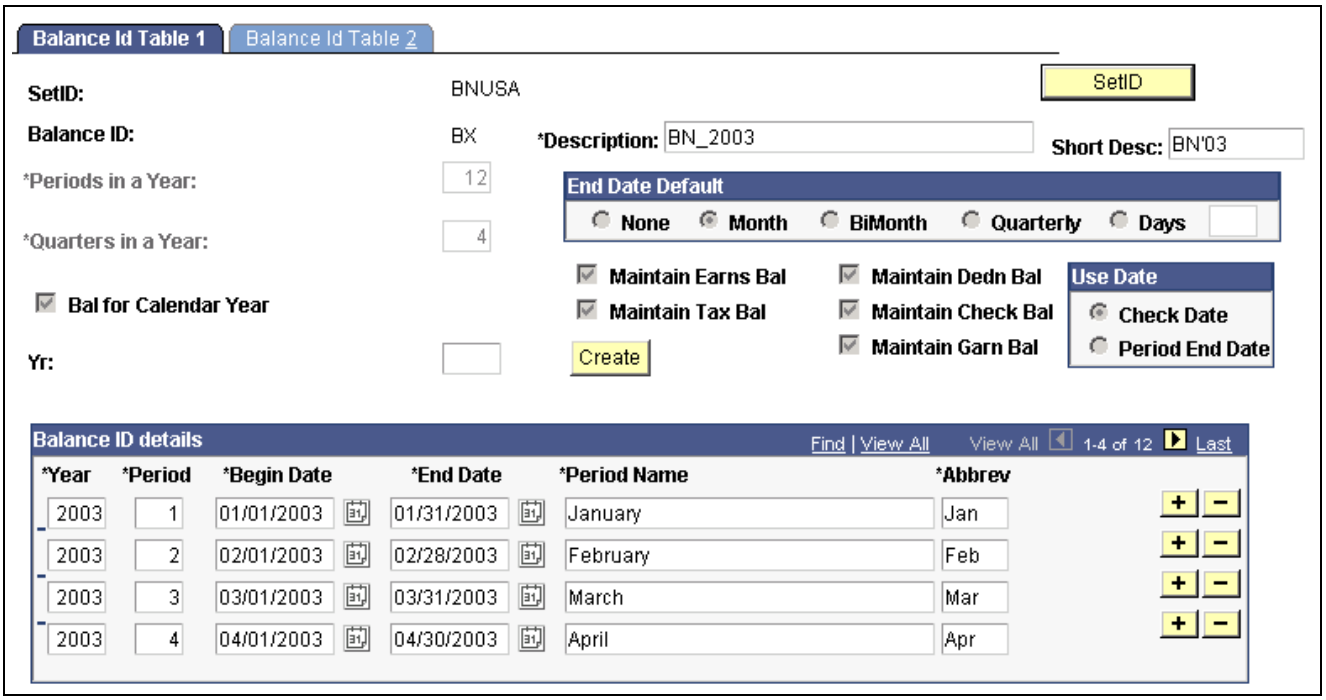
Note. You must set up a calendar year balance ID for each company for which you process payroll.

Pages Used to Create Balance IDs

Page Name	Object Name	Navigation	Usage
Balance ID Table 1	BALANCE_ID_TBL1	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 1 • Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 1	Create cycles for payroll processing according to pay group and define your balance year.
SetID - Comments	BALANCE_ID_PU	Click the SetID button on the Balance ID Table 1 or Balance ID Table 2 page.	View the setID established for each company.
Balance ID Table 2	BALANCE_ID_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 2 • Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 2	Define the actual quarter definition by company and year for each Balance Year ID.

Creating Cycles and Defining Your Balance Year

Access the Balance ID Table 1 page.



Balance Id Table 1 page

Note. When defining balances to be maintained, you can create a Calendar Year or a Non-Calendar Year. If you are creating a Calendar Year, select the Bal for Calendar Year check box, enter a year in the Year field, and click the Create button—all other fields become unavailable for entry. However, if you are creating a Non-Calendar Year, you must specify values in the Periods in a Year/Quarters in a Year, End Date Default, Use Date, Balance Typefields, and Balance ID Details.

SetID Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The setID for the Balance ID Table component is specified on the Company Table − Company Location page.

Balanced ID Entered on the Balance Id Table search page. Identifies a balance period, for example CY for Calendar Year, FY for Fiscal Year, or BY for Benefit Year. Once you establish a balance ID it should not be changed.

Note. To enable pay calendars, you must set up a balance ID for the calendar year. You can use CY or any other unique designation.

Periods in a Year If you are not setting up a balance for a calendar year, specify the number of periods in a year.

Quarters in a Year If you are not setting up a balance for a calendar year, specify the number of quarters in a year.

Bal for Calendar Year (balance for calendar year) Select if you are setting up balances for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for Description and Short Desc) to become unavailable for entry. All balance types are automatically selected for the calendar year, and the Check Date option is automatically selected. However, the Yr field and Create button appear and become available for entry.

Yr (year) Enter the year for the balance type.

End Date Default

If you are not setting up a balance for a calendar year, use this group box to specify the end date to apply for the calendar year.

None Select if you do not want a specific end date for the calendar year.

Month, BiMonth, Quarterly, Days Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.

Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, Maintain Garn. Bal If you are not setting up a balance for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating.

Note. Each of these balances are maintained for the year being defined. For example, if you are defining a fiscal year and Maintain Earns Bal was selected, earnings balances for the fiscal year is maintained.

Use Date

If you are not setting up a balance for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Check Date Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.

Period End Date Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.

Create Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Balance ID Details

If you are not setting up a balance for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

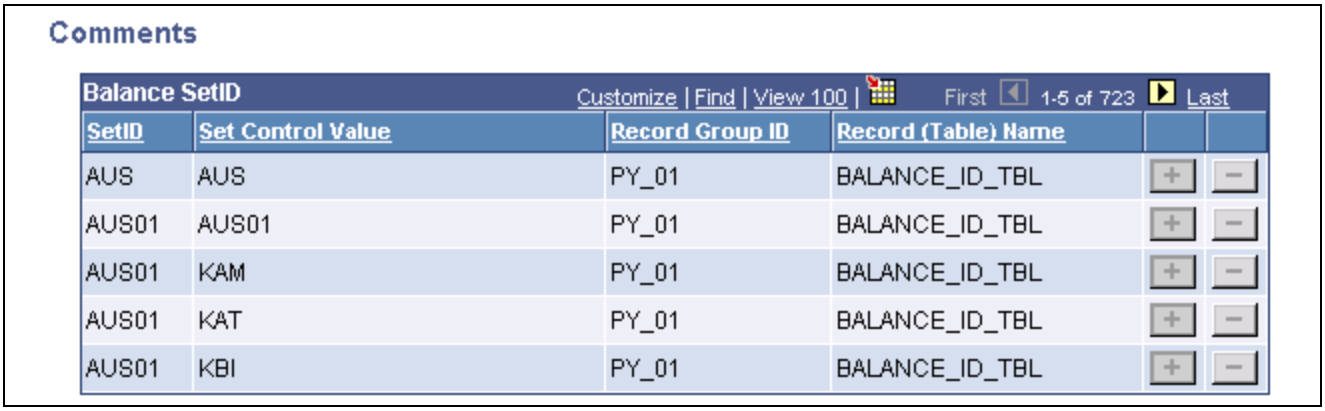
Note. You only need to set up the first entry for year, period, begin date, and end date. After you enter this information, the begin and end dates are set by default automatically for the other rows—based on the values entered in Periods in a Year and Quarters in a Year.

Year, Period, Begin Date, End Date, Period Name Enter the year, period, begin date, end date, and period name for the balance type.

Abbrev (abbreviation) Enter the abbreviation for the period name.

Viewing SetIDs Established for Each Company

Access the SetID - Comments page.

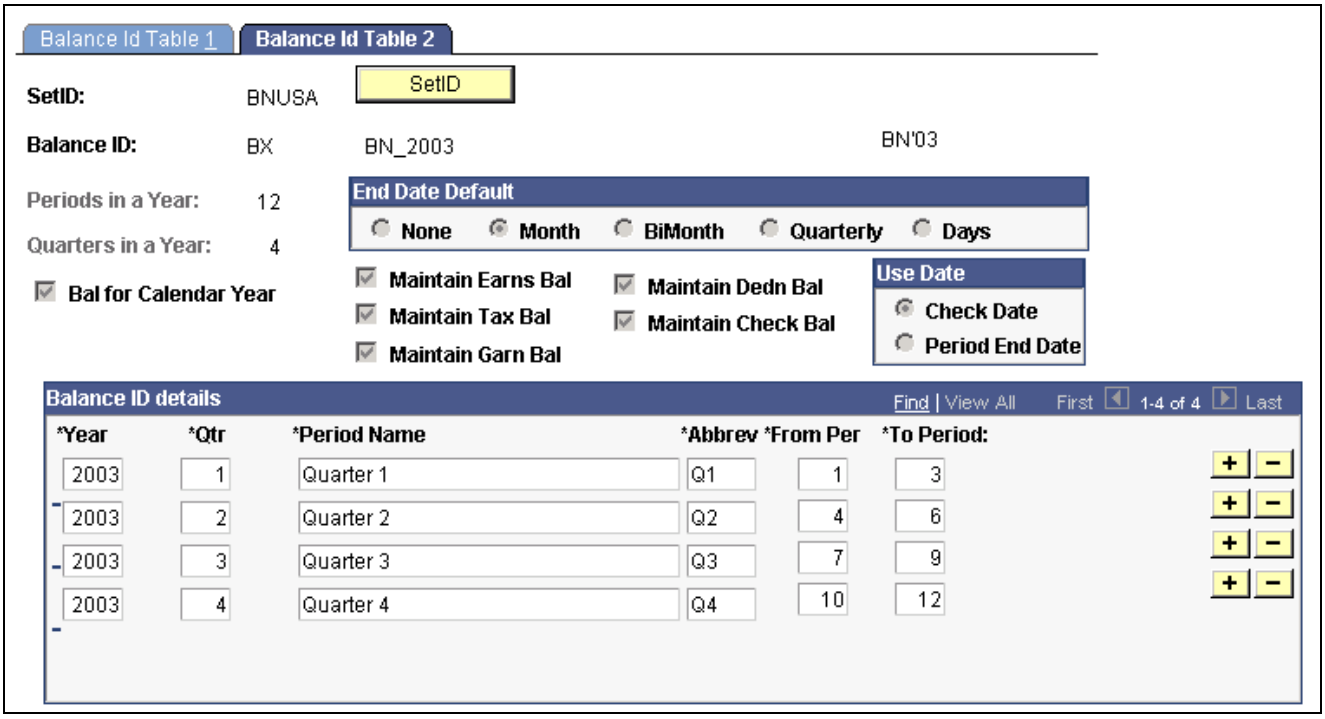


Comments page

The SetID page displays the setID established for each company. This helps you to know which setID to enter for a specific company.

Defining the Quarter by Company and Year for Each Balance Year ID

Access the Balance ID Table 2 page.



Balance Id Table 2 page

If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a balance type with a calendar year in the Balance ID Table 1 page, you must enter a value for the Year, Qtr, Period Name, Abbrev, From Period, and Thru Period fields. For each row you add after the first, the From Period field is set by default, based on the value in Quarters in a Year.

See Also

Chapter 21, "Setting Up Pay Calendars," Creating Cycles and Defining Your Balance Year, page 438

Creating Pay Run IDs

To create pay run IDs, use the Pay Run Table (PAY_RUN_TABLE) component. Use the PAY_RUN_TABLE component interface to load data into the tables for this component.

This section provides an overview of pay run IDs and discusses how to create pay run IDs.

Understanding Pay Run IDs

Use pay run IDs to indicate to the system which pay calendar entries to process together. A pay run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same pay run ID.

Generally, all calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

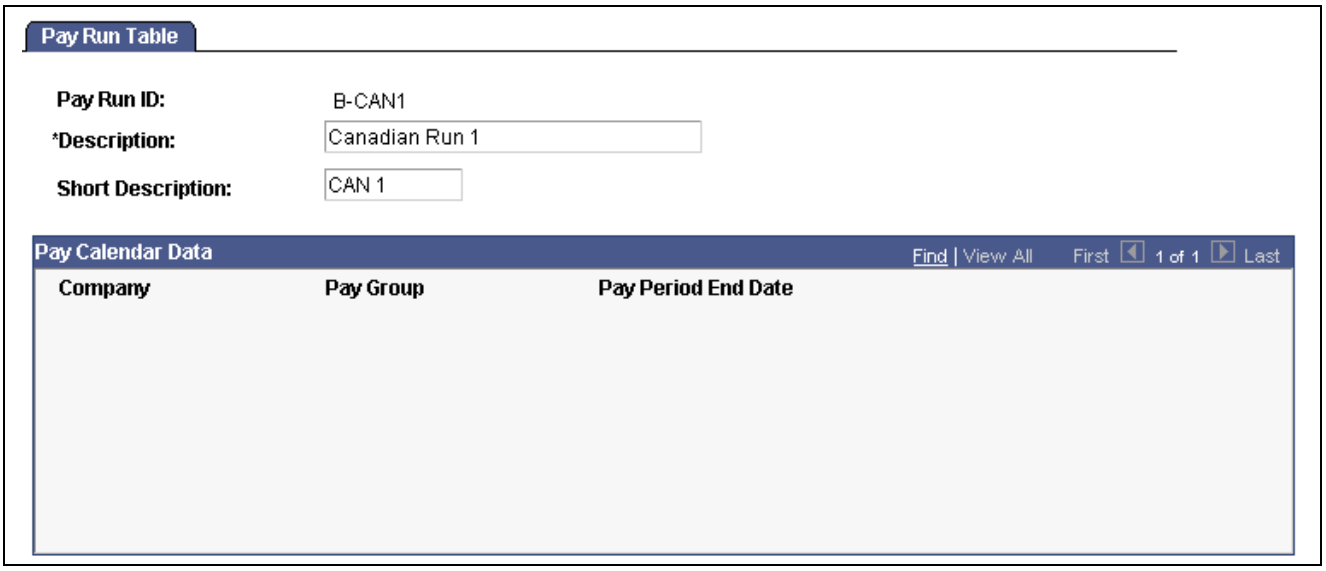
Note. A pay run ID must be unique throughout payroll history. You must create pay run IDs in the Pay Run Table before you enter them on the pay calendar. The pay run ID may be up to 10 characters. PeopleSoft suggests that you use as many of the 10 available characters as is necessary to ensure that your pay run ID is easily identifiable.

Page Used to Create Pay Run IDs

Page Name	Object Name	Navigation	Usage
Pay Run Table	PAY_RUN_TABLE	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Run Table, Pay Run Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Run Table, Pay Run Table • Set Up HRMS, Product Related, Benefits NLD, Pay Run Table, Pay Run Table, Pay Run Table	Create pay run IDs to combine pay calendar entries from different pay groups for processing.

Creating Pay Run IDs

Access the Pay Run Table page.



Pay Run Table page

Short Description Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the pay run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.

Company, Pay Group,and**Pay Period End Date** The Pay Calendar Data group box displays all the pay calendar entries grouped under the pay run ID. After you enter the pay run IDs on the Pay Calendar Table, return to this page to check the pay calendar data assigned to each pay run ID.

Creating Pay Calendars and FLSA Calendars

To create pay calendars and FLSA calendars use the Create Pay Calendars (RUNCTL_PAY_CAL_BLD), FLSA Calendar Table (FLSA_CALENDAR), Initial FLSA Calendar (RUNCTL_FLSACALPD), Review Pay Calendars or Pay Calendar Table (PAY_CALENDAR_TABLE), Pay Calendar (RUN_PAY714), Open/Close Pay Calendar (RUN_PAY130 or RUN_PAY130CN) components. Use the FLSA_CALENDAR component interface to load data into the tables for the FLSA Calendar Table component.

This section provides overviews of pay calendars and FLSA calendars and discusses how to:

- Set up FLSA calendars.
- Build pay calendars automatically.
- Build pay calendars manually.
- (USF) Review interface status and periods for federal leave accrual processing.
- Select error processing options.

Understanding Pay Calendars

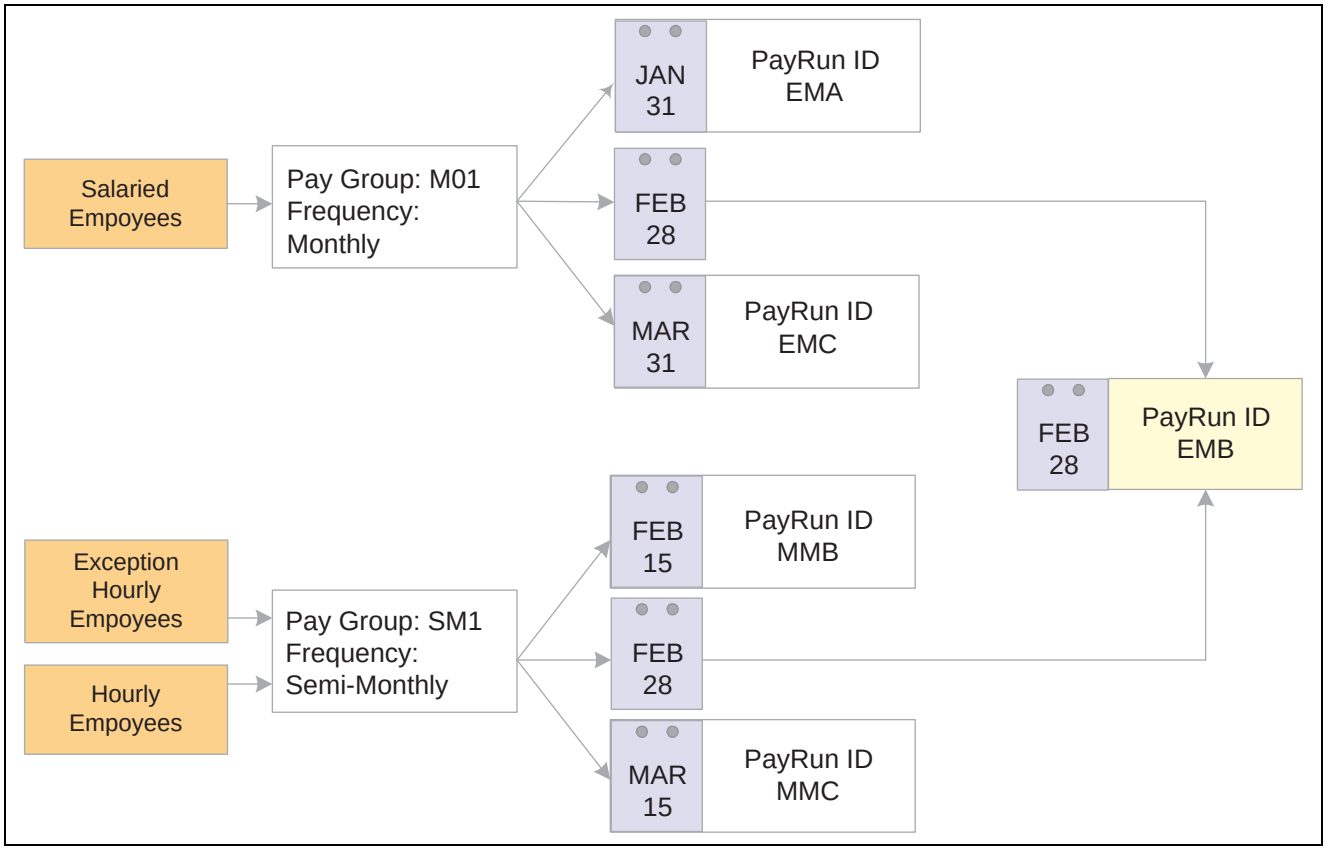
Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the pay calendar, representing one year of processing.

To process payrolls, the pay calendar entry being processed must be assigned a pay run ID. Generally, all pay calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different pay run ID for each Pay Period End Date on the Pay Calendar Table component.

Example

If you have a semi-monthly and a monthly pay calendar, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule determines which groups can or can't be grouped together.

In the following illustration, CCB has assigned the same pay run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time.



Assigning pay run IDs

Creating Pay Calendars

Follow these steps to create pay calendars:

1. Set up a balance ID — required for the pay calendar.
2. Set up a pay run ID — required for the pay calendar.
3. Build the pay calendars — either automatically or manually.

You must create a calendar entry for every pay period for each pay group you set up. You must also assign a pay run ID to each calendar entry before you run the payroll.

Building Pay Calendars Automatically

To build pay calendars automatically, use the Pay Calendar Creation page followed by the Pay Calendar Table page:

1. Use the Pay Calendar Creation page to automatically build pay calendars.

   The Pay Calendar Creation page enables you to run the Calendar Build process (PSPCLBLD), which automatically generates the pay calendar entries for all or part of a year. To run the process:

   a. Set up the run control data.

   b. Run the process.

   c. Review any error messages.

   Follow the same procedure for all pay groups. Each time you run the Calendar Build process, the system deletes the run control data. Therefore, whenever you rerun the process, you must enter the data again.

2. Use the Pay Calendar Table page to manually complete the pay calendar entries.

   The Calendar Build process does not assign values to Pay Run ID, Accrual Percent, Reverse Accruals, Aggregate ID, Off-Cycle Calendar?, Off-Cycle Ded Override, General Ded Subset ID, Benefit Ded Subset ID, Benefit Deductions Taken, or General Deductions Taken fields on the Pay Calendar Table page. After you run the process, you need to enter values for these fields manually. Although Accrual Percent and Reverse Accrual are optional, you must assign a pay run ID to each calendar entry before you run the payroll.

Building Pay Calendars Manually

To build a pay calendar manually or to manually complete pay calendar entries for pay calendars that were built automatically, use the Pay Calendar Table page (PAY_CALENDAR_TABLE).

In general, you only build pay calendars manually to accommodate off-cycle processing, such as adjustments, online checks, or check reversals.

Understanding FLSA Calendars

You must define Fair Labor Standards Act (FLSA) calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. You must add the FLSA Calendar ID to the system before you can complete the Pay Group table. The FLSA calendar requirement does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them.

The same process that creates pay calendars also creates FLSA Calendars.

Follow these steps to create FLSA calendars:

1. Set up the FLSA calendar on the FLSA Calendar Table page.

   Enter the FLSA Calendar ID and specify period length and period start date.

2. Run the Calendar Build process from the Pay Calendar Creation page.

If you did not set up the FLSA calendar before you ran the Calendar Build process, you can use the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA) to build FLSA calendars. You can also use this process if pay group FLSA status is updated or changed.

3. To view the FLSA periods, return to the FLSA Calendar Table page.

Note. The system creates the FLSA calendar for the entire calendar year. The pay calendar dates do not affect the FLSA calendar.

Pages Used to Create Pay Calendars and FLSA Calendars

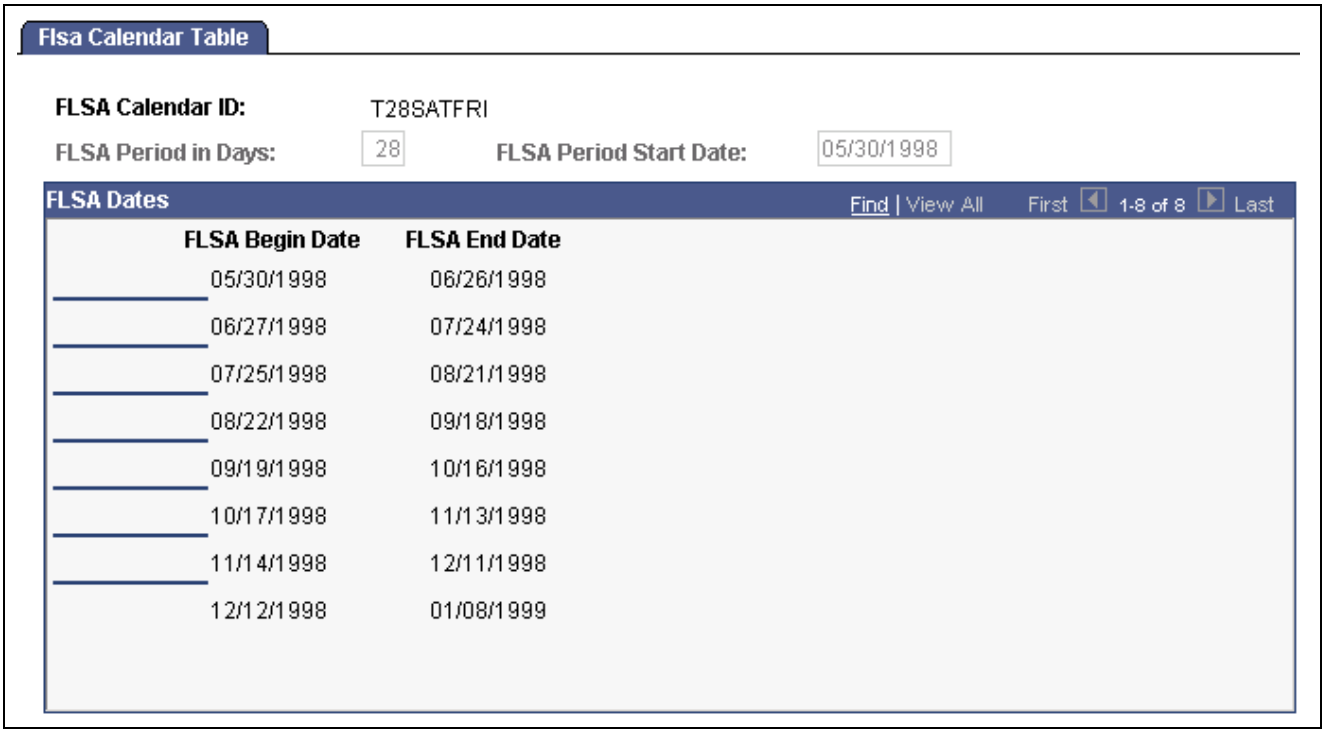
Page Name	Object Name	Navigation	Usage
Pay Calendar Creation	RUNCTL_PAY_CAL_BLD	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Create Pay Calendars, Pay Calendar Creation • Set Up HRMS, Product Related, Payroll Interface, Payroll, Create Pay Calendars, Pay Calendar Creation	Create pay calendars automatically. (After the pay calendars are built, use the Pay Calendar Table page to manually complete the pay calendar entries.)
FLSA Calendar Table	FLSA_CALENDAR	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, FLSA Calendar Table, FLSA Calendar Table	Set up FLSA calendars.
Create FLSA Cal Periods	RUNCTL_FLSACALPD	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Initial FLSA Calendar, Create FLSA Cal Periods	Run the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA), which creates FLSA calendars for existing pay groups and pay calendars.

Page Name	Object Name	Navigation	Usage
Pay Calendar Table	PAY_CALENDAR_TABLE	• Payroll for North America, Payroll Processing USA, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing CAN, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing USF, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Calendar Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Pay Calendar Table • Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table, Pay Calendar Table	Manually build a single pay calendar. Manually complete pay calendar entries for calendars that were created automatically. Review pay calendars.
Payroll Status	GVT_PAY_STATUS_SEC	Click the Federal button on the Pay Calendar Table page.	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

Page Name	Object Name	Navigation	Usage
Confirm Error Option	PAY_CALENDAR_TBL2	• Payroll for North America, Payroll Processing USA, Create Paysheets, Create Single Pay Calendar • Payroll for North America, Payroll Processing CAN, Create Paysheets, Create Single Pay Calendar • Payroll for North America, Payroll Processing USF, Create Paysheets, Single Pay Calendar • Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Confirm Error Option • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Confirm Error Option • Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table, Confirm Error Option	Select whether to bypass payroll messages during the Confirm Pay process.
Pay Calendar Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Calendar, Pay Calendar Report	Generate a report that lists information from the Pay Calendar Table component, which contains the cycles that you create for payroll processing by pay group. Each entry in the table corresponds to a pay period for a pay group.
Open/Close Pay Calendar	RUNCTL_PAY130	Payroll for North America, Annual Processing USA, Open/Close Pay Calendar, Open/Close Pay Calendar	(USA) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.
Open/Close Pay Calendar	RUNCTL_130CN	Payroll for North America, Year-End Processing CAN, Year-End/NewYear Preparation, Open/Close Pay Calendar, Open/Close Pay Calendar	(CAN) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.

Setting Up FLSA Calendars

Access the FLSA Calendar Table page.



Flsa Calendar Table page

FLSA Calendar ID The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of 14, MON-SUN, would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.

FLSA Period in Days Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.

FLSA Period Start Date Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

Note. After you create the FLSA calendar using the Calendar Build process, the FLSA Calendar Table page becomes display-only. Each row in the FLSA Dates group box displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections.

See Also

Chapter 21, "Setting Up Pay Calendars," Understanding FLSA Calendars, page 445

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USA) Setting Up Additional U.S. Payroll Functionality," Setting Up for FLSA Calculation

Building Pay Calendars Automatically

Access the Pay Calendar Creation page.



Pay Calendar Creation page

Note. Use the Pay Calendar Creation page to set up and run the Calendar Build process. Once the calendars are built, use the Pay Calendar Table page to assign pay run IDs and other information.

Pay Period End Date Enter a pay period end date for the pay calendar. For example, for a semi-monthly payroll for 1999, enter *01/15/99*. To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter *03/15/99*.

Check Dt Days From Pay End Dt Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to *3*. If the pay period end date is January 31 and the check date is January 30, enter *-1*. Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.

Pay Periods Per Year The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.

Pay Year (USF) This field appears only for U.S. federal customers.

The IRR process requires a pay year. When processing IRRs, the IRR Fiscal Data accumulator identifies all monies that come from the pay year. Enter the pay year to which the pay calendar applies.

(USF) Define Years

This group box appears only for U.S. federal customers.

Calendar Yr Run (calendar year run) This value is used by federal leave processing on particular leave types for which accrual begins with the calendar year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the leave plan calendar year. For example, for a monthly payroll there are twelve pay calendars in a year. January would be the starting point, so enter *1* in this field.

Pay Yr Run (pay year run) This value is used by federal annual leave accrual processing on leave types for which accrual begins with the pay year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the pay year for leave accrual processing.

Fiscal Yr Run (fiscal year run) This value is used by federal annual leave accrual processing on leave types for which accrual begins with the fiscal year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the fiscal year for leave accrual processing.

Leave Yr Run (leave year run) This value is used by federal annual leave accrual processing only. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the annual leave year.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

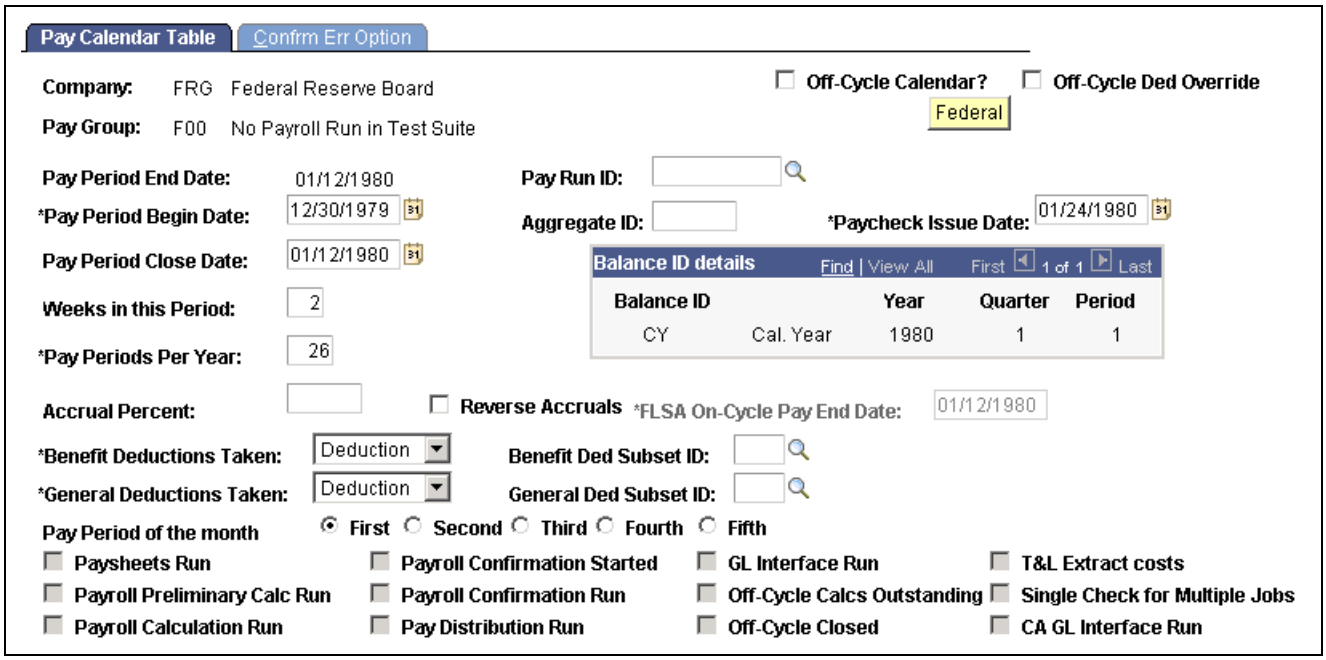
See Also

Chapter 21, "Setting Up Pay Calendars," (USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing, page 456

Chapter 21, "Setting Up Pay Calendars," Understanding Pay Calendars, page 444

Building Pay Calendars Manually

Access the Pay Calendar Table page.



Pay Calendar Table page

Off-Cycle Calendar? Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.

Off-Cycle Ded Override (off-cycle deduction override) For an off-cycle run, select this check box to specify that the Pay Calculation process should use the deduction override process to determine deductions.

If Off-Cycle Calendar is selected and Off-Cycle Ded Override is cleared, then the deduction override evaluation process is bypassed during pay calculation. That means that employee-level benefit or general deduction override will not take effect. This might be useful for an off-cycle bonus run.

Federal (USF) Click this button to access the Payroll Status page. This button appears only for U.S. federal customers.

Pay Period End Date The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Period Begin Date Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determine if the employee is

active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Run ID

Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same pay run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a pay run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a pay run ID.

Aggregate ID

Enter an aggregate ID to indicate aggregate taxation. Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period. Every pay calendar with the same Aggregate ID value is aggregated together (including Off-Cycle payrolls) for the purposes of tax calculations. All wages paid on each calendar with the same Aggregate ID are combined, then annualized and taxed accordingly. Typically this field is utilized by temporary agencies where employees are paid.

Example: An employee might be part of a weekly pay group and receive payment on Tuesday for work performed on Monday and Tuesday. On Wednesday, he might switch to a different, one-day job and be paid on that same day. The same employee might then work a third job on Thursday and Friday and receive a third payment on Friday. Using the ordinary annualized tax calculation method, each of these three checks would be taxed as if the earnings on each check were for an entire week, because the employee's pay period has been defined as weekly. The result would be that the total amount of taxes withheld for the week would be too low. To prevent this from happening use the aggregate tax method.

Paycheck Issue Date

Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation.

Note. The system updates employee balances (such as taxes, deductions, and earnings) based upon the check date on the pay calendar you are processing with , not the check date on the paysheet or check. These dates are often the same, but not always.

Weeks in this Period

Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.

Pay Periods Per Year

Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year.

Example: If you set up a deduction for $100 per month, the system multiplies $100 by 12 to arrive at $1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of $100 per pay period. For semi-monthly employees, the system divides the deduction by 24.

For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the Pay Periods Per Year field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year.

The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year.

Note. For monthly and semi-monthly pay calendars, the Pay Periods Per Year field is unavailable for entry; the only valid values are *12* and *24*.

Balance ID Details This group box displays the year, quarter, and period applicable to the pay period for each balance ID for which you're maintaining balances.

Accrual Percent Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger Interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the Reverse Accruals check box and leaving the Accrual Percent field clear. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.

Reverse Accruals Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the Accrual Percent field clear. If the Accrual Percent field is not clear, you must clear the Reverse Accruals check box.

Note. The Accrual Percent field and Reverse Accruals check box are not applicable to PeopleSoft Payroll for North America for E&G.

FLSA On-Cycle Pay End Date Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect on FLSA check box on the Earnings Table – General page is not set to None), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.

Benefit Deductions Taken Select a value to indicate how to take benefit deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take benefit deductions.
- *Deduction:* Select this value if you want to use the regular benefit deductions defined on the Deduction Table pages for these employees. This is the default value.

- *Subset:* Select this value if you want to use a specified benefit deduction subset. If you select this value, you must specify the subset ID in the Benefit Ded Subset ID (benefit deduction subset ID) field.

General Deductions Taken Select a value to indicate how to take general deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take general deductions.
- *Deduction:* Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees. This is the default value.
- *Subset:* Select this value if you want to use a specified general deduction subset. If you select this value, you must specify the subset ID in the General Ded Subset ID (general deduction subset ID) field.

Pay Period of the Month Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: *First, Second, Third, Fourth,* and *Fifth.*

Benefit Ded Subset ID (benefit deduction subset ID) Specify the subset ID if you selected Subset in Benefit Deductions Taken.

General Ded Subset ID (general deduction subset ID) Specify the subset ID if you selected Subset in General Deductions Taken.

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

The background programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL interface Run is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

After a payroll is confirmed for the next pay period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Deductions," Creating Deduction Subsets

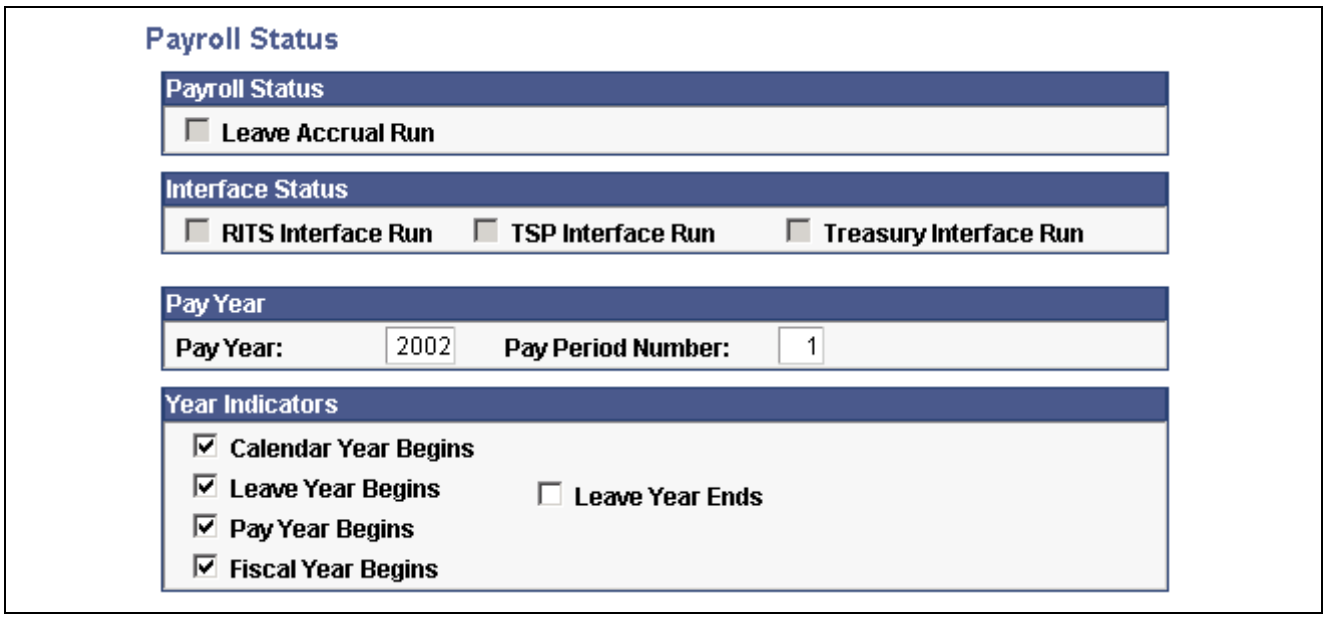
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Working with Checks and Direct Deposit"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Deductions"

(USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing

Access the Payroll Status page.



Payroll Status page

Payroll Status

Leave Accrual Run This check box is updated by the Leave Accrual process that you run after payroll is confirmed.

Interface Status

The check boxes in this group box indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar. The system updates these fields.

Pay Year

Pay Year The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the pay year to which this pay calendar applies.

Year Indicators

The system completes the first four check boxes based on the run control parameters you enter when you run the Calendar Build process. If you need to change these values, you can manually update the calendar after it is built.

Calendar Year Begins This check box is used by federal annual leave accrual processing only. If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box.

Leave Year Begins This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

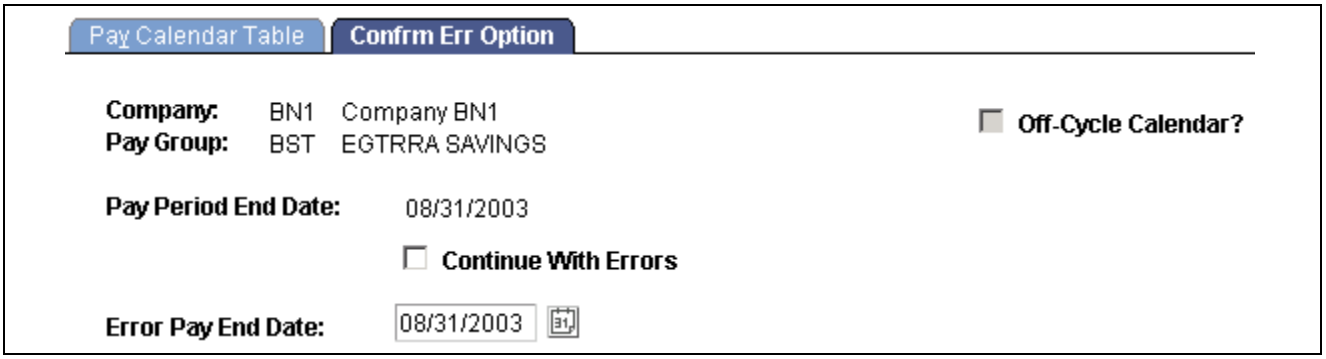
Pay Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.

Fiscal Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.

Leave Year Ends This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Selecting Error Processing Options

Access the Pay Calendar Table - Confirm Error Option page.



Confirm Err Option page

Continue With Errors Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.

Error Pay End Date Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during the regular pay run.

Off-Cycle Calendar? If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is clear.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Calculating Pay," Reviewing Payroll Messages and Correcting Errors

CHAPTER 22

Setting Up Payroll Tax Tables

This chapter provides an overview of payroll tax tables and discusses how to:

- (USA) View federal and state tax information.
- (USA) Update local tax information.
- (USA) Work with tax reciprocity.
- (USA) Update the Taxable Gross Definition table.
- (USA) Enter state marital status codes.
- (CAN) View Canadian tax information.
- (USA) Establish company state taxes.
- (USA) Establish company local taxes.
- (USF) Set up state and locality tax routing.
- Establish tax types for accounts payable integration.
- (USA) Define tax locations.
- Define tax forms.
- (E&G) Establish 1042 processing for non-resident aliens.
- (USA) Establish UI report codes.
- (USA) Establish standard occupational classifications for Alaska.
- (USA) Specify voluntary disability insurance plan location and contact information.
- (USA) Specify parameters for quarterly tax reporting.
- (CAN) Define Canadian tax information.
- (CAN) Define Canadian WCB assessment reporting.

Understanding Payroll Tax Tables

This section discusses how to:

- Find instructions on year-end processing.
- Work with payroll tax tables.
- (USA) Work with U.S. Tax tables.
- (CAN) Work with Canadian Tax tables.

Finding Instructions on Year-End Processing

Since year-end processing information changes regularly, PeopleSoft posts the most up-to-date in the current year-end tax update documentation, posted on Customer Connection

See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Accessing Year-End Processing Instructions".

Working with Payroll Tax Tables

The PeopleSoft Enterprise Payroll for North America tax tables store tax information that the system requires to calculate and report taxes. PeopleSoft provides and maintains most of the payroll tax tables.

PeopleSoft Payroll for North America delivers tax data for all federal and state or provincial taxing entities and almost all localities. Should you need a locality that PeopleSoft does not yet support, you can add and maintain entries using the tax pages. If you need to make a change or addition to the standard tax information delivered with the system, you are responsible for maintaining the change until it is incorporated into PeopleSoft-maintained tax tables. After you notify us of the missing locality, PeopleSoft will add it to our standard system and maintain it for you in subsequent versions.

You are responsible for completing the tax tables that contain data specific to your company.

Note. The pages for Federal/State Tax, Taxable Gross Definition, and Canadian Tax tables reference more than one table.

PeopleSoft Enterprise Payroll Interface does not calculate taxes. The third-party payroll system performs all gross-to-net calculations. However, you can use Payroll Interface to maintain tax withholding data and to export employee-level tax codes to the third-party payroll system.

See *PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook*, "Setting Up Tax Data".

(USA) Working with U.S. Tax Tables

Some U.S. tax tables are maintained by PeopleSoft, others are maintained by the employers.

PeopleSoft-Maintained Tables

These are the PeopleSoft-maintained tables for U.S. employers:

- Federal/State Tax and Local Tax tables, which contain rates and other constants used in the calculation of most forms of taxes for U.S. federal, state, and local taxing entities.
- State and Local Tax Reciprocity tables, which define reciprocal taxing rules between states and localities, and other rules for determining tax liabilities for multiple jurisdictions.
- Taxable Gross Definition table, which identifies differences between states or localities and the federal government in the definition of taxable wages.
- SWT Marital Status table, which defines the valid tax marital status codes for each state.

Employer-Maintained Tables

U.S. employers must define and maintain the following tables:

- Tax Location table, which contains the work locations for which you process payroll and taxes.

- Company State Tax and Company Local Tax tables, which store tax identification numbers, unemployment and disability experience rates, and general ledger codes for the states and localities for which your company collects and pays taxes.
- Tax Reporting Parameters table, which controls the execution of many of your quarterly and annual tax reports and specifies data needed for magnetic media filing.

(CAN) Working with Canadian Tax Tables

Some Canadian. tax tables are maintained by PeopleSoft, others are maintained by the employers.

PeopleSoft-Maintained Tables

Canadian Tax tables, which contain rates and other constants used in the calculation of all forms of federal, provincial, and Quebec taxes.

Employer-Maintained Tables

Canadian employers must define and maintain the following tables:

- The Canadian Wage Loss Plan table, which identifies your organization's valid wage loss replacement plans and general ledger account numbers.
- The Canadian Company Tax table, which defines the Prescribed Interest rate, Provincial Premium Tax rate, and Health Insurance rate override.
- Canadian Tax Reporting Parameters table, which controls the execution of many quarterly and annual tax reports and specifies data needed for magnetic media filing.

(USA) Viewing Federal and State Tax Information

To view federal and state tax information, use the Tax Table component (STATE_TAX_TABLE).

This section provides overviews of federal and state tax information and supplemental tax calculations and discuss how to:

- View standard deductions, allowance amounts, and supplemental taxes.
- View special tax amounts.
- View wage bracket tax rate information.
- View additional wage rates information.

Understanding Federal and State Tax Information

Use the Federal/State Tax Table pages to view the tax data PeopleSoft Payroll for North America uses to calculate U.S. federal, state, and certain local taxes. These pages supply the following information:

- Identify the general type of withholding tax calculation employed by each jurisdiction and provide all the constants needed by the calculation routines for income tax withholding and unemployment and disability taxes.
- Contain the wage bracket tax rate data used by the taxing authorities for implementing graduated taxes.

Special State Codes for Localities Using Graduated Tax Tables

In addition to the rules for state withholding, the rates for calculating federal withholding, FICA, and federal unemployment are defined on this table, primarily because the method of calculation is similar. Localities that use graduated tax tables are also included. These entries are identified by special state codes such as Z1 and Z2. Here are some of these special codes:

Code	Description
$E	Earned income credit
$U	U.S. federal tax
Z1	New York City local tax
Z2	Yonkers local tax
ZA	Maryland 3.01% local tax
ZB	MD resident works in DE

Understanding Supplemental Tax Calculations

PeopleSoft Payroll for North America tax processing supports the various tax calculation methods required by some states for supplemental earnings, including the use of aggregate tax methods.

The methods used for calculating withholding tax on supplemental payments may differ depending on the following criteria specified on the Federal Tax Table — General page:

Paid With Regular Wages The employee receives a supplemental payment paid with regular wages.

Separate Payment The employee receives a supplemental payment as a separate payment.

PeopleSoft delivers the required value in these fields. The possible values are:

- *Aggregate − No Annualize*
- *Aggregate*
- *Aggregate − No Tax else Percent*
- *Percent of Taxable Gross*
- *Special Table with Exemptions*
- *Special Table*
- *Non-Resident Supplemental*

This section provides an explanation and examples of each of these methods.

Note. PeopleSoft uses the term “normal wages” to mean the employee’s pay from regular (REG) earnings taxed using the annualized tax method.

Aggregate − No Annualize

This method is valid only for Delaware and is used only for supplemental wages paid separately from normal wages.

Normal wages are annualized, but supplemental wages are not annualized, as follows:

- Annualize the employee’s normal wages and compute tax on this amount.
- Annualize normal wages, add in the supplemental wages, and compute tax on the total.
- Subtract the difference in the tax amounts. The remainder is the withholding on the supplemental wages.

Example:

A Delaware employee, single with one allowance, earning $500 per week, is paid a $5000 bonus as a separate check.

Without Bonus		With Bonus
$26,000.00	Annualize Gross Wages	$31,000.00
1,104.55	Annual Delaware Tax	1,426.15
	Tax on Wages w/o Bonus	(1,104.55)
	Tax to Withhold on Bonus	321.60

Aggregate

For supplemental wages paid with normal wages, calculate withholding (using the annualized method) as if the aggregate of supplemental and normal wages were a single wage payment for the normal payroll period.

Example for Payment with Regular Wages:

A Maine employee, single with one allowance, is paid a $1000 bonus on the same paycheck as his normal weekly earnings of $500:

Normal Wages	$500.00
Supplemental Wages	1,000.00
Total Wages	1,500.00
Annualized (x 52)	$78,000.00
Annual Maine Tax	5,720.75
Tax to Withhold (/52)	110.01

For supplemental wages paid separately from normal wages, calculate withholding by aggregating supplemental wages with normal wages from the current payroll, if any, or from any preceding on-cycle confirmed payroll in the same calendar year. Using the annualized method, compute the tax on the combined total. Subtract the annualized tax on the normal wages. The deannualized remainder is the withholding on the supplemental wages.

Example for Separate Payment:

A Maine employee, single with one allowance, is paid a $1000 bonus as a separate check. No normal wages are paid in the current payroll. The employee's last previous on-cycle confirmed paycheck in the current year was for normal weekly earnings of $500:

Normal Wage		Reg + Bonus
$26,000.00	Annualize Gross Wages	$78,000.00
1,300.75	Annual Tax	5,720.75
	Annualized Tax on Normal Wages	(1,300.75)
	Remainder	4,420.00
	Tax to Withhold on Bonus (/52)	85.00

Aggregate − No Tax else Percent

When supplemental wages are paid separately from normal wages, withholding depends on whether tax was withheld on the employee's current payment of normal wages, if any, or on previous on-cycle payments (in the same pay group).

If no tax was withheld on either condition, calculate tax on supplemental wages using the Aggregate Method described previously for supplemental wages paid separately.

If tax was withheld on either condition, calculate tax using a flat percent rate as specified by the state, without regard for marital status or allowances.

Example:

A Connecticut employee, single with one allowance, is paid a $1000 bonus as a separate check. The employee's last previous on-cycle normal paycheck in the current year was for normal weekly earnings of $500, from which $10.92 Connecticut tax was withheld. Using the flat rate of 4.5 percent specified by Connecticut, calculate the Connecticut tax to be withheld on the bonus:

4.5% X $1000 = $45

Percent of Taxable Gross

Calculate the tax to be withheld on supplemental wages by using the special flat rate specified by the state, without regard for marital status or allowances. For some states such as Arizona, this method uses a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross.

This method may apply both to supplemental wages paid with normal wages and to supplemental wages paid separately.

Examples:

An employee subject to Indiana withholding is to be paid a $4000 bonus. Using the flat rate of 3.4 percent specified by Indiana for supplemental wages, calculate the Indiana tax to be withheld on the bonus:

3.4% X $4000 = $136

As an example of a calculation using a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross, an Arizona employee electing an Arizona withholding rate of 32 percent is paid a $3000 bonus on which $600 Federal tax is withheld. Calculate the Arizona tax to be withheld:

32% X $600 = $192

Note. For Arizona, the system uses Percent of FWT method, even though the value selected for Supplemental Method is *Percent of Taxable Gross.*

Non-resident Supplemental

When supplemental wages are paid separately from normal wages to a non-resident employee, calculate tax using a flat percent rate specified for non-residents, without regard for marital status or allowances.

Example:

A non-resident of Yonkers employed in Yonkers and subject to Yonkers tax is to be paid a $2000 bonus as a separate payment. Using the flat rate of .5 percent specified by Yonkers for non-residents, calculate the Yonkers tax to be withheld on the bonus:

0.5% X $2000 = $10

Special Table

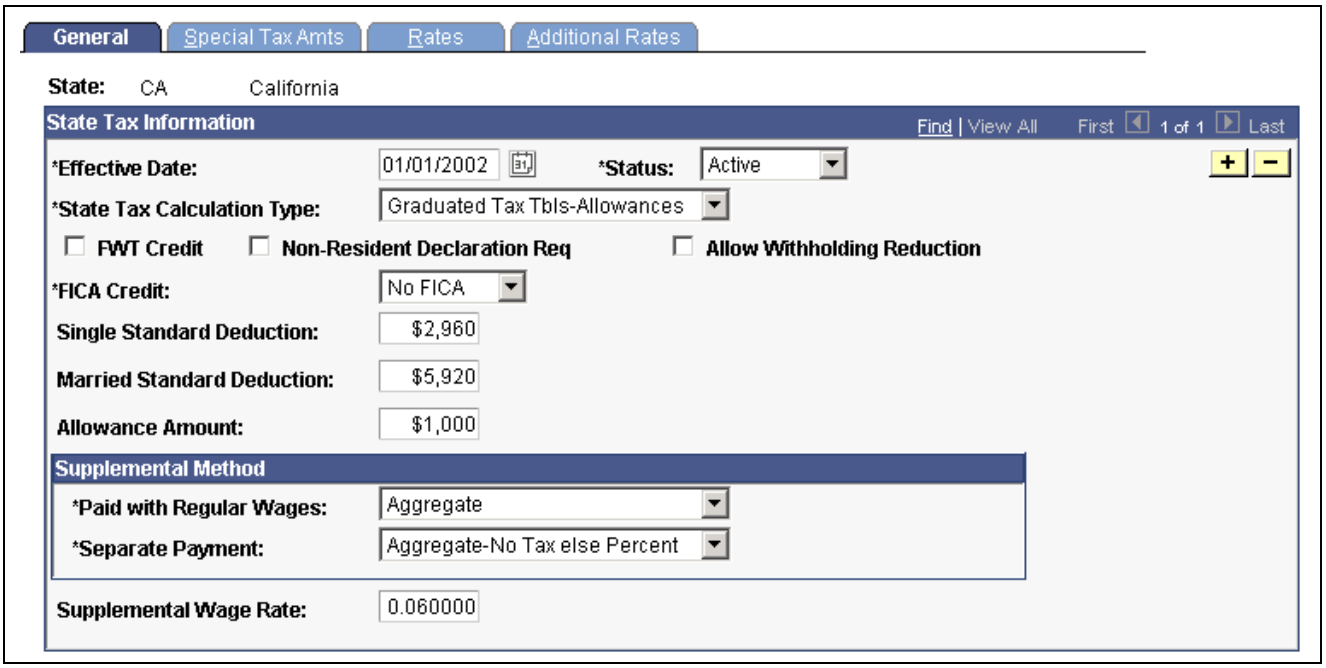
For Georgia and West Virginia only. The system uses the annual rate computed from the job record.

Pages Used to View Federal and State Tax Information

Page Name	Object Name	Navigation	Usage
General	STATE_TAX_TABLE1	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Table, General	View standard deductions, allowance amounts, and supplemental rates.
Special Tax Amounts	STATE_TAX_TABLE2	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Table, Special Tax Amounts	View information needed for tax calculations. The page for the Federal Tax Table differs from the one for specific states.
Rates	STATE_TAX_TABLE3	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Table, Rates	View wage bracket information.
Additional Rates	STATE_TAX_TABLE4	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Table, Additional Rates	View wage limits for unemployment and disability taxes.
Federal/State Tax Report	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Federal/State Tax, Federal/State Tax Report	Run TAX702 to print information from the State Tax Table and the State Other Tax Table, which store the most current tax rates and other parameters used in calculating state and federal withholding, disability, and unemployment taxes.
State Tax Rate Report	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, State Tax Rate, State Tax Rate Report	Generate TAX707 that lists information from the State Tax Rate Table, which contains bracket rates needed for calculating state and federal taxes.

Viewing Standard Deductions, Allowance Amounts, and Supplemental Taxes

Access the Federal/State Tax Table - General page.



Tax Table - General page

Note. You shouldn't need to modify this table, but if you must, you can make changes if you have the appropriate security authorization. This applies to all pages in this component.

State Tax Calculation Type Indicates the type of withholding tax calculation required by the state.

FWT Credit This check box indicates whether credit is given for FWT during calculation of state income tax withholding.

Non-Resident Declaration Required This check box indicates whether the state requires a Non-Resident Declaration for non-resident employees.

Allow Withholding Reduction This check box indicates whether the state allows a reduction amount to be computed in the state withholding calculation. Currently, this only applies to Connecticut.

FICA Credit This check box indicates whether credit is given for FICA during calculation of state income tax withholding.

Supplemental Method

Details of the values available for selection in this group box and examples of calculations are provided in the overview of this section.

Paid With Regular Wages PeopleSoft delivers the required selection: *Aggregate − No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions,* and *Special Table.*

Note. For Arizona, the system uses Percent of FWT method, even though the value shown in this field is Percent of Taxable Gross.

Separate Payment PeopleSoft delivers the required selection: *Aggregate − No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions,* and *Special Table.*

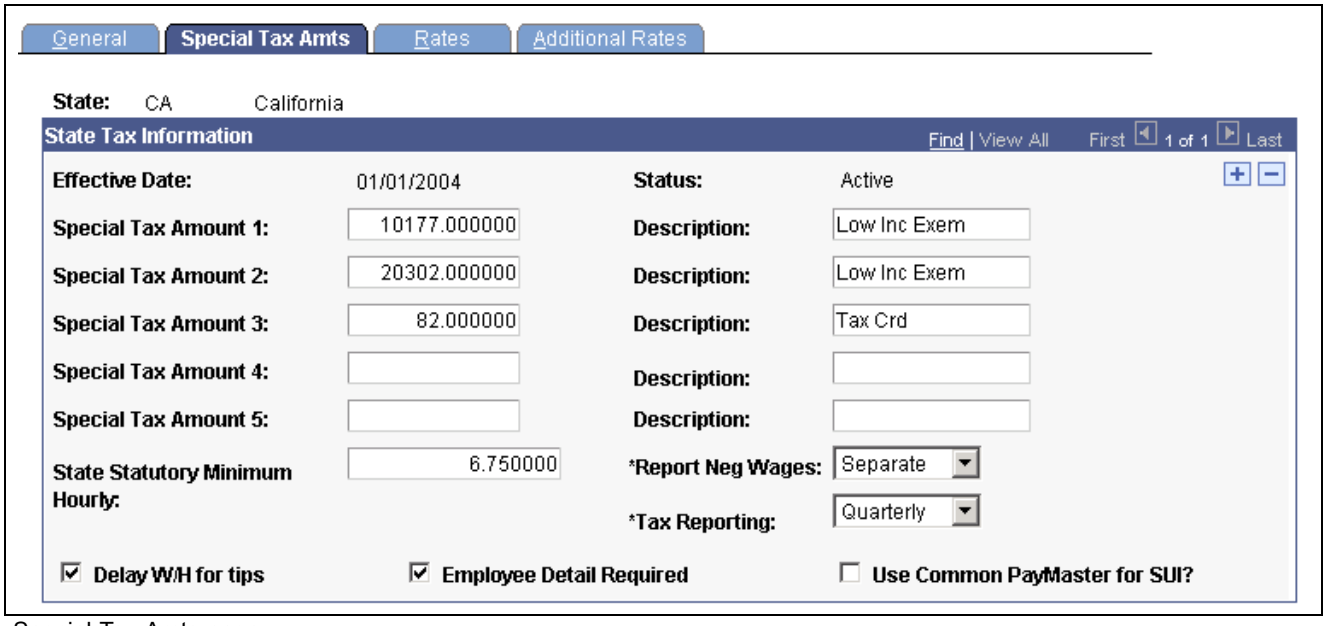
Note. For Arizona, the system uses Percent of FWT method, even though the value shown in this field is Percent of Taxable Gross.

See Also

Chapter 22, "Setting Up Payroll Tax Tables," Understanding Supplemental Tax Calculations, page 462

Viewing Special Tax Amounts

Access the Federal/State Tax Table - Special Tax Amts page.



Special Tax Amts page

Special Tax Amount This field is used to store parameters or values used in state withholding tax calculations.

State Statutory Minimum Hourly The system uses this field to calculate tip credit to pay overtime for tipped employees. The minimum hourly rate required by that state appears here.

Report Neg Wages Options are *include* or *separate.*

State Tips W/H Threshold This field appears if the value in the State field is *$U.*

This field is used in conjunction with state regulations for delaying the withholding of taxes on tips until the employee reports monthly tips in the amount equal to the threshold amount. This field displays the monthly threshold amount from the federal regulations and as of now all states use that threshold amount.

For states that allow you to delay withholding on tips, you can specify by Pay Group whether you delay withholding on tips.

Tax Reporting Options include *Annual, Monthly,* or *Quarterly.*

Delay Withholding for Tips On this page, this check box refers to state income tax.

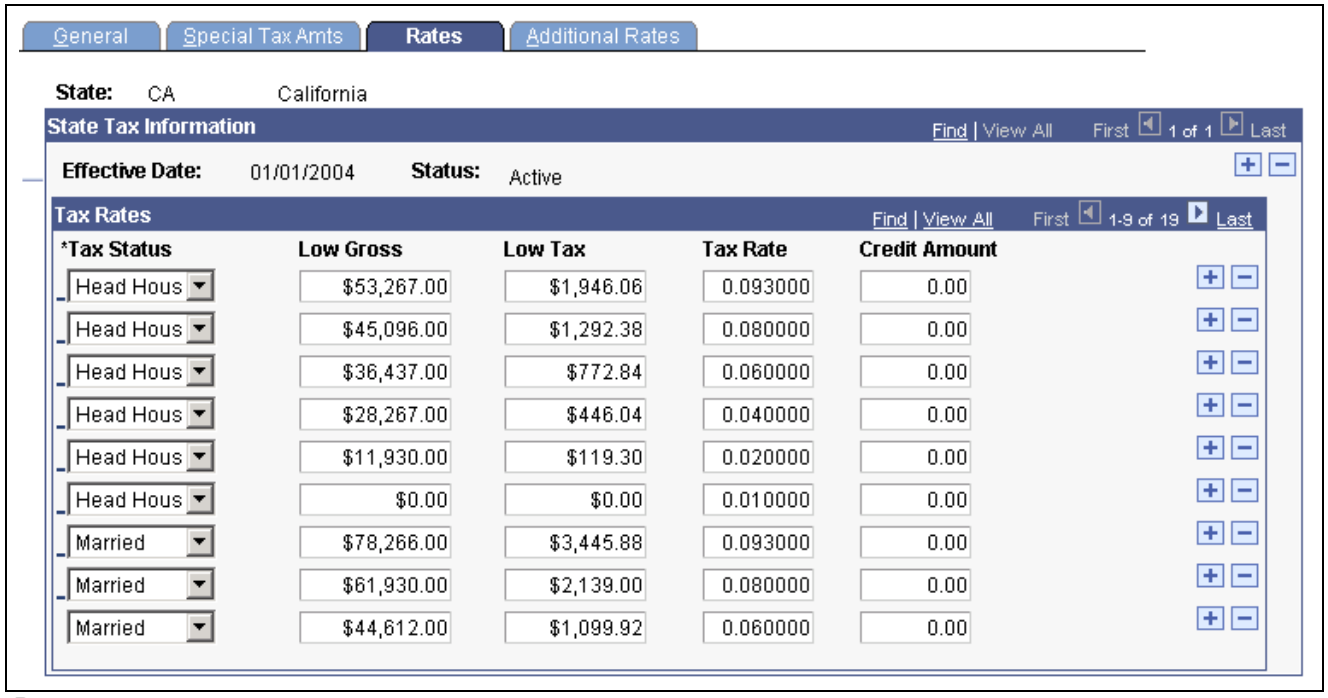
For each state, PeopleSoft selects or clears this check box, depending on whether the state allows employers to delay withholding on tip income until the monthly threshold amount is reached. For states that allow you to delay withholding on tips, you can specify by Pay Group whether you'll delay withholding on tips.

Employee Detail Required This field is informational only and indicates whether a state requires the quarterly reporting of individual employee wage data. All states currently require such reporting.

Use Common PayMaster for SUI This check box is selected if the state recognizes common paymaster status between companies for purposes of state unemployment insurance taxes.

Viewing Wage Bracket Rate Information

Access the Federal/State Tax Table - Rates page.



Rates page

Tax Status The appropriate Federal/State tax status (*Married, Single,* and so on).

Low Gross The minimum taxable gross for the bracket.

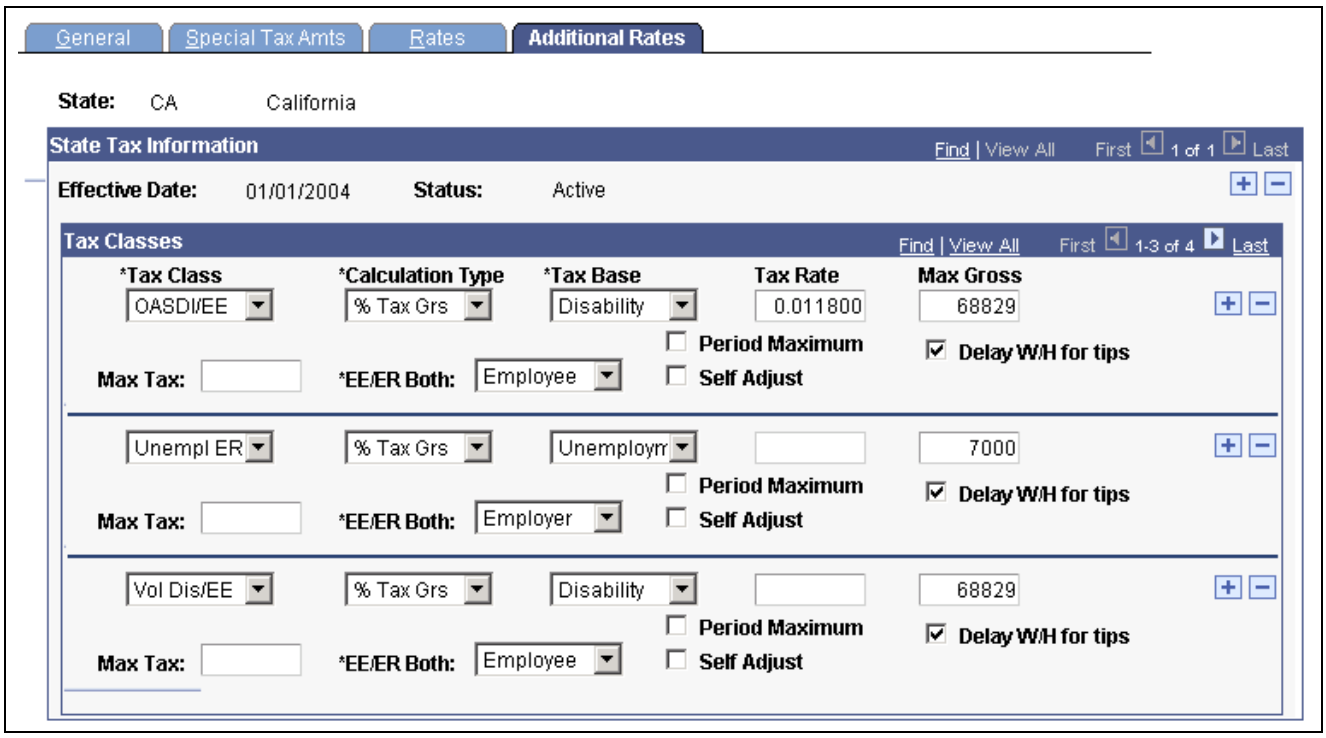
Low Tax The tax to be withheld on the corresponding minimum gross.

Tax Rate The rate to be applied until the next bracket is reached.

Credit Amount Not currently used by PeopleSoft Payroll for North America.

Viewing Additional Rates Information

Access the Federal/State Tax Table - Additional Rates page.



Additional Rates page

Tax Class

Tax classes identify different taxes that share certain characteristics.

Occ Priv represents Occupational Privilege Tax (OPT) for Pennsylvania employees.

See Chapter 22, "Setting Up Payroll Tax Tables," Understanding Federal and State Tax Information, page 461.

Calculation Type

Options are *% Tax Grs, %ER Wage,* and *N/A.*

Tax Base

Options are *Disability, Unemployment,* and *Withholding.*

Tax Rate

The tax rate for employer unemployment or disability contributions is blank on this page. The rate used during payroll calculations comes from the Company State Tax table.

Max Gross

If a tax applies only to a portion of an employee's annual wages up to a specified limit, such as employer unemployment taxes, that limit amount appears in this field. An entry of all *9s,* as with Medicare taxes, indicates a tax without limit.

Period Maximum

If selected, this option indicates that the tax is calculated for a period other than annual. Two examples of this are SDI in New York and Hawaii, both of which have weekly maximums.

Delay W/H for Tips

On this page, this check box is selected or cleared for each additional tax the state may impose.

	For each state, PeopleSoft selects or clears this check box, depending on whether the state allows employers to delay withholding on tip income until the monthly threshold amount is reached. For states that allow you to delay withholding on tips, you can specify by Pay Group whether you'll delay withholding on tips.
Self Adjust (self-adjusting)	This check box is for information only.
Max Tax (maximum tax)	If there is an annual limit on a particular type of tax, such as Pennsylvania's occupational privilege taxes, enter that limit amount here.
EE/ER Both	This field indicates whether a tax is paid by the employee, paid by the employer, or paid in equal matching amounts by both.

Pennsylvania Limit on Occupational Privilege Tax

On the Federal/State Tax Table - Additional Rates page, the Tax Class *Occ Priv* represents Occupational Privilege Tax (OPT) for Pennsylvania employees. The state of Pennsylvania requires an employer to deduct this tax class only one time annually. If an employee moves from one locality to another midyear, the employee should not be taxed an additional OPT tax amount in the new locality until the next year. To keep track of how much Pennsylvania OPT tax an employee has paid, there exists a state level Pennsylvania OPT Memo tax record. The sole purpose of this tax record is to keep track of how much Pennsylvania tax an employee has paid for the year *regardless* of the Pennsylvania locality. During the OPT tax calculation, a check is made against this state Memo tax balance before the local OPT tax is computed.

Note. Pennsylvania's OPT is withheld as an annual fixed amount. When you hire an employee who has already paid OPT for the current tax year, you should adjust the employee's tax balance for the tax year. This prevents the system from withholding OPT from that employee's pay twice in one year.

The Payroll calculation process determines the Pennsylvania OPT limit by Employee ID. Adjust an employee's memo balance for PA OPT, select on the Adjust Tax Balance pages.

See *PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook*, "Reviewing, Adjusting, and Deleting Employee Balances," (USA) Reviewing and Adjusting U.S. Tax Balances.

Voluntary Disability Plans

Of the states that provide disability insurance plans (currently California, Hawaii, New Jersey, New York, Rhode Island, plus Puerto Rico) all but Rhode Island allow employers to provide voluntary disability plans in place of the state plan. PeopleSoft maintains the Tax Class rows on the Federal/State Tax Table - Additional Rates page for the Employer and Employee paid tax for voluntary disability plans for each of these states.

Note. If you implement a voluntary disability plan for California, Hawaii, New Jersey, New York, or Puerto Rico, you must set up the appropriate tax rates on the Company State Tax table and the VDI Administrator table.

State Unemployment Insurance (SUI) Tax

You must make sure that the unemployment insurance taxable gross and tax balances transferred during the conversion process are consistent with the unemployment tax rates that have been entered for each quarter on the Company State Tax Table page.

Warning! If these amounts are not consistent and in balance, the system will either charge or refund additional unemployment tax amounts to account for the difference in the quarterly unemployment insurance tax balances.

See Also

Chapter 22, "Setting Up Payroll Tax Tables," Defining States Where You Collect or Pay Taxes, page 495

(USA) Updating Local Tax Information

To update local tax information, use the local Tax Table component (LOCAL_TAX_TABLE).

This section provides an overview of locality codes and discusses how to:

- View local tax jurisdiction information associated with a locality code.
- View the method used to calculate local withholding rates.
- Enter a locality's tax reporting requirements.

Understanding Locality Codes

The local Tax Table component (LOCAL_TAX_TABLE) displays information used when the system calculates local withholding tax. In this table, each locality is assigned a code of up to ten characters. Typically this is how these codes are assigned:

- For Pennsylvania municipalities and school districts: an eight or nine character code based on codes assigned in the official Pennsylvania local tax register.
- For municipalities in states other than Pennsylvania: a five-character Federal Information Processing Standards (FIPS) code.
- For counties: a three-digit county number.
- For Ohio school districts: a four-digit district number.

Pennsylvania Localities

The State of Pennsylvania provides a registry of tax rates for all cities, counties, political subdivisions, school districts, and so on located in Pennsylvania. For each municipality and overlying school district, the registry lists effective tax rates for both Earned Income Tax (EIT) and Occupational Privilege Tax (OPT) for residents and, where applicable, non-residents.

The following is the definition of the eight or nine character Pennsylvania code:

- The letter in the first position refers to the type of tax:
  - I - income tax.
  - O - occupational privilege tax.
- The next six digits are the numerical code assigned to the municipality by the state of Pennsylvania.
- The alphabetic code in the eighth position signifies the tax rate:
  - C - combined municipality and school district tax rate.
  - M - municipality tax rate.
  - S - school district tax rate.
- A numerical digit in the last position indicates that the municipality overlaps with all or portions of multiple school districts.

Refer to the School District Code field on the Local Tax Table 1 page to determine which locality code applies to which school district, and then choose the appropriate entry for the employee's location.

For each municipality and overlying school district, PeopleSoft delivers the following locality types:

Pennsylvania Locality Description	Example
Combined municipality and school district earned income tax	I123456C
Municipality earned Income tax	I123456M
School district earned income tax	I123456S
Combined municipality and school district occupational privilege tax	O123456C
Municipality occupational privilege tax	O123456M
School district occupational privilege tax	O123456S

Maintaining Tax Localities

For each locality that PeopleSoft supports, we maintain the entries for that locality in the following tables:

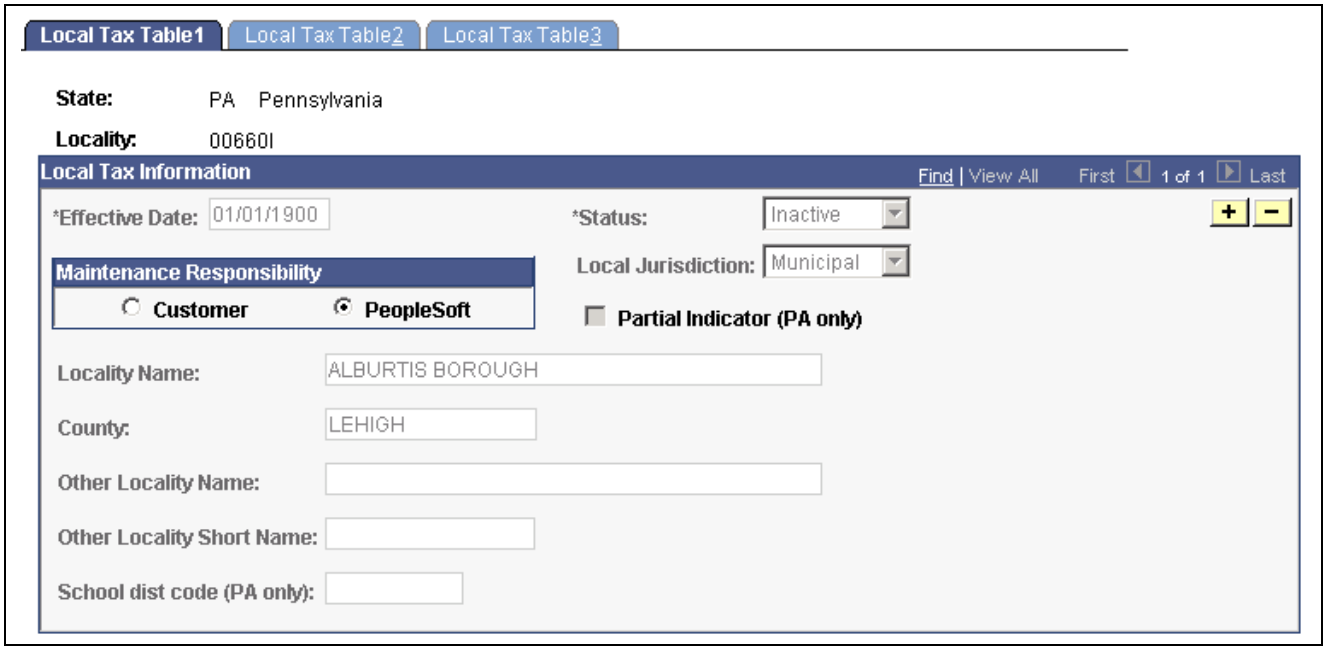
- local Tax Table.
- Local Tax Reciprocity table (if applicable).
- Taxable Gross Definition table (GTL, 401k, 125, TIP, and DPB only) (if applicable).

Pages Used to Update Local Tax Information

Page Name	Object Name	Navigation	Usage
Local Tax Table 1	LOCAL_TAX_TABLE1	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Tax Table	View information about the geographic area associated with a locality code.
Local Tax Table 2	LOCAL_TAX_TABLE2	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Tax Table	View the method used to calculate local withholding taxes, tax rates, and other constants.
Local Tax Table 3	LOCAL_TAX_TABLE3	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Tax Table	Enter data on the locality's tax reporting requirements. This information is used in quarterly and year end reporting.
Local Tax Report	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Local Tax, Location Tax Report	Run TAX703 to print information from the Local Tax Table, which contains calculations for local income taxes.

Viewing Local Tax Jurisdiction Information Associated with a Locality Code

Access the Local Tax Table 1 page.



Local Tax Table1 page

Maintenance Responsibility All entries that we supply are marked as the maintenance responsibility of PeopleSoft. However, if you add a locality to this table, the system marks it as your maintenance responsibility.

Local Jurisdiction Reserved for future use.

Partial District Indicator (PA Only) This check box is selected to indicate a Pennsylvania municipality that is co-terminus with multiple school districts, meaning the boundary of the municipality overlaps the boundaries of multiple school districts. For example, in Westmoreland County, the City of Greensburg is co-terminus with both the Greensburg Salem School District and the Hempfield Area School District. Be sure to use the Local Tax Table entry that represents the correct municipality/school district combination.

Locality Name The municipality name from the register (except for school district entries, which are school district name). Combined jurisdictions have the appendage M+SD.

Other Locality Name For Pennsylvania localities, combined entries display the school district name.

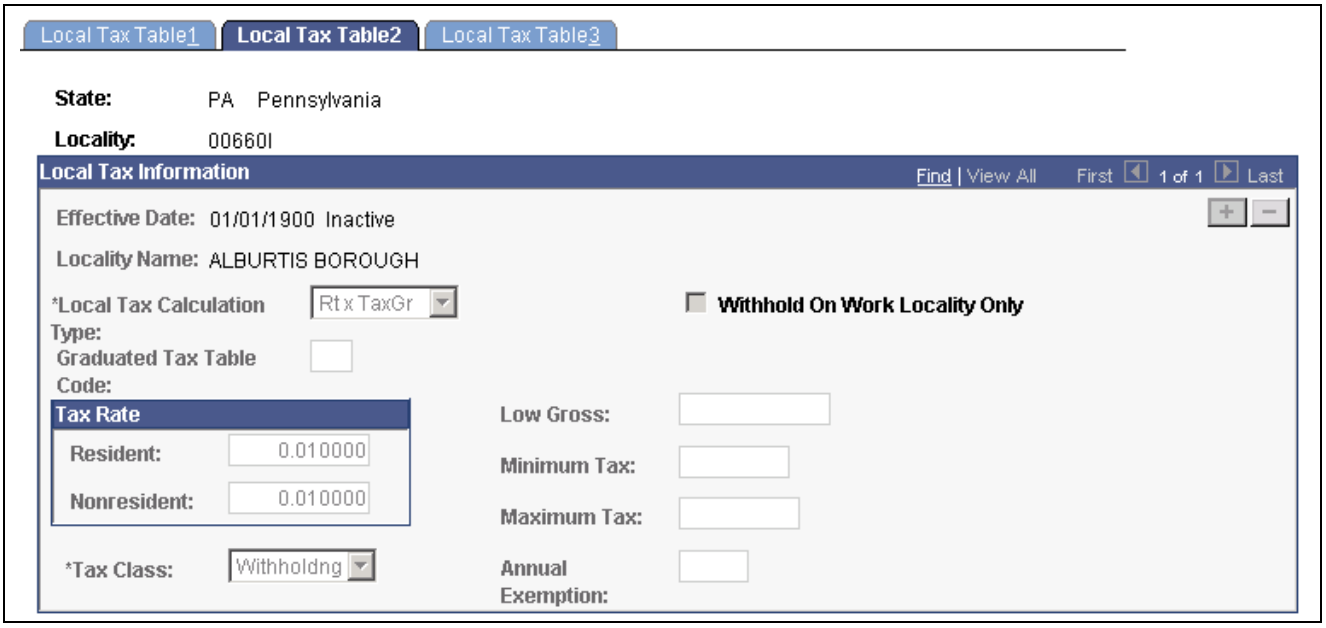
School District Code (PA Only) For Pennsylvanian localities, the appropriate school district code appears here.

See Also

Chapter 22, “Setting Up Payroll Tax Tables,” Understanding Locality Codes, page 472

Viewing the Method to Calculate Local Withholding Taxes

Access the Local Tax Table 2 page.



Local tax Table2 page

Local Tax Calculation Type Indicates the calculation method used to determine the amount of local income tax withheld.

Withhold On Work Locality Only When this check box is selected for a locality, only wages earned in that locality are considered taxable for residents of the locality. No resident tax is withheld from wages paid for work performed outside of the locality.

Graduated Tax Table Code This option takes effect if the locality requires that tax tables be referenced during calculation, as do New York City, Yonkers, and Maryland counties. In this case, the graduated tax table code entered here links the record to the appropriate entry in the PeopleSoft Federal/State Tax table where the graduated tax rates are stored.

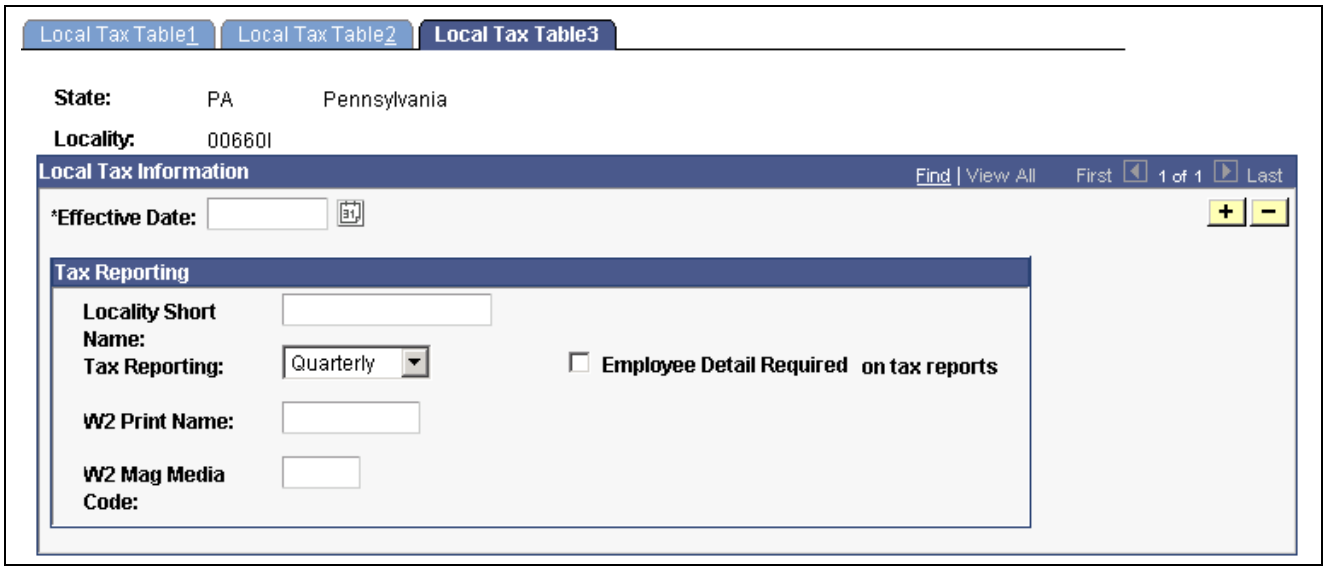
Tax Rate

Resident This field displays the tax rate for residents of the locality.

Nonresident This field displays the tax rate for nonresidents in the locality.

Entering a Locality's Tax Reporting Requirements

Access the Local Tax Table 3 page.



Local Tax Table3 page

Tax Reporting Displays the interval required by the locality for tax reporting, *Monthly, Quarterly,* or *Annual.*

Important! If you add a locality, you are responsible for maintaining the entries on these tables for the new locality until PeopleSoft incorporates it into a tax update. Contact your Global Support Center if you discover any localities not listed or any errors so we can include the addition or correction in the next PeopleSoft Payroll Tax Update.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Accessing Year-End Processing Instructions"

(USA) Working with Tax Reciprocity

To work with tax reciprocity, use the State Tax Reciprocity Table component (STATE_TX_RECIP_TBL), local Tax Reciprocity Table component (LOCL_TAX_RECIP_TBL), and the Work Locality Reciprocity component (LCLTX_WK_RECIP_TBL).

This section discusses how to:

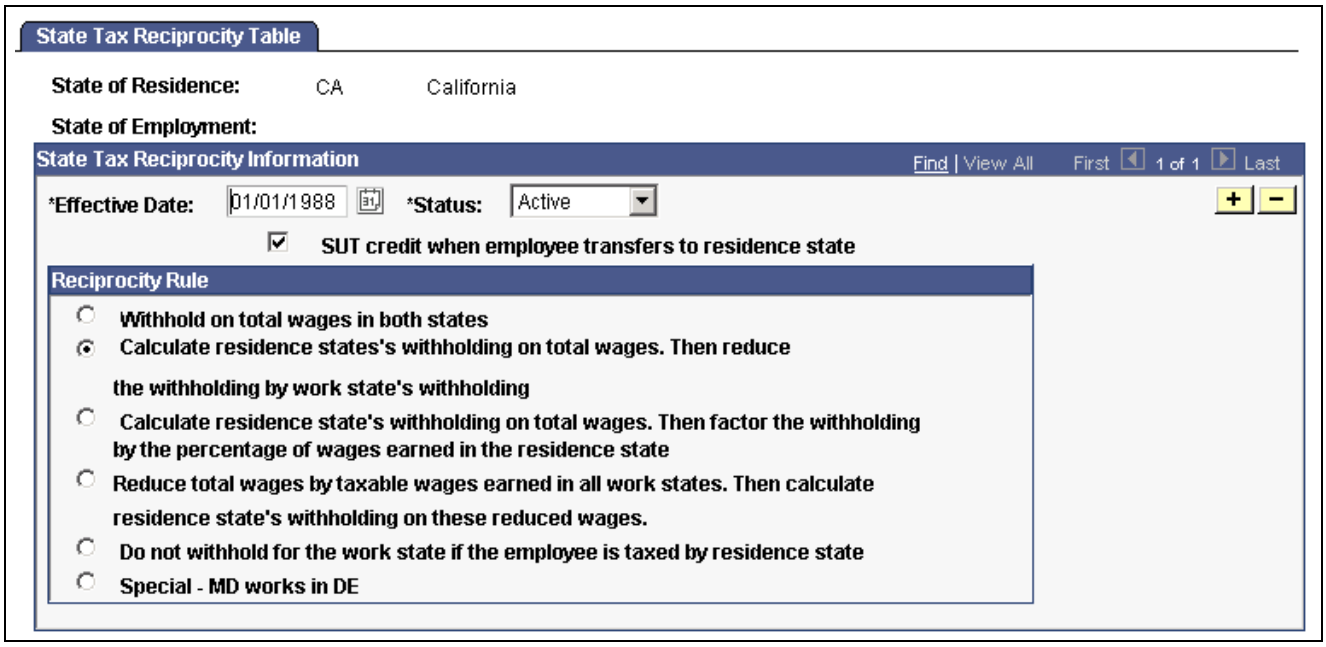
- View state tax reciprocity withholding liability rules.
- View local tax reciprocity rules.
- Define reciprocal agreements between work localities.

Pages Used with State Tax Reciprocity

Page Name	Object Name	Navigation	Usage
State Tax Reciprocity Table	STATE_TX_RECIP_TBL	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, State Tax Reciprocity Table	Display the rules used during payroll calculation to determine withholding liability when an employee lives in one state and works in another.
State Reciprocity Rules Report	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, State Reciprocity Rules	Run TAX708 to print a summary of the rules that determine where to withhold income taxes when an employee works in one state and lives in another.
Local Tax Reciprocity Table	LOCL_TAX_RECIP_TBL	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Tax Reciprocity Table	View reciprocal agreements between an employee's state of residence and a locality of employment.
Local Reciprocity Rules Report	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Local Reciprocity Rules	Run TAX709 to print a list of the rules that determine where to withhold income taxes when an employee works in one locality and lives in another.
Work Locality Reciprocity	LOCLWK_TXRCP_TABLE	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Work Locality Reciprocity	Establish reciprocal agreements between work localities.
Work Locality Reciprocity Rpt	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Work Locality Reciprocity, Work Locality Reciprocity Rpt	Run TAX713 to print the reciprocal rules that determine local income tax withholding when an employee works in a location that has multiple taxing jurisdictions that share a reciprocal agreement.

Viewing State Tax Reciprocity Withholding Liability Rules

Access the State Tax Reciprocity Table page.



State Tax Reciprocity Table page

SUT Credit when employee transfers to residence state When selected, this check box indicates that, for unemployment tax purposes, the (residence) state allows credit against its state unemployment taxable wage base for wages paid to an employee in another state.

Reciprocity Rule This field displays the rule applied to the residence/ employment state combination.

Although the employee's residence state may require withholding on all wages paid to the employee, many states provide credit for taxes paid by their residents to another state. Many other examples of reciprocity agreements also exist between states. Under these agreements, wages earned in a work state that has an agreement with the residence state are taxed by, and taxes withheld are submitted to, the employee's residence state.

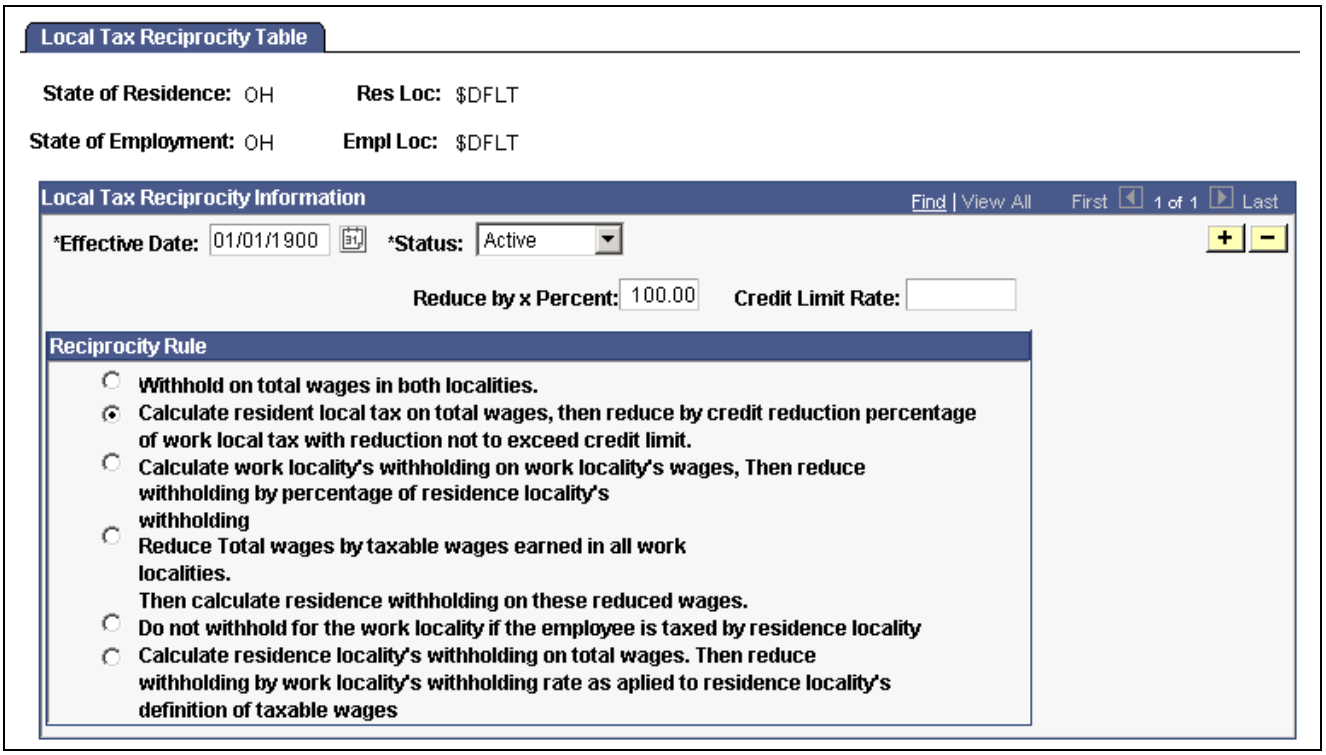
This table doesn't identify every state-to-state combination individually because most states have a single rule for dealing with residents who earn taxable wages in other states. The default reciprocity rule between a state of residence and all other states of employment is the one in which the State of Employment field is blank.

If you need to modify these table entries, consult the PeopleSoft Global Support Center.

Note. If you're a multi-state employer, review the rules in this table, particularly if you can be considered a non-resident employer for certain employees. For example, Alabama requires that resident employers withhold Alabama tax on wages earned both inside and outside the state by Alabama residents. Non-resident employers must withhold on only those wages earned in Alabama, regardless of where the employee resides. The entries in the State Tax Reciprocity table—as delivered by PeopleSoft—assume that you are a resident employer in each state.

Viewing Local Tax Reciprocity Rules

Access the Local Tax Reciprocity Table page.



Local Tax Reciprocity Table page

When the residence locality differs from the employment locality, the system calculates both taxes and applies the reciprocity rule from this table to produce the correct net withholding for the employee in each locality.

Res Loc (residence locality) The ID corresponding to the employee's locality of residence. This table does not identify every residence/employment combination, because most localities in a given state follow the same rule. The table entry for the default value, *$DFLT,* is used when there is no individual entry. Any exceptions require separate entries and act as overrides.

Entries that identify reciprocity agreements between a state of residence and employment localities are special cases. The residence state is specified as usual, but the value in this field is a special code: *STATERC*.

Empl Loc (employment locality) The ID corresponding to the employee's locality of employment. This table does not identify every residence/locality combination, because most localities in a given state follow the same rule. The table entry for the default value, *$DFLT,* is used when there is no individual entry. Any exceptions require separate entries and act as overrides.

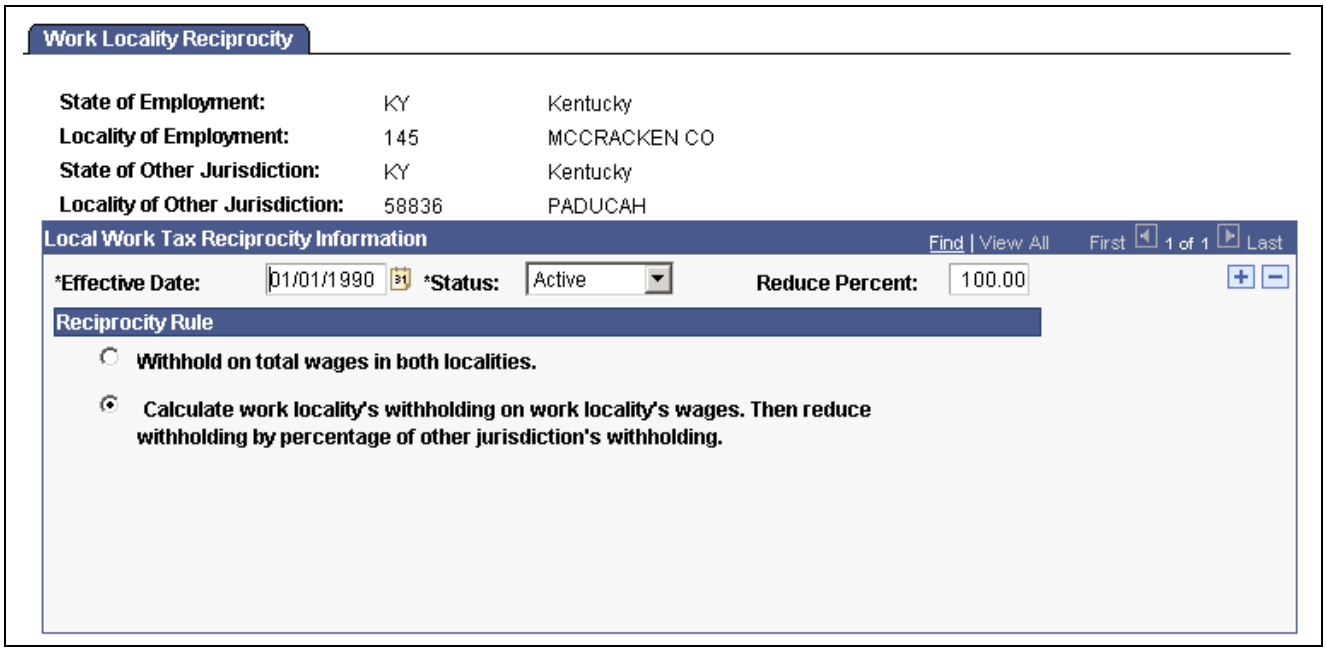
Reduce by x Percent The maximum portion of the work locality's tax rate which can qualify as a credit against the resident locality's withholding.

Credit Limit Rate The maximum portion by which the resident locality's tax rate can be reduced by a credit for the work locality's withholding.

Reciprocity Rule Displays the rule applied to the residence/ employment locality combination.

Defining Reciprocal Agreements Between Work Localities

Access the Local Work Reciprocity Table page.



Work Locality Reciprocity page

State of Other Jurisdiction The state of other jurisdiction for each record represents the state of the primary local tax jurisdiction. That is, the state of the local tax jurisdiction whose tax must be withheld in full.

Locality of Other Jurisdiction This represents the primary tax jurisdiction. That is, the jurisdiction whose tax must be withheld in full.

Reduce Percent Where allowed, this represents a percent of other jurisdiction withholding to be credited toward the withholding amount required by the locality of employment. This is not always 100%. PeopleSoft displays the percent of credit reduction allowed.

Reciprocity Rule This field displays the rule applied to the residence/ employment locality combination.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data"

(USA) Updating the Taxable Gross Definition Table

To update the Taxable Gross Definition Table, use the Taxable Gross Definition Table component (TAXGR_DEFIN_TBL).

This section provides an overview of the Taxable Gross Definition table and discusses how to set up a taxable gross definition.

Understanding the Taxable Gross Definition Table

Taxing jurisdictions may have different rules as to whether a given type of earnings or deduction should be taxed, and whether or not the tax should be withheld at the time of payment. The Taxable Gross Definition table defines the taxability for specific earnings or deduction types that must be treated differently at the state or local level than at the federal tax level. It also enables you to specify whether the state and local income tax withholding follows the same rules as federal withholding.

This section discusses:

- Taxability.
- Withholding.
- Delivered entries on the Taxable Gross Definition table.
- Example of setting up an earning with state tax withholding but without federal tax withholding.
- Reference table of taxability and withholding setup.

Taxability

PeopleSoft Payroll for North America tracks these differences in taxability by documenting where the taxable wage definition of a particular jurisdiction differs from a standard definition for the following basic payroll tax types:

- Withholding
- Unemployment
- Disability

For each of these tax types, certain earnings and deductions are taxable at the state or local level, while others are not. What is taxable differs for each tax, so we have a separate standard definition for each type. Because most states and localities follow federal guidelines for taxing earnings, we use Federal income tax withholding, Federal unemployment, and FICA as the standard taxes from which to develop these rules.

The system automatically maintains federal taxable grosses, FWT, FICA, and FUT, based on entries in the Earnings table and Deduction table:

Deduction Table	Earnings Table
Deduction classification =Taxable	Subject to FWT
Effect on FICA gross	Subject to FICA
Effect on FUT gross	Subject to FUT

Normally, the system calculates state and local taxes using the following taxable grosses:

Calculation	Taxable Gross Used
State withholding taxes (SWT)	FWT gross
State unemployment taxes (SUT)	FUT gross
State disability insurance (SDI)	FUT gross
Local withholding taxes (LWT)	FWT gross

PeopleSoft uses the FUT gross as the starting point for SDI because most states do not publish any separate definition of subject wages for SDI. Instead, states treat the definition of wages for SDI purposes as the same as the definition of wages for SUI purposes. Since SUI wages are based on FUT wages, and SDI subject wages are the same as SUI wages, FUT is the starting point for determining both SUI and SDI wages.

You can override or establish exceptions to the federal definitions of taxable gross for the following taxable grosses:

- State withholding
- State unemployment
- State disability
- Local withholding

When a state or locality declares that taxability of a certain earnings or deduction is different from one of these federal standards, a rule must be placed in the Taxable Gross Definition table indicating the deviation. The system uses the rules stored in the Taxable Gross Definition table to adjust the taxable gross for the states and localities that deviate from the federal norm.

For each of these taxable gross definitions, identify a Taxable Gross Component ID and assign it to the various states or localities affected.

Withholding

When you set up earnings and taxable benefits that are federally taxable, you specify whether or not that amount should also be subject to federal income tax withholding using:

- The Subject to FWT field on the Earnings Table - Taxes page.
- The Withhold FWT field on the Deduction Table – Tax Effect page.

Use the Withholding Follows Fed Rules (withholding follows federal rules) field on the Taxable Gross Definition Tbl page (TAXGR_DEFIN_TBL) to specify whether the state and local income tax withholding follows the same rules as federal withholding.

Note. You *must* create a Taxable Gross Definition table entry when you want to stop state or local income tax withholding on a particular earnings or taxable benefit. This is true regardless of whether or not the state or locality follows the federal rule for including the amount in taxable income, and regardless of whether or not you have selected to withhold federal income tax on the earnings or taxable benefit.

Delivered Entries on the Taxable Gross Definition Table

PeopleSoft delivers sample entries on the Taxable Gross Definition table for 401(k), Section 125, TIP, DPB, and group-term life taxable gross definitions. These sample entries are intended as examples and are delivered with the Plan Type element blank and the Deduction Code set to *$DFLT*. You must review these entries and update them with the specific values for your implementation. You maintain any taxable gross definitions that you add.

For Section 125 cafeteria plans, the taxable gross definitions are for employee deductions only. You may have to set up your own entries to process specific parts of your plan. In some states, the taxability of deductions depends on whether the employee has the option of receiving cash.

Review the definitions in this table carefully with regard to your particular 125 plans.

How Taxable Gross Definitions Affect Earnings and Deductions

The standard definition of taxability of an earnings or deduction type is determined by entries on the Earnings and Deduction tables. When establishing an entry on these tables, you specify if the earning or deduction is to be taxed for FWT, FUT, and FICA. Any earnings and deductions you marked as taxable are totaled during payroll processing to determine an employee's taxable gross for each of the standard tax types. For earnings or deduction types that increase or decrease the state or local taxable grosses compared to the federal taxable gross, enter a taxable gross component ID that identifies which rules on the Taxable Gross Definition table to use.

For example, Pennsylvania considers employee before-tax 401(k) contributions taxable for state withholding, whereas they are not taxed at the federal level. Therefore, you must have a Taxable Gross Definition for 401(k) deductions that indicate to the payroll calculation programs that when taxable gross for withholding is determined, 401(k) deductions should be included as earnings for Pennsylvania (but not for federal) withholding purposes.

Example of Setting Up an Earning with State Tax Withholding but Without Federal Tax Withholding

Take a hypothetical example of moving expenses in the state of Pennsylvania. This example assumes the following:

- Certain types of moving expense reimbursement payments that you make to Pennsylvania employees are includable in taxable gross at both the federal and state level.
- Federal regulations do not require that federal income tax be withheld from these moving expense reimbursement payments.
- Pennsylvania regulations do require that Pennsylvania income tax be withheld from these amounts at the time of payment.

In this case, state withholding does not follow the federal rules.

The following table illustrates these assumptions:

Taxing Jurisdiction	Include in Taxable Gross?	Withholding Required?
Federal	Yes	No
Pennsylvania	Yes	Yes

To define the moving expense earnings with the proper tax and withholding effects:

1. Define a Taxable Gross Component ID (here named MOV) to identify these moving expense reimbursement payments that require different tax treatments at the federal and state levels.

This table shows the relevant page elements and values on the Taxable Gross Definition Table page:

Page Element	Value	Explanation
Taxable Gross	*Withholding*	
Base Gross	*FWT*	
Taxable Gross Component ID	*MOV*	
Withholding Follows Fed Rules	Clear the check box.	You do not want state tax withholding to follow the selection you will make for the Subject to FWT check box on the Earnings Table - Taxes page for these moving expense reimbursement amounts. You do not want federal income tax withheld on this earnings type, but you do want Pennsylvania income tax withheld.
Tax Gross Effect	*No Effect*	The earnings type is to be included in both the federal and Pennsylvania taxable grosses.

2. Enter the Taxable Gross Component ID when you set up the earnings on the Earnings Table - Taxes page.

   This table shows the relevant page elements and values for setting up this moving expense reimbursement earning on the Earnings Table - Taxes page:

Page Element	Value	Explanation
Earnings Type	*MOV*	
Earnings Description	*Mov Exp Reimb – No Fed W/H*	Moving expense reimbursement without federal withholding
Tax Method	*Annualized*	
Subject to FWT	Selected	
Taxable Gross Component ID	*MOV*	You must set up the taxable gross component ID before you can select it on this page.
Add to Gross Pay	Selected	
Maintain Earnings Balances	Selected	

Reference Table of Taxability and Withholding Setup

Use the table below to look up the table entries for any combination of federal and state/local taxing options that you might need for a particular earnings or taxable benefit. The table lists the correct values in the relevant fields on the Earnings table, Deduction table, and Taxable Gross Definition table.

	Earnings Table - Taxes page:	Deduction Table - Tax Effect page:	State /local tax treatment you want:	State/local withholding treatment you want:	Taxable Gross Definition Table:	Taxable Gross Definition Table:	Taxable Gross Definition Table:
Row	Subject to FWT	Withhold FWT	Subject to state/local tax?	Withhold SWT/LWT?	Entry required?	Tax Gross Effect	Withholding Follows Federal Rules
1	Yes	Yes	Yes	Yes	No	NA	NA
2	Yes	Yes	Yes	No	Yes	No effect	No (clear)
3	Yes	Yes	No	No	Yes	Subtracts from	NA (check box does not apply)
4	Yes	No	Yes	No	Yes	No effect	Yes (select)
5	Yes	No	No	No	Yes	Subtracts from	NA (check box does not apply)
6	Yes	No	Yes	Yes	Yes	No effect	No (clear)
7	No	No	Yes	No	Yes	Adds to	Yes (select)
8	No	No	No	No	No	NA	NA
9	No	No	Yes	Yes	Yes	Adds to	No (clear)

Row 6 contains the setup values for the MOV earnings described in the example.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Earnings Codes and Earnings Programs"

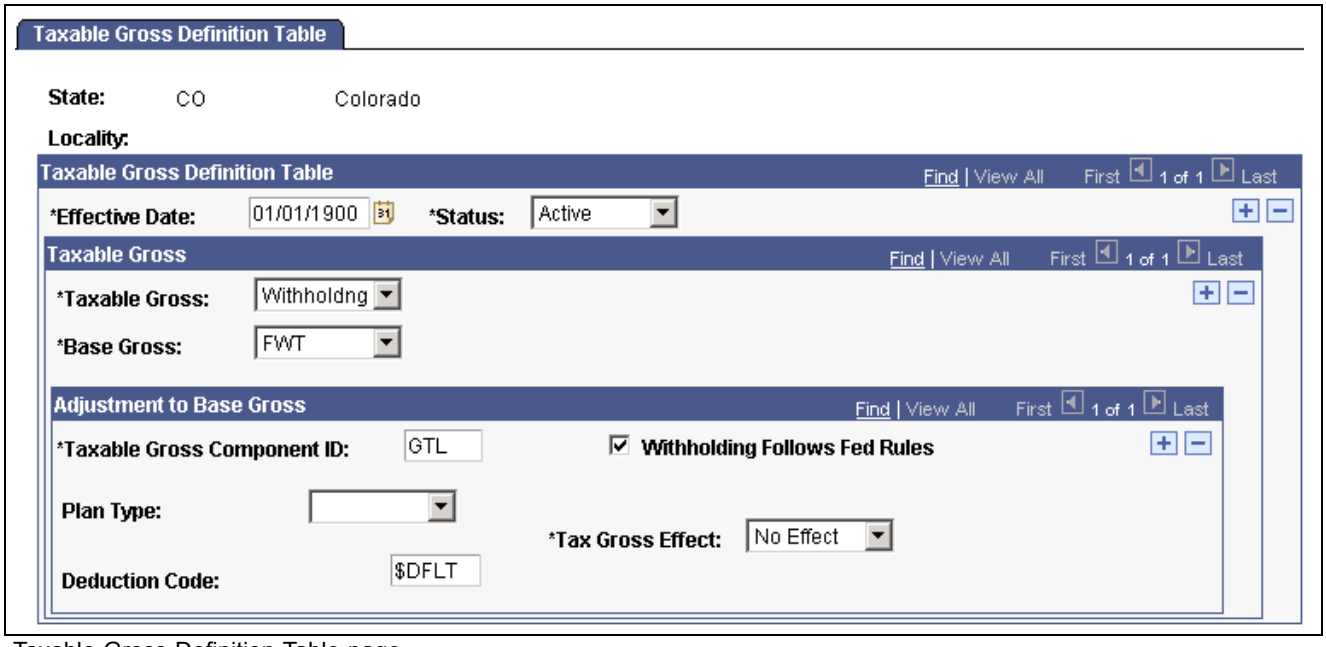
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Deductions"

Pages Used to Update the Taxable Gross Definition Table

Page Name	Object Name	Navigation	Usage
Taxable Gross Definition Table	TAXGR_DEFIN_TBL	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Taxable Gross Definition	Set up a taxable gross definition, which defines the taxability and withholding for specific earnings or deduction types that must be treated differently at the state or local level than at the federal tax level.
Taxable Gross Definition Rpt	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Taxable Gross Definition, Taxable Gross Definition Rpt	Run TAX706 to print information from the Taxable Gross Definition Table, which contains definitions that the system uses during payroll calculation to determine state and local taxable grosses that deviate from the normal federal withholding. It specifies the base for taxable gross and indicates modifications to that base.

Setting Up a Taxable Gross Definition

Access the Taxable Gross Definition Tbl page.



Taxable Gross Definition Table page

Taxable Gross

Taxable Gross Select *Disability, Unemployment,* or *Withholding* to identify the type of taxable gross you're defining.

Base Gross Select either *FUT* (Federal Unemployment Tax) for unemployment and disability, or *FWT* (Federal Withholding Tax) for withholding. (FICA is not currently used as a base gross.)

Adjustment to Base Gross

This scroll area lists the specific components for which adjustments are necessary.

Taxable Gross Component ID The taxable gross component ID you specify must be unique in what it represents (for example, 401K, GTL, 125, and so forth). If it is not unique, it can cause the taxable grosses to be incorrect.

Withholding Follows Federal Rules This check box is selected by default. Clear it if the withholding associated with the taxable gross component ID does not follow the same rules as federal withholding.

This check box appears only if you select *Withholding* in the Taxable Gross field.

This check box applies only to earnings and taxable benefit amounts identified by a taxable gross component ID. It has no effect on the processing of any before-tax deductions (such as 401(k) and Sec 125 amounts) for which there may also be entries on the Taxable Gross Definition table.

Tax Gross Effect This field controls the effect on the gross. It can either add to the gross, subtract from it, or have no effect.

Plan Type and Deduction Code Some states do not recognize certain before-tax benefits deductions. They require specific before-tax deductions to be included in taxable gross wages. Use these fields to identify such plans to the system by plan type and deduction code on the Taxable Gross Definition record for the applicable states.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Deductions"

(USA) Entering State Marital Status Codes

To enter state marital status codes, use the SWT Marital Status Table component (SWT_MAR_STATUS_TBL).

This section discusses how to define a state's marital status codes.

Pages Used to Enter a State's Marital Status Codes

Page Name	Object Name	Navigation	Usage
SWT Marital Status Table	SWT_MAR_STATUS_TBL	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, SWT Marital Status Table	Enter a state's marital status codes.
SWT Marital Status Codes Rpt	PRCSRUNCNTRL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, SWT Marital Status Codes	Print information from the Marital Codes Status Table, which contains all valid marital status codes, sorted by state.

Defining a State's Marital Status Codes

Access the SWT Marital Status Table page.

SWT Marital/Tax Status The State Withholding tax marital tax status. It is used in the employee's state tax data.

(CAN) Viewing Canadian Tax Information

To view Canadian tax information, use the Canadian Tax Table component (CAN_TAX_TABLE).

This section provides an overview Canadian tax tables and discusses how to:

- View the wage thresholds and rates for calculating Canadian federal surtax.
- View the rates, thresholds, and constants to determine withholding of Canadian provincial taxes.

Understanding Canadian Tax Tables

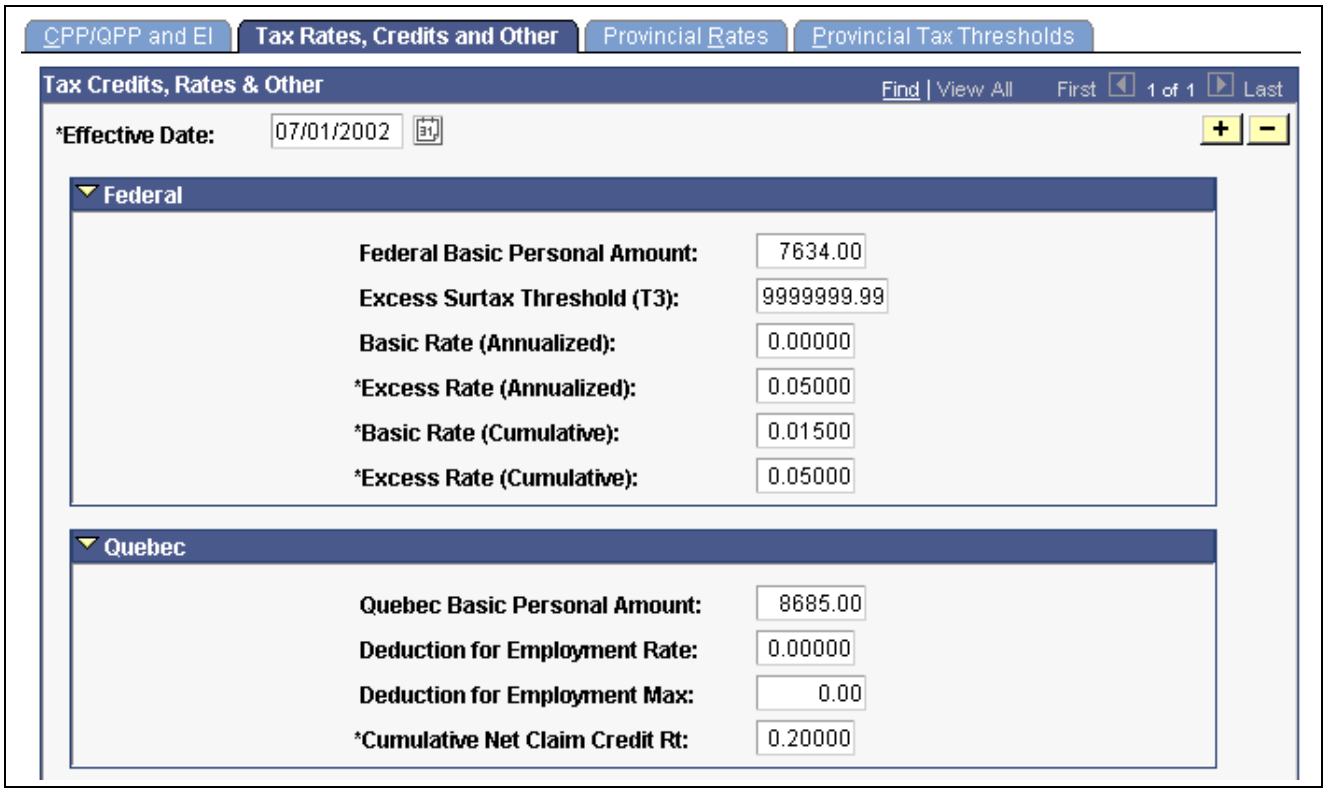
The Canadian Tax tables are used during payroll calculation to compute all federal, provincial, and Quebec taxes. Because these tables are maintained largely by PeopleSoft and updated based on the standards outlined in the Canada Revenue Agency (CRA) publication Payroll Deductions Formulas for Computer Programs and the Revenu Quebec publication Guide for Employers: Source Deductions and Contributions, you shouldn't need to modify them. However, you can make changes using the Canadian Tax Table pages if you have the appropriate security authorization.

Pages Used to View Canadian Tax Information

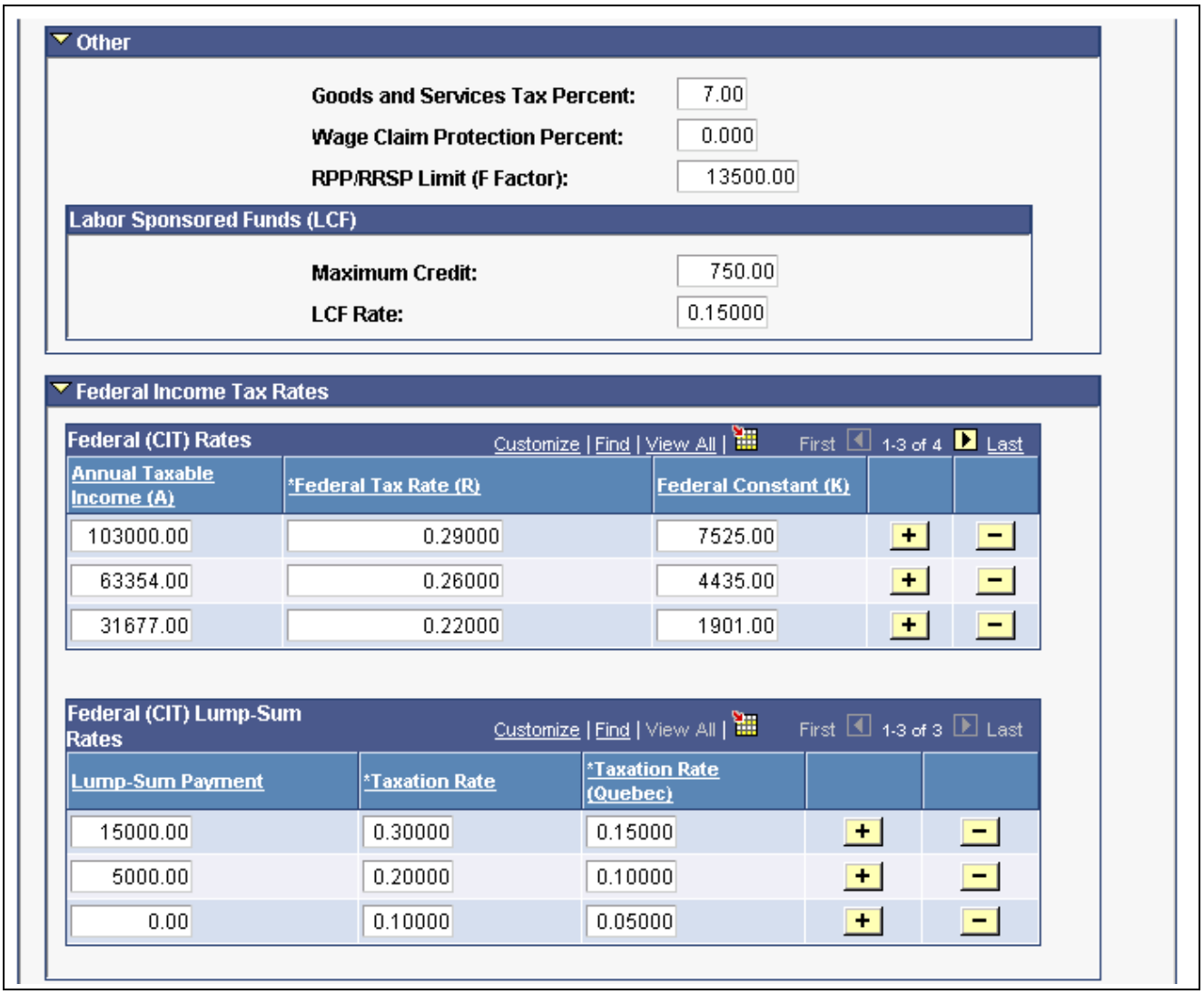
Page Name	Object Name	Navigation	Usage
CPP/QPP and EI	CAN_TAX_TABLE1	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Table, CPP/QPP and EI	Display the constant values required for calculation of contributions to Canada and Quebec Pension Plans and premiums for Employment Insurance. PeopleSoft maintains this table for you.
Tax Rates, Credits, and Other	CAN_TAX_TABLE4	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Table, Tax Rates, Credits, and Other	Display the wage threshold and rates for calculating Canadian federal surtax. PeopleSoft maintains this page for you.
Provincial Rates	CAN_TAX_TABLE2	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Table, Provincial Rates	Display rates, thresholds, and constants needed to determine withholding of Canadian provincial taxes, including withholding, health insurance, and sales taxes. PeopleSoft maintains this page for you.
Provincial Tax Thresholds	CAN_TAX_TABLE3	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Table, Provincial Tax Thresholds	Display by province the net claim amount threshold and tax reduction amount. Note that this page does not affect all provinces. PeopleSoft maintains this table for you.

Viewing the Wage Thresholds and Rates for Calculating Canadian Federal Surtax

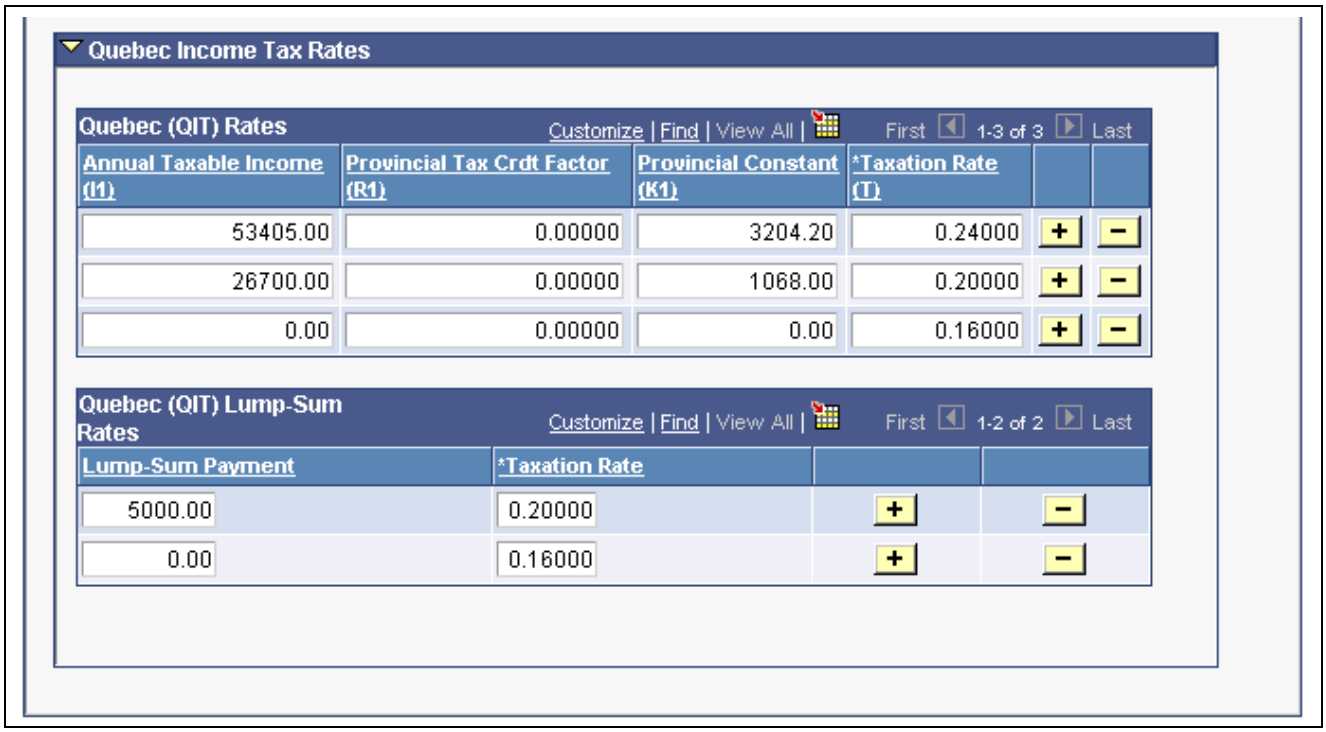
Access the Tax Credits, Rates, and Other page.



Tax Rates, Credits, and Other page, 1 of 3



Tax Rates, Credits, and Other page, 2 of 3



Tax Rates, Credits, and Other page 3 of 3

Other Rates

RRP/RRSP Limit (F factor) This field is used during the calculation of Canadian income taxes subject to the commission tax method.

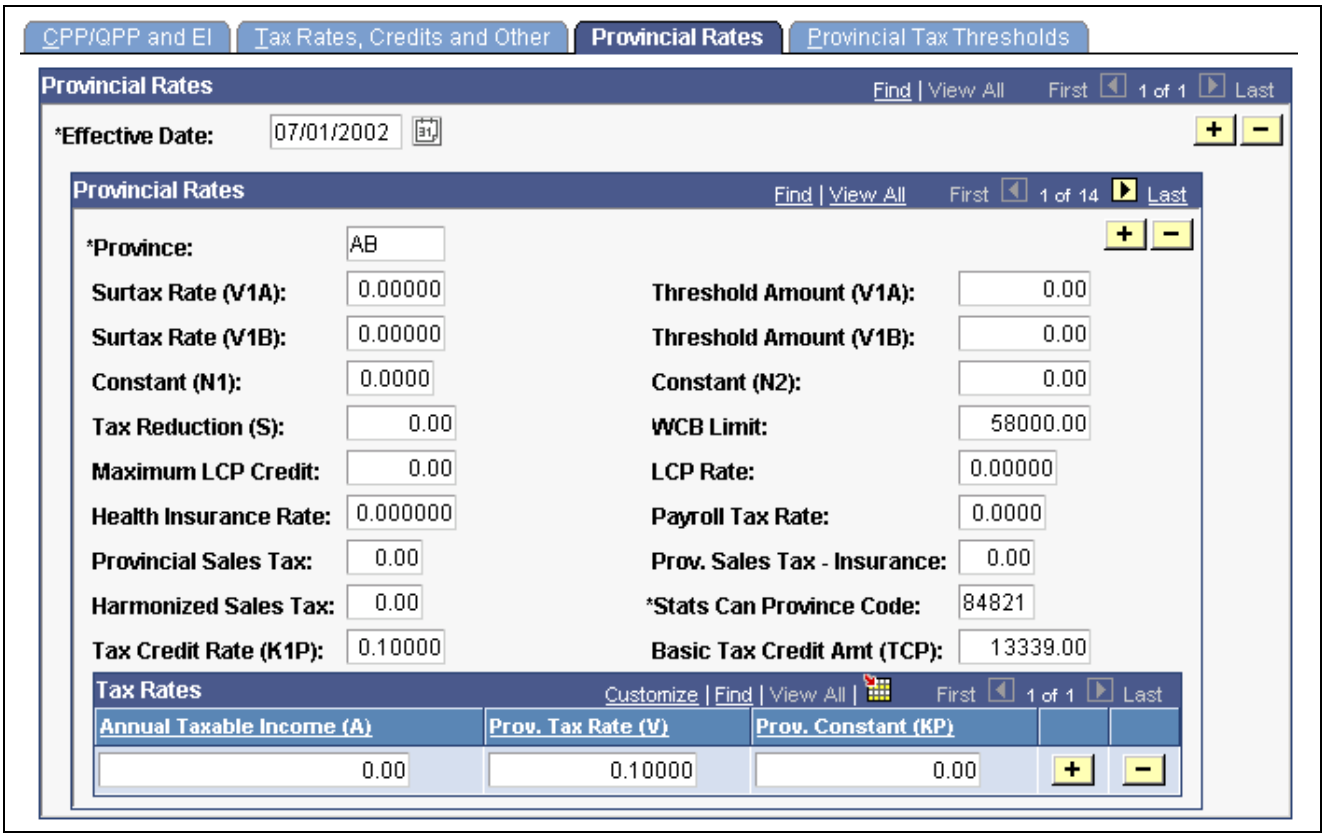
Labor Sponsored Funds (LCF)

Maximum Credit This field displays the monetary amount to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF Rate. The system applies this credit to each participating employee, according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

LCF Rate This field displays the percentage to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF rate. The system applies this credit to each participating employee according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

Viewing the Rates, Thresholds, and Constants to Determine Withholding of Canadian Provincial Taxes

Access the Provincial Rates page.



Provincial Rates page

Maximum LCP Credit For provinces where provincial labor-sponsored venture tax credits are available, you maintain the maximum LCP credit amount to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

LCP Rate For provinces where provincial labor-sponsored venture tax credits are available, you maintain the LCP rate to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

Health Insurance Rate You override the default health insurance rate on the Canadian Company Tax table.

See Also

Chapter 22, “Setting Up Payroll Tax Tables,” Defining Canadian Company Tax Information, page 516

(USA) Establishing Company State Taxes

To establish company state taxes, use the Company State Tax Table component (CO_STATE_TAX_TBL) or Agency State Tax Table USF component (CO_STATE_TAX_TBL) and Tax Collector Table component (TAX_COLLECTOR_TBL).

This section discusses how to:

- Define states where you collect or pay taxes.
- Establish the voluntary disability plans.
- Enter general ledger account numbers for state taxes.
- Maintain the Tax Collector table for Pennsylvania.

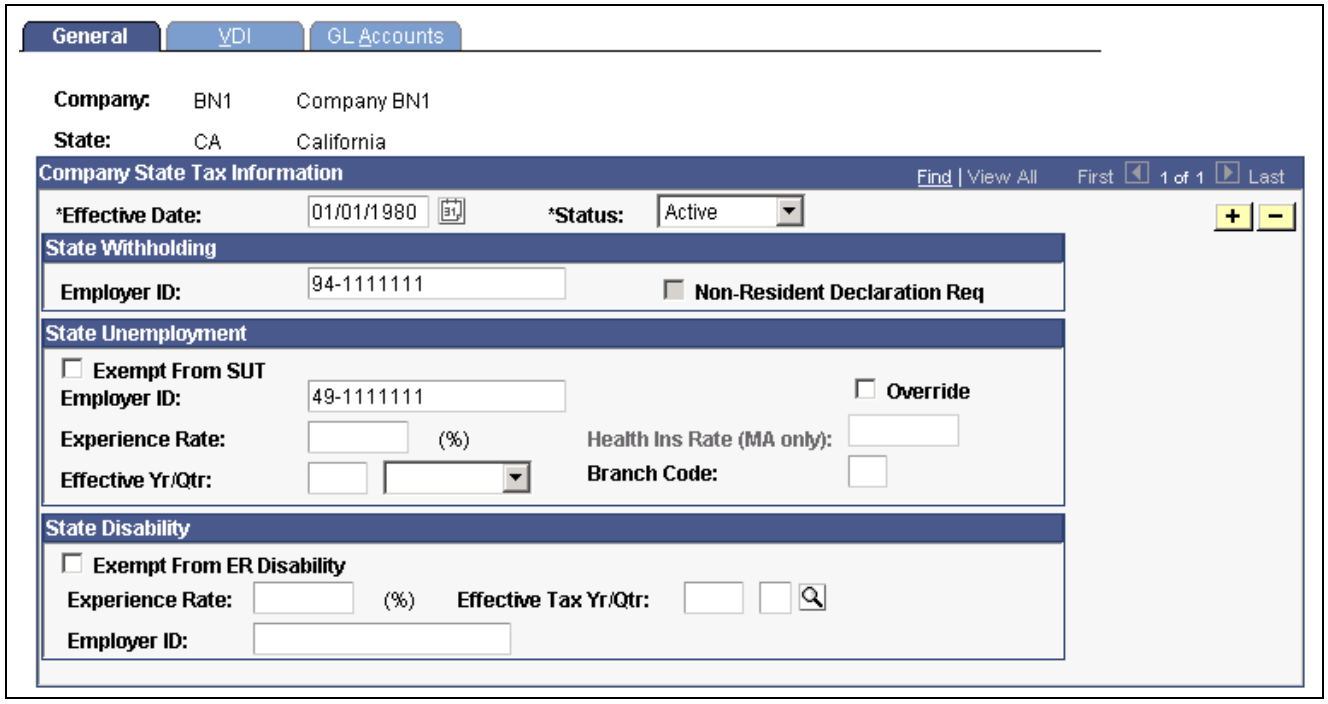
Pages Used to Establish Company State Taxes

Page Name	Object Name	Navigation	Usage
General	CO_STATE_TAX_TBL	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, General • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, General • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, General	Set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.
VDI	CO_STATE_TAX_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, VDI • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, VDI • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, VDI	Establish the voluntary disability plans associated with the company.
GL Accounts	CO_STATE_TAX_TBL3	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, GL Accounts • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, GL Accounts • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, GL Accounts	Enter your general ledger account numbers for state taxes.

Page Name	Object Name	Navigation	Usage
Company State Tax Report	PRCSRUNCNTRL	• Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company State Tax, Company State Tax Report • Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency State Tax USF, Company State Tax Report	Run TAX704 to print information from the Company State Tax Table, which identifies the states in which your company collects and pays taxes.
Vendor Information	VNDR_ID1	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Collector Table, Vendor Information	Enter vendor data for tax collectors.

Defining States Where You Collect or Pay Taxes

Access the Company State Tax Table - General page.



Company State Tax Table - General page

The State field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

Employer ID Enter your state employer ID for state withholding.

Non-Resident Declaration Req This check box is selected or cleared by default according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

State Unemployment

Exempt From SUT Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on the State Tax Data page.

See "Setting Up SUT Exemptions To Generate Data for the TAX002 and TAX810 Reports" at the end of this section.

Employer ID Enter your state employer ID for state unemployment.

Experience Rate The experience rate you enter in the State Unemployment group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the Effective Yr/Qtr field. This enables you to have different rates within a single calendar year.

Override (MA only.) The Massachusetts standard Health Ins Rate is set by default from the State Tax table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select this check box and enter the correct Massachusetts Health Ins Rate.

Health Ins Rate (MA only) (MA only.) If you select Override, enter the correct Health Ins Rate.

Branch Code This field is informational for Arizona. TAX810AZ.SQR and TAX860AZ.SQR append the branch code to the end of the state EIN.

State Disability

Exempt From ER Disability Select this check box if employees in this state are exempt from employer-paid state disability tax. This field is for informational purposes only and is not used by the system.

Experience Rate The experience rate you enter in the State Disability group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in Effective Tax Yr/Qtr. This enables you to have different rates within a single calendar year.

Note. You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error "SUT rate not found on Company/State Tax table" during Pay Calculation. This error occurs regardless of the pay end date you are processing.

Employer ID Enter the appropriate employer ID for the State Disability group. This is used for quarterly tax reporting for California when you specify to separately report UI, DI, and PIT wages. You can set this default on the Company table.

Setting Up SUT Exemptions To Generate Data for the TAX002 and TAX810 Reports

The TAX002 and TAX810 reports are generated based on SUT wages. When you select the *Exempt From SUT* field on this page, the system does not generate taxable wages, and the TAX002 and TAX810 reports will contain no data.

Perform the following to generate taxable earnings, enabling the TAX002 and TAX810 reports to produce the required wage detail reporting data, while still remaining exempt from State Unemployment Taxes:

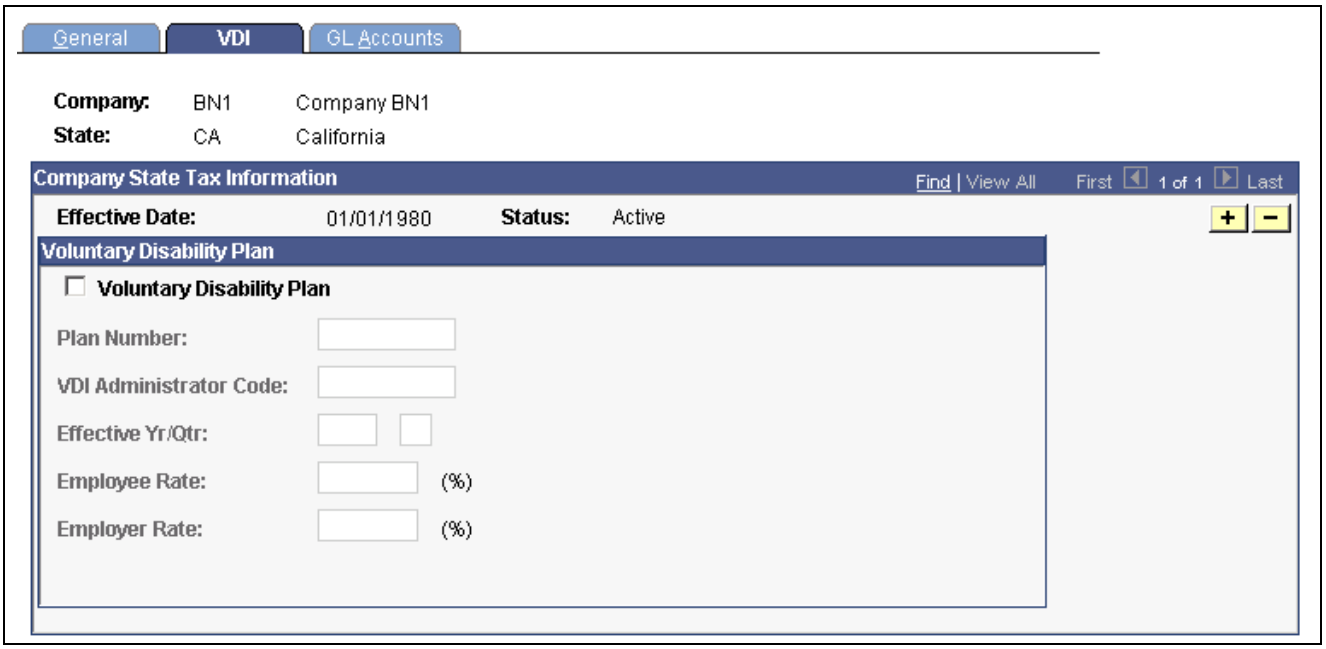
1. Ensure that the Company Exempt from SUT field on the Company Table-FICA/Tax Details page is cleared.
2. Leave the Exempt From SUT field on the Company State Tax Table - General page cleared.

   These steps should ensure that the Exempt From SUT field on the State Tax Data page remains clear for each employee. Verify that the Exempt From SUT field is clear on all three pages.
3. Enter a dummy number in the State Unemployment Employer ID field on the Company State Tax Table – General page.
4. Enter a value of *0* (zero) in the State Unemployment Experience Rate.

After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX002 or TAX810 report can report the SUT subject wages.

Establishing Voluntary Disability Plans

Access the Company State Tax Table - VDI page.



Company State Tax Table - VDI page

Voluntary Disability Plan Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.

Plan Number Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on Form W-2.

VDI Administrator Code Select the code that identifies the administrator of the voluntary disability plan. You maintain VDI Administrator Codes on the VDI Administrator table.

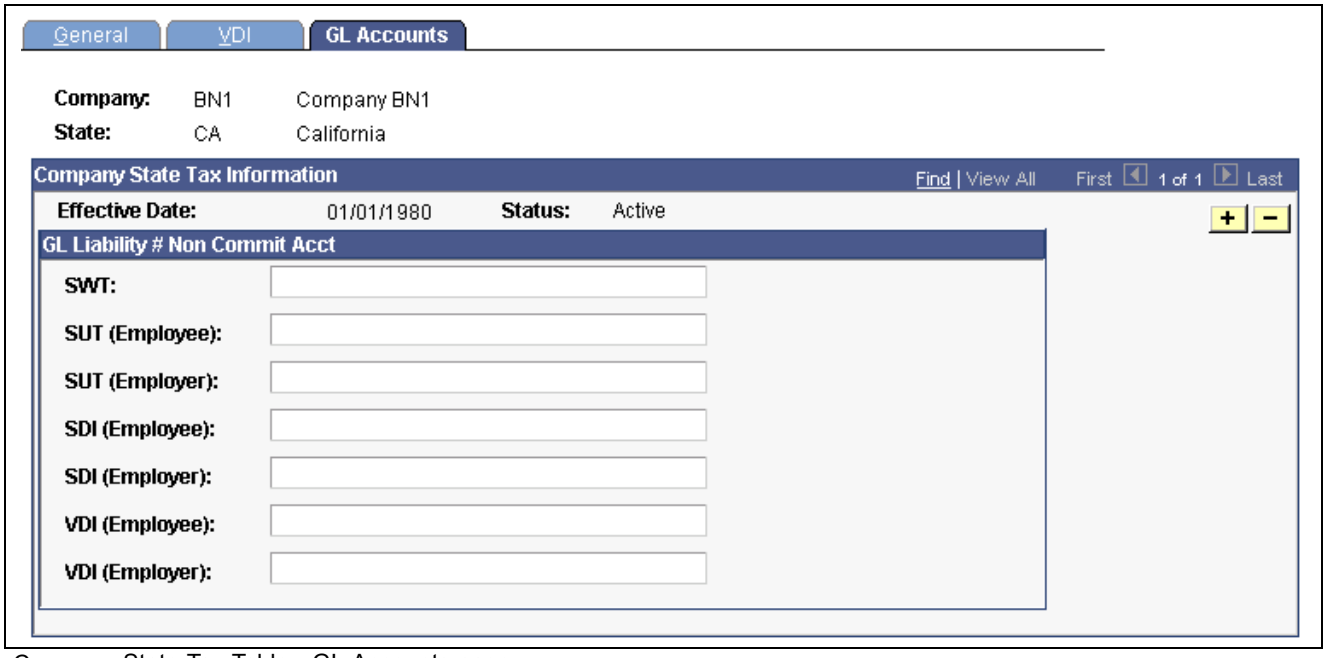
Employee Rate Enter the employee-paid rate.

Employer Rate Enter the employer-paid rate.

To set up VDI with a rate of zero so that you can track the VDI wages, enter *99.99999* as the Employee Rate and Employer Rate on this page.

Entering General Ledger Account Numbers for State Taxes

Access the Company State Tax Table - GL Accounts page.



Company State Tax Table - GL Accounts page

Enter the general ledger account numbers, if applicable, for the following company liabilities:

SWT State Withholding liabilities.

SUT (Employee) State Unemployment employee liabilities.

SUT (Employer) State Unemployment employer liabilities.

SDI (Employee) State Disability employee liabilities.

SDI (Employer) State Disability employer liabilities.

VDI (Employee) Voluntary Disability employee liabilities.

VDI (Employer) Voluntary Disability employer liabilities.

Maintaining the Tax Collector Table for Pennsylvania

For each municipality and overlying school district, the State Tax Register lists the effective rates for both Earned Income and Occupational Privilege taxes for residents and, when applicable, non-residents. Earned income and occupational privilege tax collector information for each municipality and school district are also listed. In some instances, there are different tax collectors for the municipality and the school district. When this occurs, employers must remit the school district's tax to its collector and the municipality's tax to its collector.

Tax collectors are set up as vendors using the Tax Collector Table (TAX_COLLECTOR_TBL) component or the Vendor Table component (VNDR_ID). After entering information about the tax-collecting agency, enter the vendor code on the Local Tax Type-Classes page.

See Also

Chapter 23, "Setting Up Vendors," page 521

Chapter 22, "Setting Up Payroll Tax Tables," Establishing Tax Types for PeopleSoft Enterprise Accounts Payable Integration, page 502

(USA) Establishing Company Local Taxes

To establish company local taxes, use the Company Local Tax Table component (COMP_LOCAL_TAX_TBL).

This section discusses how to set up company local tax table entries.

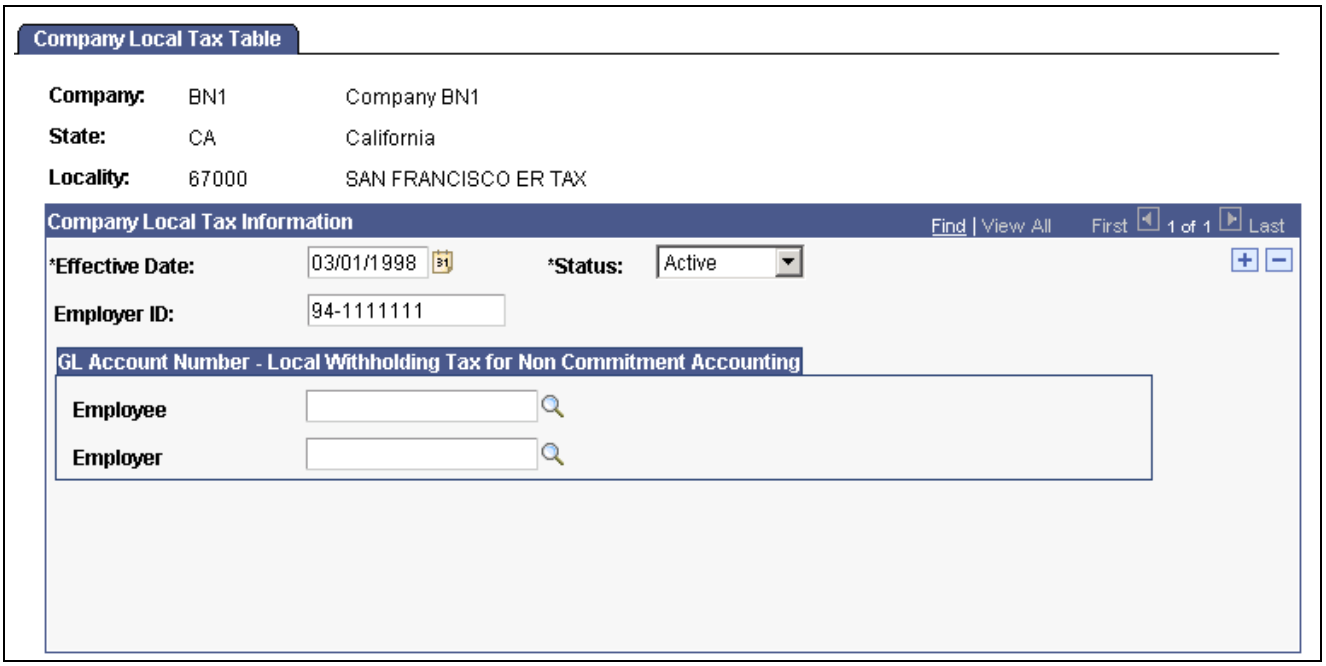
Note. You must complete the Company Local Tax table before local tax data for employees is entered because the locality field on the Local Tax Data page is edited against this table.

Pages Used to Define an Entry for the Company Local Tax Table

Page Name	Object Name	Navigation	Usage
Company Local Tax Table	COMP_LOCAL_TAX_TBL	• Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Company Local Tax Table, Company Local Tax Table • Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Agency Local Tax Table USF, Company Local Tax Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Local Tax Table, Company Local Tax Table	Set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.
Company Local Tax Report	PRCSRUNCNTRL	• Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company Local Tax, Company Local Tax Report • Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency Local Tax USF, Company Local Tax Table	Run TAX705 to print information from the Company Local Tax Table, which identifies the localities for which your organization collects and pays taxes.

Setting Up Company Local Tax Table Entries

Access the Comp Local Tax Tbl page.



Company Local Tax Table page

Employer ID This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax table.

GL Account Number - Local Withholding Tax for Non Commitment Accounting

These accounts are General Ledger accounts for use with local withholding tax; they are only used by the PayGL01 process. Only GL information not subject to Commitment Accounting would use these accounts.

Employee and **Employer** If you have general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

(USF) Setting Up State and Locality Tax Routing

To set up state and locality tax routing, use the State Tax Routing USF component (GVT_STATE_TAX_ROUT) and the Locality Tax Routing USF component (GVT_LOC_TAX_ROUT).

This section lists the pages used to set up state and locality tax routing.

Pages Used to Set Up State and Locality Tax Routing

Page Name	Object Name	Navigation	Usage
State Tax Routing 1	GVT_ST_TAX_RT1	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, State Tax Routing USF, State Tax Routing 1	Identify the payment method for paying state taxes and provide details of the EFT method.
State Tax Routing 2	GVT_ST_TAX_RT2	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, State Tax Routing USF, State Tax Routing 2	Identify check address information if the payment method for paying state taxes is by check.
Locality Tax Routing 1	GVT_LC_TAX_RT1	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Locality Tax Routing USF, Locality Tax Routing 1	Identify the payment method for paying local taxes and provide details of the EFT method.
Locality Tax Routing 2	GVT_LC_TAX_RT2	Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Locality Tax Routing USF, Locality Tax Routing 2	Identify check address information if the payment method for paying local taxes is by check.
State Tax TXP Addendum Information	GVT_ST_TAX_RT_DET	Click the TXP Addendum Control button on the State Tax Routing 1 page or the Locality Tax Routing 1 page.	Provide TXP addendum information and amount controls.

Establishing Tax Types for PeopleSoft Enterprise Accounts Payable Integration

To establish tax types for PeopleSoft Enterprise Accounts Payables integration, use the Tax Type Table USA component (TAX_TYPE_TBL), Tax Type Table USF component (TAX_TYPE_TBL), or Tax Type Table CAN component (CAN_TAX_TYPE), the State Tax Types/Classes USA component (STAT_TAX_TYPE_TBL) or State Tax Types/Classes USF component (STAT_TAX_TYPE_TBL), and the Local Tax Types/Classes USA component (LOCL_TAX_TYPE_TBL) or Local Tax Type/Classes USF component (LOCL_TAX_TYPE_TBL). Use the TAX_TYPE_TABLE component interface to load data into the tables for the Tax Type Table USA component and Tax Type Table USF component

This section provides an overview of tax types for accounts payable integration and discusses how to:

- (CAN) Define Canadian federal and provincial tax types.
- (USA) Link tax types to federal or state tax vendors and tax classes.
- (USA) Link tax types to local tax vendors and tax classes.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering the Interface with PeopleSoft Payables"

Understanding Tax Types for PeopleSoft Accounts Payable Integration

If you plan to use PeopleSoft Accounts Payable to send tax authorities the taxes deducted from employees' paychecks, you must link the appropriate set of deductions to each tax vendor.

Tax types are used to link tax classes to vendors. A tax type represents a collection of tax classes, such as withholding, earned income credit, and so on, specific to a particular tax jurisdiction (federal, state, local, provincial).

Setting up tax types and linking them to vendors is done differently for the U.S. and Canada.

- Canada

  Use the Canadian Tax Types page to name the tax type and link it to tax classes and vendors.

- U.S.A.

  1. Define tax types on the Tax Type Table page.
  2. Link tax types to tax classes and vendors on the State Tax Type Table page or the Local Tax Type Table page.

Example

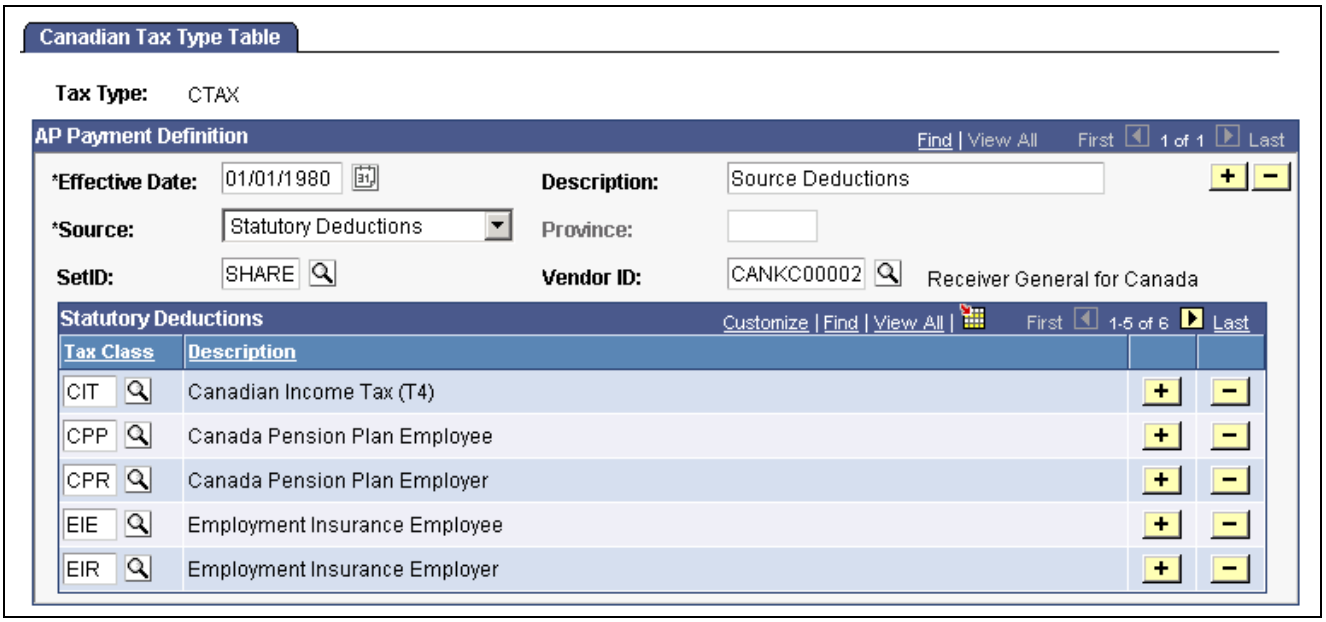
In the state of California, employees are subject to two taxes for short-term disability: SDI (paid to the state) and OASDI (paid to the federal government). Each tax is comprised of a different set of tax classes. In this case, you might create a tax type named Short-Term disability. You would then access the Fed/State Tax Type/Classes page and define what Short-Term Disability represents at the federal level: For the vendor, you select the Internal Revenue Service; for the tax classes you select only those included in OASDI. You then repeat the process to define Short-Term Disability at the state level. This time, you select the Franchise Tax Board as the vendor and just those tax classes that contribute to SDI.

Pages Used to Set Up Tax Types for PeopleSoft Accounts Payable Integration

Page Name	Object Name	Navigation	Usage
Tax Type Table	TAX_TYPE_TBL	• Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, Tax Type Table USA, Tax Type Table • Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, Tax Type Table USF, Tax Type Table	Define the names of the tax types you want to use.
Canadian Tax Type Table	CAN_TAX_TYPE	Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, Tax Type Table CAN, Tax Type Table	Define Canadian federal and provincial tax types and link them to vendors and tax classes.
State Tax Type Table	STAT_TAX_TYPE_PNL	• Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, State Tax Types/Classes USA, State Tax Type Table • Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, State Tax Types/Classes USF, State Tax Type Table	Link a tax type to a federal or state tax authority and set of tax classes.
Local Tax Type Table	LOCL_TAX_TYPE_PNL	• Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, Local Tax Types/Classes USA, Local Tax Type Table • Set Up HRMS, Product Related, Payroll for North America, AP - Tax Types/Classes, Local Tax Types/Classes USF, Local Tax Type Table	Link a tax type to the local tax authority and the applicable set of tax classes.

(CAN) Defining Canadian Federal and Provincial Tax Types

Access the Canadian Tax Type Table page.



Canadian Tax Type Table page

Source Select the type of tax transaction from the options available. Values include *Goods and Services Tax, Health and Payroll Taxes, Provincial Sales Tax,* or *Statutory Deductions.*

Province If you chose *Provincial Sales Tax* in the Source field, select the Province in this field.

Tax Class Select the tax class you want to associate with this tax type and vendor from the options available. Add all applicable tax classes. The Source field determines which tax classes are available for selection.

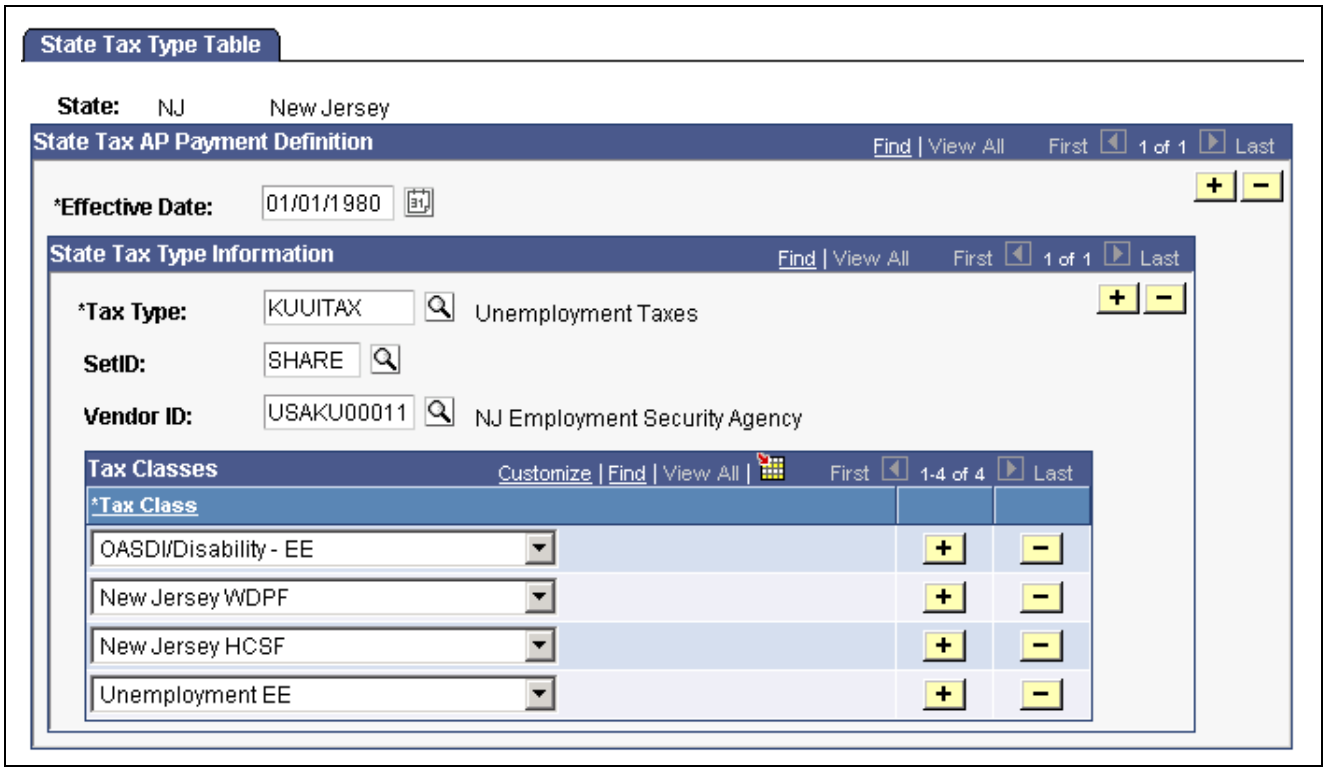
- If *Goods and Services Tax* is selected, only federal sales tax types are allowed: *G (GST)* and *H (HST).*
- If *Health and Payroll Taxes* is selected, only health and payroll tax types are allowed: *HTX* and *PYT.*
- If *Provincial Sales Tax* is selected, only provincial sales tax types are allowed: *I (PSTI), P (PST), Q (QSTI), S (QST), T (PPT),* and *U (QPT).*
- If *Statutory Deductions* is selected, only income related tax types are available: *CIT, CPP, CPR, EIE, EIR, QIT, QPP, QPR, RV2* and *T4A.*

See Also

Chapter 23, “Setting Up Vendors,” page 521

(USA)(USF) Linking Tax Types to Federal or State Vendors and Tax Classes

Access the State Tax Type Table page.



State Tax Type Table page

Note. Enter $U in the search page to enter federal tax type information.

Tax Type Select the tax type you want to define. The prompt table displays the names of the tax types you set up on the Tax Type Table page.

SetID Select the setID for the tax type. This determines which set of vendors (tax authorities) you can select in the Vendor ID field.

Vendor ID Select the tax authority (vendor) to which you want the taxes for this tax type paid. The prompt table displays only those vendors associated with the setID you selected.

Class Name Select the tax classes associated with this tax type and vendor. Add all applicable tax classes.

(USA)(USF) Linking Tax Types to Local Vendors and Tax Classes

Access the Local Tax Type Table page.

The fields on this page are the same as those on the State Tax Type Table page.

See Chapter 22, "Setting Up Payroll Tax Tables," (USA)(USF) Linking Tax Types to Federal or State Vendors and Tax Classes, page 505.

(USA) Defining Tax Locations

To define tax locations, use the Tax Location Table component (TAX_LOCATION_TBL). Use the TAX_LOCATION_TBL component interface to load data into the tables for this component.

This section provides an overview of tax locations and discusses how to:

- Establish the locations for which you process payroll and taxes.
- Associate states and localities with the tax location code.

Understanding Tax Locations

The system establishes federal, state, and local employee tax data and tax distribution data according to the information you establish in the Tax Location table. In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

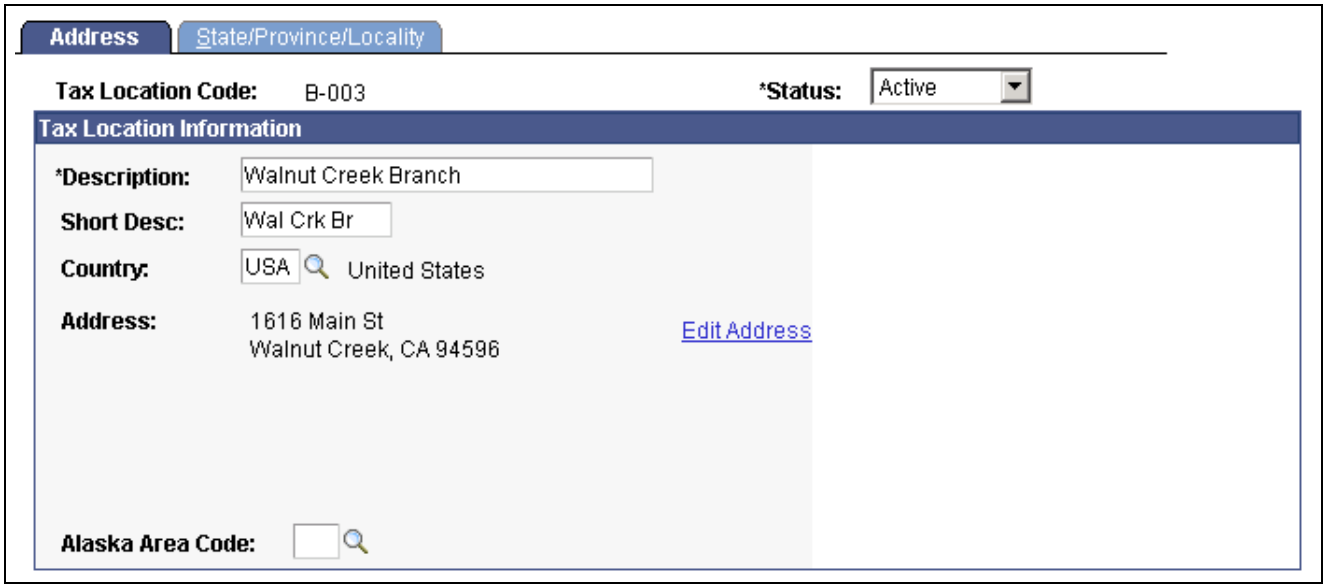
Note. If you've selected Automatic Employee Tax Data on the Installation table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.

Pages Used to Define Tax Locations

Page Name	Object Name	Navigation	Usage
Tax Location Table - Address	TAX_LOCATION_TBL1	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, Address • Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, Address	Establish the locations for which you process payroll and taxes.
Tax Location Table − State/Province/Locality	TAX_LOCATION_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, State/Province/Locality • Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, State/Province/Locality	Associate any number of states, localities, and linked localities with the tax location code.
Tax Location Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Tax Location, Tax Location Report	Generate PAY718 that lists information from the Tax Location Table.

Establishing the Locations for Which You Process Payroll and Taxes

Access the Tax Location Table - Address page.



Tax Location - Address page

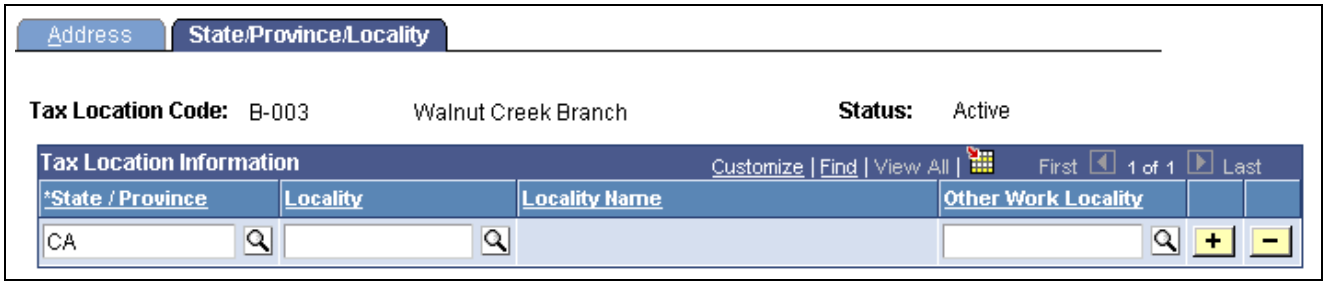
Tax Location Code Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.

Alaska Area Code If applicable, select an Alaskan area code.

Note. If you select Automatic Employee Tax Data on Installation table 1 and assign a Tax Location ID to each employee on the Job Data table, each employee's tax data is set by default to the Employee Tax Data page and the Employee Tax Distribution page.

Associating States and Localities with the Tax Location Code

Access the Tax Location Table − State/Province/Locality page.



Tax Location Table - State/Province/Locality page

State Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any.

The states you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Locality The localities you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Other Work Locality Use this field only where multiple local taxes apply in one location, such as:

- Paducah, KY and McCracken County, KY.
- Earned Income Tax, and Occupational Privilege Tax in Pennsylvania.

  To form further links in a locality chain:

  - Add another row with the same state.
  - Enter the other work locality from the previous row in Locality.
  - Enter the new work locality.

Note. You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

Note. Locality and Other Work Locality are not required in Canada, because a Canadian employee can be taxed in only one Province at a time, and there are no locality taxes in Canada.

See Also

Chapter 12, “Setting Up Organization Foundation Tables,” page 221

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

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, “Maintaining Payroll Data,” Understanding Split Local Tax Distribution for KY, AL, and OR

(E&G) Establishing 1042 Processing for Non-resident Aliens

To establish 1042 processing for non-resident aliens, use the Treaty/NR Alien Table component (TREATY_NR_ALIEN_TA).

This section provides an overview of tax treaties and discusses how to set up 1042 processing for non-resident aliens.

Understanding Tax Treaties

The U.S. government has entered into tax treaties with nearly 40 foreign jurisdictions. Income tax treaties coordinate the tax systems of the United States and other countries that are parties to treaties. Treaty provisions affect the taxation of non-resident aliens working in the U.S. While tax treaties are generally based on a standard model, each treaty might have slightly different provisions.

To claim benefits of a treaty, an employee must have a visa and be a resident of one of the treaty countries. An employee can claim benefits of only one treaty at any given time. Employees who want to claim benefits under a tax treaty must submit a written statement and applicable forms (W-4, Form 8233, Form 1001) to their employer.

As an employer, you must apply the specific treaty rules when calculating federal withholding tax. These rules often include time limits and earnings caps. Different types of earnings, such as scholarships, grants, and fellowships, might be subject to different taxation rates. You must produce a Form 1042-S and a 1042 summary form for each non-resident alien employee affected by the special withholding rates. If you file 250 or more 1042-S forms, you must report on magnetic media. Earnings reported on a 1042-S are not reported on a W2; so, an employee may need both a W2 and a 1042-S if some earnings are covered by the special tax treaty rates and some are not.

In addition to employees covered by tax treaties, some non-resident alien employees, such as those with specific types of earnings such as scholarships, fellowships, and grants, must also have those earnings reported on a 1042-S.

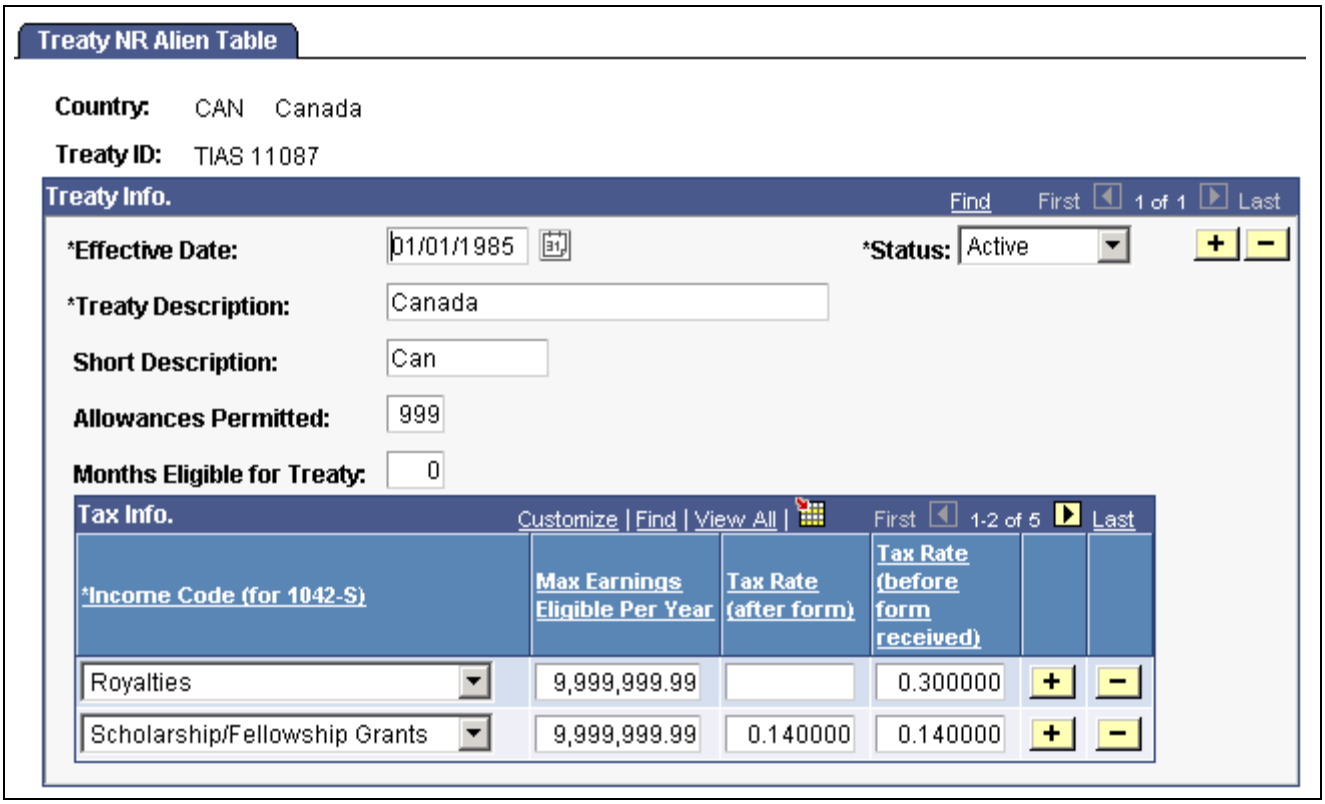
Use the Treaty/NR Alien Table page to capture the tax rates specified in tax treaties (including exempt earnings, which are recorded with a 0% tax rate). This table identifies those earnings subject to a 30% flat withholding tax.

Pages Used to Establish 1042 Processing for Non-Resident Aliens

Page Name	Object Name	Navigation	Usage
Treaty NR Alien Table	TREATY_NRA_TABLE	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Treaty/NR Alien Table	Set up the rules associated with the treaties required for each country with which the U.S. has an agreement.
Treaty/Non Resident Alien Rpt	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Treaty/Non Resident Alien, Treat/Non Resident Alien Rpt	Report on information from the Tax Treaty Table using Tax Treaty Table report (TAX720.SQR)

Setting Up 1042 Processing for Non-Resident Aliens

Access the Treaty NR Alien Table page.



Treaty NR Alien Table page

Country If you want to establish entries on the Tax Treaty NR Alien table that are applicable to more than one country (for example, to use for all scholarship income that is to be taxed at 30%), you can use any value prefixed by a $ in the country code (for example, Country = *$S)*.

Allowances Permitted For each tax treaty record you establish, specify the number of allowances permitted by the treaty.

Income Code (for 1042-S) Select each type of earnings subject to special tax treatment under the treaty.

Max Earnings Eligible Per Year Specify the earnings caps that apply for each earnings type.

Tax Rate (after form) Specify the taxation rates that apply for each earnings type.

Tax Rate (before form received) Specify the taxation rates that apply for each earnings type.

Note. PeopleSoft re-delivers the tax treaty table with each major version and, if required, with the year-end Tax Update. If interim changes are required, you must track and apply the changes in your environment.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data"

(USA) Establishing UI Report Codes

To establish UI report codes, use the UI Report Code Table component (CO_UI_RPTCD_TBL).

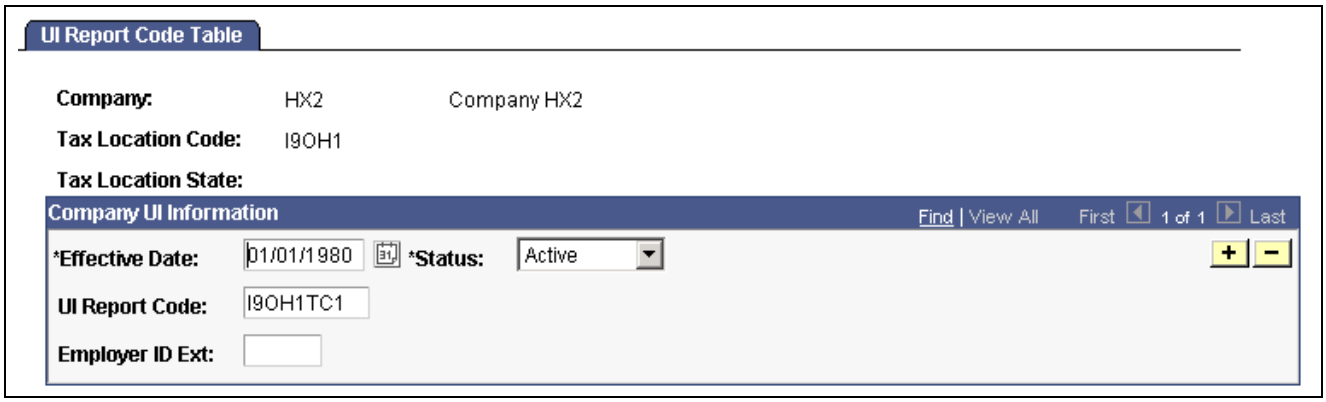
This section discusses how to set up UI report codes.

Page Used to Establish UI Report Codes

Page Name	Object Name	Navigation	Usage
UI Report Code Table page	CO_UI_RPTCD_TBL	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, UI Report Code Table	Establish UI report codes in PeopleSoft Payroll for North America for multiple work sites.

Setting Up UI Report Codes

Access the UI Report Code Table page.



UI Report Code Table page

Information you enter here works with the Multiple Worksite Report (SQR TAX004) to link a Tax Location Code to a UI Report Code. When you add an entry to the UI Report Code table, the system prompts you to enter the company code and the location code of the site you want to establish for reporting worksite information to the U.S. Bureau of Labor Statistics.

Company UI Information

UI Report Code Enter the code you have received from the state for this site.

Employer ID Ext (employer ID extension) (E&G) This field is for employers that need to report the quarterly tax report for multiple account numbers for different locations (MN/MI) or multiple categories (CA). The MN/MI tax report programs (both tax report and create magnetic tape) append the extension ID to Employer SUT ID (from the Company State Tax table) as a unique ID for reporting purposes.

(USA) Establishing Standard Occupational Classifications for Alaska

To establish standard occupational classifications for Alaska, use the U.S. SOC Table component (US_SOC_TBL). Use the US_SOC_TABLE component interface to load data into the tables for this component.

This section discusses how to set up U.S. standard occupation classifications for Alaska.

Note. If your company has no operations in Alaska, ignore the U.S. Standard Occupational Classification (SOC) table.

Page Used to Establish U.S. Standard Occupational Classifications for Alaska

Page Name	Object Name	Navigation	Usage
U.S. SOC Table	US_SOC_TABLE	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, U.S. SOC Table	Set up the U.S. Standard Occupational Classification (SOC) Table page in quarterly unemployment insurance reporting for the state of Alaska.

Setting Up U.S. Standard Occupational Classifications for Alaska

Access the U.S. SOC Table page.

Standard Occupational Classification Code The codes established here are used in the reports Quarterly State Employee Wage Listing for Alaska (TAX002AK) and Quarterly UI Wage Tape for Alaska (TAX810AK). These reports correspond to Alaska's quarterly *Employer's Report of Wages for Each Employee* form.

Note. Use the Job Code table to link Standard Occupational Classification codes with particular job codes in your organization.

(USA) Specifying Voluntary Disability Insurance Plan Location and Contact Information

To specify voluntary disability insurance plan location and contact information, use the VDI Administrator Table component (VDI_ADMINISTRATOR).

This section lists the pages used to enter voluntary disability insurance plan location and contact information.

Pages Used to Enter Voluntary Disability Insurance Plan Location and Contact Information

Page Name	Object Name	Navigation	Usage
VDI Administrator Table	VDI_ADMIN_TABLE	Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, VDI Administrator Table	Enter location and contact information about the administrators of employee voluntary disability plans. After you've established your VDI Administrators, assign administrators to their voluntary disability plans on the Company State Tax Table 2 page.
VDI Administrator Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, VDI Administrator	Report on information from the VDI Administrator Table using the VDI Administrator report (TAX715.SQR).

(USA) Specifying Parameters for Quarterly Tax Reporting

To specify parameters for quarterly tax reporting, use the Tax Reporting Parameters component (TAX_RPT_PARAMETERS).

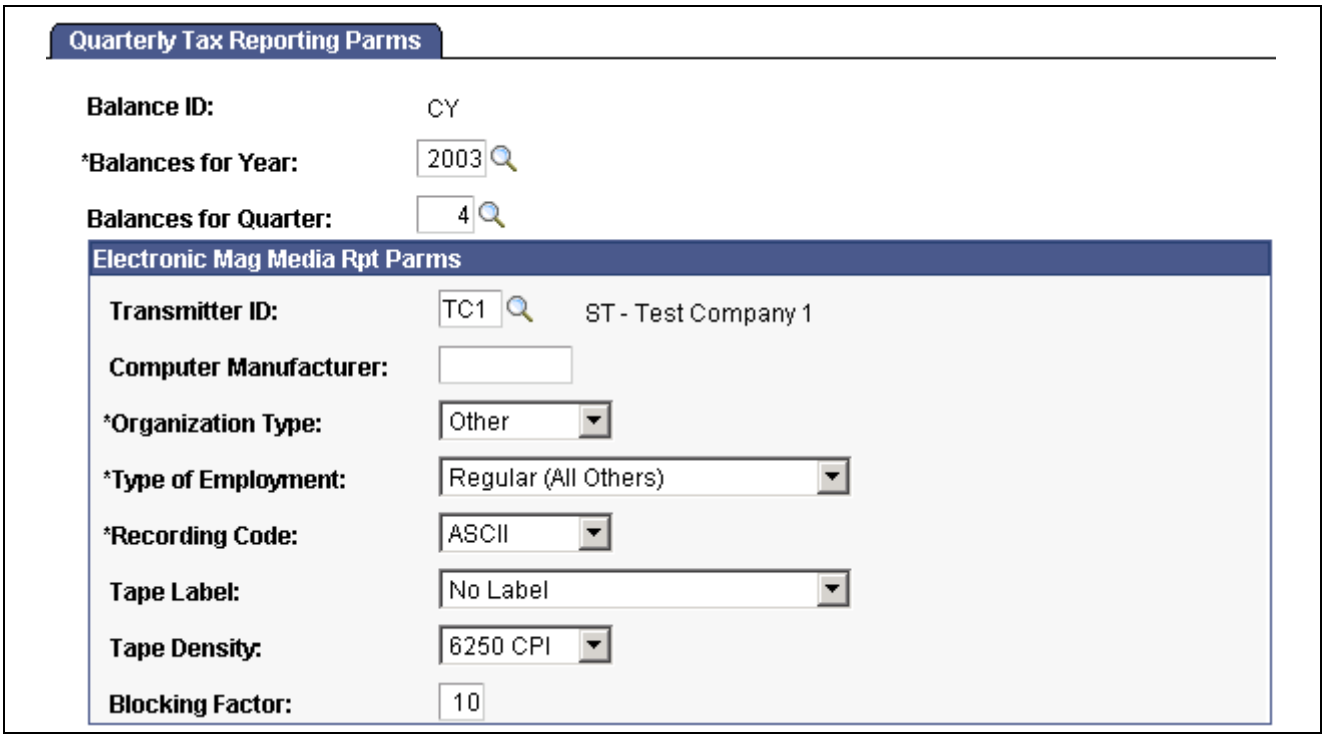
This section discusses how to define parameters for quarterly tax reporting:

Page Used to Specify Parameters for Quarterly Tax Reporting

Page Name	Object Name	Navigation	Usage
Quarterly Tax Reporting Parms	TAX_RPT_PARAMETERS	Payroll for North America, U.S. Quarterly Processing, Define Quarterly Tax Reporting, Tax Reporting Parameters, Quarterly Tax Reporting Parms	Set up parameters for quarterly tax reporting.

Defining Parameters for Quarterly Tax Reporting

Access the Quarterly Tax Reporting Parms page.



Quarterly Tax Reporting parms

Balances for Year The value you enter here defines the reporting period.

Balances for Quarter The value you enter here defines the reporting period.

Electronic Mag Media Rpt Parms

Transmitter ID Enter the Company ID of the company transmitting W-2s for tax reporting. This is used in a multi-company environment when a single company acts as the transmitter for all companies in the organization.

Computer Manufacturer Enter the name of the manufacturer, such as IBM, Compaq, or Digital that makes the computer you use to create the magnetic media (such as diskette or tape) for tax reporting.

Organization Type Select *Government* or *Other.*

Type of Employment Select *Agriculture, Federal, Medicare Qualified Government Employee, Military, Railroad,* or *Regular (All Others).*

Recording Code Select *ASCII* or *EBCDIC.*

Tape Label Select the type of tape label.

Tape Density Select the tape density.

Blocking Factor Enter the blocking factor.

(CAN) Defining Canadian Tax Information

To define Canadian tax information, use the Canadian Company Tax Table component (CO_CAN_TAX_TABLE) and the Wage Loss Plan Table component (WAGELS_PLN_TBL).

This section discusses how to:

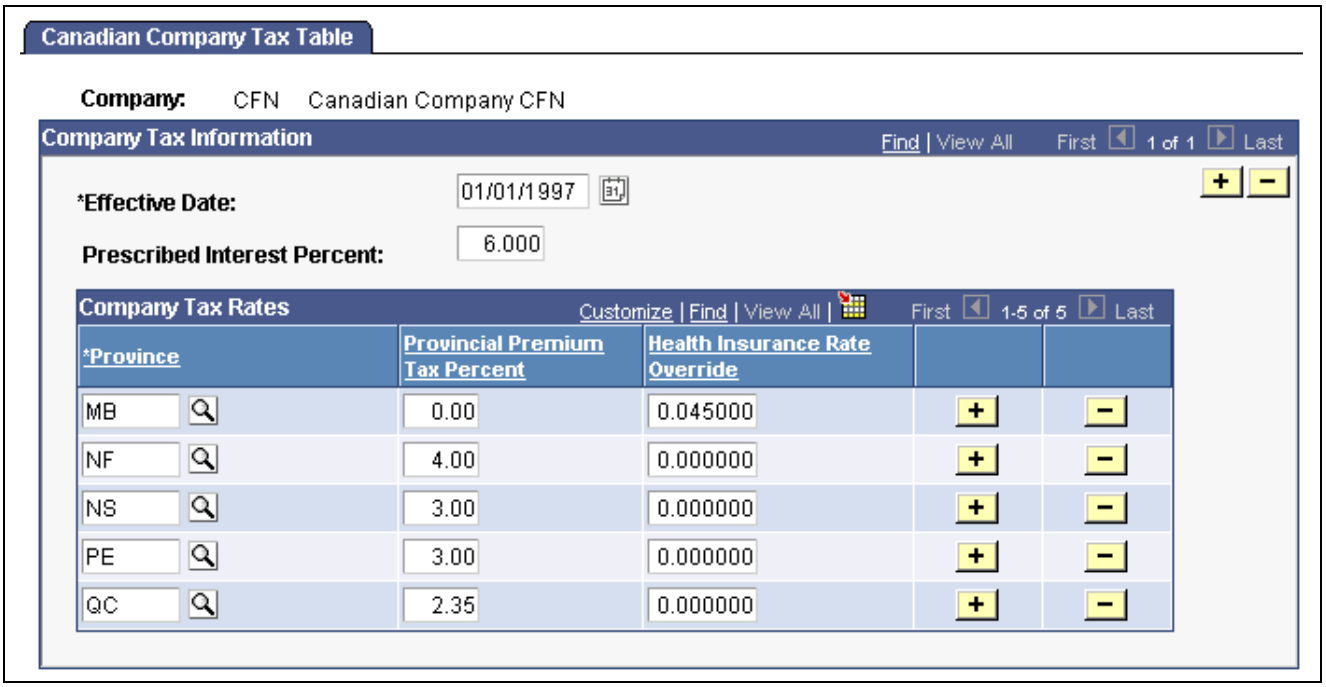
- Define Canadian company tax information.
- Define Canadian wage loss plans.
- Define Canadian yearly tax reporting parameters.

Pages Used to Define Canadian Tax Information

Page Name	Object Name	Navigation	Usage
Canadian Company Tax Table	CAN_USR_TAX_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Company Tax Table, Canadian Company Tax Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Tax Table CAN, Canadian Company Tax Table	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.
Wage Loss Plan Liability Accts (wage loss plan liability accounts)	WAGELS_PLN_TBL1	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Wage Loss Plan Table, Wage Loss Plan Liability Accts	Define a wage loss plan for your company.
Wage Loss Plan Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Wage Loss Plan CAN	Generate a report that lists information from the Wage Loss Plan Table for Canadian employers.

Defining Canadian Company Tax Information

Access the Canadian Company Tax Table page.



Canadian Company Tax Table page

Company Tax Information

Prescribed Interest Percent If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government.

Company Tax Rates

Province Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.

Provincial Premium Tax Percent Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.

Health Insurance Rate Override Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

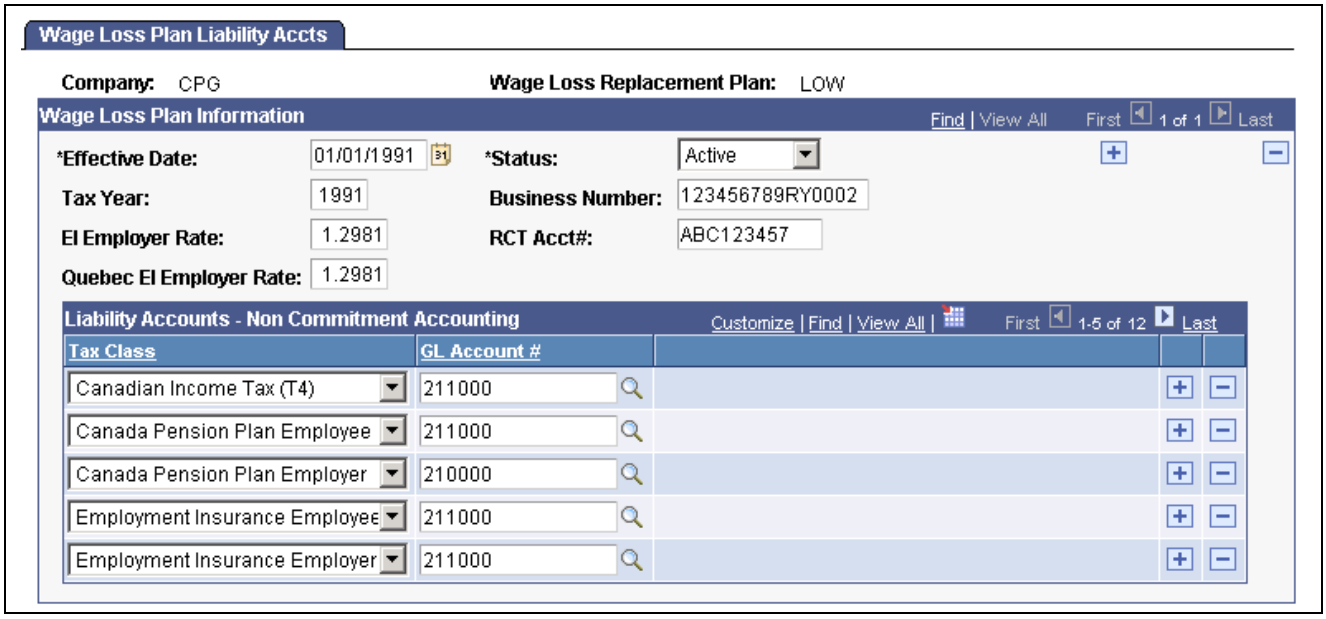
Note. It is your responsibility to update all rates on the Canadian Company Tax table.

Warning! It is your responsibility to update the Prescribed Interest Percent field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Defining Canadian Wage Loss Plans

Access the Wage Loss Plan Liability Accts page.

The Canadian Wage Loss Plan table identifies valid Canadian wage loss replacement plans. The Wage Loss Replacement Plan field in the Canadian Income Tax Data table at the employee level is edited against this table. You must create entries on this table before you enter any Canadian tax data for your employees. You must set up at least one entry on the Wage Loss Plan table for each company. Typically, you create this entry using the default EI Employer Rate and corresponding Quebec EI Employer Rate. You must define additional entries for each wage loss plan your company has registered with CRA.



Wage Loss Liability Accts page

Wage Loss Plan Information

Business Number For each plan you set up, enter your company's unique CRA Taxation account number in this field. Because a company can have more than one wage loss replacement plan, you can set up any number of plans on this table.

EI Employer Rate This is the rate of your contribution to Employment Insurance. The default rate (which comes from the Employer EI Premium Rate on the Canadian Tax table) may be overridden with your specific plan rate.

RCT Acct # This field is hidden on the page for all entries with an Effective Date of 01/01/1997 or later. The field will be displays and is available for use for all entries dated prior to 01/01/1997 for historical purposes only.

Quebec EI Employer Rate This is the rate of your contribution to Employment Insurance. You can override the default rate (which comes from the Quebec Employer EI Premium Rate on the Canadian Tax table) by entering your specific plan rate.

(CAN) Defining Canadian WCB Assessment Reporting

To define Canadian WCB assessment reporting, use the WCB classifications Component (CAN_WCB_CU_RATES). Use the CAN_WCB_CU_RATES component interface to load data into the tables for this component.

This section provides an overview of Canadian WCB assessment reporting and discusses how to:

- Define WCB assessable earnings.
- Define WCB classifications, rate groups, and assessment rates.

Understanding Canadian WCB Assessment Reporting

PeopleSoft Payroll for North America enables employers registered with the Workers' Compensation Boards (WCB) in Canada to report and pay assessments based on the total assessable earnings of their workers. The system accommodates the assessment reporting structures of all provinces. This functionality enables the reporting of assessments by rate groups and classification units.

Pages Used to Define Canadian WCB Assessment Reporting

Page Name	Object Name	Navigation	Usage
WCB Classifications	CAN_WCB_CU_RATES	Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, WCB Classifications	Define WCB classifications, rate groups, and assessment rates.

Defining WCB Assessable Earnings

To define WCB assessable earnings, you need to establish a new Tax Form ID—WCB Assessable Earnings—and the associated tax form Boxes for each province on the Tax Form Definition page. The Boxes reflect the two-letter province code, preceded by a W.

You also must define and associate the assessable Earnings and Deduction Codes for each province with the WCB Assessable Earnings Tax Form ID. The Earnings Codes defined as Regular Hours and Overtime Hours on the Pay Group table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

Select the applicable provinces and define the assessable earnings.

Associate the *WCB Assessable Earnings* tax form ID with the appropriate Plan Type, Deduction Code, Ded (Deduction) Class, Sales Tax, and Earnings Code.

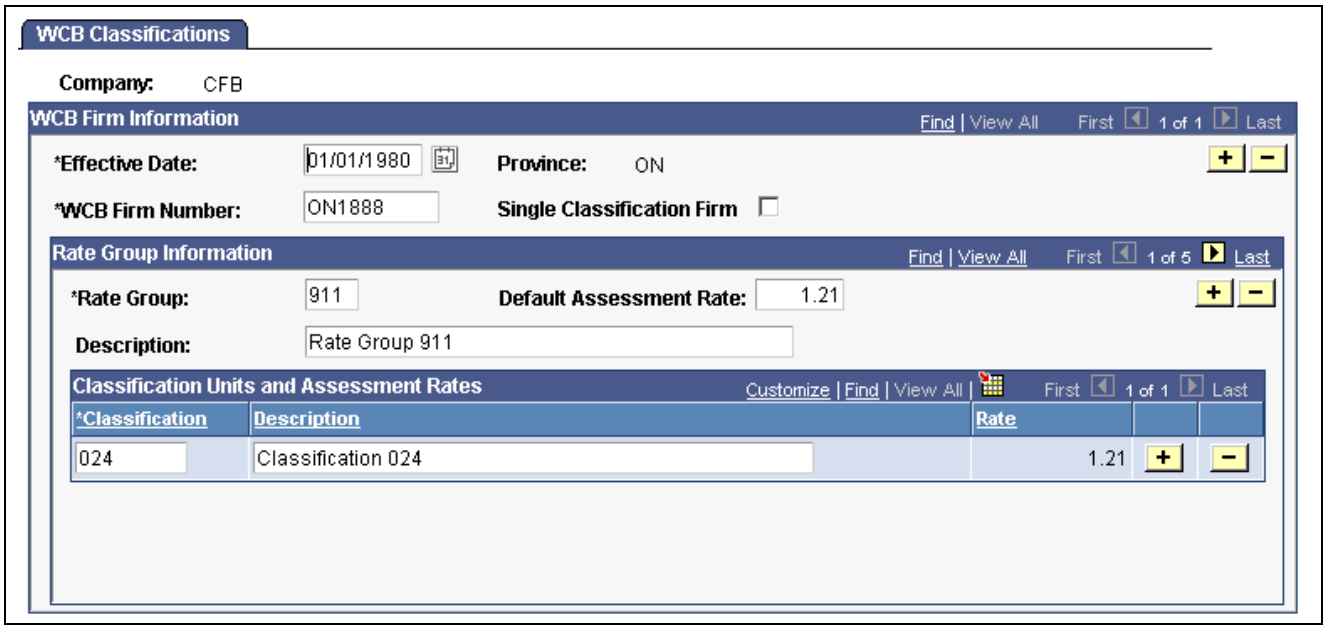
Note. The earnings codes defined as Regular Hours and Overtime Hours on the Pay Group table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Accessing Year-End Processing Instructions"

Define WCB Classifications, Rate Groups, and Assessment Rates

Access the WCB Classifications page.



WCB Classifications page

This page can accommodate both a single classification assigned to a single province and multiple Rate Groups associated with multiple classifications (or CUs) for a single province.

WCB Firm Number Enter the WCB firm number. If a single rate group and/or classification and assessment rate applies to all covered employees in the province, select Single Classification Firm.

Single Classification Firm If this check box is selected, the Workers Compensation report (PAY102CN) uses the entry on this page as the source for reporting assessment information for all covered employees in the province. If this check box is cleared, the information defined on the Job Code table (WCB Classifications page) 4 is used as the source for reporting.

Rate Group When adding the original entry for a province, this is set by default to *N/A* . If rate groups are applicable to the specified province, override the default by entering the rate group.

Default Assessment Rate If you enter a default assessment rate, that rate populates into the Assessment Rate for each Classification assigned to the Rate Group.

Description (for Rate Group) Enter the rate group description, if applicable. Similar to the Rate Group field, the description is set by default to *Not Applicable* when adding the original entry for a province.

Classification Define a classification or classification unit (CU).

Assessment Rate Enter the assessment rate applicable to the classification.

CHAPTER 23

Setting Up Vendors

This chapter provides an overview of vendors and discusses how to enter vendor information.

Understanding Vendors

A vendor is any agency or organization that the company sends money to on behalf of a worker or that the company uses to withhold money from a person's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integration Between PeopleSoft Enterprise Payables and PeopleSoft HRMS

If you are using PeopleSoft Enterprise Payables to pay your vendors, it is recommended that you enter a vendor using PeopleSoft Payables and export the vendor table to PeopleSoft Human Resource Management System (HRMS). You can enter vendors through the PeopleSoft HRMS and it will be exported to the PeopleSoft Payable system. However, any changes to existing vendors that are made through PeopleSoft HRMS will not be exported to the PeopleSoft Payables system.

PeopleSoft Payables, PeopleSoft Enterprise Payroll for North America, and PeopleSoft Enterprise Payroll Interface use publish and subscribe methodology to populate each other's Vendor Tables. The two application messages used to publish and subscribe are called:

- VENDOR_SYNC, which is an incremental publish and subscribe messaging.
- VENDOR_FULLSYNC, which is a full table publish and subscribe messaging.

The primary difference between the Incremental and the Full Table messages is that the Incremental messages process individual whereas the Full Table messages process all vendors on the table.

To research the technical details of any integration point used by PeopleSoft applications, refer to the online integration point Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering the Interface with PeopleSoft Payables," Maintaining Vendor Information

Entering Vendor Information

To enter vendor information, use the Vendor Control component (VENDOR_CONTROL), Vendor Information component (VNDR_ID), Payee Table component (GARNISH_PAYEE_TBL), and Payee Table USF component (GVT_GARNISH_PAYEE). Use the CI_GARNISH_PAYEE_TBL component interface to load data into the tables for the Payee Table component

This section discusses how to:

- Identify vendor prefixes.
- Enter basic vendor information.
- Enter vendor address information.
- Display alternate names for use on payments.
- Identify vendor locations.
- Enter bank account information.
- Enter payment processing information.
- Enter vendor contract information.
- Enter benefit policy information.
- (USF) Enter garnishment payee contract information.
- (USF) Enter garnishment payee distribution information.

Setting Up Vendor Pages

To enter vendor information, you will complete the following pages:

- Vendor Control
- Addresses
- Locations
- Contacts
- Policy Information

Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Location

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

Pages Used to Set Up Vendors

Page Name	Object Name	Navigation	Usage
Vendor Control	VNDR_CNTRL	Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Control	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information	VNDR_ID1	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Vendor Information	Enter basic vendor information.
Addresses	VNDR_ADDRESS	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter a vendor's address information.

Page Name	Object Name	Navigation	Usage
Alternate Names	VNDR_ADDR_ALTN	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses Click Alternate Names on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses Click Alternate Names on the Addresses page.	Enter any alternate name for use on payments.
Phone Information	VNDR_ADDR_PHN	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses Click Telephone on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses Click Telephone on the Addresses page.	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email ID	VNDR_ADDR_EMAILID	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses Click Email ID on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses Click Email ID on the Addresses page.	Enter a vendor's email addresses.
Locations	VNDR_LOC	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter address and remittance information.

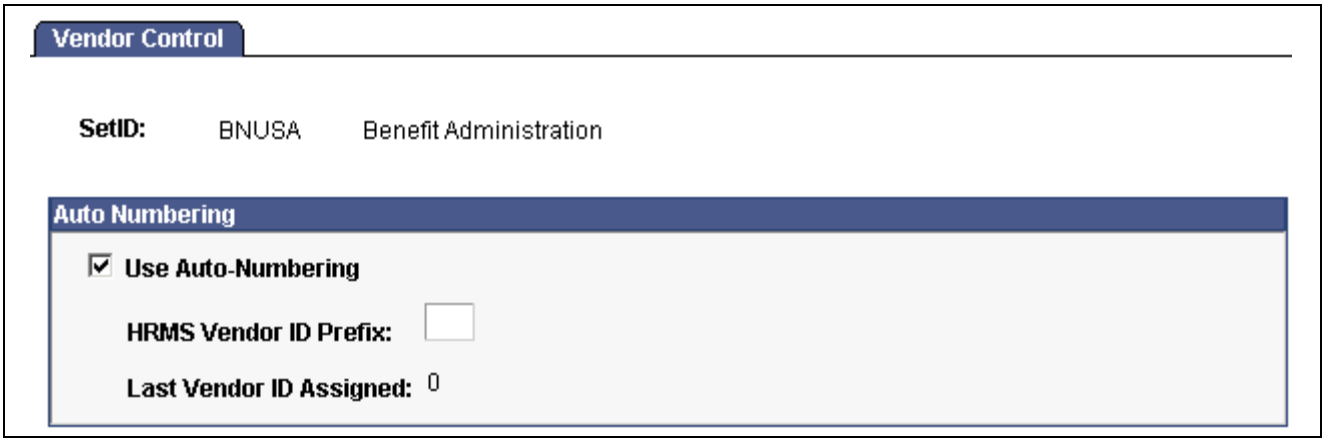
Page Name	Object Name	Navigation	Usage
Bank Accounts	VNDR_BANK_ACCOUNT	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations Click Bank Accounts on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations Click Bank Accounts on the Locations page.	Enter banking information for the vendor.
Bank Address	VNDR_BANK_ACCT2	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations Click Bank Accounts on the Locations page and Bank Address on the Bank Accounts page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations Click Bank Accounts on the Locations page and Bank Address on the Bank Accounts page.	Enter the bank's address information. The bank's Country defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.
Phone Details	VNDR_BANK_ACCT3	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations Click Bank Accounts on the Locations page and Phone Details on the Bank Accounts page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations Click Bank Accounts on the Locations page and Phone Details on the Bank Accounts page.	Enter phone information for the bank.

Page Name	Object Name	Navigation	Usage
Comments	VNDR_LOC_COMMENTS	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations Click Comments on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations Click Comments on the Locations page.	Enter notes or comments about locations.
Payment Options	VNDR_PAY	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations Click Payment Options on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations Click Payment Options on the Locations page.	Enter payment processing rules for the vendor location.
Contacts	VNDR_CNTCT	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Contacts	Enter a vendor's contact person. Enter more than one phone number if necessary.
Telephone	VNDR_CNTCT_PHN	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts Click Telephone on the Contacts page. • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Contacts Click Telephone on the Contacts page.	Enter a contact's telephone information.

Page Name	Object Name	Navigation	Usage
Policy Information	VNDR_POLICY	Set Up HRMS, Product Related, Payroll for North America, AP-Vendor, Vendor Information, Policy Information	Enter information about policies and whom to contact about them.
Garnishment Payee	GVT_GARN_PAYEE	Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee	Enter garnishment payee contact information for U.S. federal government.
Deduction Distribution Information	GVT_GARN_DIST_SEC	Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee Click the Distribution Information button on the Garnishment Payee Table page.	Enter garnishment payee distribution information for U.S. federal government.

Identifying Vendor Prefixes

Access the Vendor Control page.



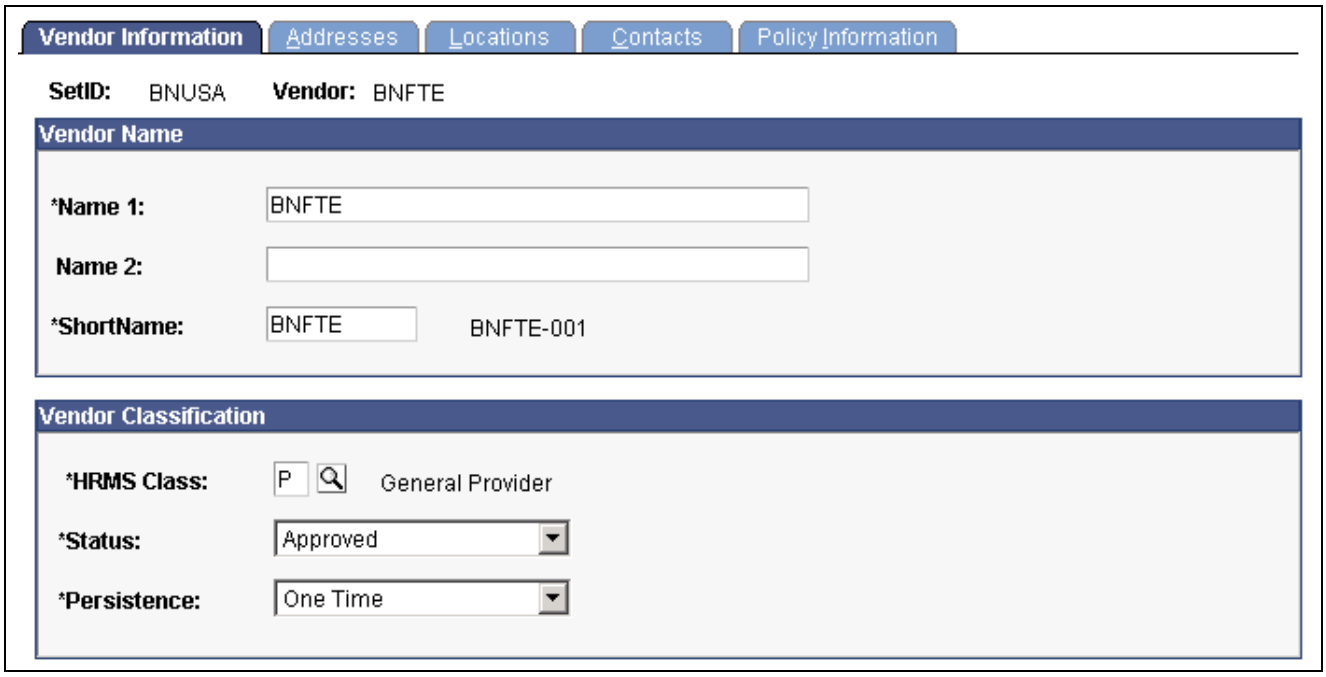
Vendor Control page

Use Auto-Numbering PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.

HRMS Vendor ID Prefix If you selected the auto-numbering check box, enter a prefix that is used identify HRMS vendors.

Entering Basic Vendor Information

Access the Vendor Information page.



Vendor Information page

Name 1 Enter the payee name as it should appear on the check.

HRMS Class (HRMS classification) This field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.

It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers.

Available values are:

- *General Deduction (D)*
- *Garnishment Payee (G)*
- *National Health Service Provider (H)*
- *Industrial Insurance Board Provider (I)*
- *General Provider (P)*
- *Tax Collector (T)*

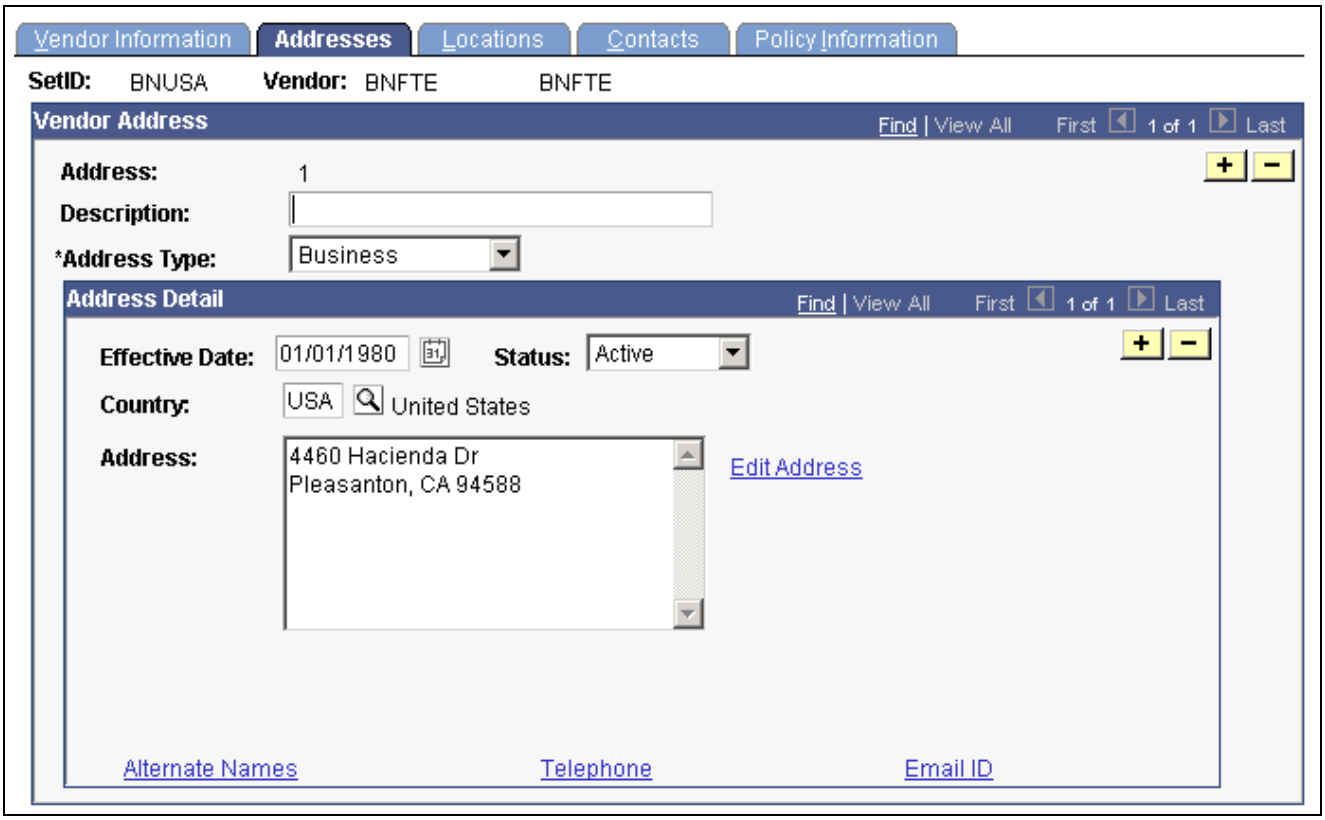
For benefit providers, select *P* for General Provider.

Status For HRMS vendors, select *Approved*. The other values are used by PeopleSoft Accounts Payable.

Persistence For HRMS vendors, select *Regular*. The other values are used by PeopleSoft Accounts Payable.

Entering Vendor Address Information

Access the Addresses page.



Vendor Information - Addresses page

Address Type

Enter the one or more addresses for the vendor.

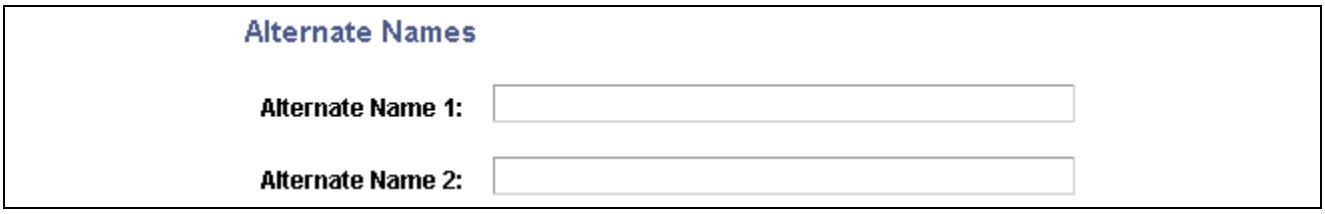
If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers.

Premium Payment and *Remittance* are the only valid address types for deduction recipients. If any other address type is displayed for this vendor, contact your Accounts Payable department.

Premium Payment t generally applies to benefit deductions and *Remittance* applies to all other types of deductions including taxes.

Displaying Alternate Names for Use on Payments

Access the Alternate Names page.



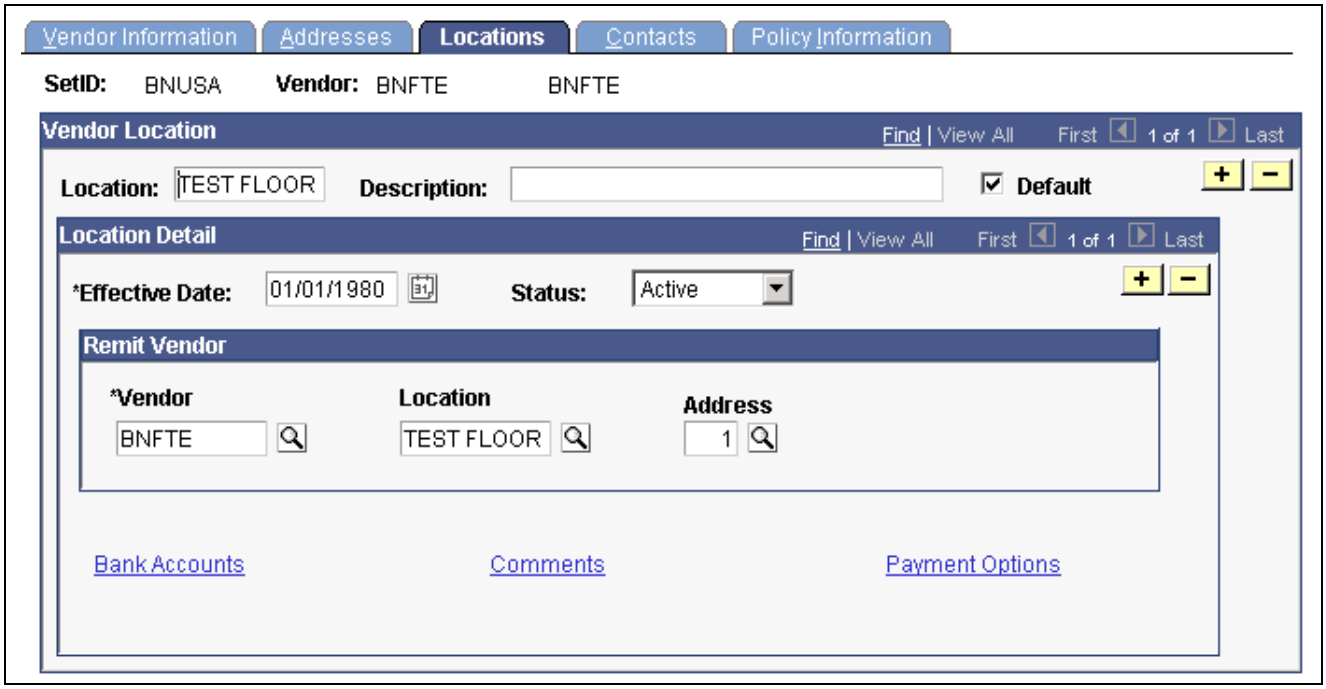
Alternate Names page

Alternate Name 1 and **Alternate Name 2**

When the system generates payments for the location using this address, PeopleSoft Accounts Payable needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Identifying Vendor Locations

Access the Provider/Vendor Table - Locations page.



Vendor Information - Locations page

Location Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.

Default Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.

Remit Vendor This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.

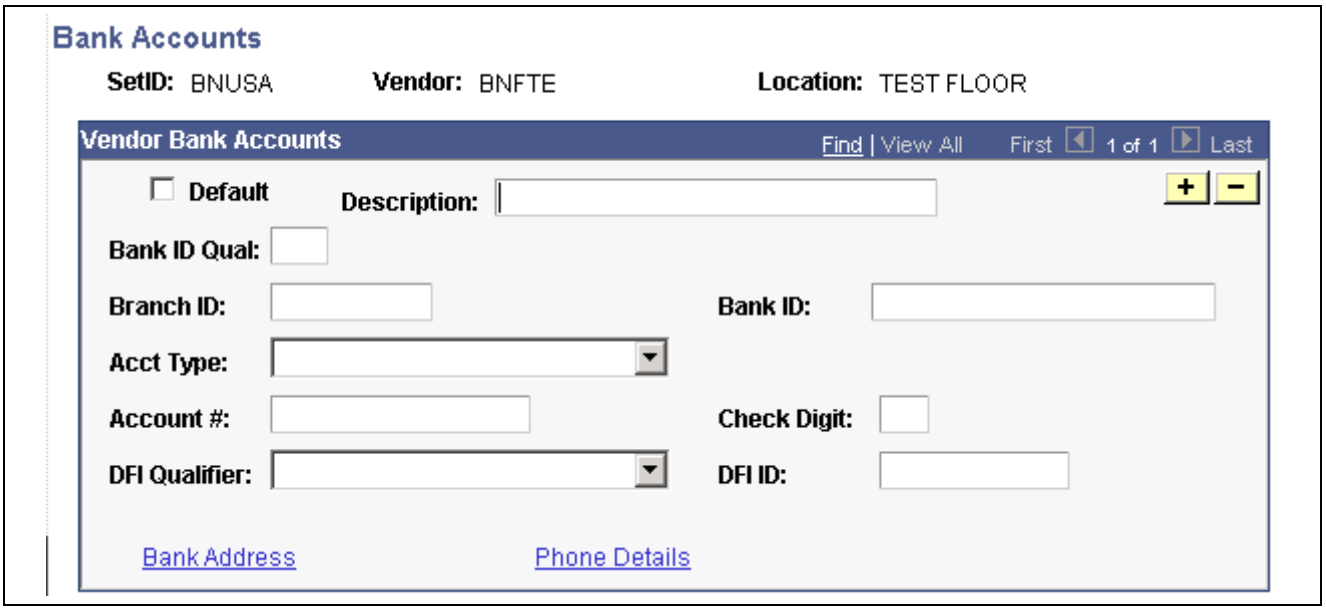
Bank Accounts Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.

Comments Click this link to display the Comments page.

Payment Options Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Entering Bank Account Information

Access the Bank Accounts page.



Bank Accounts page

Default The Default check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.

Bank ID Qual The country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.

Branch ID The branch ID for the bank, if appropriate.

Bank ID The Bank ID for the bank.

Acct Type The account type for the bank, *Bond, Checking Account,* and *Life Insurance,* for example.

Account # The vendor's bank account number.

Check Digit The check digit used by the bank.

DFI Qualifier If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the DFI ID field.

- *Transit Number:* The DFI ID is exactly 9 digits, plus check digit calculation.
- *Swift ID:* The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code.
- *CHIPS ID:* The DFI ID is 3 or 4 digits.
- *Canadian Bank Branch/Institute* and *Mutually Defined:* No validation for DFI ID.

The DFI Qualifier determines the format of the bank's DFI ID.

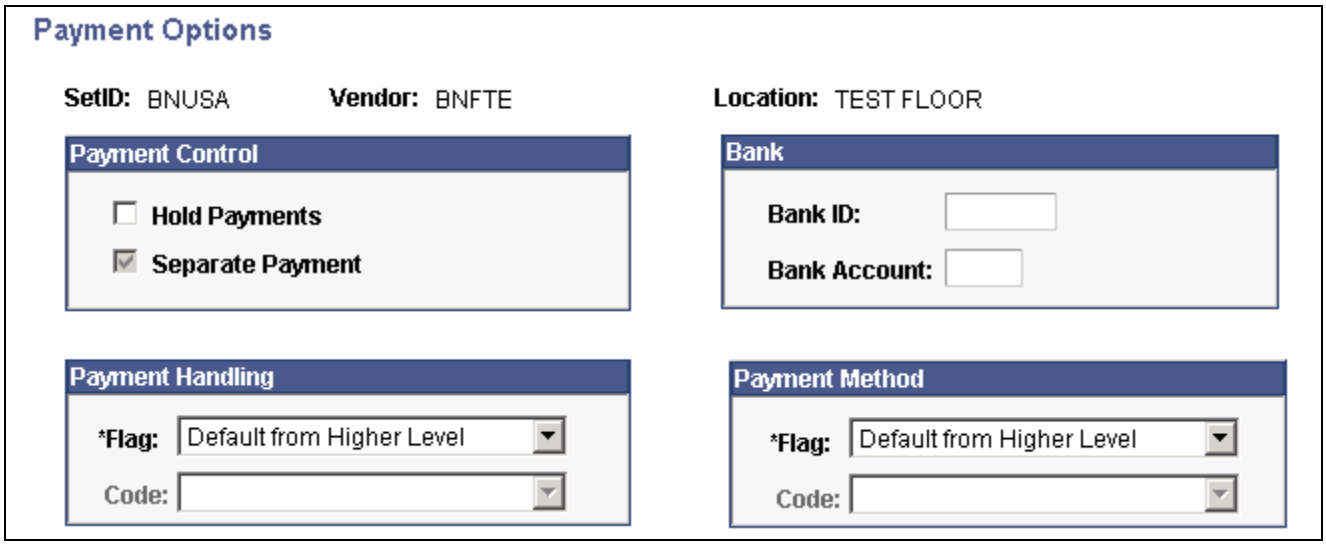
DFI ID The bank's DFI ID. The format is determined by the value displayed in the DFI Qualifier field.

Bank Address Select Bank Address for the Bank Address page.

Phone Details Select Phone Details for the Phone Details page.

Entering Payment Processing Information

Access the Payment Options page.



Payment Options page

Payment Control

Hold Payments If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.

Separate Payment If this check box is selected, PeopleSoft Payables creates a separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Bank ID The code for the bank from which you want to make payments for this vendor.

Bank Account The account from which payments will be made to this vendor.

Payment Handling

Flag This field determines the payment handling instructions.

- *Default from Higher Level:* The payment handling instructions for the vendor come from the control hierarchy.
- *Specify at this Level:* The payment handling instruction for the vendor appears in the Code field.

Code If you select Specify at this Level in the Flag field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor:

- *High Dollar Processing.*
- *Internal Distribution.*
- *Regular Payments.*
- *Route to Purchasing.*

Payment Method

Flag This field determines the payment method:

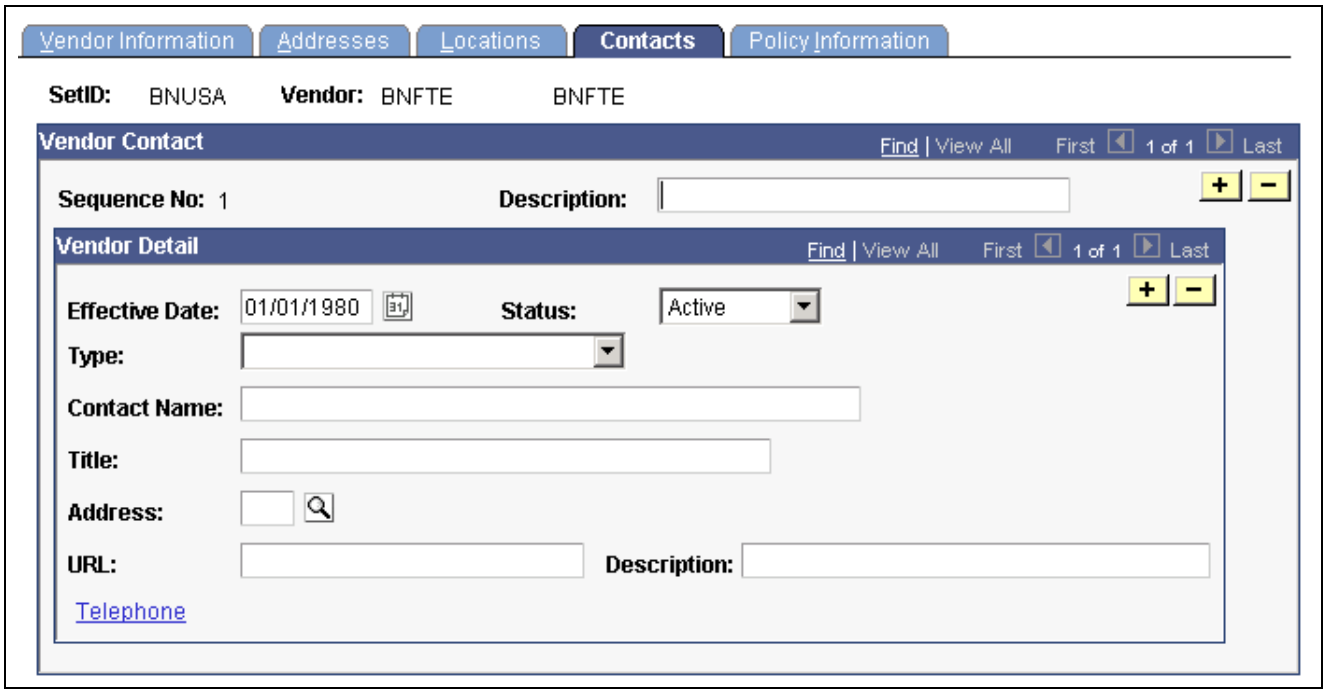
- *Default from Higher Level:* The payment method for the vendor comes from the control hierarchy.
- *Specify at this Level:* The payment method for the vendor appears in the Code field.

Code If you select Specify at this Level in the Flag field, this field displays the payment method for this vendor:

- *Automatic Clearing House.*
- *Customer Initiated Draft.*
- *Direct Debit.*
- *Draft - Customer EFT.*
- *Electronic Funds Transfer (EFT).*
- *Giro - EFT.*
- *Giro - Manual.*
- *Letter of Credit.*
- *Manual Check.*
- *System Check.*
- *Treasury Wire Flat File.*
- *Vendor Initiated Draft.*
- *Wire Report.*

Entering Vendor Contact Information

Access the Contacts page.



Vendor Information - Contacts page

Sequence No (sequence number) This number is automatically assigned to this contact.

Type Select the type of contact.

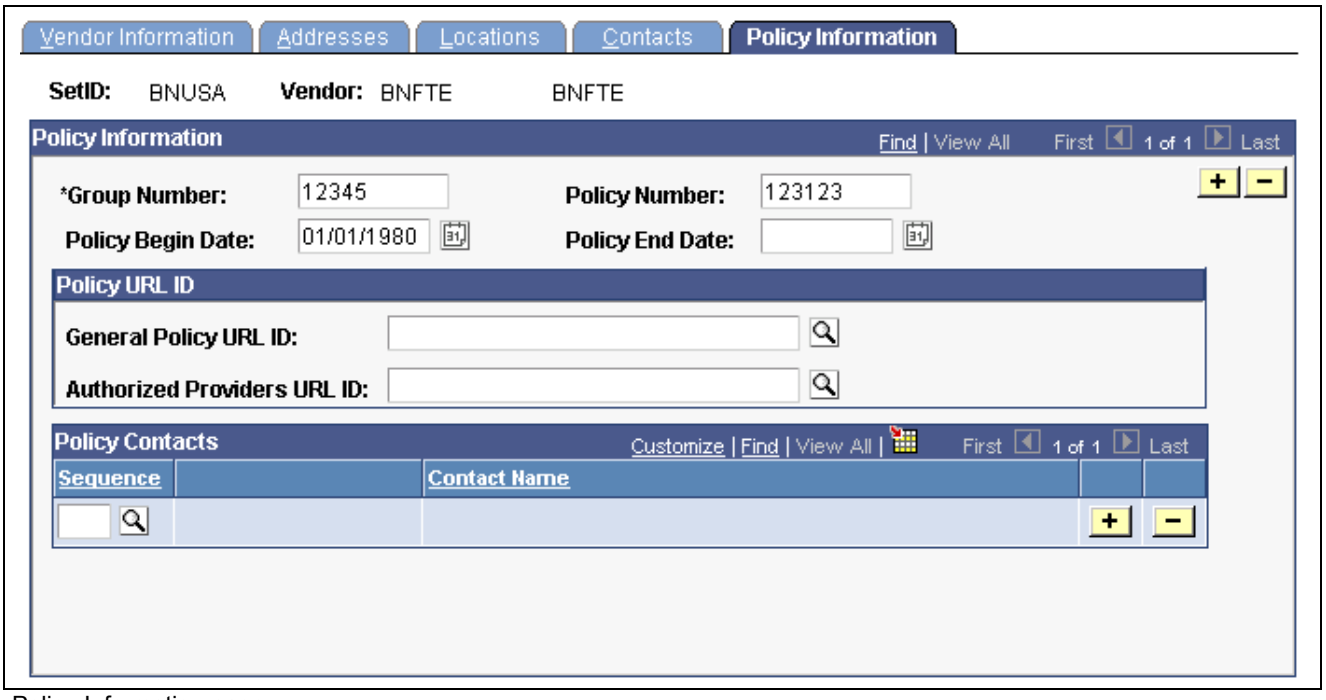
Address Select one of the addresses that you entered on the Addresses page.

URL Enter the contact's website address.

Telephone Click this link to display the Provider/Vendor Table - Contacts: Telephone page.

Entering Benefit Policy Information

Access the Provider/Vendor Table - Policy Information page.



Policy Information page

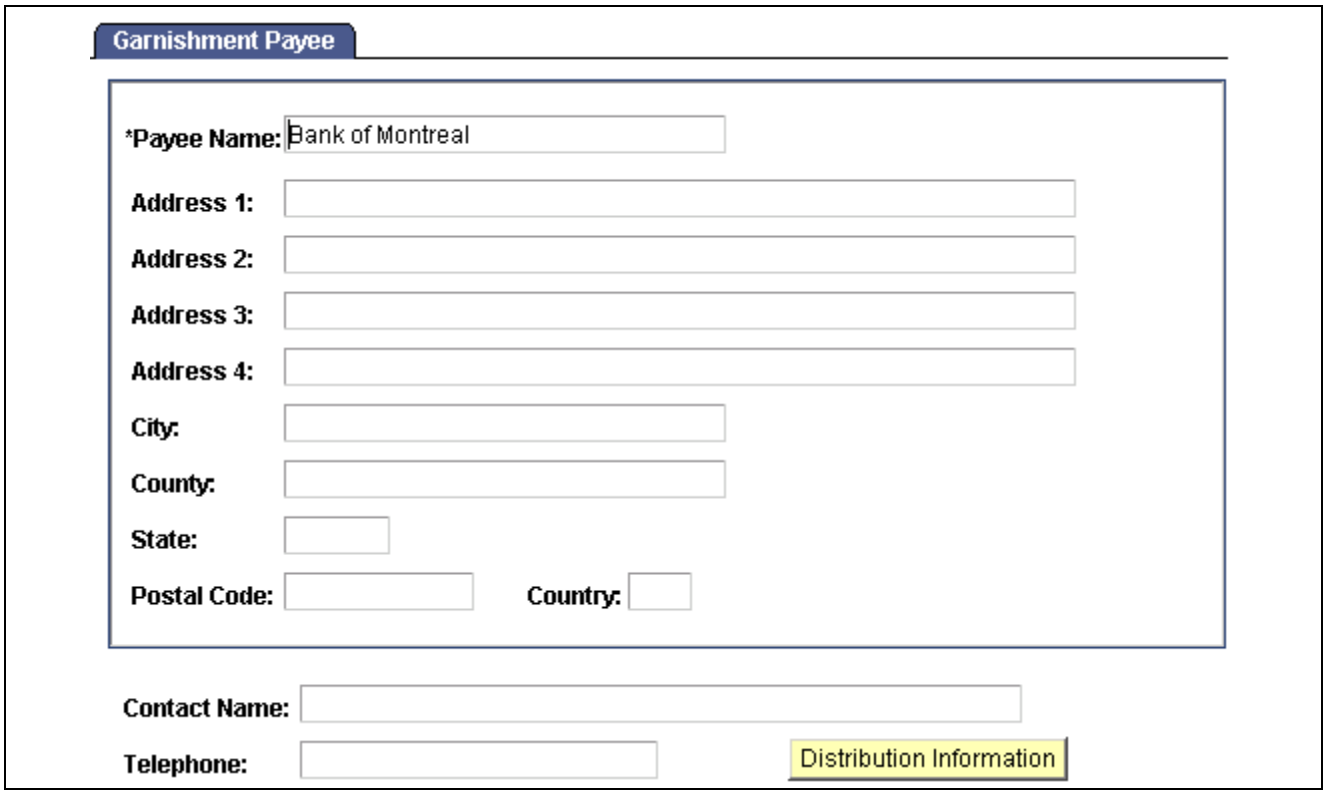
General Policy URL ID Select the vendor's website address that provides general policy information.

Authorized Providers URL ID Select the vendor's website address that contains a list of authorized participating providers

Sequence Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the Contact Name automatically appears.

(USF) Entering Garnishment Payee Contact Information

Access the Garnishment Payee page.

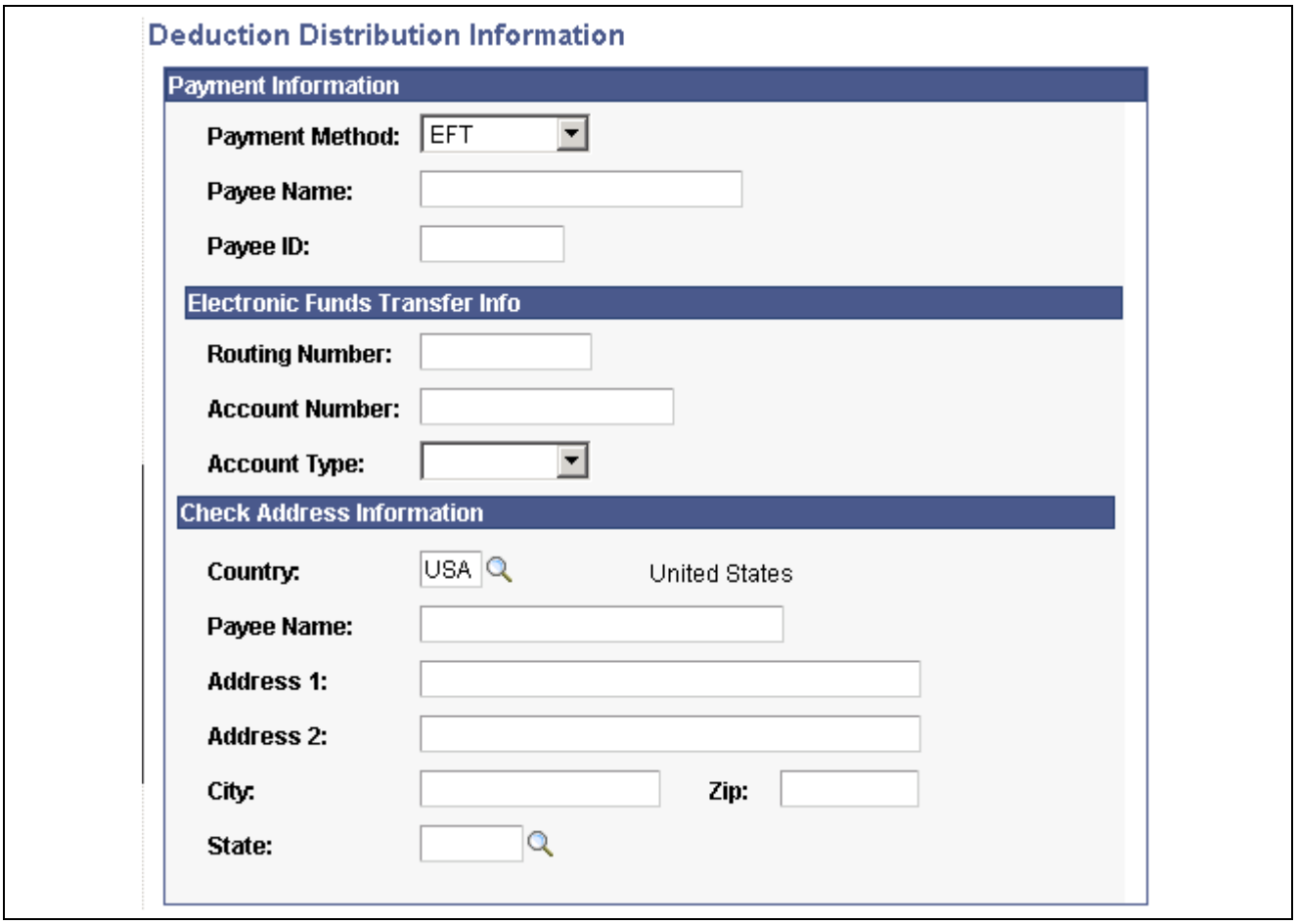


Garnishment Payee page

Distribution Information Click this button to access the Deduction Distribution Information page.

(USF) Entering Garnishment Payee Distribution Information

Access the Deduction Distribution Information page.



Deduction Distribution Information page

Enter the payment information.

CHAPTER 24

Setting Up Group Definitions and Security

This chapter provides an overview of group build and discusses how to:

- Set up group definitions.
- Set up group security.

Understanding Group Build

This section discusses how to:

- Use the group build feature.
- Create a group.

Using the Group Build Feature

The Group Build feature provides a standard way to create groups of people in HRMS. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 though 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Base Compensation and Budgets module. You define the group only once.

You can define groups in Group Build and use those groups in:

- PeopleSoft Enterprise Payroll for North America
- PeopleSoft Enterprise Benefits Administration
- PeopleSoft Enterprise Stock Administration
- The following PeopleSoft Enterprise Human Resources business processes:
  - Base Compensation and Budgeting
  - Salary Forecasting for France *(La Masse Salariale)*
  - Total Compensation Reporting
  - Variable Compensation
  - Employee Review
  - Training Administration

- Collective Labor Management

Creating a Group

Creating a group in PeopleSoft HRMS involves three steps. These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft HRMS:

1. Defining the population that belongs to the group.
2. Setting up group security.
3. Refining dates and other application-specific parameters in individual PeopleSoft applications (if necessary).

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.
- Set up the group's date parameters in the Planning Salaries business process.

Note. To use the same review group later in the Variable Compensation business process, just link the existing group ID to a node in the Variable Compensation Group Tree in the Variable Compensation business process.

Groups for Variable Compensation

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID NOGROUP is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID = "NOGROUP" in the Group Build application.

Setting Up Group Definitions

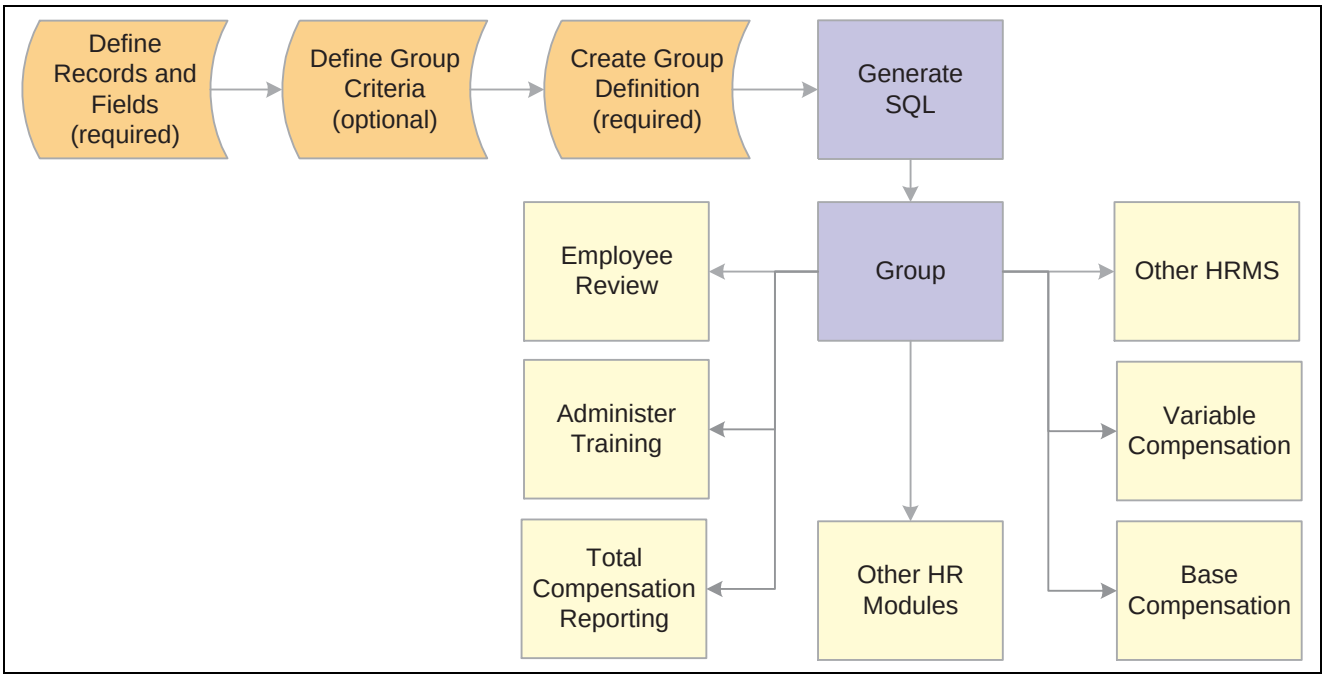
To set up group definitions, use the Group Build Records and Fields component (GB_REC_FIELD), Group Criteria component (GB_CRITERIA_TABLE), Group Build - Group Definition component (GB_GRP_DEFN_TABLE), and Group Build from Co./Dept. component (RUNCTL_GBP003).

This section provides an overview of group definitions and discusses how to:

- Define a group criteria.
- Attach a group criteria ID to the group definition.
- View records, fields, values and operators for a group.
- Define records, fields and field values for a group.
- View and sort group members.
- Create groups from departments.

Understanding Group Definitions

This graphic shows the steps involved in creating a group.



Steps in setting up group definitions

To define a group's population:

1. (Required) On the Group Build Records and Fields component (GB_REC_FIELD), select the fields for each record available to make them available to create group criteria on the Group Criteria page (GB_GRP_CRIT1_TBL) and Group Definition page (GB_GRP_DEF2_TBL).

   See Chapter 24, "Setting Up Group Definitions and Security," Selecting Fields For Use in Group Criteria and Definitions, page 544.

2. (Optional) Create a group criteria on the Group Criteria page.

   Group criteria are like building blocks of records and fields that you can use repeatedly to create different groups. For example, if your organization operates several business processes based on workers' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

Record Name	Field Name
Job	Department
Job	Union Code

   See Chapter 24, "Setting Up Group Definitions and Security," Defining a Group Criteria, page 545.

3. (Optional) Attach a group criteria ID or query to the group definition on the Group Profile page (GB_BRP_DEFN1_TBL).

   On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.

   - Using a group criteria ID

     If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can refine the group even further by attaching a query definition. However, you can use only one group criteria per group.

- Using PeopleSoft Query

  If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the thirty-two records that are available through the Group Criteria page or Group Definition page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.

See Chapter 24, "Setting Up Group Definitions and Security," Attaching a Group Criteria ID to the Group Definition, page 545.

4. (Required) Define the group by selecting records, fields, and field values on the Group Definition page.

   If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Criteria. You can also add any other records, fields, and values that you want to include in the group's definition. If you've included a query in the group definition, you can't make any further selections on the Group Definition page.

   You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

See Chapter 24, "Setting Up Group Definitions and Security," Defining Records, Fields and Field Values for a Group, page 548.

Note. Only the fields that you select on the Group Build Records and Fields component are available on the Group Definition page.

Note. Once you have saved a Group ID, you must give yourself access to that group on the Security By Group page (GB_GRP_SEC_TBL) or Security By Operator page (GB_GRP_SEC_TBL) or else you will be unable to access the group in the Group Build - Group Definition component (GB_GRP_DEFN_TABL).

See Chapter 24, "Setting Up Group Definitions and Security," Setting Up Group Security, page 553.

See Also

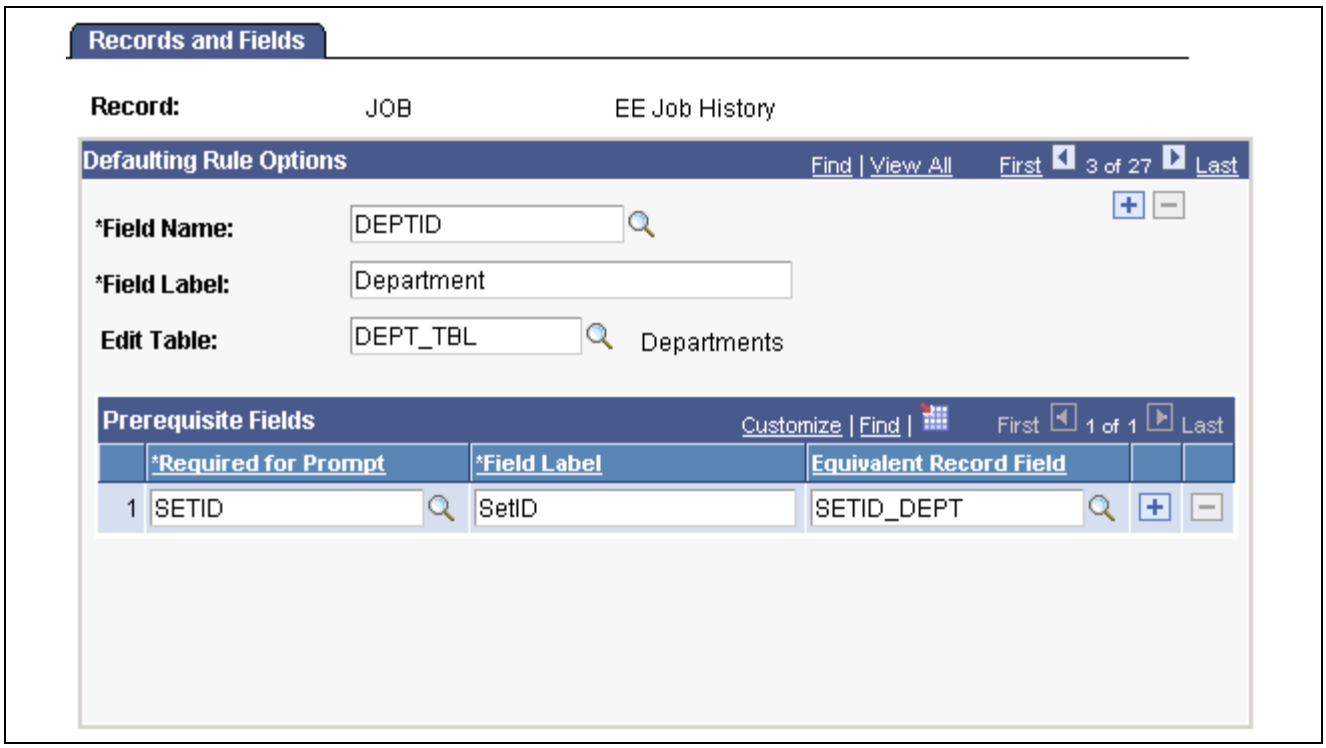
Enterprise PeopleTools PeopleBook: PeopleSoft Query

Pages Used to Define Group Criteria

Page Name	Object Name	Navigation	Usage
Records and Fields	GB_REC_FIELD	Set Up HRMS, Common Definitions, Group Build, Group Build Records and Fields, Records and Fields	For each record used in Group Build, select fields (and the necessary prerequisite fields) for use on the Group Criteria page and Group Definition page.
Group Criteria ,	GB_GRP_CRIT1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Criteria	Define the records and fields that you want to use to create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.
Group Criteria - Comments	GB_GRP_DEF1_SEC	Click the Comments button on the Group Criteria Definition page.	Enter free-form comments about a Group Criteria definition.
Group Profile	GB_GRP_DEF1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Profile	Attach an existing group criteria ID and/or attach a query to a group definition. To attach a group criteria ID or query to the group definition, you must already have created the group definition.
Group Build Definition View	GB_GRP_DEF1_SEC	Click the Comments button on the Group Profile page.	View the records, fields, values, and operators that you've defined for the group.
Group Definition	GB_GRP_DEF2_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Definition	Define the records, fields, and field values to associate with a group. To attach a Group Criteria ID or a query to the group, you must have defined the Group Criteria and entered its ID on the Group Definition - Group Profile page.
Group Result	GB_GROUP_RES_SEC	Access from the Group Definition page.	View and sort the members of the groups that you've built on the Group Build pages.
Group Build From Co. & Dept (group build from company and department)	RUNCTL_GBP003	Set Up HRMS, Common Definitions, Group Build, Group Build From Co./Dept.	Translate your existing company and department structure into group format.

Selecting Fields For Use in Group Criteria and Definitions

Access the Records and Fields page.



Records and Fields page

For the record you selected on the search page, choose the fields you want to make available for creating group criteria on the Group Criteria page. The system makes only those fields that you select here available on the Group Criteria page.

Defaulting Rule Options

Field Name and **Field Label** — Select the field name that you want to have available for use as group criteria. After you select a field name, its description appears in Field Label; you can change this description.

Edit Table — Select the field's edit table—the table from which the field is prompted.

Prerequisite Fields

Required for Prompt and **Field Label** — Select the field that prompts for the group criteria fields, if required.

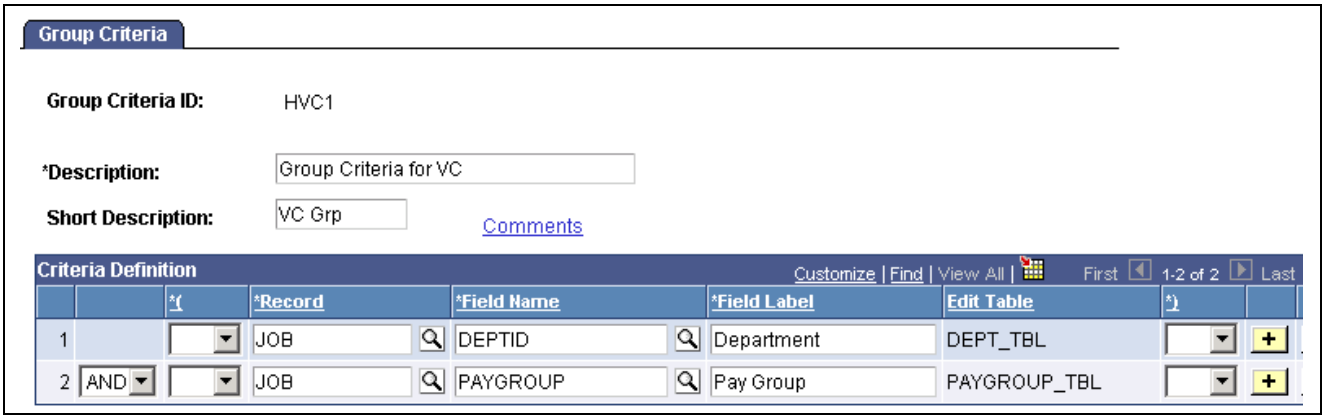
For example, if the defaulting rules field is Department, select SETID because before you can select a department, you need to select the department's setID. The appropriate Field Label and Equivalent Record Field appear when you select the Required for Prompt field.

Equivalent Record Field — Select the Required for Prompt field's equivalent. For example, the department's equivalent of SETID is SETID_DEPT

Sometimes the equivalent field is the same as the Required for Prompt field or there is no equivalent field. If there is no equivalent field, leave this field blank.

Defining a Group Criteria

Access the Group Criteria page.



Group Criteria page

AND/OR This field appears only if you add a second row of data to the page. Use it to tell the system how to process the records and fields that you enter on this page. Values are *AND* (the default) and *OR*.

(Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is *none*.

Record Select the record name to include in the group criteria definition. The system displays a list of the records you made available on the Group Build Records and Fields component.

Field Name Enter the field name to include in the group criteria definition. The system displays a list of the fields you made available on the Group Build Records and Fields component for the record that you selected in the Record field.

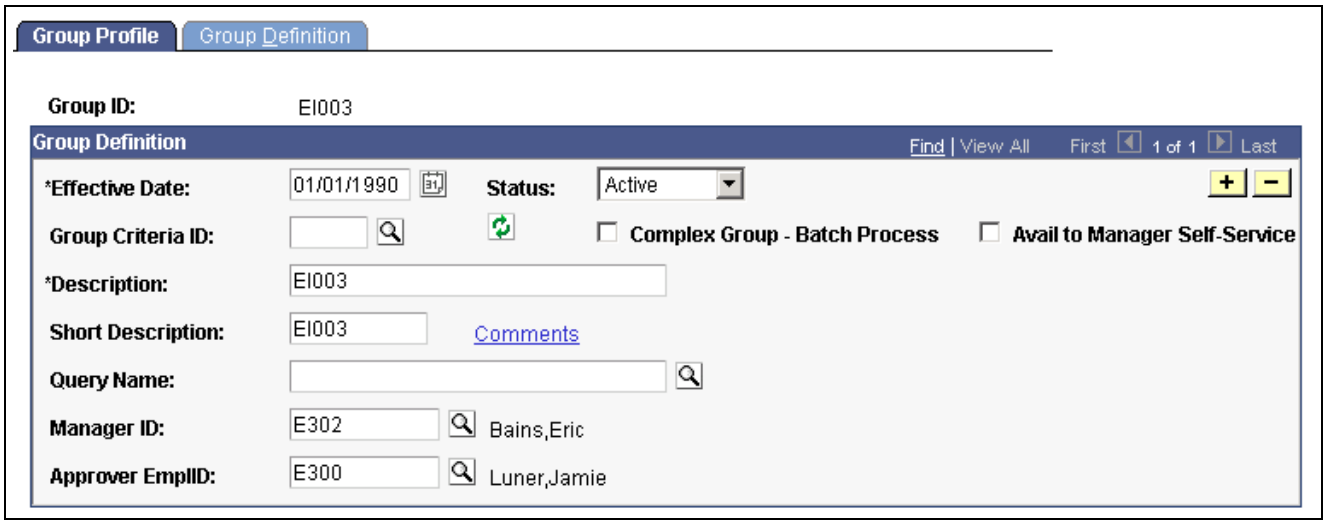
Field Label The system fills in this field when you press TAB to move out of Field Name. You can change the entry.

Edit Table The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of Field Name.

) Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Attaching a Group Criteria ID to the Group Definition

Access the Group Profile page.



Group Profile page

Group Criteria ID To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.

If you changed the Group Criteria ID, click the Refresh button to repopulate the Group Definition page with new values.

Complex Group - Batch Process Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes.

PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page.

Avail to Manager Self-Service Select this check box if you plan to use Group ID as an access type for any manager self-service transaction.

Comments Click this link to enter free-form comments on the Group Definition - Group Build Definition View page. Below the Comments area, the system displays the records, field names, operators, and values that you have defined for this group.

Query Name To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank.

Warning! When you access the list of options in this field, all existing queries that include the record GB_QRY_LINK_VW appear. However, the Group Build process works only with queries that have the fields EMPLID, EMPL_RCD, EFFDT, and EFFSEQ. If you select a query that does not contain those fields, the system will not display the Launch Count and Group Visualize buttons.

Manager ID Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200, enter the department manager's ID here. You can also use this field to designate the leader of a project team.

Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups.

If you selected the Avail to Manager Self-Service check box, Manager ID is required.

Approver EmplID (approver employee ID)

If you're planning to use this group in the Variable Compensation Administration by Groups business process, enter the employee ID of the person who approves awards for this group. The system displays a list of values.

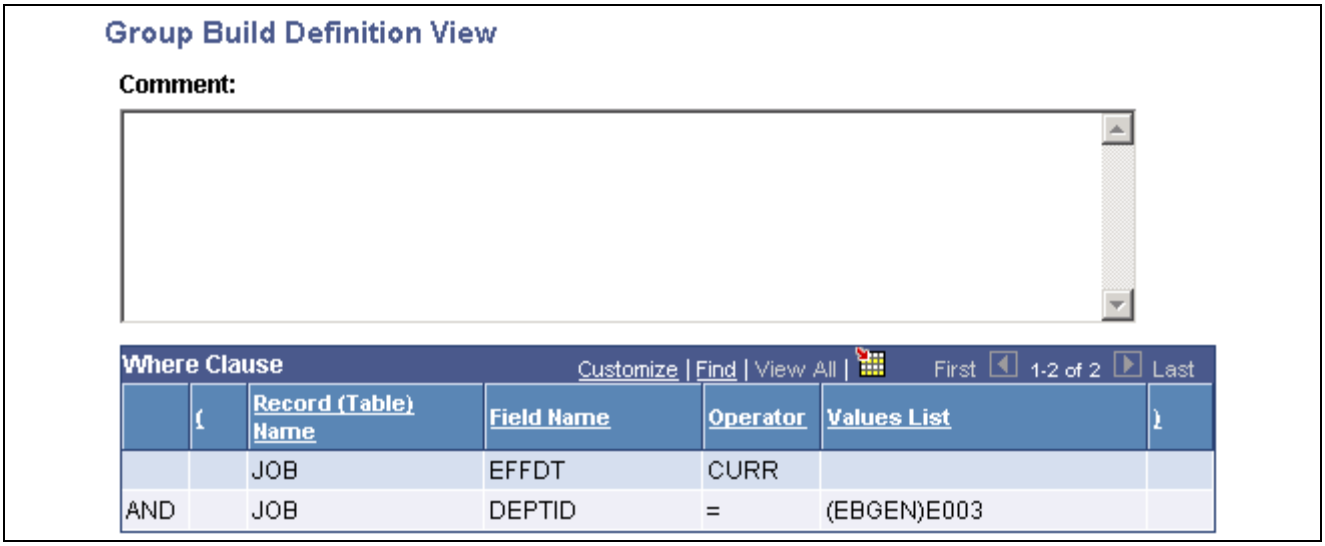
If you selected the Avail to Manager Self-Service check box and are using workflow with self-service transactions, Approver EmplID is required.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Viewing Records, Fields, Values and Operators for a Group

Access the Group Build Definition View page.



Group Build Definition View page

Where Clause

Enter a where clause (optional). See the field descriptions on the Group Criteria page.

See Chapter 24, "Setting Up Group Definitions and Security," Defining a Group Criteria, page 545.

Using Queries to Refine Groups

Use PeopleSoft Query to refine a group in the Group Build component to access many more tables than the thirty-two tables that are available in the Group Build component.

Defining Queries for Group Definitions

When you define a query to use in group definitions, the following rules apply:

- The first record you insert into the query must be the Group Build view (GB_QRY_LINK_VW).

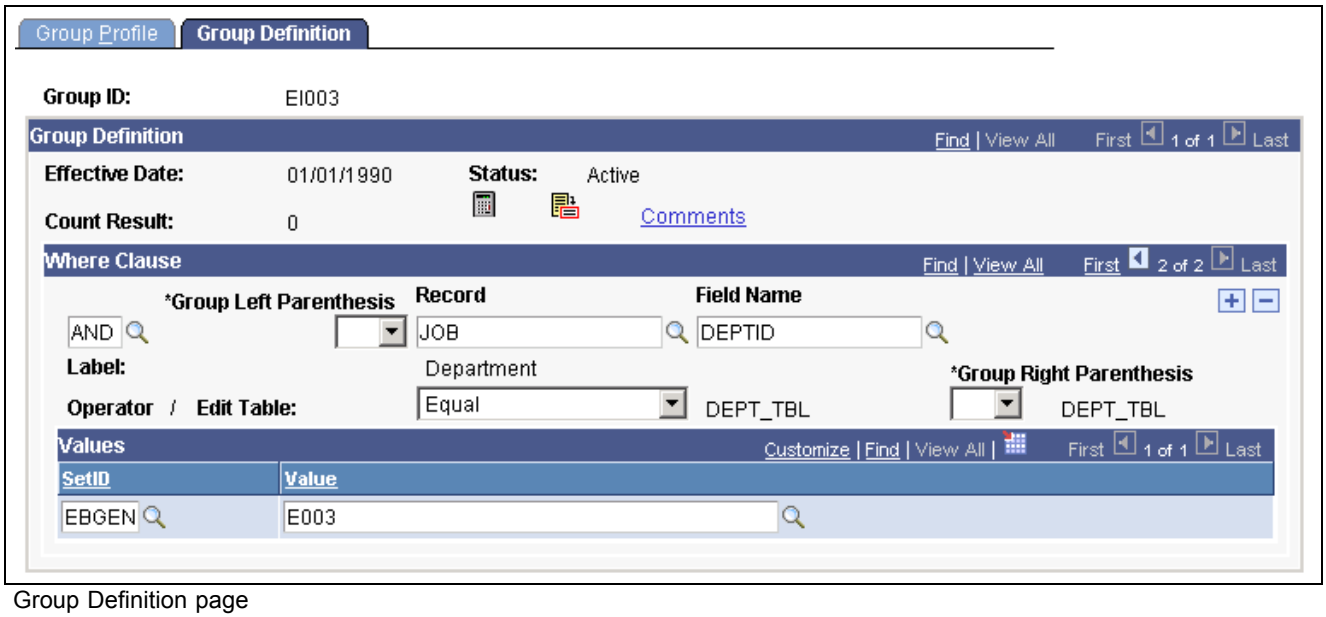
The system uses this view to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.

- You must select the following four fields from the GB_QRY_LINK_VW record:
  - EMPLID
  - EMPL_RCD
  - EFFDT
  - EEFFSEQ
- You must have at least one criterion for a record that you add in PeopleSoft Query.
- You can't define fields that are returned by the SQL statement.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You can't use a prompt as an expression.

  You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).
- The maximum length of the expression is 254 characters.

Defining Records, Fields and Field Values for a Group

Access the Group Definition page.



Group Definition page

You can use this page in combination with the Group Criteria Definition - Group Criteria page and the Group Definition - Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

The system populates the Group Definition page with the record and field names from the Group Criteria page. You can't change the record and field names on this page. The system displays the Imported from Group Criteria check box when the fields are imported from the group criteria. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Criteria page. You can add more records, field names, and field values to the definition.

- If you entered a query on the Group Profile page.

  You can't refine a group that is based on a query.

- If you aren't using a Group Criteria ID or a query.

  Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.



After you save the page, click the Launch Count button to compute how many members are in the group. If you selected the Complex Group - Batch Process check box on the Group Definition - Group Profile page, clicking Count sends the group to PeopleSoft Process Scheduler to be generated.

If this is a complex group that you have already generated, clicking Count retrieves the number of rows in the group.

Count Result When you click the Count button, the system displays the number of members in the group. If you used effective-dated records in the group definition, the group might include more than one row of data per employee. Each data row counts as one item in the Count Result.



Click the Group Visualize button to build the group and to access the Group Result page, where you get a list of all group members.

Comments Click this link to enter comments about the group on the Group Definition - Group Build Definition View page.

Record Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Criteria definition from the Group Definition - Group Profile page, you can't change the entry.

Field Name Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the Record field. If you entered a group criteria ID on the Group Definition - Group Profile page, the system populates this field, and you can't change the entry.

Label The system populates this field when you move out of the field.

Operator Define the field values to include in or exclude from the group. See the following Valid Operators table.

Note. *(JPN)* If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job − Effective Date to *Current.* If you select *Current,* you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to *Current* here, you can run processes to extract other than current data by using the As of Date on the process page.

Edit Table The system uses edit tables to validate the data that you entered in certain fields. If the Field Name that you entered is linked to an edit table, the system populates this field.

Note. If the Field Name that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.

Value Select a field value from the list.

Valid Operators

Operator	Description
<	Less than.
<=	Less than or equal to.
<>	Less than or greater than.
=	Equal to.
>	Greater than.
>=	Greater than or equal to.
Between	
Current	
EFFDT<	Effective date is less than.
EFFDT<=	Effective date is less than or equal to.
EFFDT>	Effective date is greater than.
EFFDT >=	Effective date is greater than or equal to.
In List	
Is Null	Field value equals 0.

Operator	Description
Like	
Max	Maximum.
Min	Minimum.
Not Btw	Not between.
Not Equal	
Not In	Not In List
Not Like	
Not Null	Field value does not equal 0.

Defining Groups with Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data
- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

  For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

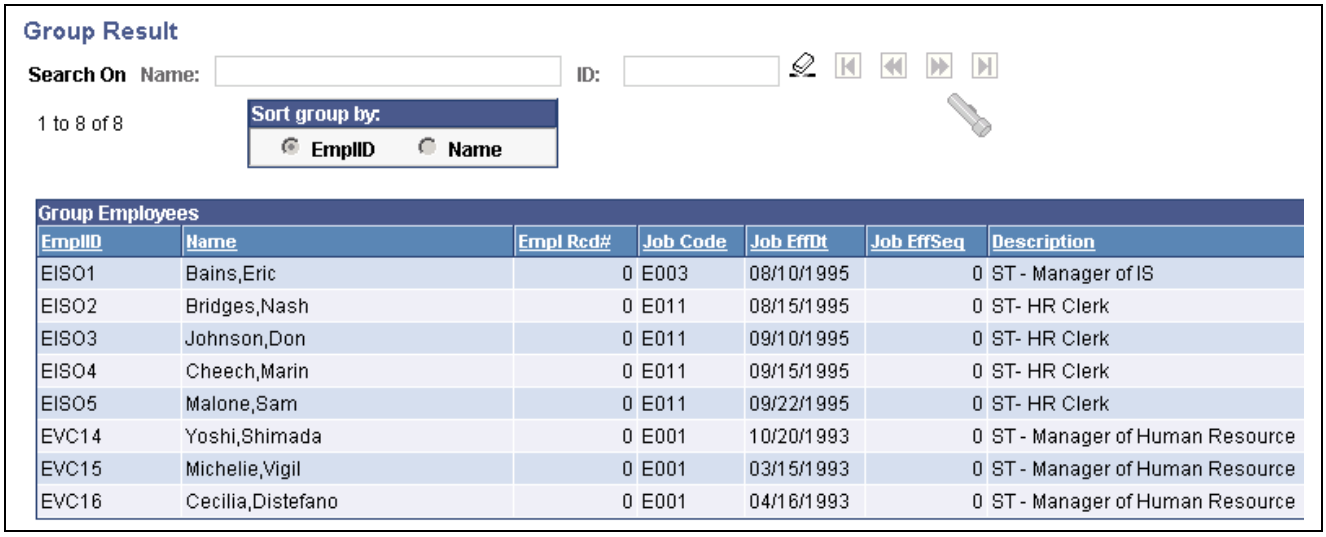
  For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

Operator	Description
Effdt<=	Effective date is less than or equal to.
Effdt>=	Effective date is greater than or equal to.
Effdt<	Effective date is less than.
Effdt>	Effective date is greater than.

Viewing and Sorting Group Members

Access the Group Result page.



Group Result page

Using Group Member Chunking Controls

Because the number of group members could be very large, the system loads members into this page in chunks. You can determine the number of rows in a chunk in the Maximum Number of Rows for Scrolling field on the Installation Table. You manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

Important! Group Build automatically joins the JOB, COMPENSATION, PERSON, and PER_ORG_ASGN tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.

When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition JOB.EFFDT <= Given Date is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Note. Using the Kanji character set in a non-Unicode database will disable the Sort by Name feature.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered.

You can use the wild card *%* to help select a record. For example, to search for all employees named John enter *%John.*

ID (employee ID) Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.

Sort Group by Select whether you want the members to appear in order by EmplID (employee ID) or Name.



Click the Search button to display the results of a new search. The field to the left of the Search button shows which rows are visible compared to the total number of rows. For example, *1 to 4 of 4* means that rows 1 through 4 are displayed out of a total of 4 rows.



Click the Refresh Search Fields? button to clear all previously entered search criteria from the filter fields.

Creating Groups From Departments

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides an automated process for translating your departmental structure into group format. On this page, you create new groups that correspond to your existing company, setID, and department structure. For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new Group USA 10200.

Setting Up Group Security

To set up group security, use the Group Security Default component (GB_GRP_DFT_TABLE), Security By Group component (GB_GRP_SEC_TABLE), and Security By Operator component (GB_GRP_SEC_TABLE).

This section provides an overview of group security and discusses how to:

- Set up default component access.
- Set up security by group.
- Set up security by operator.

Understanding Group Security

Because you can group people together in any manner that suits your needs, including across companies or departments, groups have their own security structure that is separate from, and overrides, data permission security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes people in department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

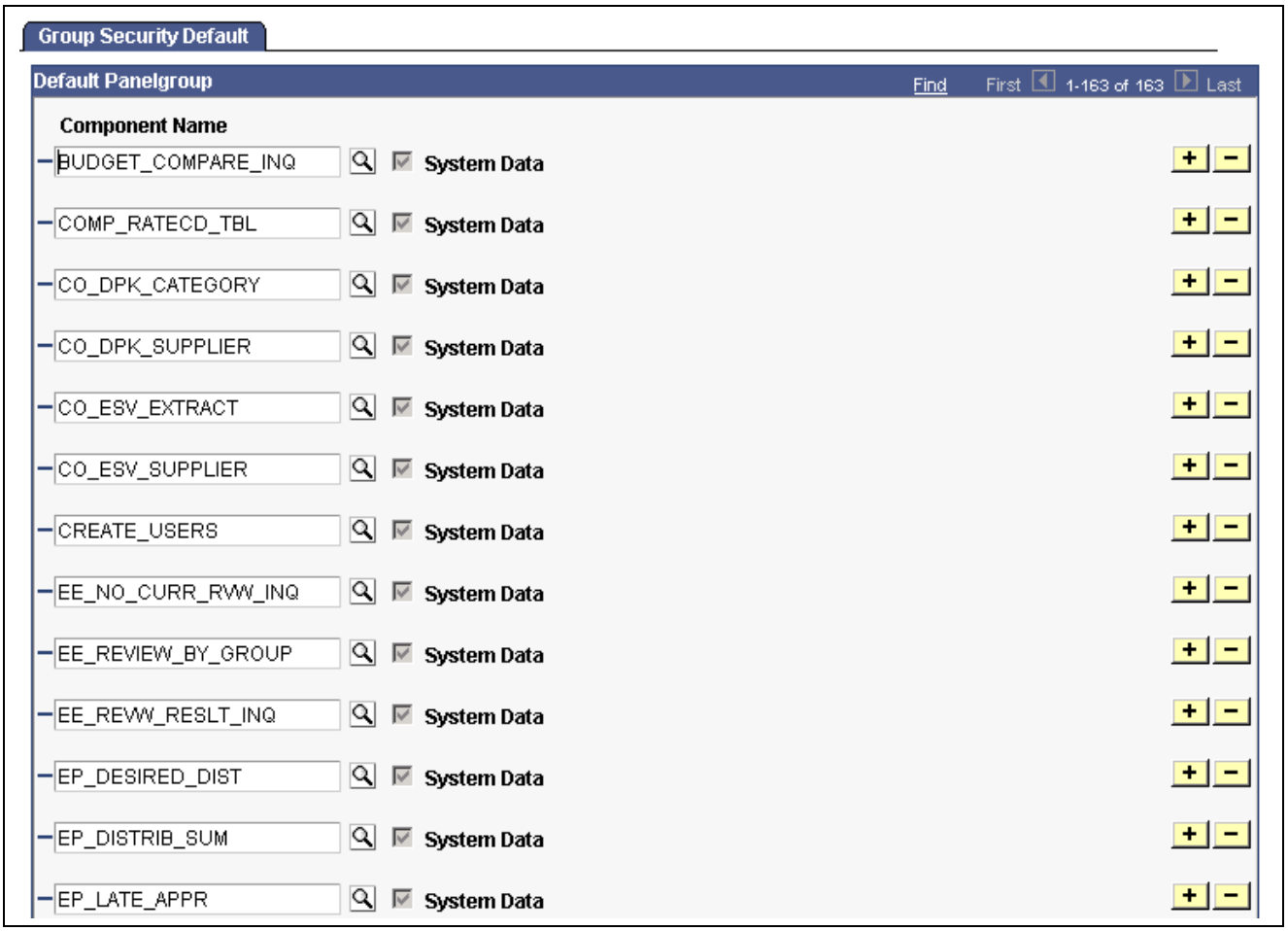
Note. User profiles must have an associated person in order to be given security access to groups (the system will not list user IDs that don't have a person associated with them). This ensures that the security is assigned to a person and the activities involving the group can be tracked by the person. Assign people to user profiles on the User Profiles component in PeopleTools security.

Pages Used to Set Up Group Security

Page Name	Object Name	Navigation	Usage
Group Security Default	GB_GROUP_DFT_TBL	Set Up HRMS, Common Definitions, Group Build, Group Security Default	Manage group access to pages in your system. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Security By Group	GB_GRP_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security by Group	Control security access to a group and to components that are used by the group.
Security By Operator page	GB_OPR_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security By Operator	Control a users's security access to various groups and components.

Setting Up Default Component Access

Access the Group Security Default page.



Group Security Default page

Component Name The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups. This can occur in one of two ways:

- The page contains a field that prompts the user to supply a group ID.
- The page displays a list of people who belong to a particular group.

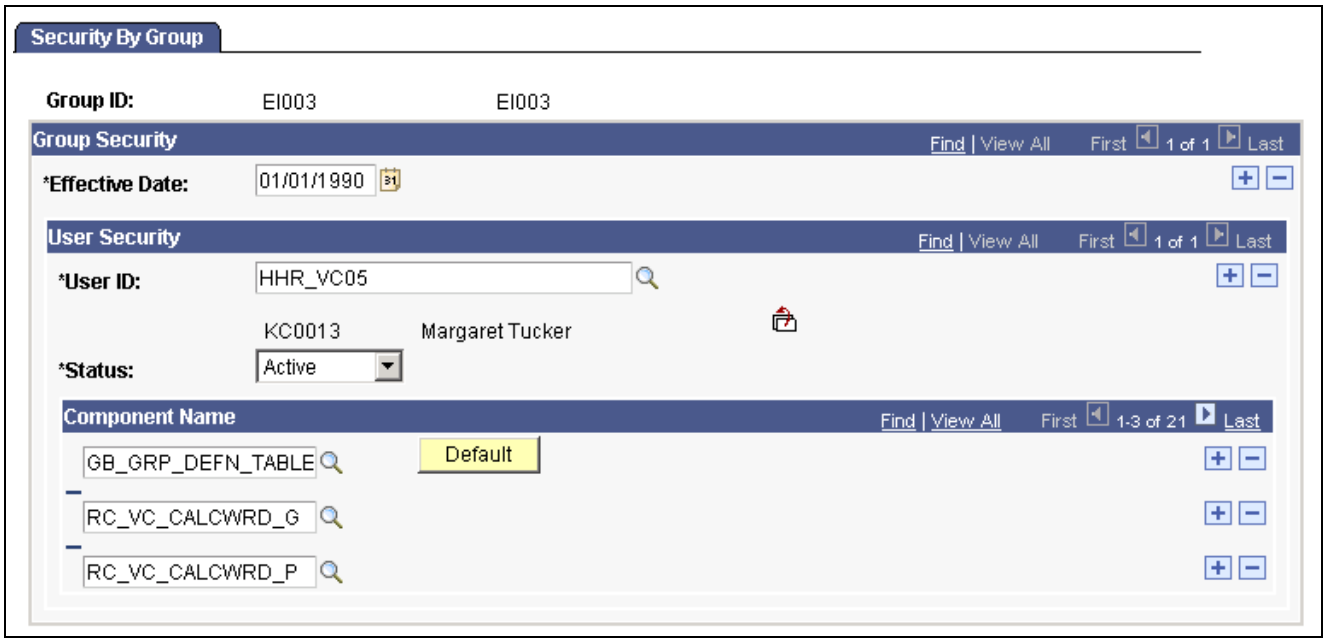
When you define group security for a particular group or user, you can import this default list into the Security By Group and Security By Operator pages. Then you can selectively delete components to make them unavailable to that group or user.

To keep a particular component from appearing on the Security By Group or Security By Operator page, delete its name from the list.

System Data Select to specify whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and cleared if the component is modified. You can't change this field.

Setting Up Security By Group

Access the Security by Group page.



Security By Group page

Group ID The ID of the group for which you will control security. You can't change this field.

Effective Date The date when the security configuration will take effect. The system defaults to today's date. Change the date to grant security access as of a different date.

User ID Enter the ID of a user whose group access you want to set up change. The system displays a list of valid user IDs.

If you know a person's ID but not the matching user ID, click the Get Employee ID button to search for the person's user ID. The system displays the Search Operator ID box. Enter the ID and click OK to add the person's user ID to the user list, if it isn't already on the list.

If you don't know the person's ID, leave EMPLID blank and click the list box arrow to search for it. The system displays a Valid Values page that you can use to search for the ID you want.

Status Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.

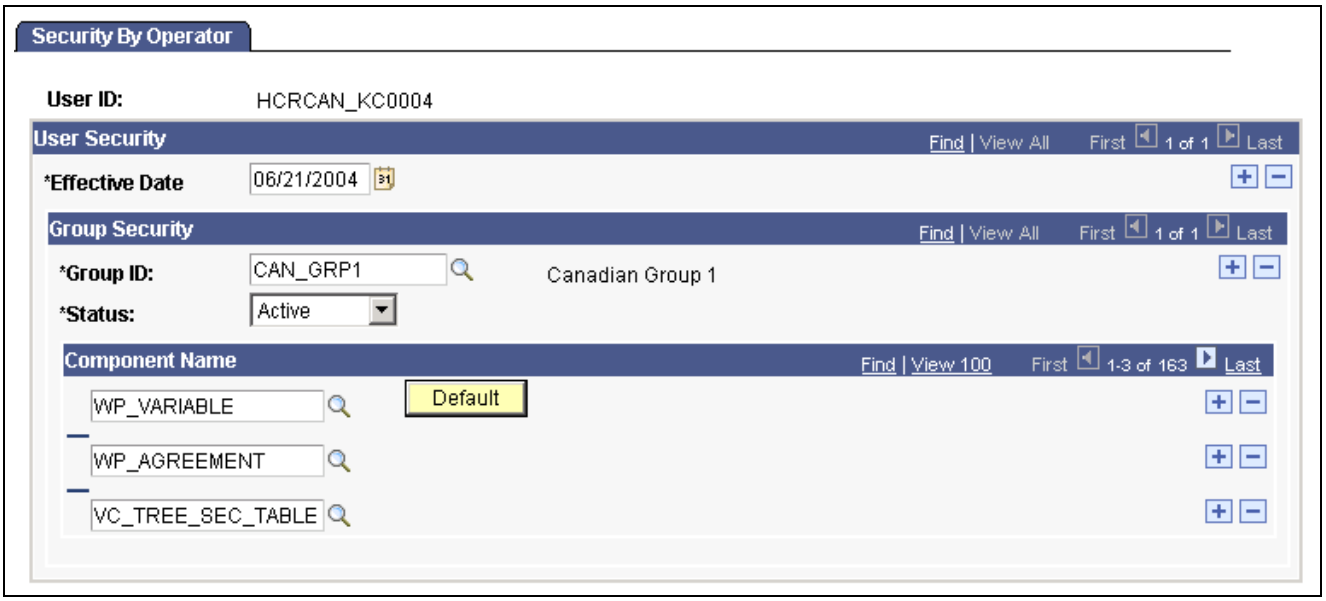
Component Name Enter the name of the component that you want to include in the user's security status. The status that you assign to the user will apply to that component. The system displays a list of valid values.

Default Click this button to assign this user access to the current group from any component that listed on the Group Security Default page. The system displays the components you've selected.

See Chapter 24, "Setting Up Group Definitions and Security," Setting Up Default Component Access, page 554.

Setting Up Security By User

Access the Security By Operator page.



Security By Operator page

User ID The user ID of the user whose security access you set on this page. You can't change this field.

Effective Date The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.

Group ID Enter the ID of the group to which you want to control this user's access.

Status Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.

Component Name Enter the name of a component to set the user's security access in this component to the group that you entered in the Group ID field.

Default Click to assign the user's security access for the group that you entered in the Group ID field to all components listed on the Group Security Default page. The system displays the components you've selected.

See Chapter 24, "Setting Up Group Definitions and Security," Setting Up Default Component Access, page 554.

CHAPTER 25

Setting Up and Working with Groups

This chapter provides an overview of group build discusses how to:

- Refine groups in PeopleSoft applications.
- View group results.
- Run group build reports.
- Work with group versions.
- Purge group results.
- Build applications or batch programs that include group build functions.

Refining Groups in PeopleSoft Applications

The refinement of group members takes place at the application level. You can define a group as of:

- A point in time.
- A period of time.

Viewing Group Results

This section provides an overview of group membership and discusses how to view complex group results.

Understanding Group Membership

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides an inquiry page and reports that you can use to view group members.

See Also

Chapter 25, "Setting Up and Working with Groups," Running Group Build Reports, page 560

Page Used to View Complex Group Results

Page Name	Object Name	Navigation	Usage
Complex Group Results Summary	RSLT_SMRY_PNL	Set Up HRMS, Common Definitions, Group Build, Complex Group Results Summary Panel	View the status of the complex groups that you created in the Group Definition component. You must already have run the background process to create the group.

Viewing Complex Group Results

Access the Result Summary Panel.

You can designate any group as a complex group by selecting the Complex Group - Batch Process check box on the Group Definition - Group Profile page. The system creates complex groups by background process and notifies you when processing is complete.

Group ID Enter the ID of the group whose members you want to view.

Group As Of Date Since group definitions are effective-dated, you may have defined several versions of the same group for different dates. Enter the effective date to specify the group definition that is valid as of this date. The report lists the members who belong to the group as of the current date.

Running Group Build Reports

This section lists common elements.

Common Elements

Group ID Enter the ID of the group whose members you want to view.

As Of Date The report lists the members who belong to the group as of the current date, or as of the date you specify in the Refinement Date field.

Refinement Date If the group definition includes effective-dated records, enter the date for which you want the records run. For instance, you might want to run a group with an effective date of 1/1/1990, but run the effective-dated rows in the group as of 2/15/1998. In that case, you would select a Group As of Date of 1/1/1990 and a Refinement Date of 2/15/1998.

If you leave this field blank, the system will run the group as of the current date.

Pages Used to Run Group Build Reports

Page Name	Object Name	Navigation	Usage
Group Overlapping	RUNCTL_GBP001	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups.
Group Membership	RUNCTL_GBP002	Set Up HRMS, Common Definitions, Group Build, Group Membership	Run the Group Membership report (GBP002). This report lists the members of selected groups.

Purging Group Results

This section provides an overview of the group results and discusses how to:

- Purge usable results.
- Purge unusable results.

Understanding Group Results

Each time you generate and execute a group, the system stores the results in the Group Result Table. The next time you execute the same group, the system checks to see if the group's definition and date parameters have changed since the last time you ran the group. If they have, the system deletes the old results from the Group Results Table and saves the new results.

Pages Used to Purge Results

Page Name	Object Name	Navigation	Usage
Group Results Purge	RUNCTL_GBP004	Set Up HRMS, Common Definitions, Group Build, Group Results Purge	Delete (purge) the results of a previous version of a group from the Group Results Table.
Unusable Group Results Purge	RUNCTL_GBP005	Set Up HRMS, Common Definitions, Group Build, Group Unusable Group Results Purge	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Purging Usable Results

Access the Group Results Purge page.

The Group Results Purge process deletes *usable groups* —groups with results in the Group Results Table that are still in sync with the current Group Definition and can potentially be retrieved by the system.

Group ID Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

Purging Unusable Results

Access the Unusable Group Results Purge page.

The Unusable Group Results Purge process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

Building Applications or Batch Programs that Include Group Build Functions

This section discusses how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This section discusses what a developer must do to use Group Build in the application that he or she is building. (We refer to this application as the client application.)

Note. Please read this entire section before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

   Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build application. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table*.

   If you want a table for your application where you can add, delete, or modify rows, you must perform this optional step. Your table will be taken into account for the construction and purge processes of the Group Build application.

   There are two ways to set up your own table:

   a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

      This record becomes your client application result table.

b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab». For example, if your result table is defined as DEPTID, define your modified query as follows:

– All fields from GB_QRY_LINK_VW.

– All of your additional fields.

2. (Optional) Add two fields on the client application record to store the group ID and group as of date. If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

   In PeopleSoft Application Designer, add two fields to the client application record (MyClientModuleRecord):

   • The field GB_GROUP_ID for storing the Group ID.

     This field should prompt on GB_GROUP_TBL.

   • The field MyAsOfDate for storing the as of date of the group.

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.
   a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.
   b. Create a new field: MyClientModule_GEN_BTN.
   c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.
4. In PeopleSoft Application Designer, Include the work page GB_API_WRK in the client application component.
   a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.
   b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.
5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.
   a. Insert the view GB_QRY_LINK_VW (required).
   b. Insert the record(s) that are needed for joins and criteria.
   c. Write your query according to the Group Build limitations.

      See Group Build Query Limitations for Developers

   d. Add all necessary prompts on the criteria tab.

      Prompt values are bound using the GB_BIND API call.

   e. Verify that your query is PUBLIC.
   f. Save your query as MyDeveloperQueryName.
6. Add modified fields on the client application page.
   a. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.
   b. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.
   c. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.
7. Add PeopleCode to implement calls to Group Build API.

Warning! All calls to Group Build API must be done from level 0 of your client application page.

a. Make calls to Group Build API in the FieldChange PeopleCode event.

b. Set the PeopleCode Event Properties to Application Server.

c. Select Application Server on the PeopleCode Event Properties page.

See PeopleCode API Functions.

8. Implement PeopleSoft Security to see if a group can be used in the component.

a. GB_GROUP_ID field must be on the page, and the recordfield properties must be set to prompt table edit on Record GB_GROUP_SEC_VW.

b. Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on level 0 of the page. The fields must be display-only and hidden.

PeopleCode API Functions

This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode. Specifies which API group, query name for refinement, and results table to use.

- Specifies which group, query name, results table to use.

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name, result_table_⇒
name)
```

  - The parameter group_id is required.
  - The parameter AsOfDate is required.
  - The parameter query_name specifies a developer query name for refinement. It is optional. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).
  - The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

  - Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.
  - The parameter prompt_code must be defined as a prompt in the developer query.
  - The parameter value is required.

- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```

  - Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.
  - The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

```
&group_version_number = GB_EXEC(refresh_flag)
```

- This API generates and executes the SQL statement.
- It returns the version number of the generated group.
- If the parameter refresh_flag is set to *Y,* the SQL statement is generated each time you call the function. If the refresh_flag is set to *N,* the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.

• Deleting the content of the result table.

```
GB_DELETE()
```

• Disabling/enabling the generic workflow and the specific workflow.

```
GB_SET_JOB_WF(job_name)
```

- Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.
- The parameter job_name is optional.
- If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow section.
- Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).
- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
/* Use this instruction if you plan to use GB_GRP_RES_TBL */
GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.MyAsOfDate, «⇒
 », « ») ;
/* Bind all parameters for the default Query : The Effdt of JOB */
GB_BIND_DATE(Any Date ) ;
/* Execute the SQL and fill the group result table */
&MyVersion = GB_EXEC ( « Y » ) ;   /* <Y> Forces to rebuild the group even if one⇒
 is available */
* The list of employees for the group is now available for your own usage */
/* The code presented above populates the Group Result table GB_GRP_RES_TBL */
/* You can now use this record to populate your scrolls or can be used as a join⇒
 for a SQL Statement */
/* ADD YOUR CODE HERE  */
/* Clear the group result table only in the case you know the group will not be⇒
 used anymore*/
[GB_DELETE() ;]
```

Scenario 2

If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
/* Give your result table name to GB_DECLARE  (STEP 1 must have been previously⇒
 performed) and your Query Name if  you created one */
GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord. MyAsOfDate,⇒
 « MyDeveloperQueryName », «MyClientModuleResultTable ») ;
/* Bind all parameters for MyDeveloperQueryName */
/* Each prompt in MyDeveloperQueryName must be binded */
GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;
[…]
GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;
/* Or use local variable for binding */
GB_BIND(« :n », &MyLocalVarn) ;
/* Execute the SQL and fill the group result table */
&MyVersion = GB_EXEC ( « N » ) ;   /* <N> Don't rebuild the group if it is⇒
 available */
/* Employee group is now available for your module */
/* This populates the group result table MyClientModuleResultTable  */
/* You can now use this record to populate your scrolls or work on this table… */
/* ADD YOUR CODE HERE  */
/* Clear the group result table only in the case you know the group will not be⇒
 used anymore*/
[GB_DELETE() ;]
```

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This section discusses what a developer has to do to use Group Build in the application that he or she is building, using PeopleSoft Application Engine. (We refer to this application as the client application.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

   In this record, add:

- The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.
- The field VERSIONGBQDM.

3. In PeopleSoft Application Engine, create a new program .

   This program must contain:

   - A retrieval of parameters.

```
Step01.SQL:
%Select(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, AE_GBP002_AET.GB_⇒
REFINE_DATE)  SELECT GB_GROUP_ID  , GB_EFFDT  , GB_REFINE_DATE  FROM PS_RUN_⇒
CNTL_HR  WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

   - A call to Group Build PeopleCode API.

```
Step02.PeopleCode:
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
GB_SET_PANELGROUP("APPENGINE");   /* This is due to a tools issue and will⇒
 disappear as soon as the TPRD is closed */
GB_RESET();
&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, "", "");
&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);
AE_GB_API_AET.REFRESH_SW.Value = "N";   /* You can see that the REFRESH_FLAG is⇒
 set to “N”  Equivalent to GB_EXEC(“N”). As we can’t call a section with direct⇒
 parameters, we must use the cache record of the AE API to perform this⇒
 operation */
```

   - A call to Group Build AE API GB_EXEC.

```
Step02.Call Section:
Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC Directly.⇒
 You will always use the GB_API AppEngine Lib.
```

   - Version number of the group.

```
Step01.SQL:
UPDATE PS_RUN_CNTL_HR  SET VERSIONGBQDM = %Bind(AE_GB_API_AET.VERSIONGBQDM) ⇒
 WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

   Note. Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

   When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

Differences Between PeopleCode and Application Engine APIs

Question	Answer
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. • In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

Developing Client-Specific Workflow

This section provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build application. Workflow must be fully implemented by the client application developer. This section discusses the main differences between the Group Build workflow and the standard way of implementing workflow.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client application to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the user directly to the calling-client application page.
- The business event is triggered from the client application page.

The worklist record table has to contain key fields for accessing the client application page, so map those fields to the appropriate client application page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client application page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client application key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client application developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.

2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client application page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and user ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.
11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

1. Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client application page will be recorded.
    a. Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.
    b. Add a workflow flag, WF_FLAG.
2. Design MySpecificWorkflowDerived/Work.
    a. Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).
    b. Make the fields invisible.
3. Define a worklist record, MyWorklistRecord, for routing to the calling client application page.

    BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

    Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.
4. Define the Database Agent (DBAG) query.

    The DBAG query is responsible for calling the client application key field values: group ID, group version number, and user ID.
    a. In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:
    b. Go to PeopleSoft Query.
    c. Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and user ID.
    d. Include in your criteria prompts on group ID and version number.
    e. Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".
5. Design the MySpecificBusinessProcess.

a. In PeopleSoft Application Designer, define a business process.

MySpecificBusinessProcess has two activities:

MySpecificWorkflowModule

MySpecificWorkflowModuleResult

Each activity has only one step branching to the client application page:

b. In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.

c. Define each item and its required attributes.

The business event is triggered from the MySpecificWorkflowDerived/Work record.

d. Add workflow PeopleCode, using the button Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.

e. On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).

f. On the Field Map page, specify the mapping between the worklist record fields and your client application page keys.

g. For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.

h. For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your application fields.

i. Define the Database Agent items:

Define the target component on the Message Attributes page and provide the path to your client application component.

In the Query Name field, enter the database agent query defined in Step 5.

Define the mapping between the query selection fields (second column) and your client application page fields (last column).

6. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess

a. Add a new process of type Database Agent on the Process Definitions page.

b. On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:

E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName

kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -kbind2=:DERIVED_HR_GB.VERSIONGBQDM

/A stands for Activity Name

/MD stands for Message Definition

-kbind1 and −kbind2 are bind variables from the API work page.

7. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

8. Add calls to Group Build API on your client application.

On the FieldChange PeopleCode event of your Group Build calling button, use Group Build API as described at Step 7 in the first section of this documentation. Don’t forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.

9. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

Working with Group Versions

This section provides an overview of version numbers and discusses how to work with versions (for developers).

Understanding Version Numbers

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working with Versions (for Developers)

Before reading this section, see “Building Applications or Batch Programs That Include Group Build Functions”.

You can implement Group Build in an application by:

- Using the default developer query.

  The default developer query works with the default Group Result Table.

- Creating your own query.

  If you use your own query, you can define more parameters and/or more fields in a personal Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.
- The Group Results Table.

Note. You can bypass the versioning mechanism by calling GB_EXEC("Y"). Then the group is generated each time it is called.

Note. When using Developer Query or User Query, keep in mind that GB_QRY_LINK_VIEW is based on the JOB record. When Group Build generates the SQL, the system replaces all references to GB_QRY_LINK_VIEW with JOB. If, after this is done, the left REC.FIELD is the same as the right REC.FIELD, Group Build will not process the line in the SQL generation.

For example, if you have the criteria GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT in Query, Group Build will replace it with JOB.EFFDT <= JOB.EFFDT. The system will then remove the line because the left REC.FIELD is the same as the right REC.FIELD. As a result, the Query count may differ from the one returned by Group Build.

CHAPTER 26

Administering the HRMS System

This chapter discusses how to:

- Analyze portal navigation.
- Restrict the deletion of IDs.
- Refresh and audit Human Resources data.

Analyzing Portal Navigation

To analyze portal navigation, use the Portal Analysis component (RUNCTL_PORTAL).

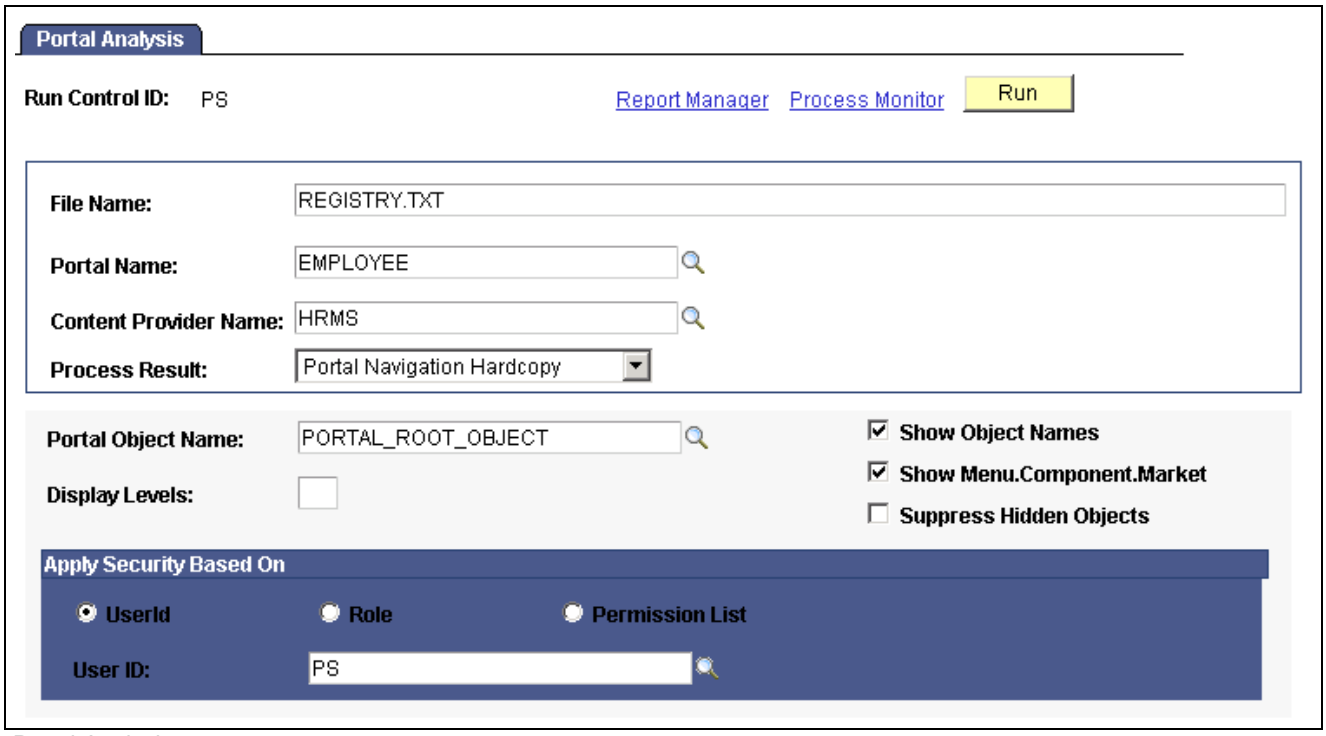
This section discusses how to analyze HRMS portal navigation.

Page Used to Analyze Portal Navigation

Page Name	Object Name	Navigation	Usage
Portal Analysis	RUNCTL_PORTAL	Set Up HRMS, System Administration, Utilities, Portal Analysis, Portal Analysis	Analyze the portal navigation structure for users, roles or permission lists.

Analyzing Portal Navigation

Access the Portal Analysis page.



Portal Analysis page

File Name Enter the name of the file you want the process to create and populate with the portal analysis. The process will distribute the file to the reporting repository.

Portal Name Enter the name of the portal you want to analyze.

Content Provider Name Select *HRMS* in the Content Provider Namefield to analyze HRMS portal navigation.

Process Result Select the processing result from the following options:

- *Portal/Menu Path*

  The result creates a straight list of the portal and menu paths. This result does not use the other values on the page so the system hides them when you select this option.

- *Portal Navigation Hardcopy*

  This result gives you more options and can create a more hierarchical view of the navigation.

Portal Object Name Select the portal object name.

Display Levels Enter the number of portal levels to print. Leave empty to print all the levels.

Show Object Names Select to display the object names of the CREFs or folders.

If you leave this check box clear, the process will just display the labels.

Show Menu.Component.Market Select to display the CREFs menu, component, and market information.

Suppress Hidden Objects Select to keep the process from including hidden objects.

If you leave this check box clear, the system identifies hidden objects with the following text preceding the object name: *hidden*.

Apply Security Based On

Select to analyze the portal navigation for the security access assigned to a *UserId*, *Role*, or *Permission List*. Select the userID, role, or permission list to use.

Restricting the Deletion of IDs

To restrict the deletion of IDs, use the ID Delete Control component (ID_DEL_PRVNT_TABLE).

This section discusses how to prevent the deletion of IDs from critical records.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Updating Person and Job Information," Changing and Deleting IDs

Page Used to Restrict the Deletion of IDs

Page Name	Object Name	Navigation	Usage
ID Delete Control	ID_DEL_PRVNT_TABLE	Set Up HRMS, System Administration, Database Processes, ID Delete Control, ID Delete Control	Enter records from which an ID should not be removed during an ID deletion or change. This ensures that the information is stored for historical purposes .

Refreshing and Auditing Human Resources Data

To refresh and audit Human Resources data, use the Refresh EMPLOYEES Table component (RUN_PER099), PERSONAL_DATA Settings component (PERSON_DT_SETUP), Refresh Personal Data component (RUN_PERS_REFRESH), Update Personal Data-Future component (RUN_PERSDATA_FUT), Refresh Name Display Values component (NAME_DISPLAY_RC), and the Core HR Data Integrity Audit component (RUN_PER900).

This section discusses how to:

- Refresh the EMPLOYEES table.
- Select refresh options for the Personal Data component.
- Refresh the PERSONAL_DATA table.
- Refresh the PERSONAL_DATA table with future-dated data.
- Refresh name display values.
- Audit Human Resources data for integrity.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Updating Person and Job Information," Refreshing Tables to Facilitate Reporting

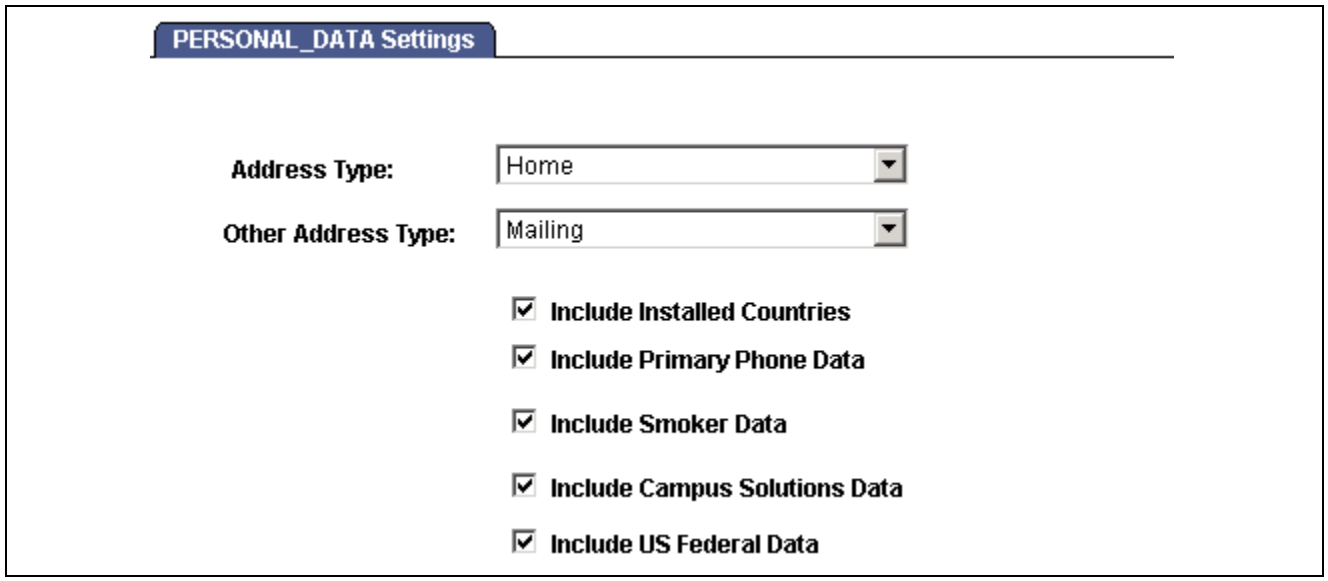
Pages Used to Refresh and Audit Human Resources Data

Page Name	Object Name	Navigation	Usage
Parameters	RUNCTL_ASOF_DATE	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table, Parameters	Refresh the PS_EMPLOYEES snapshot table as of the selected date.
PERSONAL_DATA Settings	PERSON_DT_SETUP	Set Up HMRS, System Administration, Database Processes, PERSONAL_DATA Settings, PERSONAL_DATA Settings	Select the data that you want to include in the refresh snapshot of the Personal Data component (PERSONAL_DATA). The fewer options you select, the faster the system can refresh the table. You must make these selections when you install HRMS. PeopleSoft only uses EmplID and Name data. Select the options you need to meet your ad hoc reporting and query needs.
Refresh Personal Data	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Refresh Personal Data, Refresh Personal Data	Refresh the Personal Data component. The Refresh Personal Dat component (PERS_REFRESH) loads the data types that you selected on the PERSONAL_DATA Settings page.
Update Personal Data-Future	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Update Personal Data-Future, Update Personal Data-Future	Run this process shortly after midnight to update the Personal Data component. The process will update data with future dated information that has become current. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

Page Name	Object Name	Navigation	Usage
Name Display Refresh	NAME_DISPLAY_RC	Set Up HRMS, System Administration, Database Processes, Refresh Name Display Values, Name Display Refresh	Refresh all records with the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the PeopleCode definition of those fields. You can choose to update records with all name format types or just with one name format type.
HR Core Integrity Audit	HRAUDIT	Set Up HRMS, System Administration, Database Processes, Core HR Data Integrity Audit, HR Core Integrity Audit	Initiate the Core Human Resources Data Integrity Audit.

Select Refresh Options for the Personal Data Component

Access the PERSONAL_DATA Settings page.



PERSONAL_DATA Settings page

Address Type Select which address type to refresh.

Other Address Type Select a secondary address type to refresh.

Include Installed Countries Select to include the information in the country-specific group boxes for those countries that you've installed on the Installation Table - Country Specific page.

Include Primary Phone Data Select to include the information in the PERSONAL_PHONE record.

Include Smoker Data Select to include the information in the PERS_SMOKER record.

Include Campus Solutions Data Select to include the information in the PERSON_SA record.

Include US Federal Data Select to include the information in the PERS_DATA_USF record.

See Also

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

Refreshing Name Display Values

Access the Refresh Name Display Values page.

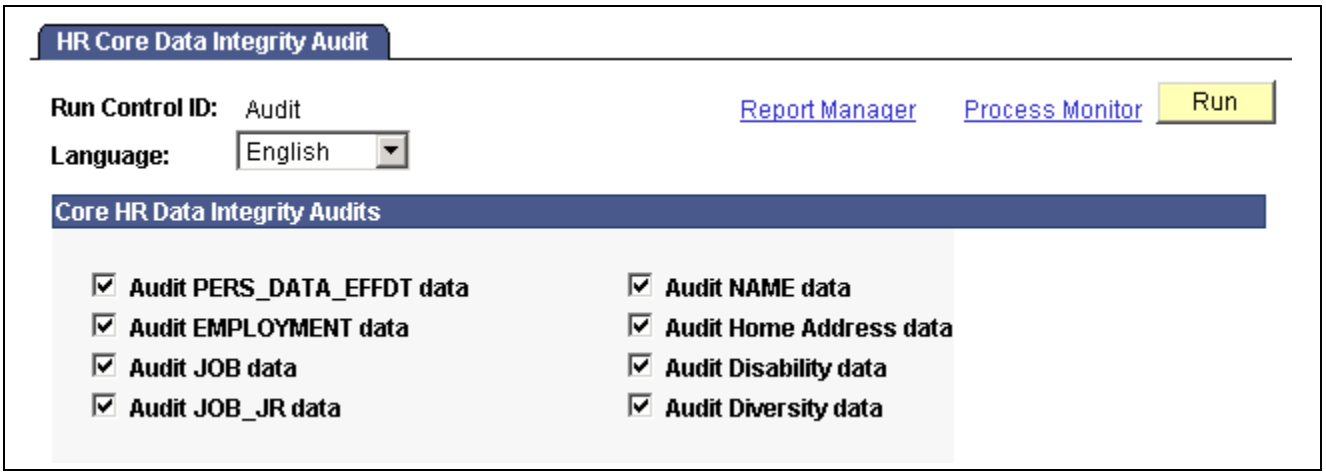


Name Display Refresh page

Select which records whose name fields format you want to update.

Auditing Human Resources Data for Integrity

Access the HR Core Data Integrity Audit page.



HR Core Data Integrity Audit page

Select the HR tables you want to audit for integrity.

CHAPTER 27

Setting Up and Building Organization Charts

This chapter provides an overview of organization charts, lists prerequisites, and discusses how to create organization charts.

Understanding Organization Charts

PeopleSoft Enterprise Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. Building organization charts is easy—all you do is choose to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees; and run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Once you select formatting options using the Visio Organization Charting Wizard, creating detailed charts of only one department or your entire organization is as simple as clicking a button.

Prerequisites

Before you can create organization charts, you must:

- Make sure that Visio is installed on your client.

  Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio on the client computers separately. For more information about installing Visio, see your Visio documentation.

- Make sure that organization and person data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Creating Organization Charts

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

- Create an organization chart.
- Copy the organization chart file to the client.
- Review the organization chart.
- Use the Visio Organization Chart Wizard.

Understanding the Process

To create organization charts that are based on your human resources data:

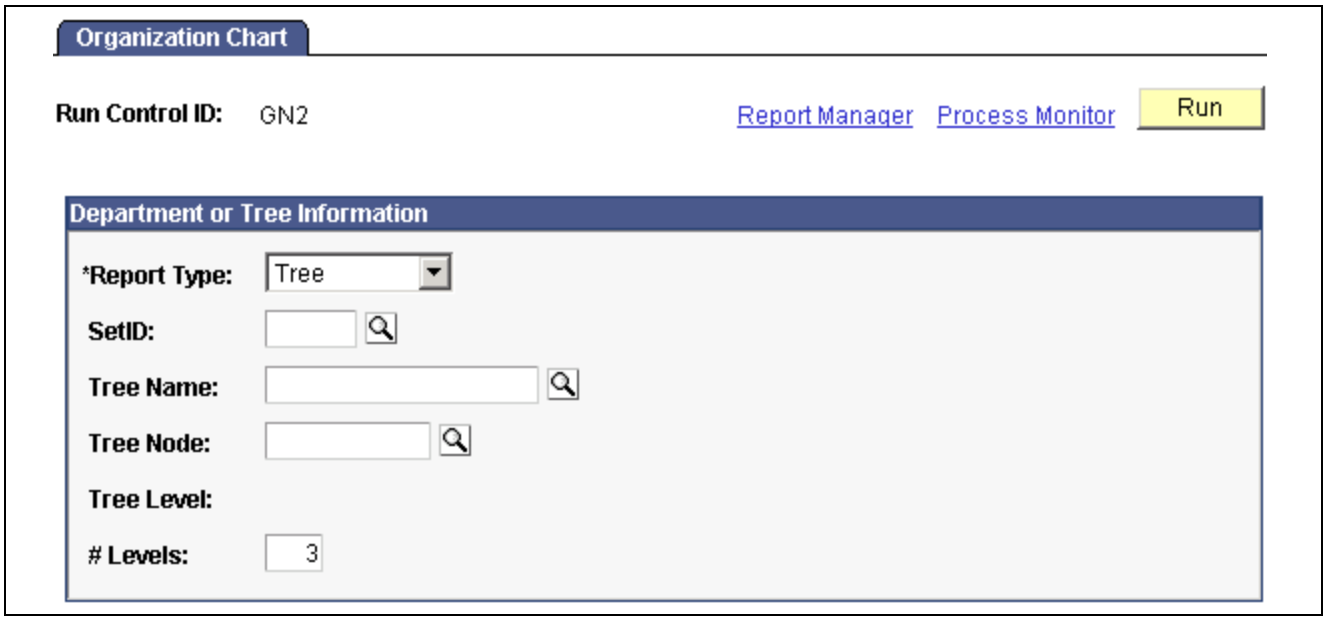
- Run the Organization Chart SQR from the Organization Chart page.
- Copy the resulting file to the client.
- Review the organization chart information gathered by the Organization Chart SQR.
- Start Visio and run the Vision Chart Wizard.

Page Used to Create an Organization Chart

Page Name	Object Name	Navigation	Usage
Organization Chart	ORGCHART_PNL	Organizational Development, Position Management, Create Organization Structure, Build Organization Chart, Organization Chart	Create an organization chart based on PeopleSoft Human Resources system trees.

Creating an Organization Chart

Access the Organization Chart page.



Organization Chart page

First, set up organization and person data in PeopleSoft Human Resources, and then set up your Organization Charting Interface on the Third-Party/System page in the Installation Table component (INSTALLATION_TBL).

To build your chart using one of the PeopleSoft Human Resources system trees, you provide the system with department and/or tree information.

Report Type Select a report type. Options are:

- *Department*

  Builds your chart based on a single department that you select.

- *Tree*

  Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

Note. You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

Building Your Chart Using Departments

If you select Department in the Report Type field, then the SetID and *Department* fields appear.

Department Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)

Run Click Run if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree,* the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.
2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

The Tree Node and #Levels fields tell the system where to start the organization chart at the Tree Node level and the next x number of levels to include in the chart. For example, if you begin the chart at tree level *5* and you leave #Levels at *3,* the organization chart includes levels 5 though 7 of your tree.

The system displays the tree level that you selected. For example, if you selected Department 10100, the Office of the President, from the Department Security tree, the system indicates that you are using tree level *5.* Click the Run button to have PeopleSoft Process Scheduler run the Organization Chart SQR.

See Also

Chapter 6, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 99

Copying the Organization Chart File to the Client

The Organization Chart SQR creates the ORGCHART.TXT file and stores it in the application server. To create an organization chart using Visio, you need to copy the ORGCHART.TXT file to a client computer. You will run Visio and create the organization chart on the client.

To copy the ORGCHART.TXT file:

1. Access the Process Monitor – Process List page (PMN_PRCSLIST) (PeopleTools, Process Scheduler, Process Monitor).
2. Locate the organization chart process and click the associated Details link.

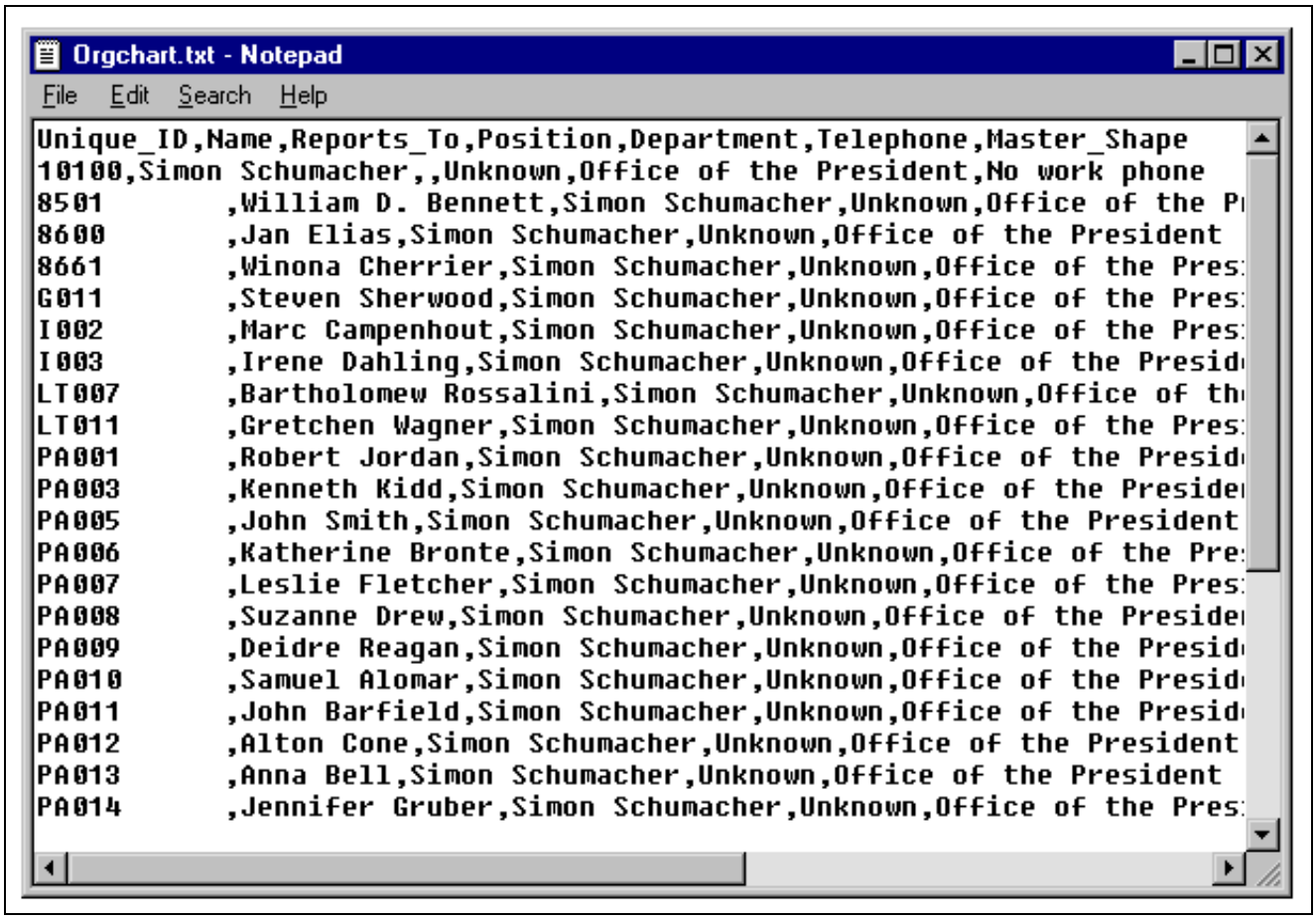
3. Click the View Log/Trace link.
4. Click the ORGCHART.TXT link to open the file.
5. Select File, Save As and save to the client.

Reviewing the Organization Chart

To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The file contains the following data:

- Unique ID
- Name
- Reports To
- Position
- Department
- Telephone

Following is an example of the ORCHART.TXT file:



Example of ORGCHART.TXT file

Using the Visio Organization Chart Wizard

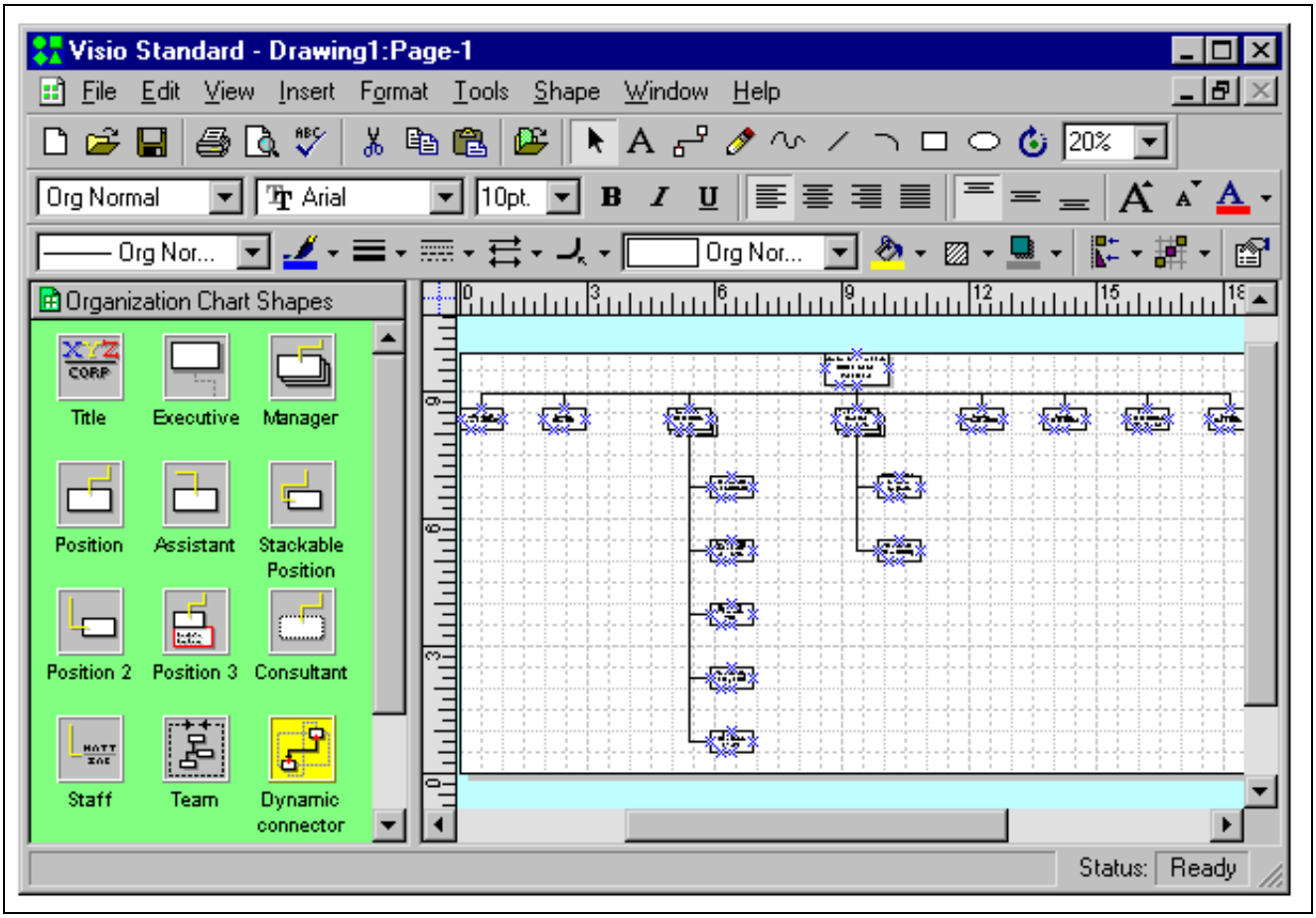
Open Visio and use the Organization Chart Wizard to create your organization chart automatically.

Note. These instructions are for Visio 2000. The Organization Chart Wizard may operate slightly differently for Visio 2002.

To run the Organization Chart Wizard:

1. In Visio, select File, New, Organization Chart, Organization Chart Wizard.
2. In the window that appears, select the option *Information that's already stored in a file or database* and click Next.
3. On the next window select the option *A text, Org Plus (*.txt), or Microsoft Excel file* and click Next.
4. On the next window enter the location on the client that contains your organization information (where you saved the ORGCHART.TXT file), for example *C:\TEMP\ORGCHART.TXT* and click Next.
5. Select *Name* for the Name field, *Reports_To* for the Reports to field, and <*none*> for the First Name (optional) field and click Next.
6. Select the data that you want displayed in the chart shapes (for example *Name* for the First Line and *Position* for the Second line) and click Next.
7. Add other fields contained in the ORGCHART.TXT file to the Org Chart by selecting them from the Data file columns and adding them to the Custom Property fields column. Click Next.
8. Select *I want the wizard to automatically break my organization chart across pages* and click Finish.

Following is an example of the Visio page that you see when your organization chart is complete:



Example of a department organization chart in Visio

Note. For more information about editing and printing your organization chart in Visio, see your Visio documentation.

CHAPTER 28

Setting Up and Processing Mass Updates

This chapter provides an overview of mass update processing and discusses how to process mass updates.

Note. PeopleSoft no longer supports HRMS specific Mass Change templates. We have left the templates in the database for your convenience but recommend that you use the Mass Update feature.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Understanding Mass Update Processing

This section discusses:

- The steps for a mass update run.
- The Mass Update process.
- Tips for a successful mass update run.

Steps for a Mass Update Run

Mass update processing enables you to make changes to the data of large groups of people. Update job data by groups (using the groups you create using PeopleSoft Group Build), position number, job code, establishment, or department.

To run a mass update:

1. Set up templates keyed to Mass Update IDs on the Mass Update Definition page (MU_MASS_UPDATE_TBL).

   These templates identify the parameters of the updates and enable you to save and reuse parameters.

2. Enter the Mass Update IDs that you want to execute on the Mass Update page (RUN_MASSUPD1) and run the Mass Update process (HR_MASSUPD).

   Choose to execute just one or a number of IDs.

3. Review the execution result record on the Mass Update Result page (MU_EXEC_RESULT).

   Use the result record to determine the source of any errors, correct the problems, and then run the process again for just the affected people.

Mass Update Process (HR_MASSUPD)

The Mass Update process (HR_MASSUPD) uses the component and component interfaces related to the data slated for update (that is, for job data, it uses the JOB_DATA component) and retrieves the data for each person in the group. It then assigns the new values for the people and saves the change, triggering any business rules that apply to this component. It also creates an execution result record to trace the statuses of all modifications for all people.

Tips for a Successful Mass Update Run

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain you want to override data.

  If at all possible, add a new effective-dated row, instead.
- Familiarize yourself with the online transaction to understand the rules governing the component before trying to automate it using the Mass Update process. When you update a component using Mass Update, it is governed by the same rules (such as defaulting and required fields) as when you access the component online.
- To enhance performance, group change lines (using sequence numbers) by record when possible.

  By keeping all changes for a record together, the system opens the component only once. When changes to a record are interspersed with other record changes, the system must keep moving between records.
- Create several simple Mass Update IDs that you can use in combination instead of trying to create a complicated one that changes everything.

  In addition to being more flexible, it's easier to identify the source of errors.

Important! The Mass Update feature uses component interfaces to update data. Component interfaces execute all of the business logic associated with a component, which ensures that the components function correctly and that the data is consistent. However, updating the data in this manner, while more complete, is slower than some other methods (such as a SQL update). When you run a mass update, take steps to improve performance, such as limiting the size of the transaction set and/or performing the update at night when server traffic is low.

Creating Mass Update Definitions

To create mass update definitions, use the Mass Update Setup component (MU_MASS_UPDATE_TBL).

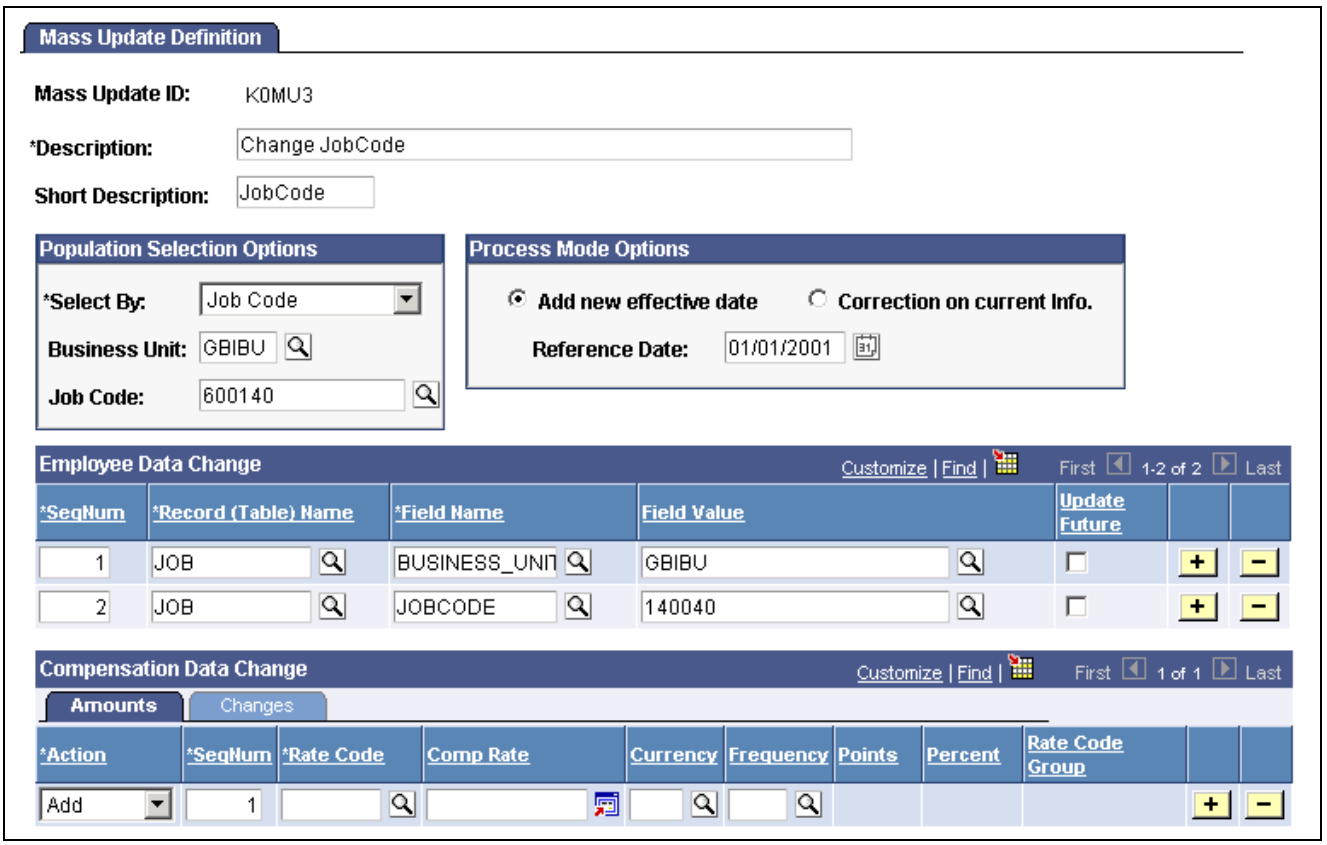
This section discusses how to set up mass update definitions.

Page Used to Create Mass Update Definitions

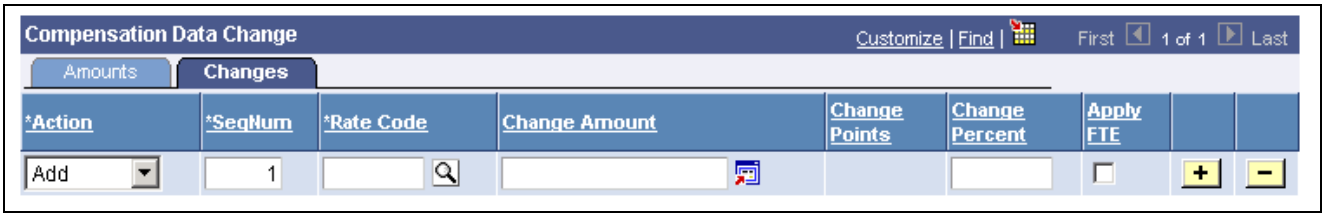
Page Name	Object Name	Navigation	Usage
Mass Update Definition	MU_MASS_UPDATE_TBL	Workforce Administration, Collective Processes, Mass Changes, Mass Update Setup, Mass Update Definition	Set up mass update definitions to process mass updates.

Setting Up Mass Update Definitions

Access the Mass Update Definition page.



Mass Update Definition page, 1 of 2



Mass Update Definition page, 2 of 2

Population Selection Options

Select By

Indicate how you want the system to select people for mass update: *Group ID, Position Number, Job Code, Establishment,* or *Department.*

When you make a selection here, the system displays related fields below for you to specify which *Group ID, Position Number, Job Code, Establishment,* or *Department* you want the process to update. For example, if you selected *Group ID*, the system displays the Group ID field. The update process will select all people with the group ID you specify.

Note. To set up mass update definitions by group, you must grant group security to the Mass Update Definition page. To set up a mass update definition by department, the user must have access to the selected department.

Process Mode Options

Indicate whether you want the process to correct the current information or add a new effective-dated row.

Add new effective date and **Reference Date** — Select to insert a new effective-dated row using the reference date as the new effective date. If a record already exists with this effective date, the system inserts a row with the date and a sequence number. If the record is not organized by effective sequence, the system produces an error message warning you that if the update were to go ahead, it would overwrite data. This option inserts new information and does not override previous data.

Correction on current Info and **Reference Date** — Select to change incorrect data and override information in the person's records. The system corrects the record that is or was effective as of the reference date you enter.

Employee Data Change

Use these fields to define which fields to update and with what values.

SeqNum (sequence number) — Indicate in what order the system should update the fields. Some fields cannot be updated without specifying several other related fields in the same mass update ID. For example, to specify a Location field on the JOB record, you must first specify the appropriate business unit. The Business Unit field should be processed first and should have an earlier sequence number than the Location field.

Fields that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number.

The system warns you if you need to add a related or key field.

Note. Be careful to sequence fields appropriately. Remember that the same constraints (such as defaulting and required fields) that govern a component when you access it online are also active when you update them with Mass Update. The Mass Update process does a preliminary check during the saving process, but it cannot prevent all errors.

Record (Table) Name — Select the record containing the field that you want to update.

Field Name — Select the field whose value you want to update.

Field Value — Enter the value you want to enter in the field you selected.

Update Future — Select to have the Mass Update process update all existing future effective-dated rows (rows that have an effective date later than the Reference Date) in addition to the effective-dated row it is adding or correcting. This option is not applicable to data that is not effective-dated.

Specifying Job Actions and Action Reasons in Compensation Data Change

Enter a row for action and action reason fields. It's important that you include an action and action reason value when making changes to job data. If you do not specify an action and action reason for inserting a new effective-dated row in a person's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

Change Type	Action	Action Reason
Job Data Change	Data Change (DTA)	None
Compensation Data Change	Pay Rate Change (PAY)	Other (OTH)

Compensation Data Change: Amounts Tab

See the above exhibit for an example of this tab.

Use this tab to correct or add compensation amounts.

Action Select to *Add, Change,* or *Delete* compensation data.

- *Add:* When you select this option and the rate code already exists in the person's compensation package, the system adds the compensation element to the existing package with a new compensation sequence number.
- *Change:* When you select this option, the system can process changes to people with only one compensation element or people who have previous compensation rows with the same rate code.
- *Delete:* If you select this option, the system removes all compensation elements with the rate code specified here from the person's compensation package.

The Mass Update process can only change or delete compensation packages that contain rate code information.

SeqNum (sequence number) Indicate in what order the order the system should update the compensation record.

Rate Code Select the rate code whose associated data you want to add, change, or delete. When you add compensation data, the system inserts the compensation rate code for any new compensation effective sequences.

Compensation Data Change: Changes Tab

Use this tab to add compensation changes. The fields on this tab match those of the Amounts tab.

See Also

Chapter 6, "Setting Up and Administering HRMS Security," page 57

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation

Processing Mass Updates

This section discusses how to:

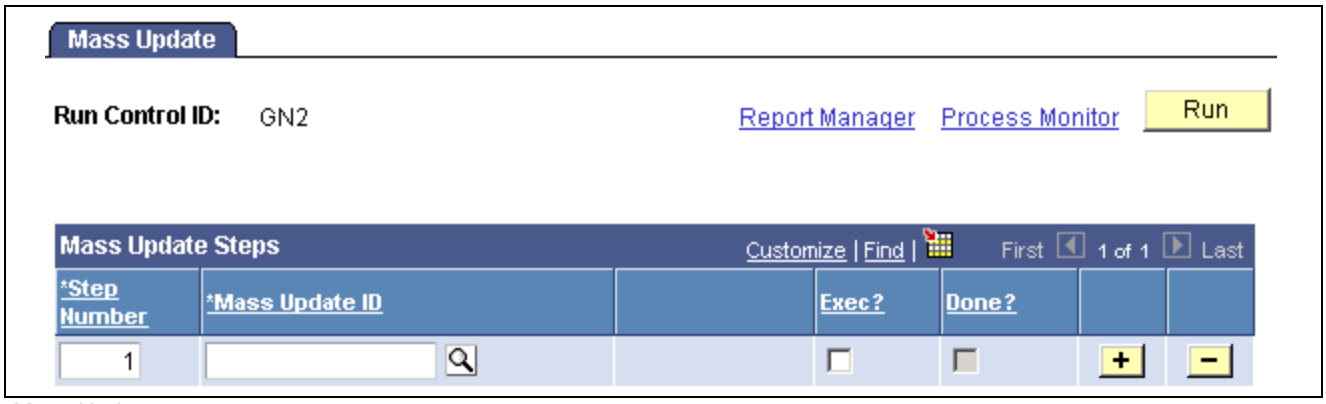
- Run mass updates.
- View Mass Update process results.

Pages Used to Process Mass Updates

Page Name	Object Name	Navigation	Usage
Mass Update	RUNCTL_MASSUPD1	Workforce Administration, Collective Processes, Mass Changes, Mass Update Run Control Page, Mass Update	Run mass updates using Mass Update IDs.
Mass Update Result	MU_EXEC_RESULT	Workforce Administration, Collective Processes, Mass Changes, Mass Update Result, Mass Update Result	View Mass Update process results.
Mass Update message log	MU_EXEC_MSGLOG_SEC	Workforce Administration, Collective Processes, Mass Changes, Mass Update Result, Mass Update Result Click Details on the Mass Update Result page.	View any errors that occurred during the Mass Update process.

Running Mass Updates

Access the Mass Update page.



Mass Update page

Step Number Enter the order in which to process this step.

Mass Update ID Select the mass update ID you want to process.

Exec? (execute?) Select to execute mass updates step by step instead of executing all the mass updates in an ID at once. This enables you to ensure that the each step executes properly before proceeding to the next. Select to execute your first step or to execute a row after the previous row has completed.

Done? The system selects this check box when it has processed the mass update ID in the step. If the process completes, the system displays a link to the Mass Update Result page where you can review the results of the update.

Viewing Mass Update Process Results

Access the Mass Update Result page.

Status Displays the status of the mass update change to this person's record.

If the status is *Failure,* the process was unable to make the change. You can correct the problem and come back to this page to reset the status to *Ready,* or you can opt to *Cancel* the process for this person.

When you select *Ready,* you can rerun the process.

Details Select to view the message log for this person. The message log displays the errors (if any) that occurred during the mass update process.

CHAPTER 29

Working with Metadata and Query Builder

This chapter discusses how to:

- Manage the HCM metadata repository.
- Use Query Builder.
- Analyze portal navigation.

Managing the HCM Metadata Repository

To manage the HCM metadata repository, use the Base Catalog component (HCMD_BASE_CATALOG), the Object Catalog component (HCMD_OBJ_CATALOG), the Export component (HCMD_EXPORT_OBJS), and the Import component (HCMD_IMPORT_OBJS).

This section provides an overview of the HCM metadata repository and discusses how to:

- Define base classes.
- Define object classes.
- Enter class attribute details.
- Enter class relationship details.
- Export metadata.
- Import metadata.

Understanding the HCM Metadata Repository

Metadata is data about the data in your system. It defines every object, object attribute, and relationship between objects. Metadata enables you to define and manipulate the records in your PeopleSoft HRMS database as objects.

The HCM metadata object model consists of the following two elements:

- PeopleTools-level metadata

  Provides information about fields, field labels, and database records and views.

- HCM-level metadata

  Establishes relationships between objects at the object level, defines objects's services, and alternative labels.

HCM metadata object definitions are registered in the metadata repository as classes and these classes are grouped in the following two catalogs according to general behavior, processing, and attribute needs:

- Base catalog.

Object classes:

- Define the general behavior and attributes for a class.
- Group objects for better processing and querying.
- Provide a single layer of inheritance for derived classes.

• Object catalog.

Object classes:

- Can be the child object of a parent base class, inheriting all of the attributes of the base class.

Note. Object catalogs do not need to have a parent class object.

Note. Any metadata class definitions that are not obviously a parent class object, should be defined in the object catalog.

- Are defined with unique attributes in addition to any inherited attributes.

For example, the base class object, Person Base, is the parent to the derived object class, Person.

Common Elements Used in this Section

Basic Information Define the class's basic characteristics by entering information into the following fields:

- Class Name
- Display Label
- Object Owner ID
- Active Flag

Class Use Define how the class object is used by:

- Selecting one of the following options:
  - *Production*: a standard production object.
  - *Staging*: a specialized staging object used to load data into the HCM system.
  - *Reporting*: a specialized reporting object.
  - *System*: an HCM system object not usually visible to users.
  - *Configuration*: a specialized object used in HCM system configuration.
  - *Source View* (object class only)
  - *Attribute Map*(object class only)
  - *Key Map*(object class only)
  - *Temporary*(object class only)
- Selecting Use in UI? to display the class in a dynamic user interface.
- Selecting Use in Queries? to display the class in Query Builder.

The system selects the System Data check box if the class object is delivered as HCM system data.

Persistence Mapping

Enter the name of the PeopleTools record to which this class maps. The PeopleTools record is the sole source for the class object. Each class definition maps to one PeopleTools record

Class Attributes (Record Field)

Review or enter the class attributes.

Click the View Attribute Details button to review details or enter a details for a new class attribute on the Class Attribute Details page.



Click to populate the Class Attributes grid with all the fields associated with the PeopleTools record you selected in the persistence mapping Record Name field.

The button does not overwrite valid fields.

Note. PeopleSoft recommends that you keep the attributes in sync with the PeopleTools record fields by using this button after you make a modification to the PeopleTools record.

Relationships

Define the relationships this class definition has with other class definitions. For example the Person class that maps to the PeopleTools Person record could be have relationships with the:

- Name class.

  People in the system could have one or more names.

- Address class.

  People in the system could have one or more address.

- Job class.

  People in the system could have zero or more jobs.

Click the View Relationship Details button to review details or enter a details for a new class attribute on the Class Relationship Details page.

Class Extensions

Class extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Name
- Value

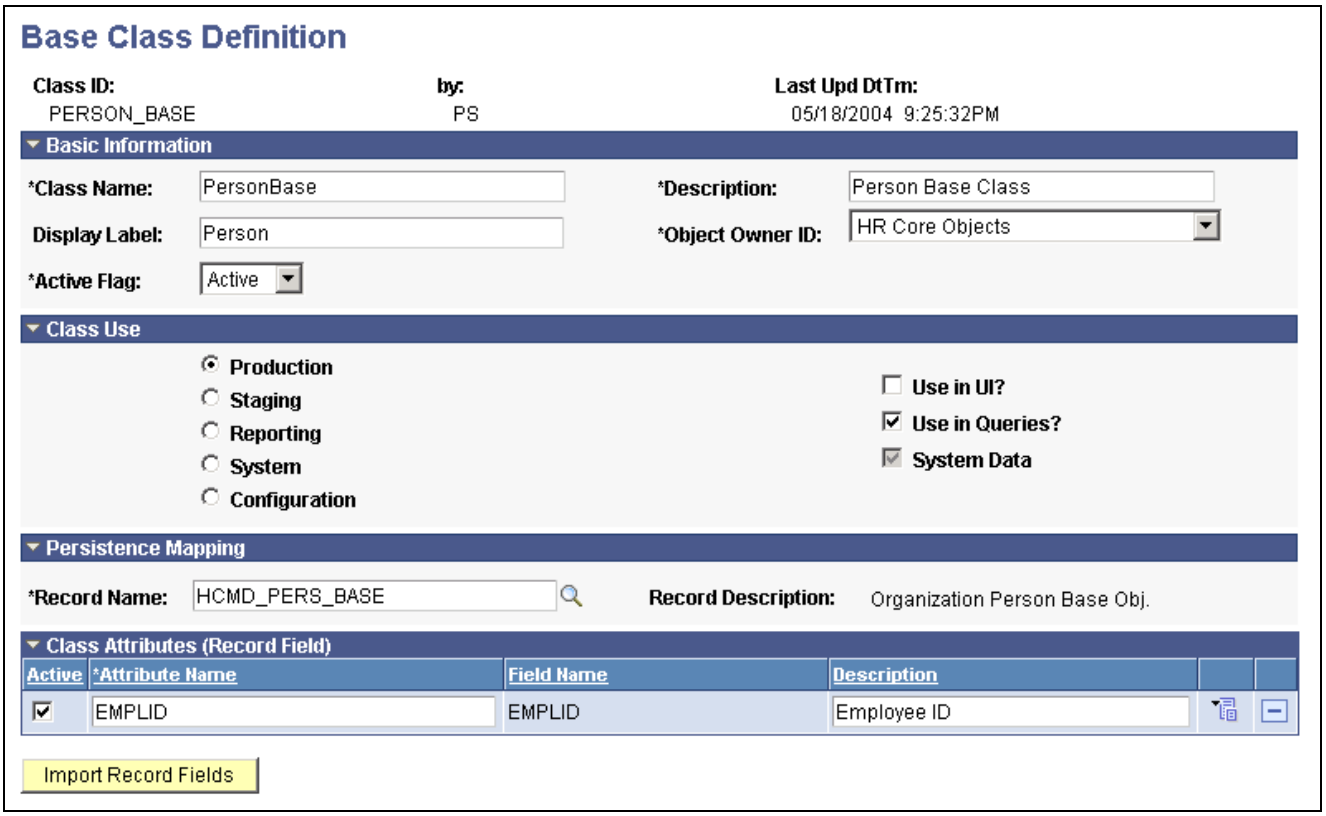
Pages Used to Manage the HCM Metadata Repository

Page Name	Object Name	Navigation	Usage
Base Class Definition	HCMD_BASE_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition	Set up and review definitions for base classes.
Object Class Definition	HCMD_OBJS_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition	Set up and review definitions for derived classes.
Class Attribute Details	HCMD_OATT_SPG	• Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition Click the View Attribute Details button on the Base Class Definition page • Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition Click the View Attribute Details button on the Object Class Definition page	Enter or review class attribute details
CLass Relationship Details	HCMD_OREL_SPG	• Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition Click the View Relationship Details button on the Base Class Definition page • Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition Click the View Relationship Details button on the Object Class Definition page	Enter or review class relationship details.

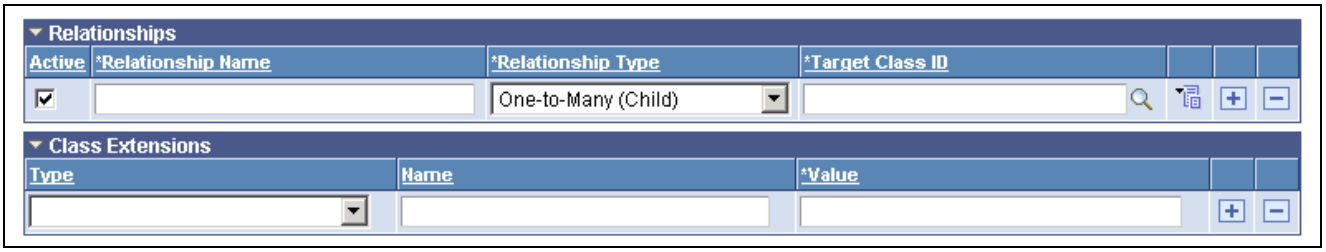
Page Name	Object Name	Navigation	Usage
Export Metadata Definitions	HCMD_EXPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Export, Export Metadata Definitions	Export metadata definitions from the catalog to XML.
Import Metadata Defintions	HCMD_IMPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Import, Import Metadata Definitions	Import metadata definitions.

Defining Base Classes

Access the Base Class Definition page.



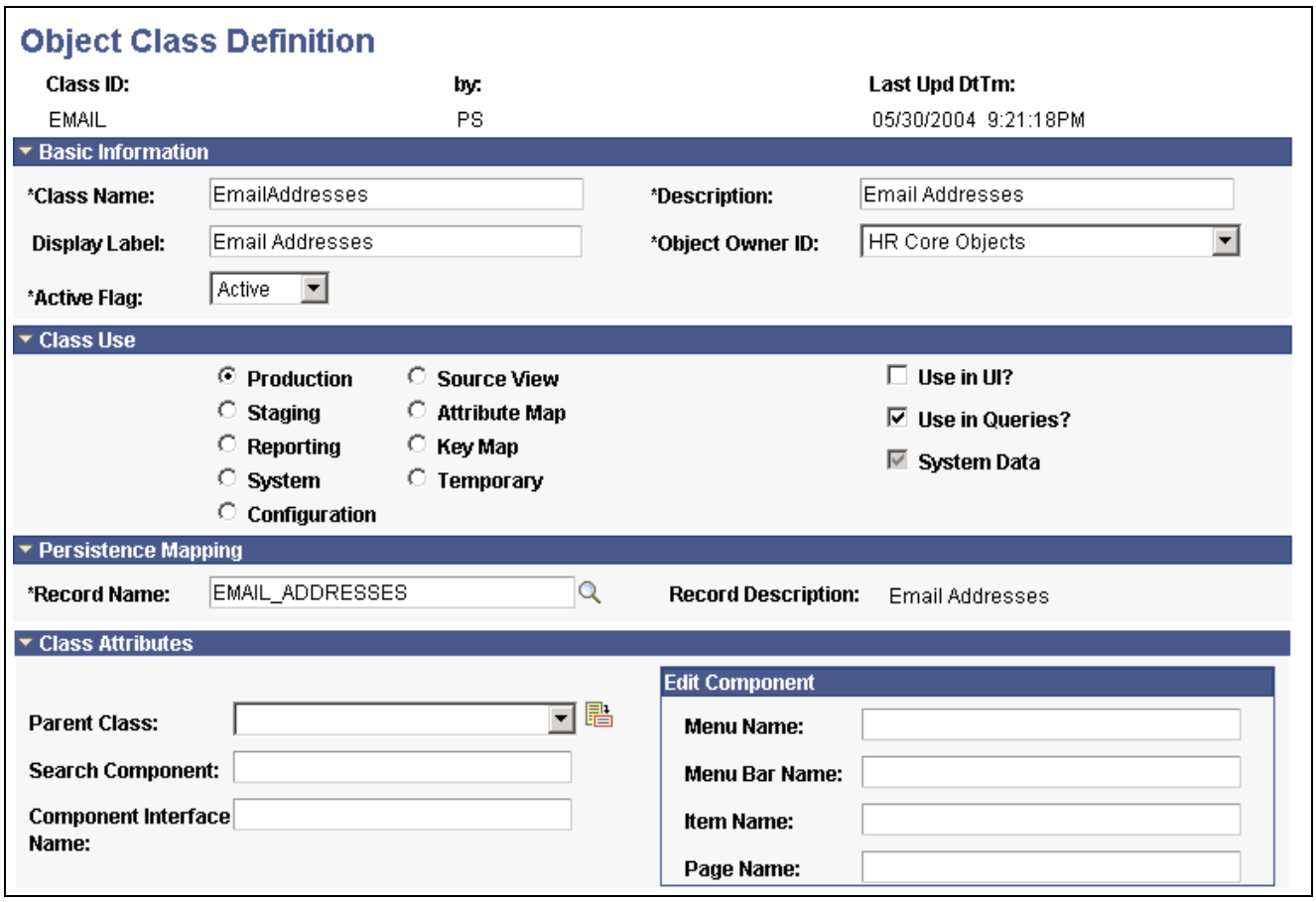
Base Class Definition page (1 of 2)



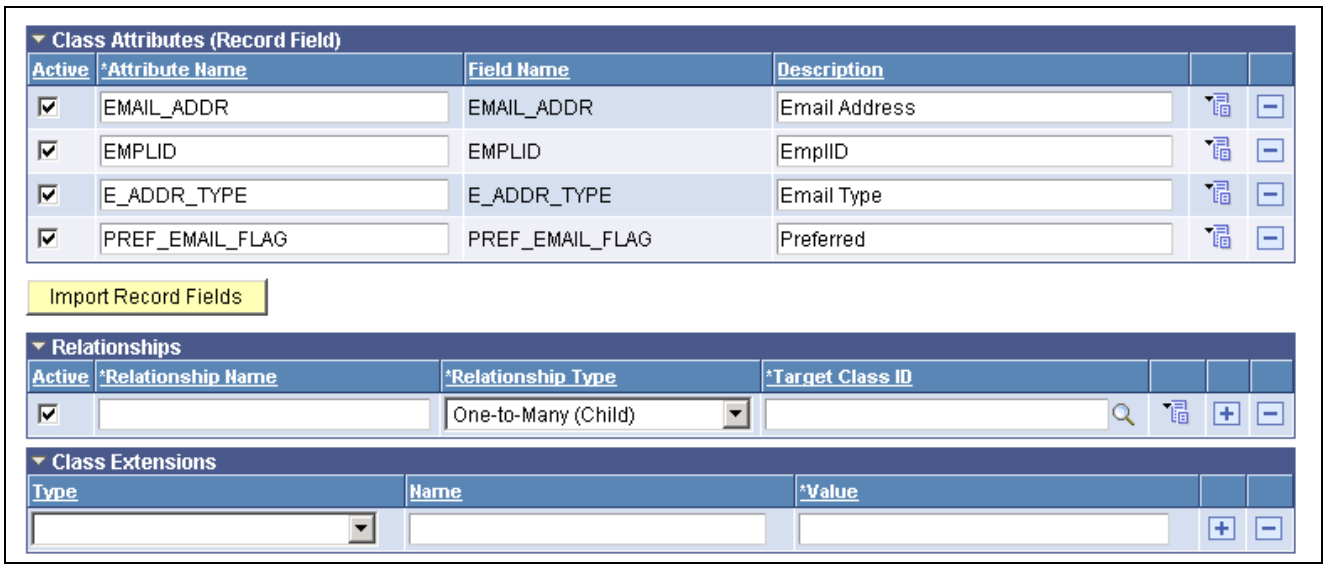
Base Class Definition page (2 of 2)

Defining Object Classes

Access the Object Class Definition page.



Object Class Definition page (1 of 2)



Object Class Definition page (2 of 2)

Class Attributes

Parent Class If this class object is built upon a parent class object, select it here. The class object will inherit all of the parent's attributes.

Leave this field blank if the object class has no parent.

Component Interface Name Select the PeopleTools component interface used to save data for the class. You can use the component interface in Query Builder to perform bulk updates. For example, you can create a query for all the people at Location A and then update the location information on the Job Data component for that group of people to Location B.

Search Component Select the search component to search for instances for this derived class object. The system uses the Query Builder search component as a default if you do not enter a value here.

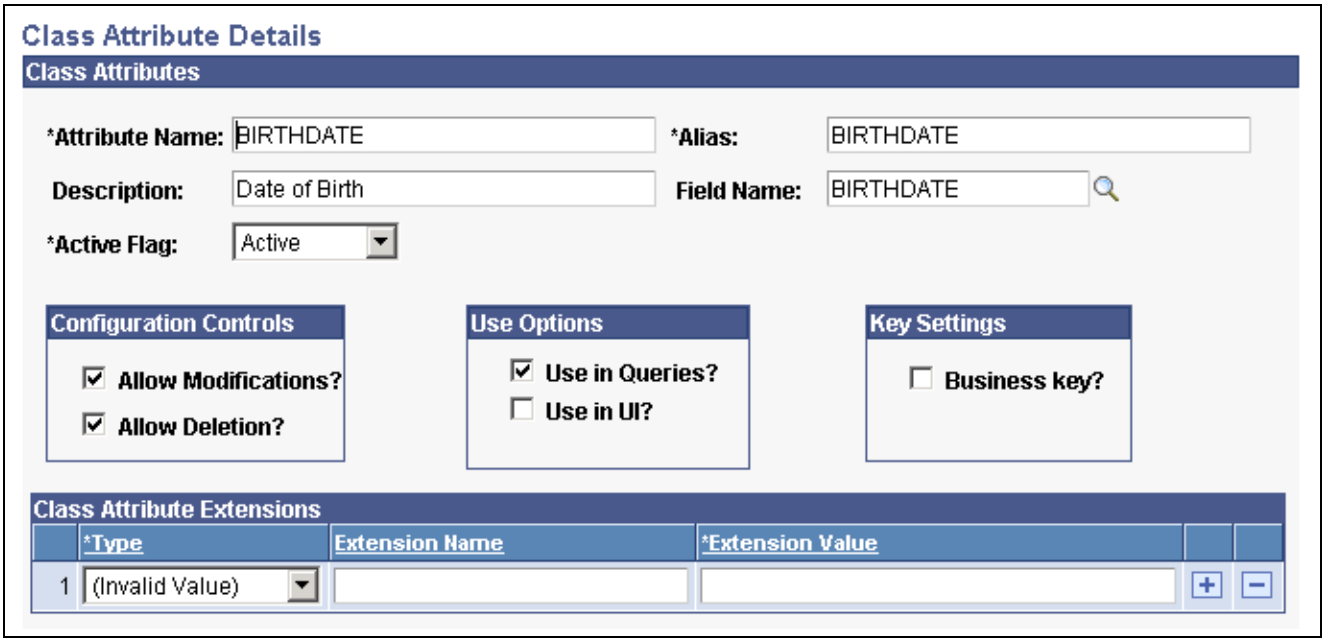
Edit Component

When you enter a component in this group box for a class, the system enables you to link to the component or page from a hyperlink in the query results when you query the class in Query Builder. This enables you to make updates to the component while you are reviewing the query results

Enter the component's Menu Name, Menu Bar Name, Item Name, and Page Name.

Entering Class Attribute Details

Access the Class Attribute Details page.



Class Attribute Details page

Attribute Name Enter the attribute name. It can be different from the corresponding field.

Alias Enter an alias for the attribute.

Field Name Each attribute must have a corresponding field in the PeopleTools record.

Configuration Controls

Allow Modifications? Select if the users can modify the attribute in dynamic user interfaces.

Allow Deletion? Select if the users can delete the attribute in dynamic user interfaces.

Use Options

Use in Queries? Select to display the class in Query Builder.

Use in UI? Select to display the attribute in a dynamic user interface

Key Settings

Business key? Select if the business logic indicates that this attribute (field) is a key. You do not need to define the attribute as a key field at the record level.

Class Attribute Extensions

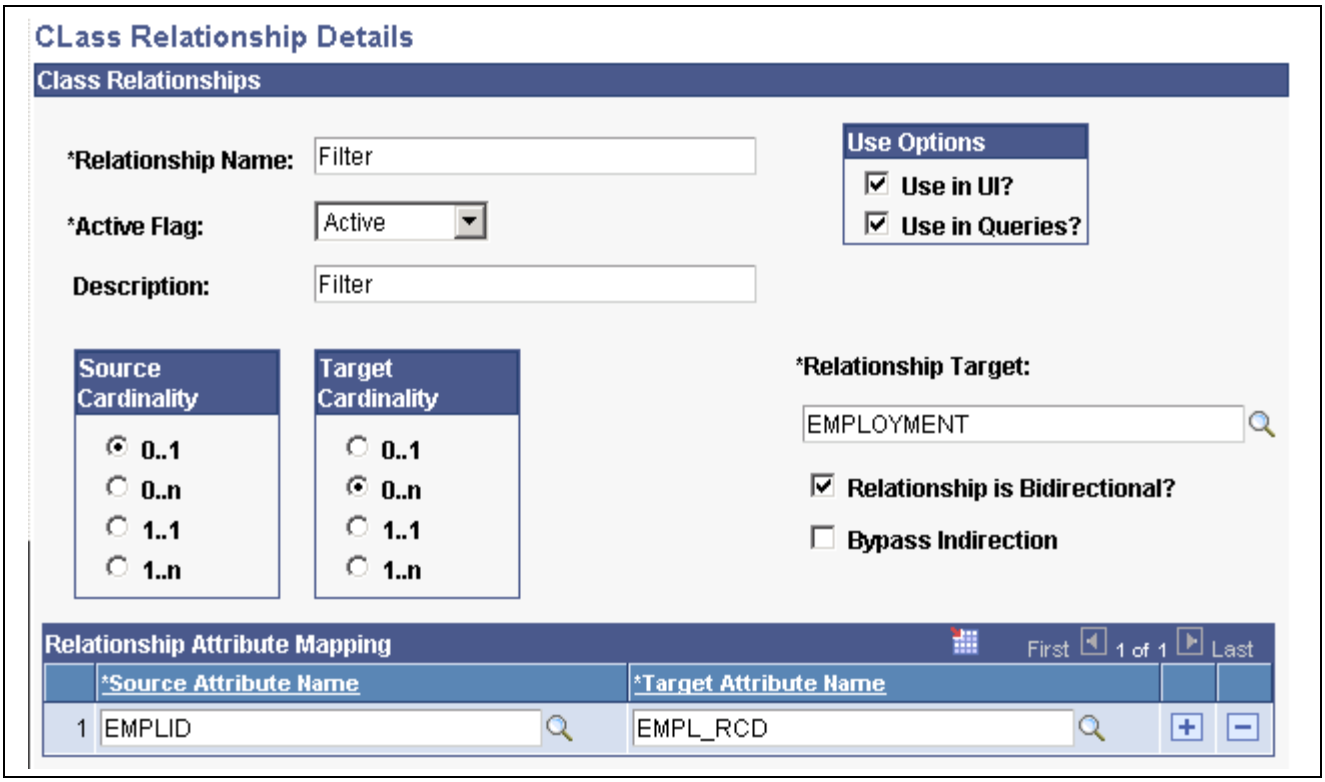
Class attribute extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class attribute extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Name
- Value

Entering Class Relationship Details

Access the CLass Relationship Details page.



CLass Relationship Details page

Relationship Name Enter the name of the relationship.

Use in Queries? Select to display the relationship in Query Builder.

Use in UI? Select to display the relationship in a dynamic user interface.

Source Cardinality Select the cardinality setting of the source class object from the following options:

- zero to 1 (*0.. 1*)
- zero to many (*0.. n*)
- one to one (*1.. 1*)
- one to many (*1.. n*)

Target Cardinality Select the cardinality setting of the target class object from the following options:

- zero to 1 (*0.. 1*)
- zero to many (*0.. n*)
- one to one (*1.. 1*)
- one to many (*1.. n*)

Relationship Target Select the relationship's target class object.

Relationship is Bidirectional? Select to make the reverse relationship (with the source and target object classes reversed) automatically available.

Bypass Indirection Select to bypass automatic setID indirection for those relationships that include setID indirection fields.

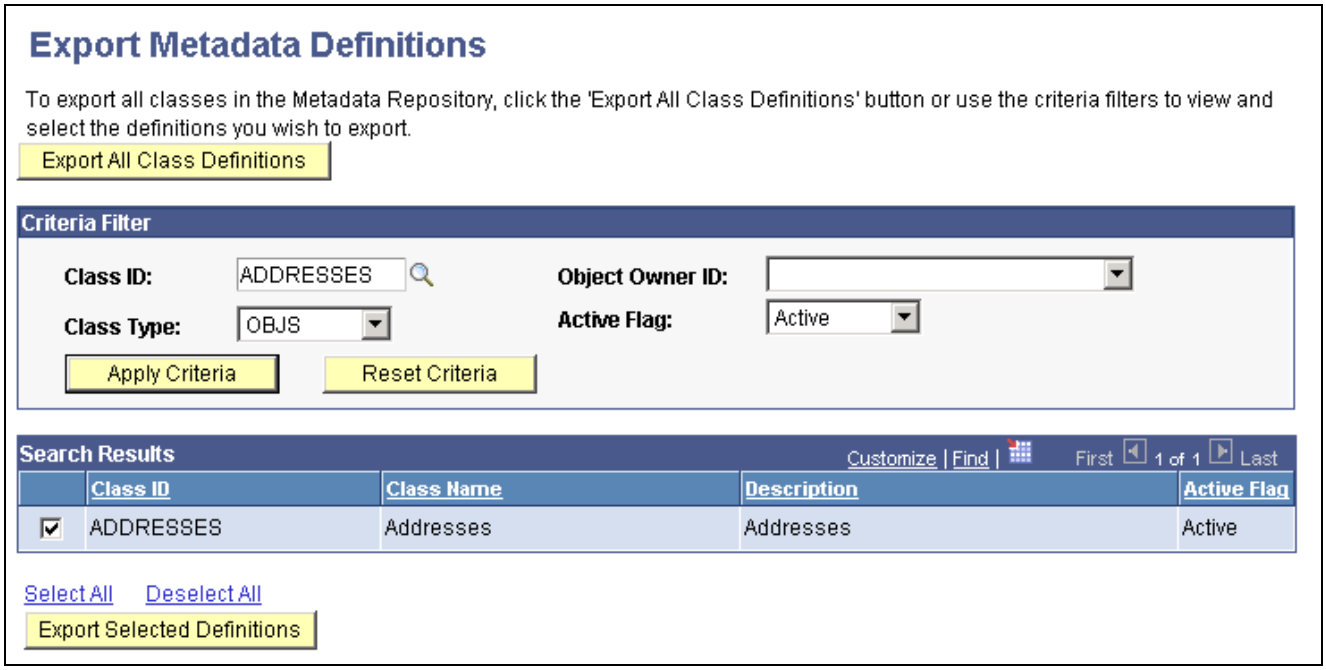
Query Build automatically adds the required SetID logic as required. If you select this option, you must define the logic in the relationship attribute mapping. For example, SETID_Location maps directly to the SetID field on the Locations table (LOCATION_TABLE) to improve performance.

Relationship Attribute Mapping

Enter the names of the attributes that you are mapping. You can map any number of attributes and the attributes do not have to have the same name to be mapped.

Exporting Metadata Definitions

Access the Export Metadata Definitions page.



Exporting Metadata Definitions page

Export All Class Definitions Click to export all the metadata definitions in the catalog to an XML file. The system will display the Export Metadata Definitions page where you enter the export path and file name to be created.

Criteria Filter

To limit the classes, enter filter criteria in the Class ID, Class Type, Object Owner ID, or Active Flag fields.

Note. You can select more than one class ID in this field by separating the values with commas.

Apply Criteria Click to apply the criteria you entered. The system populates the Search Results grid with the class objects that meet the criteria.

Reset Criteria Click to clear the search criteria fields.

Search Results

The system populates this grid with the class objects that meet your search criteria and automatically selects all of them. Clear those the check box next to those class objects that you do not want to export.

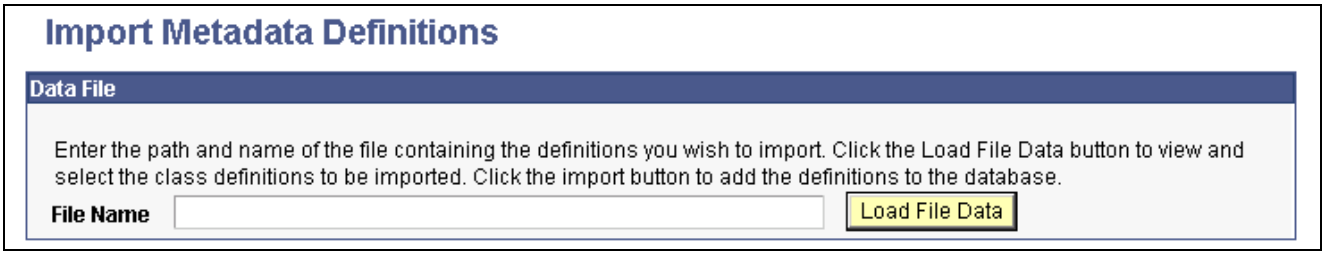
Export Selected Definitions — Click to export the selected class objects to an XML file.

Export Metadata Definitions page

The system displays the Export Metadata Definitions page when you click the Export All Class Definitions button or Export Selected Definitions button. Enter the full path to the application server and the file name. If you do not specify a file name, the process will create the file in the default directory.

Importing Metadata Definitions

Access the Import Metadata Definitions page.



Import Metadata Definitions page

Enter the file path and name to load the data from the XML file. The system will display a list of classes that exist in the exported file and an icon indicates if the class already exists. Select which classes should be imported and if the system should overwrite existing class definitions.

Building SQL Queries with Query Builder

To build SQL queries with Query Builder, use the Query Builder component (EQRY_SAMP_HTML_CMP) and the Pre-defined Queries component (EQRY_VIEWER_CMP).

This section provides an overview of Query Builder and discusses how to:

- Specify, save, and load results attributes.
- Define query criteria.
- Save query definitions.
- View query results.
- Reuse queries predefined in Query Builder.

Understanding Query Builder

Query Builder is a flexible tool that is used to query class objects that are defined in the PeopleSoft HCM metadata repository.

Query Builder lets you:

- Create queries of unlimited length and complexity without the need to know the underlying database model.

  Query builder automatically generates the most efficient SQL based on the metadata class definitions, generates all SQL joins automatically based on the relationships defined in metadata, and includes SetID and effective-dated logic.
- Select any number of available output fields to display results from both the underlying class and the class relationships.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.
- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.

  Query Builder automatically generates the appropriate SQL for aggregations.
- Preview the Structured Query Language (SQL) query generated by Query Builder.

Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.
- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

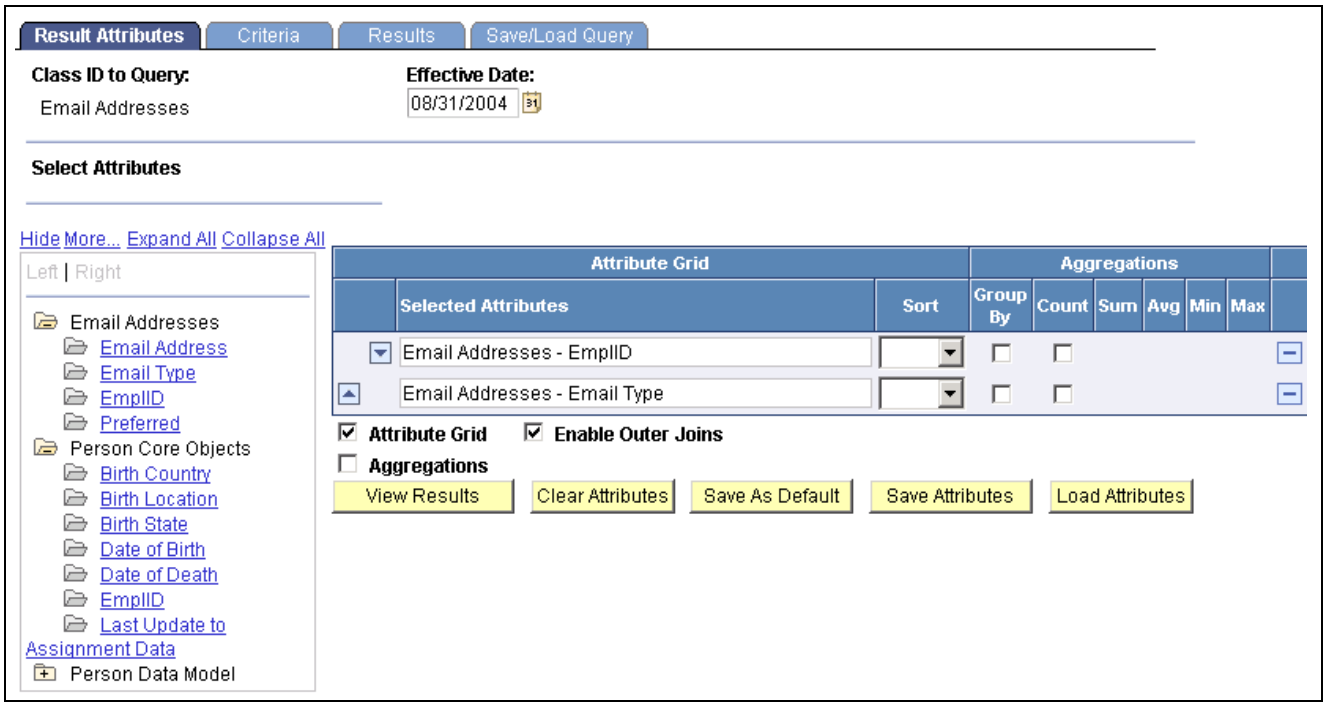
Pages Used to Build Queries

Page Name	Object Name	Navigation	Usage
Results Attributes	EQRY_OUTPUT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results Attributes	Select the object attributes that you want to use as results attributes in the query results. Select as many attributes as needed.
Save Attributes	EQRY_OUT_S_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results Attributes Click the Save Attributes button on the Results Attributes page.	Save the results attributes of the query. Enter a name and description for the query. The query is available to all users who have access to Query Builder. If you don't want the query generally available, select Private Query.
Load Attributes	EQRY_OUT_L_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results Attributes Click the Load Attributes button on the Results Attributes page.	Load or append predefined results attributes selection for use in the current query. The attributes that are available depend on the target object that is selected when Query Builder is invoked.

Page Name	Object Name	Navigation	Usage
Criteria	EQRY_ISCRIPT	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria	Specify the attributes for which you want to query, and define expressions by using operators and values.
Criteria Attribute Tree	EQRY_ATT_TREE_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Select Attribute button next to the Attribute Name field on the Criteria page.	Using the object selection tree, navigate to the attribute that you want to use as query criteria and select it.
Select Value	EQRY_VBUILD_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Value lookup button on the Criteria page.	Select the attribute value to use as query criteria
Save Criteria	EQRY_PROP_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Save Criteria button on the Criteria page.	Save the current criteria selection by name for use in later queries. The system saves the query criteria selection for the target object that is selected when Query Builder is invoked.
Load Criteria	EQRY_LOAD_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Load Criteria button on the Criteria page.	Load an existing criteria selection.
Results	EQRY_RESULT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results	Review the results of your query.
Save/Load Query	EQRY_COMBO_SAVE_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Save/Load Query	.Save the current query or load a predefined query.
Pre-defined Queries	EQRY_VIEWER_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Pre-defined Queries	Run a query that you've predefined on the Query Builder component. The page looks like the Query Builder - Results page.

Selecting Query Attributes

Access the Results Attributes page.



Results Attributes page

Use the Results Attributes page to select the object attributes that you want to search against. You can select any combination of the defined attributes for the object.

At any point while defining results attributes, you can run the query and view the results. You can then return to the Results Attributes page to modify the query results attributes, go to the Criteria page to refine the query selection, or save the definitions.

Class ID to Query Displays the class ID you selected for querying on the search page.

Select Attributes

The system displays folders for the target class ID object and any other objects that have a relationship (as entered on the Object Class Definition page) with the selected class ID. In this example, you can see that both the Person Core Objects and Person Data Model objects have a relationship with the Email Addresses object.

Click the folder to view the attributes of each object. Click an attribute to add it to the attribute grid.

Select Attributes You can rearrange the order of the selected attributes to determine the order in which they appear on the Results page. You can also determine the sort order of the data that is in each results column.

Hide Hides the attribute tree.

More When Query Builder first opens, the Select Attributes tree displays the system objects that are closely related to the target object through direct association. These relationships are defined in HCM metadata and represent the objects that you most often use in queries. If you can't find the objects that you want, click the More link to access other objects .

Expand All Click to reveal the contents of all attribute tree folders.

Collapse All Click to collapse all attribute tree folders.

Attribute Grid Select this check box to display the results columns as defined in the Attribute Grid.

Aggregations Select this check box to display the results based on the groupings that are selected in the Aggregations grid.

Enable Outer Joins Select this check box to enable the query to use outer joins to gather additional data in the query.

View Results Click to run the query. The system opens the Results page, showing the results of the query.

Clear Attributes (Optional) Click to remove the attributes that appear in the Selected Attributes list.

Save As Default (Optional) Click to set the attributes that you select as the default attributes that appear each time that you use the target object.

Save Attributes (Optional) Click to save current attribute selections as a query.

Load Attributes (Optional) Click to load predefined attribute selections.

Attribute Grid

Selected Attributes The system populates the Selected Attributes list with the target object's list box items as they're defined in the Tools Record definition. You can add or delete attributes as necessary for your query.

 and  Use the arrows to rearrange the attributes to determine the column display order in query results. For example, the attribute at the top of the Selected Attributes list appears as the left-most column in the query results.

Sort (Optional) Indicate a sort order for the attribute in the column results: *Blank, Asc*(ascending), and *Desc* (descending). You can sort one or multiple columns. Specifying multiple sorts causes column results to sort from left to right. Column results that are sorted have a link that appears in the column header in the query results.

Group Select this check box to group the results by the attribute.

Count, **Sum**, **Avg** (average), **Min** (minimum), and **Max** (maximum) Select these options to have the system count the different groups. For attributes that are related to transaction amounts, the system can also sum, average, and indicate the minimum or maximum amounts.

Aggregations

Use the check boxes in this grid to indicate how you want the results to appear on the Results page. For example, you can tell the system to group the results by order number, and within each group, sum the order amounts as well as show the minimum and maximum amounts.

Loading Results Attributes

Access the Load Attributes page.



Load Attributes page

Use the Load Attributes page to add saved results columns to the query. The page displays all of the attribute sets that are saved by all users as well as the attribute sets that you save and mark as private.

Load Replaces the results attributes in the query.

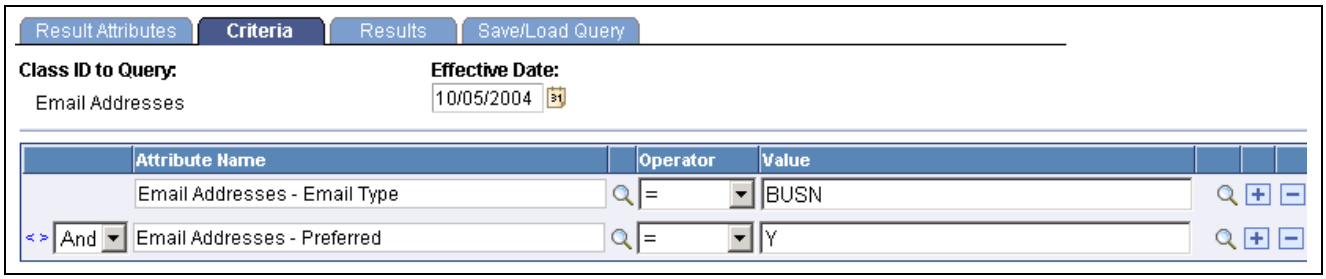
Append Adds the results attributes onto the query.

User ID The user who creates and saves the results attributes.

Private Query Indicates the private queries.

Selecting Query Criteria

Access the Criteria page.



Criteria page

After you load or define the query results attributes, you can optionally add criteria to filter the query results on the Criteria page. You can only select attributes from the objects that are selected on the Results Attributes page. Specify as many criteria rows as needed, or save a criteria selection for later use to use as a predefined query selection in the current query.

By using indentation in expressions, you can create queries that are as complex as you need. Query Builder intelligently parenthesizes the expressions to ensure that the query is evaluated correctly.

Attribute Name Select the attributes from the objects connected to the class ID you're querying.

Click the Select an Attribute button to view a list of all defined attributes for the object on the Select Criteria page. Select an attribute to return to the Criteria page.

Operator Select an operator to define the condition for the criteria.

Value Enter a value for the selected attribute to use as query criteria.

Selecting a Value

Access the Select Value page to select the values that you want to use to filter the query. The fields on the page differ depending on the operator that you select on the Criteria page.

If you use the between or not between operators, you select a From and To value.

If you used the like, not like, equal to, not equal, greater than, less than or equal to, less than, or greater than or equal to, you select a value for the system to compare the result to.

If you use the in or not in operator, you can select one or more check boxes for the values within which you want the system to return the results.

At any point while defining the criteria, you can click the View Results button to run the query, and then return to the Criteria or Results Columns page to modify or (optionally) save the definitions.

Working with Criteria



Click to view the results of the query on the Results page.



Click to remove all current attribute names and value selections and start over.



(Optional) Click to save current attribute name and value selections.

After selecting the criteria, you can save the query definition for future use. On the Save Criteria page, enter a name and description for the query and indicate whether or not you want it to be a private query.

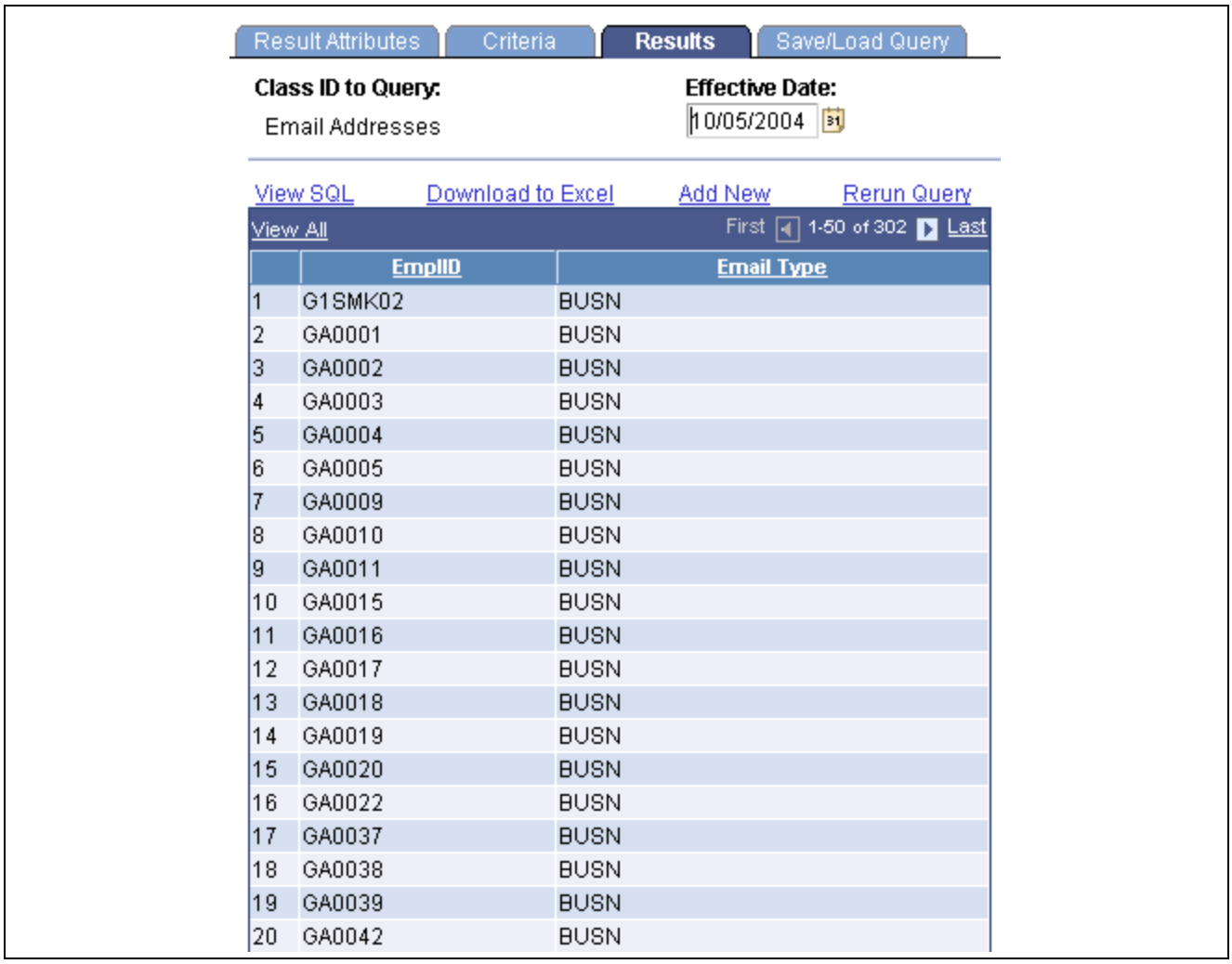


(Optional) Click to load predefined attribute name and value selection.

This page works just like the Load Columns page, and displays all of the query criteria sets that are saved by all users as well as the sets that you save and mark as private.

Viewing Query Results

Access the Results page.



Results page

Use the Results page to view the results of the query. You can click any of the links that are in the results columns to go to the application page where the attribute is defined.

Select to view the query SQL, download the query results into Excel, add new criteria, or rerun the query.

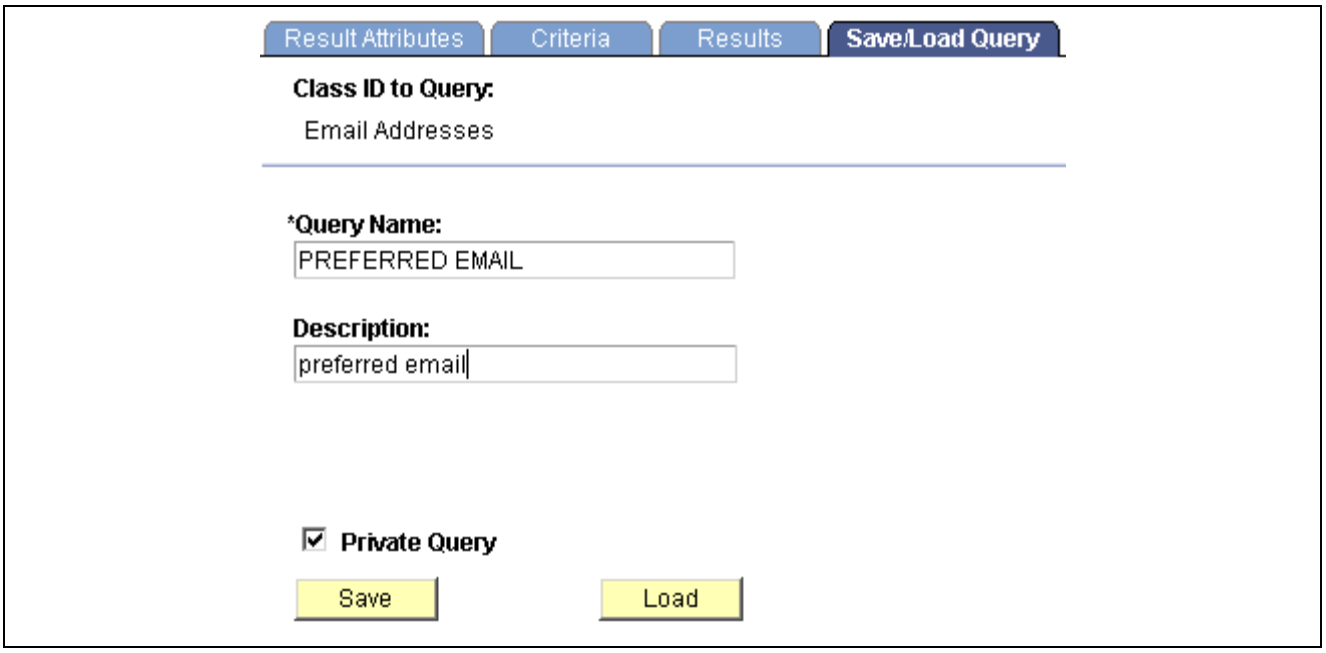
Note. When you select to download the current query results to a Microsoft Excel spreadsheet, only the results currently displayed on the page are downloaded to the spreadsheet. To download all query results, click the View All link, and then click the Download to Excel link.

Aggregations grid

Shows the results sorted and totaled based on the check boxes that you select on the Results Columns page. This grid is only visible if you select the Aggregations check box on the Results Columns page.

Saving and Loading the Query

Access the Save/Load Query page.



Save/Load Query page

While defining a query, you can save the results attributes and criteria as separate definitions. This allows you the flexibility to mix and match various results attributes and criteria. You can also save a query definition, which is a combination of an output (results attributes) selection and a criteria selection.

Query Name Enter a name under which to save the query. When you save a Query Builder query, both the results attributes and the criteria selection are saved.

Private Query Select to make the query private and available only to the user who created it.



Click load to load a predefined query.

Running Predefined Queries

Access the Pre-defined Queries page.

Select a query by searching on output and criteria combination, description, original class ID, or a combination of these. Then click the query result that you want to run. Click the View Definition link to access the Query Builder component, where you can change the results columns, attributes, or criteria of the query and rerun the query.

Note. Predefined queries are also available by loading existing query definitions from within Query Builder.

CHAPTER 30

Working with HCM Transformation Framework

This section provides an overview of HCM Transformation Framework and discusses how to set up and manage HCM transformation maps.

Understanding the Transformation Framework

When an application sending a message uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. HCM Transformation Framework uses definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

HCM Transformation Framework enables seamless integration among PeopleSoft applications as well as with third-party applications such as Oracle, SAP, and Siebel. Transformation schemas are associated with transformation maps, enabling you to quickly locate and modify a schema to respond to external changes.

The transformation map registry is made up of transformation maps. The transformation map defines the message properties of the message for both the target and source application. For each transformation map, create a transformation schema, an XML document that defines the message structure mapping between two applications.

When a message needs to be transformed in order to be successfully received by an application, you need to assign a transformation program with the message on the Integration Broker Relationships component (IB_RELATIONSHIP).

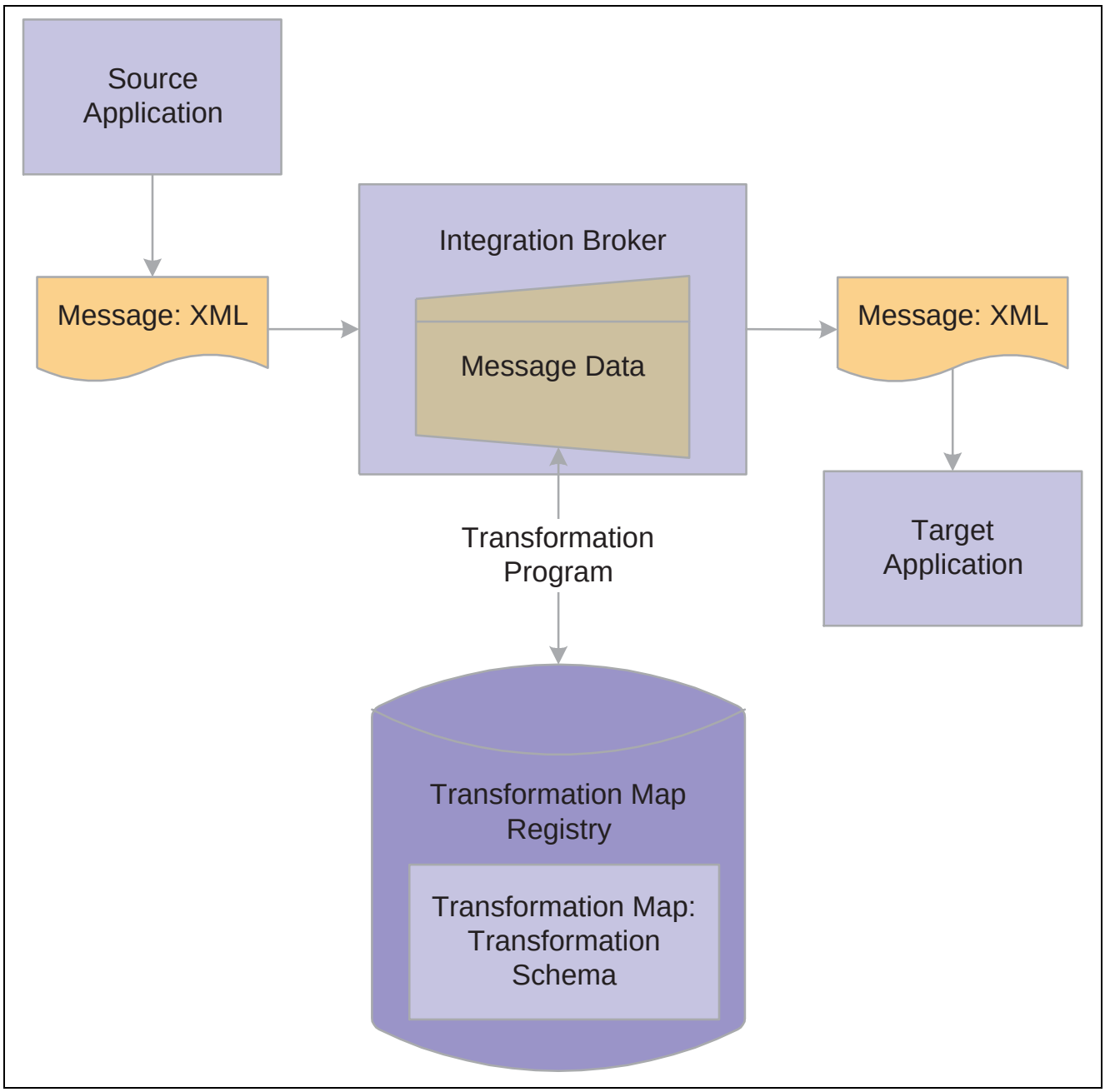
There are four transformation programs supported by the transformation framework:

- HTMF_TR_IA, for inbound asynchronous communications.
- HTMF_TR_IS, for inbound synchronous communications.
- HMTF_TR_ISR: for the inbound synchronous response
- HTMF_TR_OA, for outbound asynchronous communications.
- HTMF_TR_OS, for outbound synchronous communications.
- HMTF_ TR_OSR for outbound synchronous responses

Based on the transaction type, choose the appropriate transformation program to associate with your application message.

When an application publishes a message that requires transforming, PeopleSoft Integration Broker invokes the transformation program associated with the message. The transformation program determines which transformation map corresponds to the target message and applies the transformation schema to the message data using XSLT, an XML translation language. The transformation schema can modify the metadata or the message data itself to comply with the target application requirements. PeopleSoft Integration Broker repackages the transformed message data into an XML document that is structurally compliant with the target application. The Integration Broker can then deliver the message to the receiving application.

This diagram illustrates the flow of information from one application to another using HCM Transformation Framework:



Transforming data using the transformation framework

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker, "Applying Filtering, Transformation and Translation"

Base Message Format in PeopleSoft Integration Broker

Before you create a transformation schema, it helps to understand the base XML document format used by PeopleSoft Integration Broker to package application data:

```
<?xml version="1.0"?>
<PeopleSoftMessageName>
 <FieldTypes>
  <RecordName1 class="R">
   <fieldname1 type="CHAR"/>
   <fieldname2 type="NUMBER"/>
   ...
  </RecordName1>
  <RecordName2 class="R">
   <fieldname1 type="CHAR"/>
   <fieldname2 type="NUMBER"/>
   ...
  </RecordName2>
  ...
 </FieldTypes>
 <MsgData>
  <Transaction>
   <RecordName1 class="R">
    <fieldname1>Fieldvalue</<fieldname1>
    <fieldname2>Fieldvalue</<fieldname2>
     ...
   <RecordName1>
   <RecordName2 class="R">
    <fieldname1 type="CHAR"/>
    <fieldname2 type="NUMBER"/>
     ...
   </RecordName2>
  <PSCAMA class="R">
   <AUDIT_ACTN>ActionCode</AUDIT_ACTN>
          </PSCAMA>
     ...
  </Transaction>
  ...
 </MsgData>
</PeopleSoftMessageName>
```

This format is then packaged into an XML document for transmission to the target application. If you have attached one of the supported framework transformation programs to the message, the transformation program identifies the appropriate transformation map and applies the transformation schema to the message, modifying its structure. The message is then repackaged into an XML document in its altered form and delivered.

Note. The transformation message must be supported by the transformation framework. Only supported programs can work with the transformation maps. You can also add configured Application Engine or XSLT transformation programs as part of the relationship definition independent of the transformation framework.

The transformation program can modify the following elements of the standard message structure:

PeopleSoftMessageName	The name of the message as it is defined in PeopleSoft using Application Designer. The transformation program can change the message name.
FieldTypes	The metadata for the records and their fields. The transformation program can select the fields required by the target applications and can change their names.
Transaction	Contains the data for the records and their fields and organizes them into a hierarchy. The record tags at each level contain the fields for that record. The transformation program can select one or more record subsets and their fields or just a subset of fields required by the target application message and can change their names.
PSCAM (PeopleSoft Common Application Message Attributes)	The last record within a transaction that provides information about the entire transaction. The PSCAMA record contains fields that are common to all messages. The <PSCAMA> tag repeats for each row in each level of the transaction section of the message. The sender can set PSCAMA fields to provide basic information about the message, for example, to indicate the message language or the type of transaction a row represents. The transformation program copies this structure to the target message structure.

Setting Up and Managing HCM Transformation Maps

To set up and manage HCM transformation maps, use the Register Transformation Map component (HMTF_WZ_STEP1) and the Transformation Registry component (HMTF_TRF_REGISTRY).

This section discusses how to:

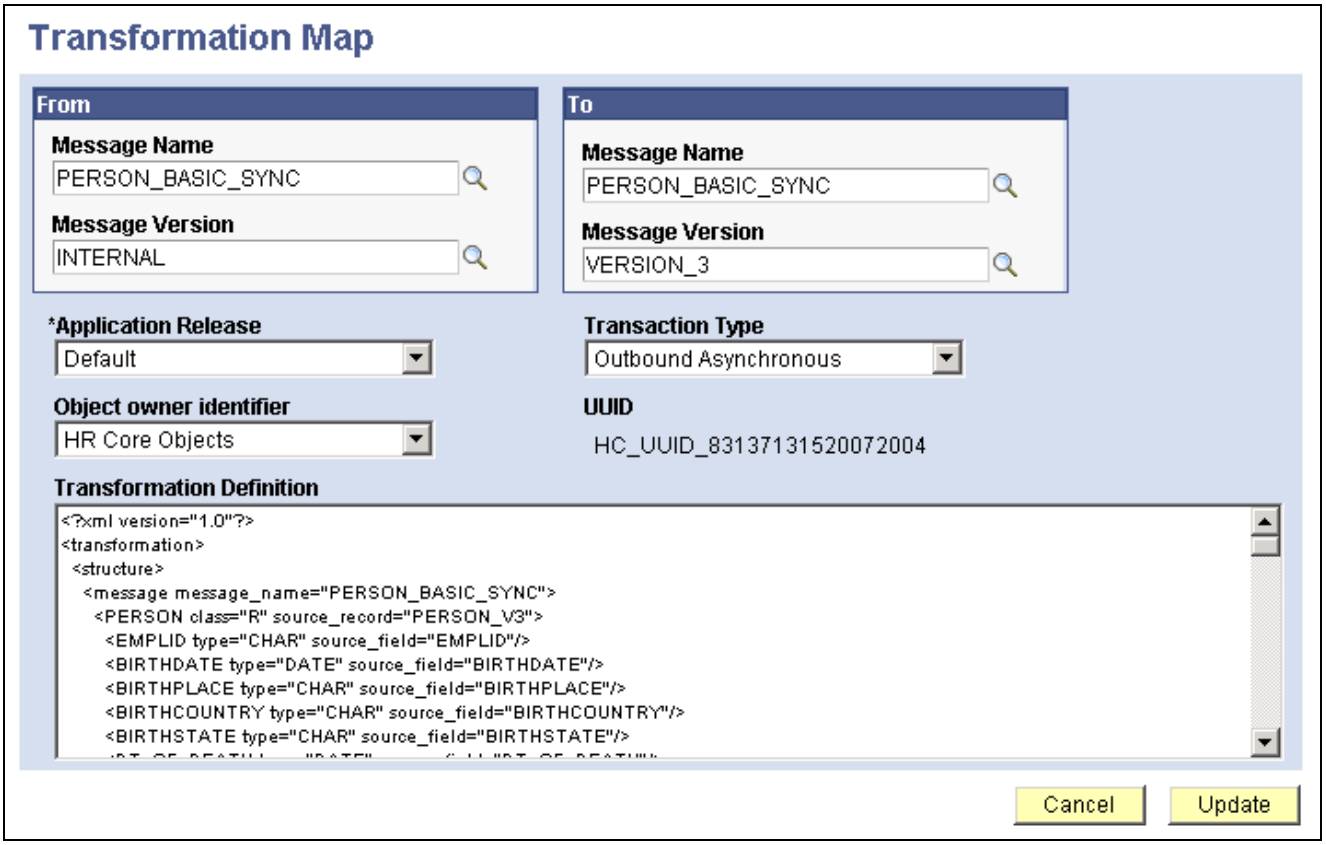
- Set up transformation maps.
- Use the HCM transformation registry.

Pages Used to Set Up and Manage HCM Transformation Maps

Page Name	Object Name	Navigation	Usage
Transformation Map	HMTF_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Register Transformation Map, Transformation Map	Use to define or modify transformation maps (transformation XML schemas).
HCM Transformation Maps	HMTF_TRF_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, HCM Transformation Maps	Organizes the transformation maps by message name, message version, application version, and transaction type. Click a transformation map URL to modify the transformation map

Setting Up HCM Transformation Maps

Access the Transformation Map page.



Transformation Map page

The system stores the map as an HTML template in the portal registry (HC_REGISTRY) in the HCM Transformation Maps component.

Message Name and **Message Version**	Select the message name and version for both the source (From) and target (To) application.
Application Release	Select the release of the source application.
Transaction Type	Indicate if the type of transaction is *Inbound Synchronous*, *Inbound Asynchronous*, *Outbound Synchronous* , *Outbound Asynchronous*, *Inbound Synchronous Response*, or *Outbound Synchronous Response*.
Object owner identifier	Select the owner of the object.
Transformation Definition	Define the mapping information (schema) to map the source application message structure to the target application message structure.

Defining the Transformation Schema

The transformation definition contains the following code:

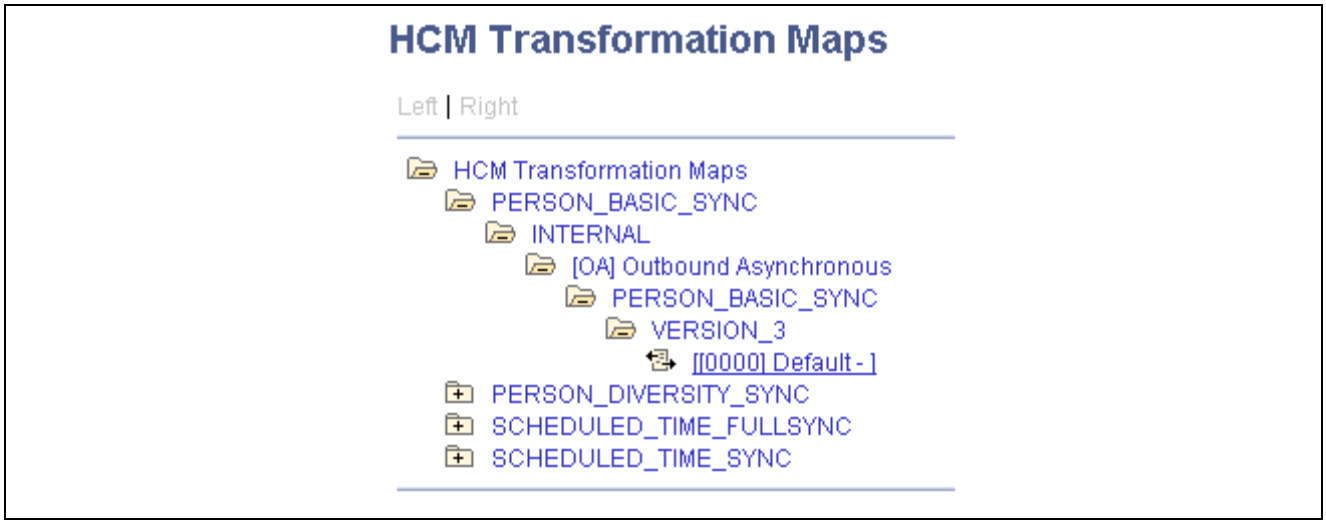
```
<?xml version="1.0"?>
 <transformation type="IA"application_release="Application Name and?
 Release"default_node="Default Node Name">
  <structure>
   <message message_name="Original Message Name" new_message_name="New Message?
 Name">
    <TargetMessageRecord class="R" source_record="SourceMessageRecord ">
     < TargetMessageRecordField1 type="CHAR" value="DefaultValue"/>
     < TargetMessageRecordField2 type="CHAR" source_field="SourceMessageRecord?
Field" [source_record="SourceMessageRecord"/>
      ...
    </TargetMessageRecord>
   </message>
  </structure>
 </transformation>
```

Enter values in the following elements:

XML Tag	Elements	Values
transformation	type	Enter a transformation type. Supported values are: • IA: inbound asynchronous. • IS: inbound synchronous. • OA: outbound asynchronous. • OS: outbound synchronous.
	application_release	(Optional) Enter the Category.AppRelease property of the relationship defined in PeopleSoft Integration Broker.
	default_node	(Optional) Enter the default node to be used.
message	message_name	Enter the name of the source application message.
	new_message_name	(Optional) Enter the name of the message in the transformed structure.
[TargetMessageRecord] **Note.** Edit this tag so that it is the name of the target message record.	class	Enter the element class. The value is *R* for PeopleSoft record based message structure.
	source_record	(Optional) Enter the name of the source record. You should enter a value if the names of the source and target records are different.
[TargetMessageRecordField] **Note.** Edit this tag so that it is the field name in the target message record.	type	Select the data type of the field of the transformed message for the target application. Valid values are: • CHAR • DATE • NUMBER
	source_field or value	Enter the name of the source record field name whose values should be copied in the transformed message structure for the target application *or* enter the default value that should be copied in the transformed message structure for the target application. **Note.** Enter a value in source_field or value, but not both.

Using the HCM Transformation Registry

Access the HCM Transformation Maps page.



HCM Transformation Maps page

Drill down to the transformation map by message name, message version, application version, and transaction type. Click the template URL to access the Transformation Map page for the transformation map.

CHAPTER 31

Setting Up and Generating Form Letters

This chapter provides an overview of HRMS form letters and discusses how to:

- Generate form letters for PeopleSoft Enterprise Human Resources.
- Set up standard letter codes.
- Generate form letters for other PeopleSoft HRMS applications.
- Review sample form letters.

Understanding PeopleSoft HRMS Form Letters

This section lists prerequisites and discusses using PeopleSoft HRMS form letters.

Prerequisites

Use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the sample form letters that are delivered with PeopleSoft HRMS. The PeopleSoft Process Scheduler runs a job that:

1. Executes a Structured Query Report (SQR) — with SQRibe Technology's Structured Query Report Writer to extract data from the database.
2. Merges the data into a Microsoft Word for Windows document template — with Microsoft Word for Windows as the word processor.
3. Posts the resulting letters on the web server.

If you currently use a report writer other than SQRibe Technology's Structured Query Report Writer or a word processor other than Microsoft Word for Windows, review the information in this chapter to understand the steps that are involved in generating form letters. Then, consult your report writer or word processor documentation to modify the procedures to fit the sample letters.

Once you are familiar with the sample form letters, you can modify the letters or create new ones for other tasks.

Note. To generate letters, you should be familiar with the Microsoft Word for Windows mail merge functions.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Adapting Form Letters, page 632

Using PeopleSoft HRMS Form Letters

PeopleSoft HRMS delivers a set of sample form letters for use with PeopleSoft HRMS applications. There are two methods for generating form letters; one for PeopleSoft Human Resources and one for applications other than PeopleSoft Human Resources (referred to as other PeopleSoft HRMS applications).

Please follow the appropriate method to create your form letters successfully.

Many human resource management activities involve sending out routine letters and memos on a regular basis. For example:

- (PeopleSoft Enterprise Recruiting Solutions) Letters acknowledging resumes, job postings, and job offers.
- (PeopleSoft Human Resources) Letters of rejection following interviews.
- (PeopleSoft Human Resources) Letters announcing course session enrollments, cancellations, and rescheduling.
- (PeopleSoft Enterprise Global Payroll, Pension Administration, Benefits Administration) Letters, notification forms, and plan updates.

The wording of such letters doesn't change much from mailing to mailing; what does change is information such as addresses and dates. In PeopleSoft HRMS, you can create form letters in your word processor by accessing the data that you need from your human resources database.

You can generate several types of letters and print them all at the same time, or you can generate letters now and print them later, if you prefer to review them first. Three sample form letters are provided at the end of this chapter.

See Also

Microsoft Word for Windows User's Guide.

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration

PeopleSoft Enterprise Talent Acquisition Manager 8.9 PeopleBook

PeopleSoft Enterprise Candidate Gateway 8.9 PeopleBook

Generating Form Letters for PeopleSoft Human Resources and Recruiting Solutions

This section provides an overview of form letters for PeopleSoft Human Resources Recruiting Solutions and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Prepare to print form letters.
- Adapt form letters.

Note. These instructions show you how to use templates to create form letters for PeopleSoft Human Resources. To create form letters for other PeopleSoft HRMS applications, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Generating Form Letters for Other PeopleSoft HRMS Applications, page 639

Understanding Form Letters for PeopleSoft Human Resources and Recruiting Solutions

PeopleSoft delivers a set of sample letters for use with the following:

- PeopleSoft Human Resources: Administer Training
- PeopleSoft Human Resources: Manage Labor Administration
- PeopleSoft Recruiting Solutions

The form letter processes search the database for records that have been tagged with specific letter codes. For example, when you enroll an employee on a training course using the Administer Training business process, you can add a letter code to the employee record that identifies the type of letter required. When you later run the training letter report, the system searches for records with the letter codes for training letters.

The form letter processes use Microsoft Word for Windows to generate the letters based on data extracted from the PeopleSoft database.

To generate form letters for PeopleSoft Human Resources:

1. Create letter codes by using the Standard Letter Table page (STANDARD_LTR_TABLE).

   Letter codes represent form letters and are used to link a record to the required letter.

2. Tag people's records with the appropriate letter code in the PeopleSoft Human Resources database.

   Enter a letter code into the records of applicants, employees, contingent workers, or people of interest to flag the record when it's time to generate a form letter.

   For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee, contingent worker, and person of interest records.

3. Generate form letters by running a report that runs the following processes:

   a. An SQR data extract process.

   b. A WinWord WORDINIT process.

   c. The PSMERGE Application Engine process.

   The final step is completed by the Distribution Agent that moves the letter files to the Report Repository.

4. Send training letters by email.

   This step is for the training letters only. The system also emails training letters to students if their email addresses are in their person records.

   Note. You must configure SMTP and activate Workflow to automatically send training letters by email.

   See *Enterprise PeopleTools PeopleBook: System and Server Administration*

5. Print the letters by using Microsoft Word for Windows.

   The system creates the form letters in a temporary directory on the web server, putting all letters of the same type in one file.

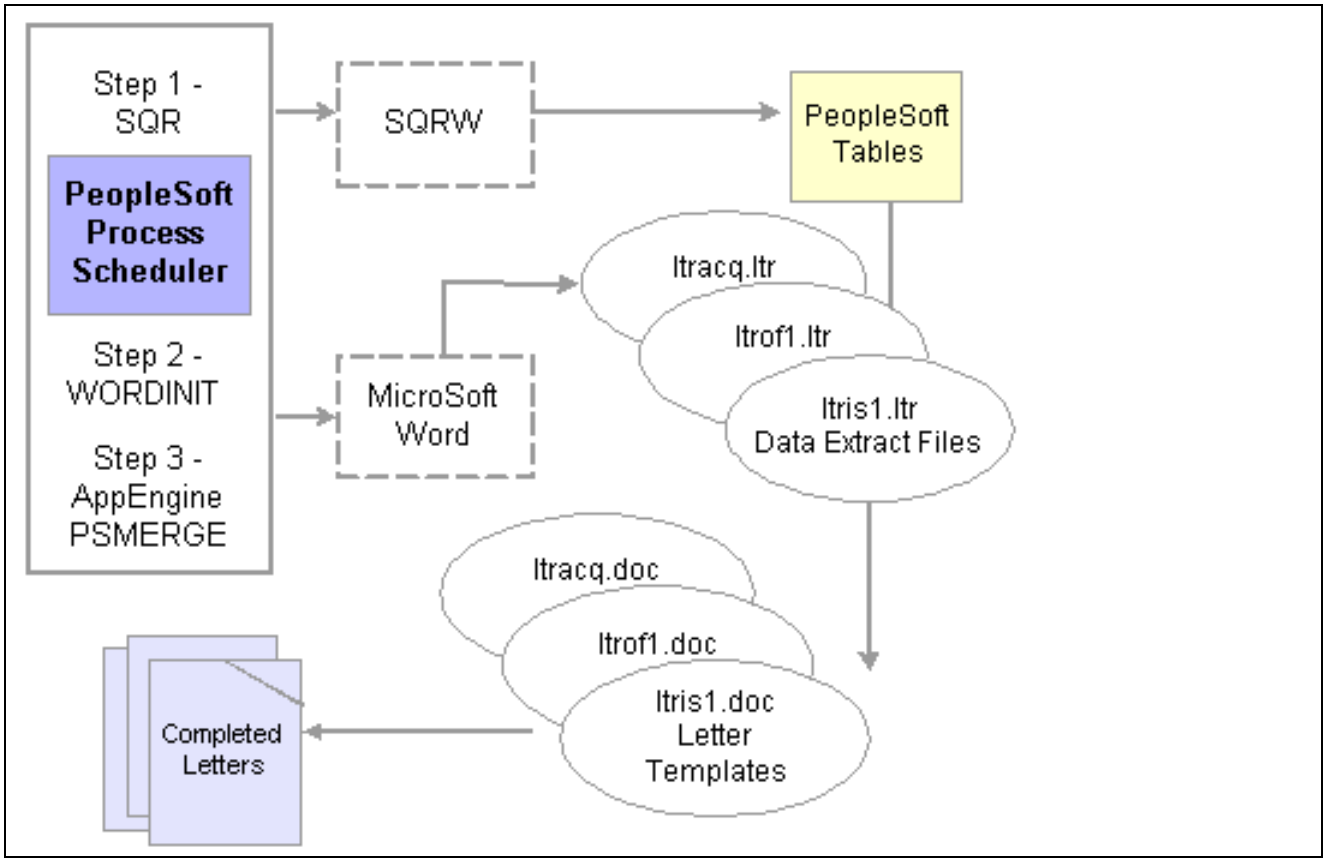
   The distributed architecture of the PeopleSoft Human Resources system enables you to access the application server far from local machines therefore the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word for Windows print options.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Setting Up Standard Letter Codes, page 638

Generating Form Letters

This diagram illustrates how PeopleSoft Process Scheduler generates form letters for PeopleSoft Human Resources:



Generating form letters for PeopleSoft Human Resources with PeopleSoft Process Scheduler

Step 1: SQR Data Extract Process

The SQR data extract process:

- Identifies records in the database with the appropriate letter codes (and no print date).
- Extracts data from these tagged records.
- Updates the Print Date field in the tagged records.

- Creates a data extract file (with an .ltr extension) that contains the data for each letter.

  For example, the file containing data for offer letters is ltrof1.ltr, where of1 represents offer letter, and .ltr represents letter.

The SQR process sends its output to the log/output directory defined for SQR reports. Define the log/output directory in the Process Scheduler configuration file.

Step 2: WORDINIT WinWord Process

The WORDINIT WinWord process is an initialization process. Its purpose is to ensure that the PSMERGE application engine process can retrieve the location of:

- The executable file for Microsoft Word for Windows, winword.exe.
- The PS_HOME directory that contains the letter templates.

The WORDINIT process runs winword.exe and a dummy macro called PSINIT which opens and closes the psmerge.doc file without creating any output. By including the WORDINIT WinWord process in the job definition, the Process Scheduler ensures that it has loaded the location of the winword.exe file into PSPRCSPARMS.

The PSMERGE application engine process uses this information to call Microsoft Word for Windows.

Step 3: PSMERGE Application Engine Process

The PSMERGE Application Engine process completes the merge of the data extract files and the Word templates. It:

- Retrieves the locations of the data extract files, winword.exe and the PS_HOME Winword directory.
- Creates a file called param.txt in the log/output directory.

  This file contains the locations of the files and a list of files to be merged.
- Calls Microsoft Word for Windows to carry out the merge.

  Microsoft Word for Windows:

  - Opens the form letter templates that correspond to the data extract files.
  - Merges the appropriate extract file data into the field codes for each template.

    For example, the offer letters template is ltrof1.doc and it includes field codes for names, addresses, and offer amounts.
  - Inserts the data from the appropriate .ltr file into the template field codes.

    For example, it inserts the data from the ltrof1.ltr extract file into the ltrof1.doc template.
  - Places the resulting letters in the log/output directory.

Using Naming Conventions in Form Letter Files

Before you adapt existing form letters or create new ones, you should be familiar with the naming conventions for each element of the process. Use the same naming conventions for the new form letter components that you create.

This section discusses how to:

- Use letter codes.
- Use data extract files and corresponding Word letter templates.

Using Letter Codes

You create letter codes in the Standard Letter Table component. Use letter codes to indicate what kind of letter is required for a particular record. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed below.

Using Data Extract Files and Corresponding Word Letter Templates

The extension .ltr represents form letters and the extension .doc is the normal templates extension. Every letter code for which you generate form letters must have a corresponding data extract file and a template with the same name of the data extract file:

Object	Example
New letter code	xyz
Data extract file name	aaaxyz.ltr
Template name	aaaxyz.doc

The letter codes and their associated data extract files and Word templates include:

- Recruiting letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Acknowledgement	LAQ	ltrlaq.ltr	ltrlaq.doc
Acknowledgment of resume receipt	ACQ	ltracq.ltr	ltrlaq.doc
Applicant Interview, Level 1	IS1	ltris1.ltr	ltris1.doc
Applicant Interview, Level 2	IS2	ltris2.ltr	ltris2.doc
Applicant Interview, Level 3	IS3	ltris3.ltr	ltris3.doc
No current opening letter	ANO	ltrano.ltr	ltrano.doc
Rejection after an interview	IR	ltrir.ltr	ltrir.doc

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Job offer 1 letter	OF1	ltrof1.ltr	ltrof1.doc
Job offer 2 letter	OF2	ltrof2.ltr	ltrof2.doc

Note. The Standard Letter table also contains four codes, IBE, IEC, IMG and LMQ, that are used in Recruiting Solutions. However, these codes don't have macros or sample letters associated with them.

- Training letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of session enrollment	CON	ltrcon.ltr	ltrcon.doc
Rescheduling of course session	RSC	ltrrsc.ltr	ltrrsc.doc
Cancellation of course session	CAN	ltrcan.ltr	ltrcan.doc

Note. The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

- Labor Administration letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of Disciplinary Action Filed	DAF	ltrdaf.ltr	ltrdaf.doc
Confirmation of Disciplinary Action Resolution	DAR	ltrdar.ltr	ltrdar.doc
Confirmation of Grievance Filed	GRF	ltrgrf.ltr	ltrgrf.doc
Confirmation of Grievance Resolution	GRR	ltrgrr.ltr	ltrgrr.doc

Setting Up Form Letters

This section discusses how to:

- Set up the Process Scheduler.
- Set up WinWord security.
- Set up document templates.

- Run the WORDSAMP process.
- Define the output type and format of the SQR process.

Setting Up the Process Scheduler

To set up your Process Scheduler to generate form letters:

1. Install the Microsoft Word for Windows on the same machine that runs the Process Scheduler.
2. Define the WINWORD parameter in the Process Scheduler configuration file.

   The WINWORD parameter defines the location of the Microsoft Word for Windows executable file, winword.exe on the server. Make sure that there are no spaces in the path and the path does not end with a slash (/).
3. Use the Process Scheduler Manager to define a server specifically for running the form letter processes.

   Select PeopleTools, Process Scheduler Manager, Use, Server Definitions to define the server. On the Distribution page, leave the Transfer Log Files to Report Repository check box clear.

If you run the Process Scheduler as a service, modify the service to interact with the desktop:

1. From the Microsoft Windows Control Panel, open Administrative Tools, Services.
2. Open the Process Scheduler service and access the log on tab.
3. For the Log on as field, select Local System account and select the Allow service to interact with desktop check box.

   This enables Microsoft Word for Windows to run in the foreground of the server. You cannot run Microsoft Word for Windows macros as a background service.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Appendix: Using the PSADMIN Utility"*

Setting Up Winword Security

To run the macro that completes the merge, you must set the macro virus protection to Low. To do this:

1. Run Microsoft Word for Windows and select Tools from the menu bar.
2. Configure security according to the version of Word you are running:
   - Microsoft Word for Windows 97: Select Options and click the General tab. Clear the Macro Virus Protection check box.
   - Microsoft Word for Windows 2000: Select Macro, Security to display the Security window. Select Low.

See *Microsoft Word for Windows User's Guide*

Setting Up Document Templates

To generate form letters, the document templates and the macros must be located in the directory %PSHOME%\winword.

Check that the files psmerge.doc and psmerge.dot, and all the document templates in this directory are read-only.

Running the WORDSAMP Process

Before running any of the form letters processes, test your environment by running the WORDSAMP process. If this process runs successfully, this demonstrates that the environment is correctly configured to run Microsoft Word processes.

Note. To verify that the WORDSAMP process has successfully completed verify that it has created a document called wordsamp.doc.

To run the WORDSAMP process:

1. Select PeopleTools, Process Scheduler, System Process Requests. Select a Run Control ID and click Run.
2. The Process Request Dialog page (PRCSSAMPLEPNL1) appears.
3. Select your server in the Server Name field and select the Win Word Sample Process check box.
4. Click OK.
5. Click the Process Monitor link to check that the process runs successfully (Run Status is *Success*).
6. Check that a document wordsamp.doc is created. This document is posted to the Report Repository as a normal report.

   If the process doesn't run successfully or the process doesn't create wordsamp.doc, then your environment is not set up correctly to run WinWord processes.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Submitting and Scheduling a Process Request"*

Defining the Output Type and Format of the SQR Process

When you run the form letter report to generate letters, make sure that the Type and Format fields are set up correctly for the SQR data extract process. The SQR process must be set up with Type set to *File* and Format set to *LP*.

For example, if you are creating a recruiting letter, check the output type and format as follows:

1. Select Recruiting, Administration, Generate Recruitment Letters, Hrs Run Letters page (HRS_RUN_LETTERS).
2. Select a Run Control ID and click Run.
3. On the Process Scheduler Request page, click Doc. Generation for Recruit Ltr to access the Job Detail page.
4. The Process List group box lists the three processes run to generate recruitment letters. For the SQR process APP007, select File in the Type field and LP in the Format field.

For information about running the form letter reports, refer to the appropriate PeopleSoft Human Resources PeopleBook.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Tracking Disciplinary Actions and Grievances".

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training*, "Enrolling and Wait-Listing Students," Generating Student Form Letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word for Windows macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

  The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word for Windows, you print them to your local printers.

To set up the system to print form letters:

1. On the Servers — Distribution page create a new dedicated Process Scheduler leaving the Transfer System Files to Report Repository check box clear to run form letters.
2. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the Letter Code field to other pages in PeopleSoft Human Resources.

This section discusses how to:

- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.
- Add letter code fields to pages.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks that you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are located in the directory \PS\WINWORD.
2. In Microsoft Word for Windows, open the document that you want to modify.

   If you see " " in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document and save the file.

   In the example letter below, we changed the author from Barbara Smith, Employment Coordinator to Jay Ferreira, Recruitment Specialist.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

{MERGEFIELD System Date}

{MERGEFIELD Line1}

{MERGEFIELD Line2}

{MERGEFIELD Line3}

{MERGEFIELD Line4}

{MERGEFIELD Line5}

{MERGEFIELD Line6}

Dear {MERGEFIELD Salutation}:

I am pleased to offer you a position at PeopleSoft at a starting salary of {MERGEFIELD Offer_Amt}. Salary payments are made on the last working day of each month. You are provided with 15 paid leave days during each calendar year with the Paid Time Off program.

Following a one-month waiting period, you will be eligible for our company-paid benefits package, which includes the medical/dental, vision, life insurance, and disability benefits described in the attached brochure.

You will be eligible to participate in the 401(k) plan beginning the first quarter after your hire date. You are also eligible for the PeopleSoft Stock Option plan. Grants are made at the discretion of management based on performance and significant contribution to achieving corporate goals.

I believe that PeopleSoft has tremendous potential as a company that provides great opportunities for personal growth, challenging work, and financial rewards. We look forward to your joining the PeopleSoft team.

Sincerely,

Jay Ferreira

Recruitment Specialist

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft Human Resources. For example, if you routinely make job offers using multiple currencies, you might want to include a currency field code in the Recruitment job offer letter.

Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

For example, to include currencies in the job offer letter ltrof1.doc, add a currency field code to the form letter template. Also add a variable for currency in app007.sqr so that the SQR retrieves the currency value and writes it to the data extract file.

Here's what the data extract file looks like before the change:

```
systemdate, Line1, . . ., Offer_Amt
"May 15, 1993", "Mr. John Matson" . . . , "40,000"
```

Here's what it looks like after the change:

```
systemdate, Line1, . . ., Offer_Amt, Currency
"May 15, 1993", "Mr. John Matson" . . . , "40,000", "US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters listing interview schedules for applicants. Or for administering training, you might want to create a form letter notifying students they are on the waiting list for a course session.

To create a new form letter:

1. Create a new letter code in the Standard Letter table.
2. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   The file name of the template must match the data extract (.ltr) file name. For example, if the data extract file is app004.ltr, the Word template file must be called app004.doc.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

   For example, create a form letter for interview schedules (INT) by adapting the offer letter template. In the directory \PS\WINWORD, open ltrof1.doc. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, ltrint.doc.
3. Edit the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.

   Insert the MERGEFIELD field code where you want the merge process to insert data from the data extract file into the letter. Press ALT + F9 to insert the MERGEFIELD field code.

   For example, to create a new form letter for interview schedules, you create new procedures in app007.sqr to extract values from all the fields and create a separate data extract file to store interview schedule letter information.

   The SQR process must include the name and extension (.ltr) of the data extract file that is created. An example is:

```
begin-procedure Write-Heading
move '{IMPORTPREFIX}' to $FileName !start a new report file
do Get-prcsoutputdir
if (rtrim($prcsoutputdir,' ') <> '')
move $prcsoutputdir to $Filename
concat 'APP004.LTR' with $Filename
end-if
NEW-REPORT $Filename
Let $InputField1 = 'LANG,Audience,Job_Requisition,JobTitle,DeptID,DeptName,Min_Rt_⇒
Annual,Max_Rt_Annual,Name1,Value1,Name2,Value2,Name3,Value3,Name4,Value4,Name5,Val⇒
```

```
ue5,Name6,Value6,Name7,Value7,Name8,Value8,'
Let $InputField2 = 'Name9,Value9,Name10,Value10,Name11,Value11,Name12,Value12,Name1⇒
3,Value13,Name14,Value14,Name15,Value15,Name16,Value16,Name17,Value17,Name18,Value1⇒
8,Name19,Value19,Name20,Value20,AsOfToday'
Let $InputFieldTot = $InputField1 || $InputField2
move
$InputFieldTot
to $ioarea
print $ioarea (1,1)
next-listing
end-procedure
```

If you create an Application Engine process, the file created by the process must have an .ltr extension.

See *Enterprise PeopleTools PeopleBook: SQR for PeopleSoft Developers*

4. Copy the new letter template to the Process Scheduler %PS_HOME%\winword directory.
5. Create a PSJOB to ensure that the SQR, WORDINIT, and PSMERGE processes are run in the correct order.

   Define the job to include these steps in the following order:

   a. SQR process or Application Engine data extract process.
   b. WORDINIT Winword process.
   c. PSMERGE application engine.

Note. PeopleSoft recommends that you do not modify any of the delivered Winword macros or templates.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See *Microsoft Word for Windows User's Guide*

Adding Letter Code Fields to Pages

We deliver PeopleSoft Human Resources with Letter Code fields in several pages in Recruiting, Administer Training, and Administer Workforce, and Manage Labor Relations.

You can add the Letter Code field to any other pages (and their underlying tables) in PeopleSoft Human Resources. For example, if you routinely send letters to employees, notifying them of career planning sessions, you can add the Letter Code field to one of the pages from the Plan Careers menu.

Note. To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word for Windows field codes, macros, and data statements; and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular application.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.

- A job containing the SQR, WinWord process WORDINIT, and the Application Engine PSMERGE.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, "Working With Processes and Reports"

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word for Windows User's Guide

Troubleshooting

This section discusses:

- Troubleshooting the SQR process.
- Troubleshooting the WORDINIT process.
- Troubleshooting the PSMERGE Application Engine process.
- Troubleshooting the Process Scheduler.
- Troubleshooting the Winword Directory.
- Troubleshooting Winword processes.
- Troubleshooting the PSMERGE process.

Troubleshooting the SQR Process

For the SQR data extract process check that:

- The process is run with the output Type set to *File* and Format set to *LP*. If you have run the SQR with any other output type or format, make sure that you delete these data extract files.
- The data extract file has been produced in the format xxx.ltr in the Process Scheduler log/output directory.
- Use the Process Monitor to delete all failed Process Requests.

Troubleshooting the WORDINIT Process

If the WORDINIT process fails and the environment is correctly configured, the most likely cause is macro security. Switching off the macro security for some Microsoft NT networks and you may need to consult your Systems Administrator.

In some networks, Microsoft Word automatically switches the security level back to "high" when running the process. For example, if Winword macro security is defined at the NT User Profile level then you need to set macro security to "low" for the NT ID that starts the Peoplesoft Process Scheduler service.

Note. Windows NT/XP locks and caches the macro virus protection settings for Winword and this may cause difficulties when turning off the macro virus protection.

Try hard-coding the path to PS_HOME in the Process Definition for WORDINIT:

1. Navigate to PeopleTools, Process Scheduler, Processes.
2. Select Process Name in the Search By field and enter WORDINIT.
3. Select the Override Options page.
4. In the Parameters field replace %%PS_HOME%% with the hard-coded path to the directory.

Troubleshooting the PSMERGE Application Engine Process

If the PSMERGE Application Engine process does not complete and you have added extra fields to the SQR data extract process, check that the fields have also been included in the document template and that the fields occur in the same order.

Troubleshooting the Process Scheduler

Check that the Process Scheduler is configured correctly:

- You must define a separate Process Scheduler server at Process Scheduler Definition level with the Transfer Log Files to Report Repository check box cleared.
- Confirm that the WINWORD parameter is correctly specified in the prcs.cfg file.

Check that all failed attempts at running the form letters have been deleted using the Process Monitor. Delete any Process Requests that have failed.

Use the Windows Task Manager to check that there are no Winword processes still running. Delete these before rerunning the form letter report.

Once Microsoft Word is interacting with the desktop it may try to reinstall itself. To avoid this, disable the Windows Installer.

Troubleshooting the Winword Directory

Check that the template files are in the correct directory with the correct access:

- The Winword templates and the macros must be located in the %PS_HOME%\winword directory.
- The files psmerge.doc and psmerge.dot and the document templates in the %PSHOME%\winword directory must be read-only.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

Troubleshooting Winword Processes

To display errors and debug the Winword Processes, modify your Process Scheduler configuration file, psprcs.cfg, by adding the following line to the Process Scheduler section of the file (after the line for the Allow Dynamic Changes parameter):

```
Allow To Interact With Desktop=1
```

Save the changes, clear the cache and re-start the application server.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Using the PSADMIN Utility"*

Troubleshooting the PSMERGE Process

If the PSMERGE Application Engine process is failing or the status remains as *Processing*, take the trace file, AE_PSMERGE_<PI>.trc (where <PI> is the process instance number), and extract the arguments from the file, combine them and run them from a command line. This tests the process outside the Process Scheduler.

For example if AE_PSMERGE_<Pl>.trc is set up as follows:

```
cmd = D:\PSHR88\WINWORD\run.bat
 cwd = (null)
 argc = 5
 argv[0] = D:\PSHR88\WINWORD\run.bat
```

```
argv[1] = C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
argv[2] = D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
argv[3] = D:\PSHR88\WINWORD\PSMERGE.DOC
argv[4] = /mPSMERGE
```

You run them from the DOS command line as follows:

```
D:\PSHR88\WINWORD\run.bat  C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
D:\PSHR88\WINWORD\PSMERGE.DOC  /mPSMERGE
```

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine, "Tracing Application Engine Programs"*

Setting Up Standard Letter Codes

To set up standard letter codes, use the Standard Letter Table component (STANDARD_LTR_TABLE).

This section discusses how to set up standard letter codes.

Note. You set up letter codes only for PeopleSoft HRMS form letters used with PeopleSoft Human Resources. You do not set up letter codes for PeopleSoft HRMS form letters used with other PeopleSoft HRMS applications.

Pages Used to Set Up Standard Letter Codes and Run a Report of the Codes

Page Name	Object Name	Navigation	Usage
Standard Letter Table page	STANDARD_LTR_TABLE	Set Up HRMS, Common Definitions, Standard Letter Table, Standard Letter Table	Define your letter codes.
Standard Letter Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Standard Letter Report	Run the Standard Letter Table report (PER711) that lists the codes in your Standard Letter table.

Setting Up Standard Letter Codes

Access the Standard Letter Table page.



Standard Letter Table page

PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

Note. PeopleSoft delivers a letter code for each template, but not all letter codes have a template. Before you use a letter code, confirm that there is a corresponding template.

Set Letter Code

Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are:

- *Customer Letters:* Select if you have created letters for your organization that don't fit into any other category.
- *Employee Review Letters:* Select for employee review letters.
- *Manage Labor Relations:* Select for labor relations letters. Standard disciplinary and grievance letters.
- *Recruitment Letters:* Select for recruitment letters and job postings.
- *Training Letters:* Select for training letters.

The system uses the Set Letter Code field to determine which letter codes to list for the Letter Code fields. For example, on a recruitment page, the list of options includes only letter codes with *Recruitment Letters* selected in the Set Letter Code field.

Generating Form Letters for Other PeopleSoft HRMS Applications

This section provides an overview of form letters for other PeopleSoft HRMS applications and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Prepare to print form letters.
- Adapt form letters.

Note. These instructions show you how to use templates to create form letters for other PeopleSoft HRMS applications. To create form letters for PeopleSoft Human Resources, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Generating Form Letters for PeopleSoft Human Resources and Recruiting Solutions, page 624

Understanding Form Letters for Other PeopleSoft HRMS Applications

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft HRMS, you need to understand how the process works for PeopleSoft HRMS applications other than PeopleSoft Human Resources.

To generate form letters for other PeopleSoft HRMS applications:

1. Use the report writer to run SQRs.

   The SQRs search your PeopleSoft HRMS database, retrieve data, and create data extract files containing one line of data for each letter.

2. Use Microsoft Word for Windows to run the macros that merge the data extract files into form letter templates, one for each type of letter.

   To generate form letters by using PeopleSoft Process Scheduler, PeopleSoft delivers two files (stdltr.dot and stdltr.95 located in the \PS\WINWORD directory on your application CD) containing the Word macros. You must use the file that is appropriate for your system.

   - The macros in stdltr.dot are for use with Word 97 (in Microsoft Office 97) and are written in Visual Basic.
   - The macros in stdltr.p5 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

     If you need to use stdltr.95, copy it to your system and rename it stdltr.dot.

3. Print the letters by using Microsoft Word for Windows.

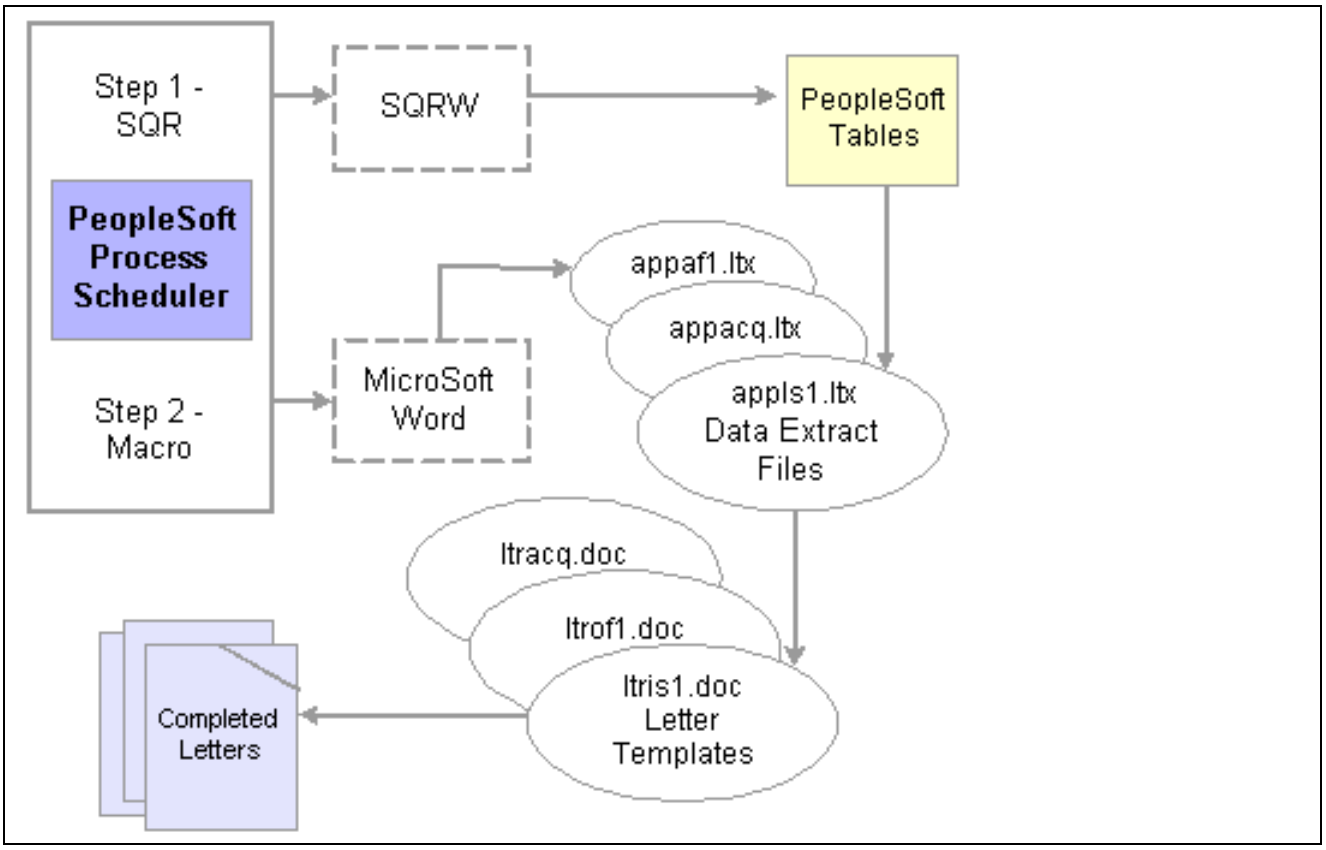
   The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

   The distributed architecture of your PeopleSoft HRMS system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word for Windows print options.

Generating Form Letters with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler uses Microsoft Word for Windows to run the macros that merge the data extract files into form letter templates and prints the letters. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

This diagram illustrates how PeopleSoft Process Scheduler generates form letters for other PeopleSoft HRMS applications:



Generating form letters for other PeopleSoft HRMS applications with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler follows these steps to generate form letters for other PeopleSoft HRMS applications:

1. SQR PAWRL01:
    a. Scans the personal data record of each employee.
    b. Retrieves the information from the record.
    c. Creates data extract files pastdext.dat in the TEMP directory that is defined in the macro.
2. The macro PAWRL01:
    a. Opens the form letter templates that correspond to the data extract files.
    b. Merges the appropriate extract file data into the template rollover.doc.
    c. Inserts the data from pastdext.dat into the template field codes.

Using Naming Conventions in Form Letter Files

Microsoft Word for Windows assigns the extension .doc to all documents. No other naming convention is required for these types of letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word for Windows macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

  The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word for Windows, you print them to your local printers.

To set up the system to print form letters:

1. Set up a shared directory on your machine for the letters.

   This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the C:\TEMP directory on your machine as TRNTEMP.

   For the multilingual letters, set up subdirectories for each language in which you run the letters. For example, if you run letters with the Language field set to *English*, you create the directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your empty.doc file and the location of your shared directory.

   In that macro, you replace this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT", "C:\HR800⇒
   \WINWORD", "ROLLOVER.DOC", ""
   ```

   With this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT", "C:\<path>⇒
   \WINWORD", "ROLLOVER.DOC", "\\<machine_name>\TRNTEMP"
   ```

   Where:

   <path> is the path to the directory that contains empty.doc.

   <machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

This section discusses how to:

- Modify the Word macros for the sample letters.
- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.

Modifying the Word Macros for the Sample Letters

You specify several environment variables in each Microsoft Word for Windows macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you need to modify the PATH to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Microsoft Word for Windows documents and macros and the report writer SQRs and study them carefully.

Note. To make this change, you should be familiar with Microsoft Word for Windows templates and macros and with your report writer.

All of the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Microsoft Word for Windows file called empty.doc.

To modify a macro:

1. In Microsoft Word, open the empty.doc file.
2. Select Tools, Macro.
3. In the Macros in field, select *Stdltr* (template).
4. Highlight the macro that you want to modify and click Edit.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft HRMS contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are located in the directory \PS\WINWORD.
2. In Microsoft Word for Windows, open the document that you want to modify.

   If you see " "in the document, select Tools, Options; then select the Field codes check box.
3. Make changes to the text as you would in any other document, and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft HRMS.

Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include currencies in the notification letter rollover.doc, add a Currency field code to the form letter template. Also add a variable for currency in pastdext.sqr so that the SQR retrieves the currency value and writes it to the data extract file.

   Here's what the data extract file looks like before the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE
USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993"
```

   Here's what it looks like after the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE,Currency
USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993","US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters about their benefit plans to be signed by employees.

To create a new form letter:

1. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.
2. Create the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.
3. Create a new macro that is able to read the extracted data and merge it with the Word letter template.

   You might find it easier to copy an existing macro and adapt it.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word for Windows User's Guide

Reviewing Sample Form Letters

This section presents three PeopleSoft HRMS sample form letters:

- Training Letter Sample — A confirmation of enrollment letter that is used in training (PeopleSoft Human Resources Administer Training business process).
- Recruitment Letter Sample — A resume acknowledgment letter that is used in recruiting (PeopleSoft Recruit Solutions business process).

- Pension Form Sample — A Direct Rollover Election Form that the employee must complete for pension (PeopleSoft Enterprise Pension Administration).

Training Letter Sample

August 10, 2001

Barry Robert Campbell 4928 Wildwood Place Toronto, ON

Dear Barry:

I am pleased to confirm your enrollment in training course K018 titled PeopleTools 1 beginning 09/11/2000 and ending 09/15/2000. Course hours are 9:00 AM to 6:00 PM daily, unless otherwise advised. The course will commence at: Corporation Headquarters Bldg 2000 Floor 2 Room Training Room 2

500 George Washington Pkway

New York, NY

Directions:

From the Airport, take the shuttle bus to George Washington Parkway.

Sincerely,

Barbara Smith Training Coordinator

Recruitment Letter Sample

November 1, 2001

Ms. Judith Cologne

698 Donegall Drive Apt. 301

Toronto, ON M5P 3K8

Dear Ms. Cologne:

Thank you for sending your resume to PeopleSoft. We are now reviewing your qualifications and background against current openings. We will contact you for an interview if we identify an appropriate position for you. It is our policy to keep all applications in an active file for one year. If you do not hear from us, we will place your application in our file for future consideration.

We thank you for your interest in PeopleSoft and wish you well in your pursuit of new goals.

Sincerely,

Barbara Smith

Employment Coordinator

Pension Form Sample

DIRECT ROLLOVER ELECTION FORM «PLAN» (Sample Form)

«NAME»

Date: «CURDATE»

«ADDR1»

«ADDR2»

Social Security No: «NATIONAL_ID»

«ADDR3»

I. Distribution Information:

Amount of distribution: _____ (If distribution is for the entire account balance enter "account balance")

II. Information About Plan or IRA to Receive Direct Rollover:

Name of Plan:_____

Name of Plan Administrator:_____

Address of Plan:_____

_____

OR

Name of Plan Trustee or Custodian of IRA :_____

Address of Plan Trustee or Custodian:_____

Account Number of IRA: _____

Check which Applies to the Plan to Receive Your Rollover:

___ The plan is a qualified plan under Internal Revenue Code Section 401(a).

___ The plan accepts direct rollover contributions.

___ The plan accepts noncash contributions (optional).

I hereby certify that the information I have entered on this form is true, correct, and complete.
_____ Date_____

Signature of Participant

CHAPTER 32

(USF) Setting Up the Work-in-Progress Management System

This chapter provides an overview of the WIP management system and tells you how to:

- Set up the WIP management system.
- Manage the WIP system.
- Set up WIP status.
- Define WIP activity processes.
- Review sample system parameters.

Understanding the WIP Management System

In PeopleSoft Enterprise Human Resources, you can track and process personnel data using a work-in-progress (WIP) management system. PeopleSoft Enterprise Human Resources is delivered with a WIP management system that is already set up for controlling your personnel and recruiting data. The system is ready for configuration. You set up this system only once.

Setting Up the WIP Management System

As part of setting up your WIP system, you perform the following tasks:

- Set up records to define each status type and determine how the system handles it.
- Decide which process works best for your agency and set parameters to automate your Personnel Action Request (PAR) and recruiting processes.
- Define the users who have access to your WIP data.
- Plan a routing and approval process that is synchronous with your agency's requirements.

Prerequisites

Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in this chapter is for your agency's system administrator who will perform the setup and is not for managers or system users.

All discussions assume that you understand the processes that are being described. A sample WIP setup exists for the Personal Action Request (PAR) and recruiting in the demonstration database that was delivered with your system.

Before you start setting up your WIP system, we recommend that you review the sections cited below under "See Also."

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "(USF) Processing Personnel Action Requests"

Managing the WIP System

This section discusses how to:

- Configure WIP controls.
- Define WIP status codes and status types.
- Link WIP status codes and status types.

Configuring WIP Controls

You can configure your WIP controls by setting up records that define the WIP status codes that you want to use. The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. You associate various status types with each code. The status type tracks the requests.

Defining WIP Status Codes and Status Types

When you define WIP status codes, you classify the WIP processes into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

When reviewers change the WIP Status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency's review levels and keeps it going until it is completed as an actual event.

Designing Your Agency's WIP Process

First, review the charts for processing PARs as a sample for one of the WIP setups.

Next, analyze your agency's review process and determine the levels of review that you need for PARs and recruiting processes.

You can design your system based on your agency's requirements for routing requests and other data through approval processes.

In the section "Overview - Sample System Parameters," review the charts, which show the sample system's parameters. You can use these charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes

When you set up your WIP management system, you select and configure the types of status codes that your agency needs. You can use all or some of the statuses that are delivered with the system; you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval. The sample system assigns the following status codes:

WIP Status	PAR Status Code
Initiated	INI
Requested	REQ
1st Authorized	1st
2nd Authorized	2nd
Approved	APP
Authorized	AUT
Reviewed	REV
Approved/Signed	SIG
Processed By Human Resources	PRO
Return for More Information	RET
Withdrawn	WTH
Disapproved	DIS
Corrected	COR
Canceled	CAN
IRR Reported (individual retirement record reported)	IRR

Defining WIP Status Types

When you're ready to choose your WIP statuses, you link each WIP status that you've defined to a WIP status type. Status types are:

WIP Status Type	Definition
Work-in-progress	The request hasn't reached the final level of approval.
Canceled	A completed request is canceled by HR.
Corrected	A completed request is corrected by HR.
Completed	A request that has successfully completed all review levels is approved by HR.
IRR Reported	The request will be reported on an IRR.

Linking WIP Status Codes and Status Types

Now that you understand the WIP Status and the Status Type, have analyzed the request process, and have determined the process that your agency will use, you're ready to define your WIP statuses and link each one to a status type.

To link status codes and status types:

1. Define your WIP status codes according to the plan you've set up for your agency.

   For example, for a PAR, you might have two first-level authorization reviews, one second-level approval review, and a final human resources (HR) review. You define those review levels in the WIP record tables.

2. Link a *Work-in-progress* status type to each PAR.

   When a PAR is traveling along a path of approvals, you link the status type *Work-in-progress* to the PAR until it is completed and approved.

3. Change the status type to *Completed* after the request has passed all reviews and has been approved by HR.

   Only when you define a WIP status as *PRO (Processed by HR)* do you link the status type to *Completed*.

Note. After a PAR has been processed, it might need to be corrected or canceled; only HR can correct or cancel a completed PAR. For the WIP status *Corrected* or *Canceled* , link to the status type *Corrected* or *Canceled.*

Note. Only HR can create supplemental or corrected IRRs (individual retirement records). For PARs with the WIP status *IRR Reported,* link to the status type *IRR Reported.*

Setting up WIP Status

to set up WIP status, use the Approval Transaction component (GVT_WIP_RECORD).

This section discusses how to:

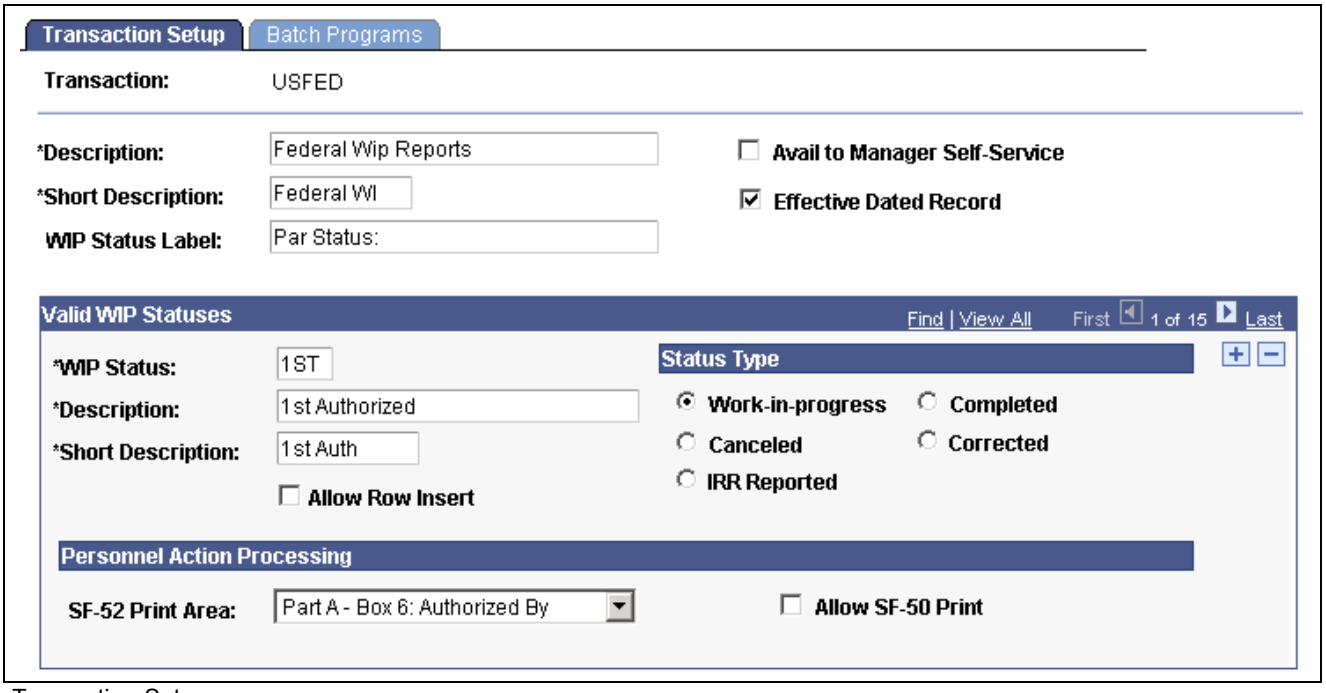
- Define WIP statuses.
- Identify the programs and define the data.

Pages Used to Define and Link WIP Status

Page Name	Object Name	Navigation	Usage
Transaction Setup	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup Select *USFED* as the Transaction value in the search page.	Describe the type of records you're setting up for the USFED transaction, describe each status that you want to use, and link each status to a WIP status type.
Batch Programs	GVT_WIP_RECORD2	Set Up HRMS, Product Related, Workforce Data USF, Approval Transactions, Batch Programs Select *USFED* as the Transaction value in the search page.	Identify the programs and define the data that is needed to support this WIP process.

Defining WIP Statuses

Access the Transaction Setup page.



Transaction Setup page

Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values to correspond to the setup that you require for your agency.

The WIP record is the record for which you are setting up these parameters. The USFED (US Federal) record that is delivered with this system includes the Employee Data and Recruitment records that refer to Gvt_Pers_Data (government personal data), Gvt_Job, Gvt_Employment, and others as one record. This value shows the records that you specified when you opened the WIP Record Table 1 page.

On this page, describe the type of records you're setting up, describe each WIP status that you want to use, and link each status to a WIP status type.

WIP Status Label Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is *PAR Status* (personnel action request status).

Effective Dated Record? Select if the record is to be effective-dated; for example, *USFED* (US Federal).

WIP Record Details

WIP Status (work-in-progress status) Enter the step in the process; for example, *1st* (first review, first level).

Status Type

Select the status type to be linked to the status that you defined in the Description field:

- Work-in-progress: Request hasn't reached the final level of approval.
- Corrected: A completed request has been corrected.
- IRR Reported (individual retirement record reported) : HR has reported a request in IRR.
- Completed: HR approves a request that has successfully completed all review levels.
- Canceled: The request will be reported on an IRR.

For the WIP status codes and status types for which you selected *Allow Row Insert From Status* on some pages in PeopleSoft Human Resources, the system creates a history of the changes that you can see on the pages. For example, on the Administer Workforce request pages, the user can enter a new effective-dated row on the Data Control page.

These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row. Therefore, you define the WIP status and status types that enable a user to enter a new row for various pages in the system.

Allow Row Insert? Select if you want users to be allowed to enter a new row in a record with the selected status. When this check box is selected, the first authorization level can authorize existing rows but not new ones.

Personnel Action Processing

In this group box, define whether and where a user can print forms from page with the selected status.

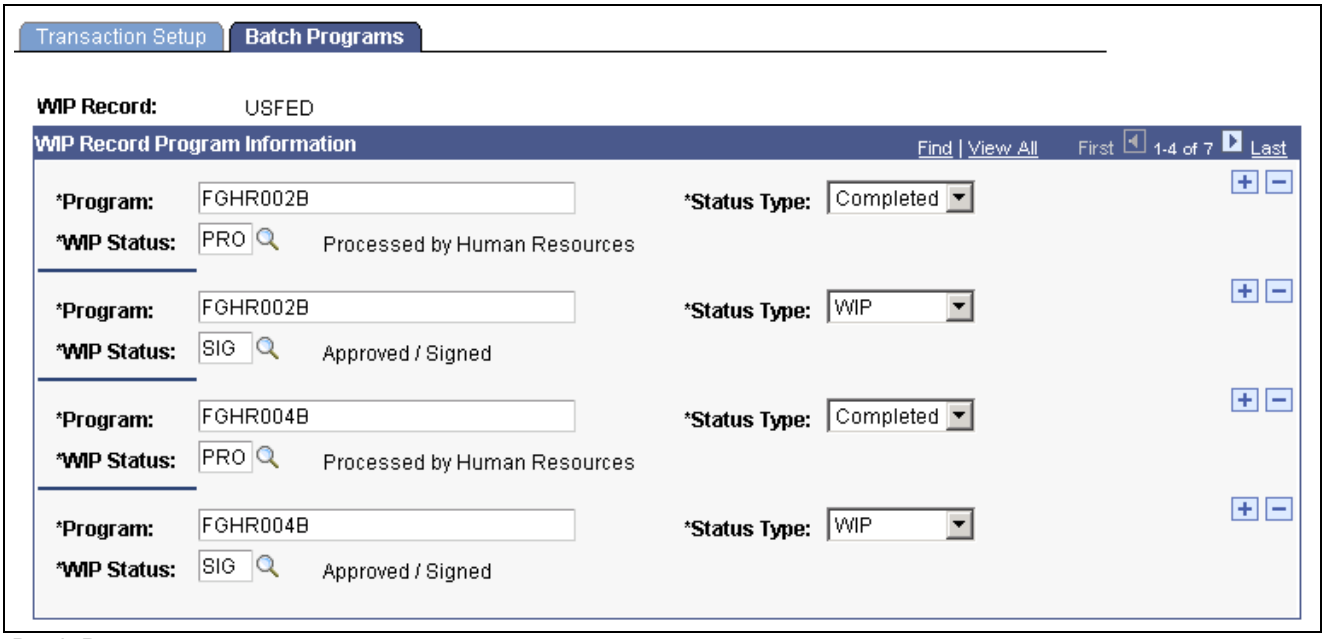
SF-52 Print Area Select the area on the form where the name is to appear; for example, *Part A - Box 6: Authorized By.*

Allow SF-50 Print? Select if you want the SF-50 form to be printed for this status.

To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the entries.

Identifying the Programs and Defining the Data

Access the Batch Programs page.



Batch Programs page

The Program is the name of the Structured Query Report (SQR) file, COBOL, or database agent process that inserts a new row based on the status type. The row that the system inserts is the highest effective-dated row with the status type that is specified in the *Status Type* field.

For example, in the exhibit above, based on a status type of *Completed* for the program *FGHR002B,* the system inserts a new row and displays *PRO (Processed by Human Resources)* in the WIP Status field. Therefore, the WIP Status field designates the WIP status for the new row, and the Status Type field designates the status type from which to insert.

Program Enter the name of the program's SQR file, COBOL, or database agent process that inserts a new row.

To add programs, place your cursor in the Program field and clickthe Insert Row button on the toolbar.

Status Type Options are as follows:

- *Completed:* The system searches for both *Completed* and *Corrected.*
- *WIP:* The system searches for *WIP, Completed,* and *Corrected.*

When setting up your system, you can change these status type options.

To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the entries.

Defining WIP Activity Processes

To define WIP activity processes, use the Approval Flow component (GVT_WIP_ACTVTY).

This section discusses how to:

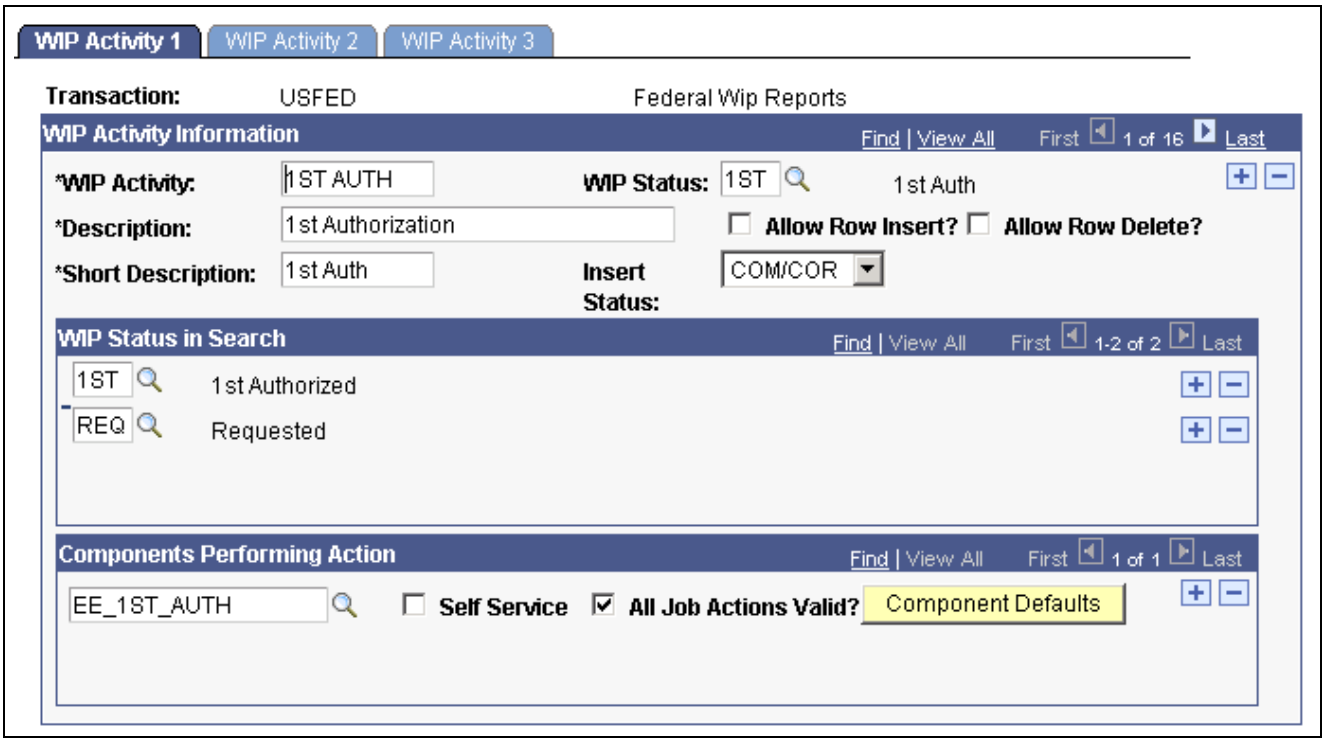
- Link WIP activities to components.
- Set default values for components.
- Select actions for components.
- Make WIP statuses available to components.

Pages Used to Define WIP Activity Processes

Page Name	Object Name	Navigation	Usage
WIP Activity 1	GVT_WIP_ACTVTY1	Set Up HRMS, Product Related, Workforce Data USF, Approval Flow, WIP Activity 1 Select *USFED* as the Transaction value in the search page.	Link each WIP activity to the component in which the action will be processed, specify if data rows can be inserted or deleted by each activity, and set up default values.
WIP Activity 1 - Component Defaults page	GVT_WIP_PGRP_SEC	Set Up HRMS, Product Related, Workforce Data USF, Approval Flow, WIP Activity 1 Select *USFED* as the Transaction value in the search page. Click the Component Defaults button on the WIP Activity Table - WIP Activity 1 page.	Set default values for the selected component.
WIP Activity 2	GVT_WIP_ACTVTY2	Set Up HRMS, Product Related, Workforce Data USF, Approval Flow, WIP Activity 2 Select *USFED* as the Transaction value in the search page.	Select the action for each component for each activity.
WIP Activity 3	GVT_WIP_ACTVTY3	Set Up HRMS, Product Related, Workforce Data USF, Approval Flow Select *USFED* as the Transaction value in the search page.	Make the WIP status available for input for the selected components.

Linking WIP Activities to Components

Access the WIP Activity 1 page.



WIP Activity 1 page

WIP Activity Information

WIP Activity Enter the activity for which you are defining controls.

WIP Status Select the WIP status for this WIP record.

Allow Row Insert? For effective-dated records only. Select to permit users to insert rows using this WIP activity.

Allow Row Delete? For effective-dated records only. Select to permit users to delete rows using this WIP activity.

Insert Status Defines the WIP status codes that appear when you insert a new row or when you are in Add mode. For example, when you enter a WIP status of *Hire*, you aren't inserting a row, but when you request a change in benefits, you *are* inserting a row.

WIP Status in Search

Select the WIP status codes to include in search records. The search record for the components that are linked to this activity retrieves only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

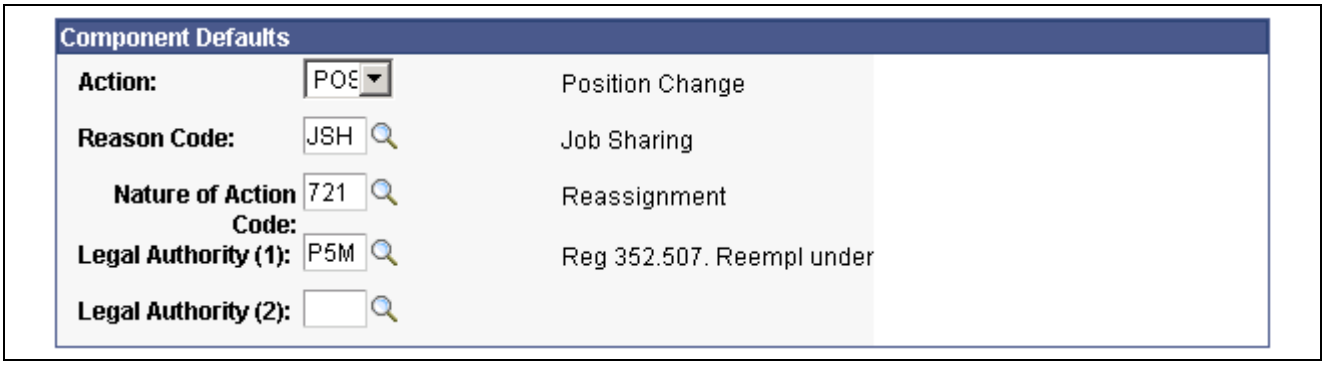
Self Service Select if the component is a self-service component. When this check box is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.

All Job Actions Valid? Select if all job actions are valid for this component.

Component Defaults Click this button to enter component defaults.

Setting Default Values for Components

Access the Component Defaults page.



Components Defaults page

Action Select the default value for this component. When the component is used, this value populates the Action fields on the PAR (personnel action request) pages. You cannot change this value from the PAR pages.

Reason Code Select the default value for this component when it performs this WIP Activity.

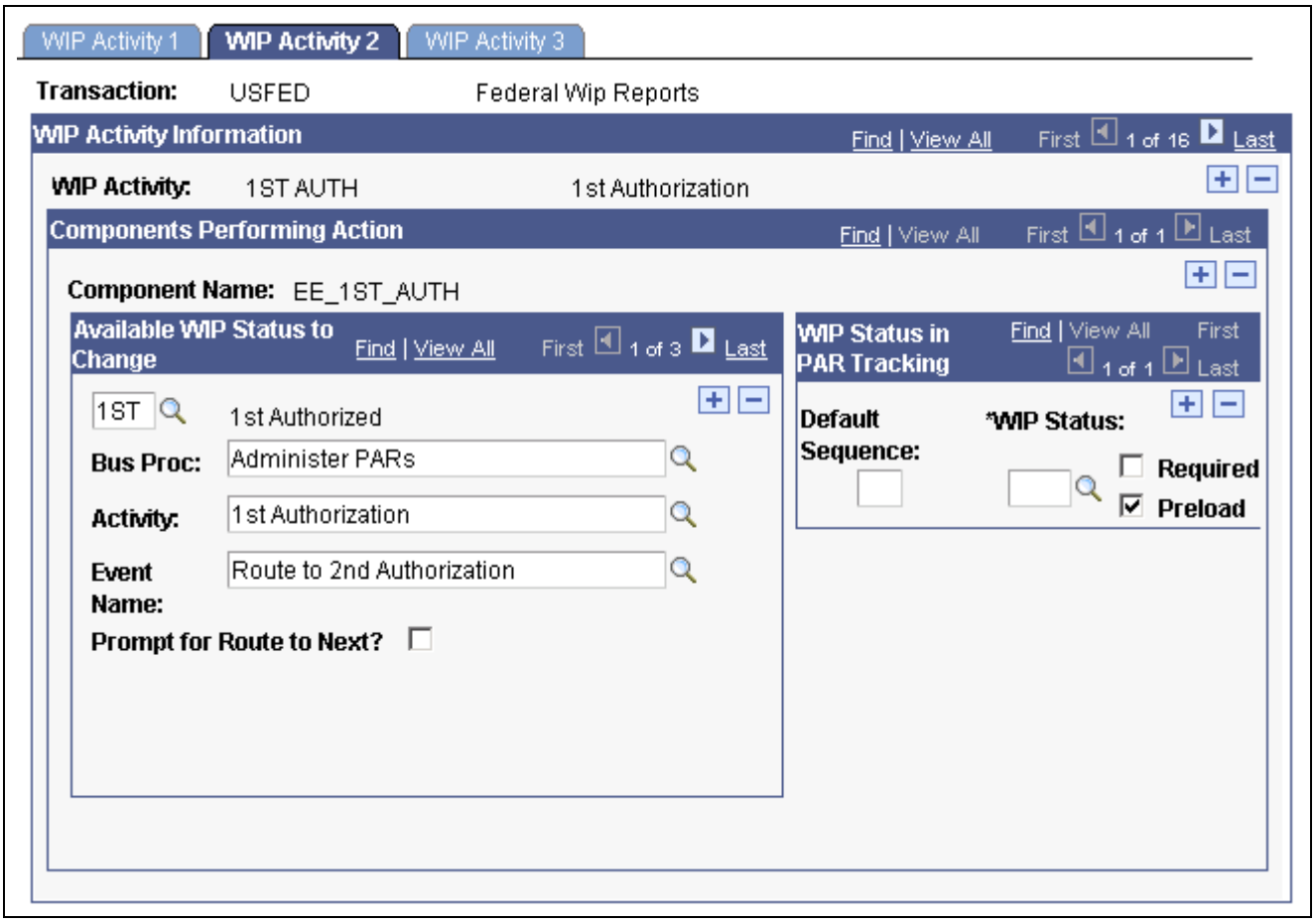
Nature of Action Code Select the default value for this component when it performs this WIP Activity.

Legal Authority (1) Select the default value for this component when it performs this WIP Activity.

Legal Authority (2) Select the default value for this component when it performs this WIP Activity.

Selecting Actions for Components

Access the WIP Activity 2 page.



WIP Activity 2 page

Components Performing Action

Component Name Displays the name of the component that you selected on the WIP Activity 1 page.

See Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Linking WIP Activities to Components, page 654.

Available WIP Status to Change

The statuses that you specify in this group box determine what the users see when they click the prompt button for the WIP Status field on the PAR (personnel action request) pages. The user sees only the statuses that you have designated on this page.

Component Name Displays the names of the components that you entered on the WIP Activity 1 page.

See Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Linking WIP Activities to Components, page 654.

Bus Proc (business process), **Activity, Event Name** The Bus Proc, Activity, and Event Name fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes.

To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.

Prompt for Route to Next? Select to specify the routing prompt list views that are to be used on the prompt page.

When this check box is selected, you can enter the parameters for the routing process in the two new fields that appear: Using and Routing Text.

When this check box is selected, a new page appears when the user clicks Save.On the new page, the user selects from the list of employees who are in the result set of this view. The user routes the request to the selected employee for the next level of approval.

In Routing Text, the user specifies the next routing of this action.

WIP Status in PAR Tracking

Default Sequence Select the default sequence of a WIP status in PAR (personnel action request) tracking.

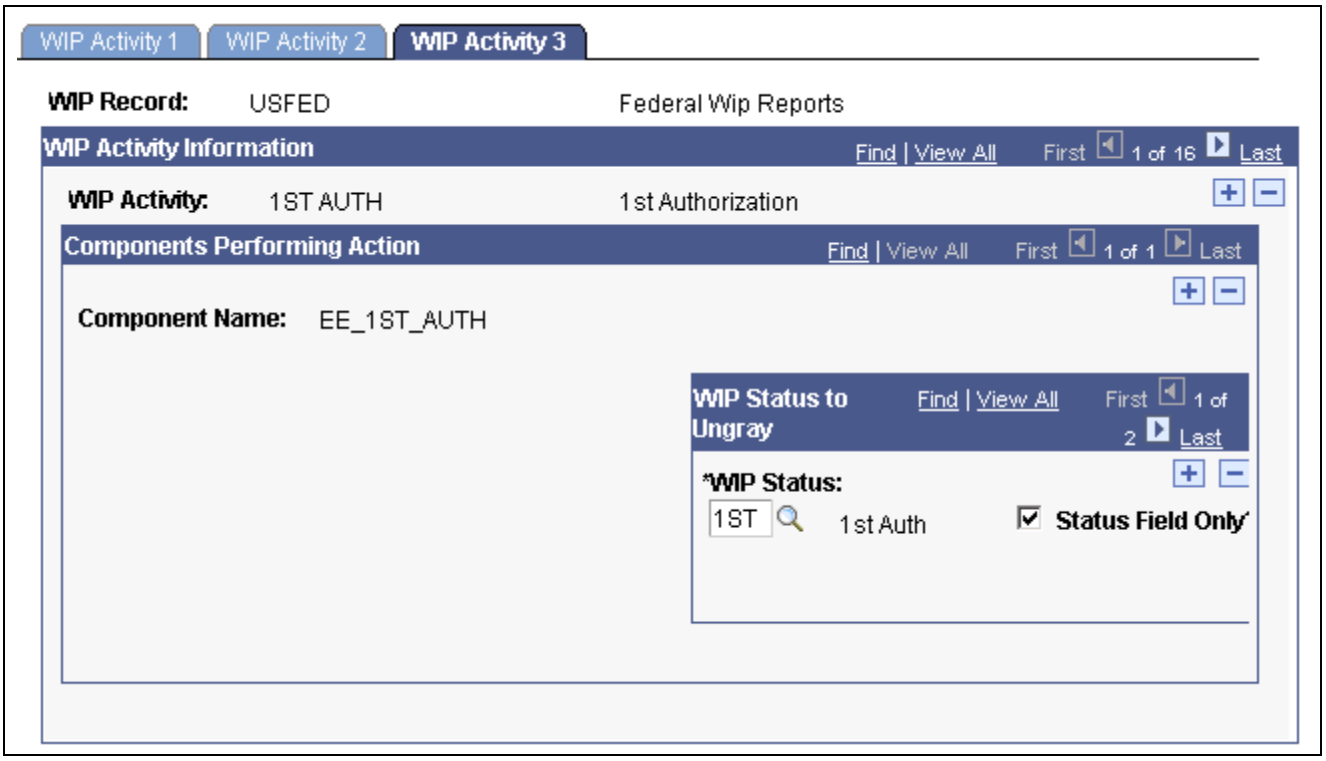
WIP Status Select the WIP status for the sequence you are defining.

Required Select if the sequence is required.

Preload Select if the sequence is Preload.

Making WIP Statuses Available to Components

Access the WIP Activity 3 page.



WIP Activity 3 page

Action Reason

Action Enter the action for the identified component that appears in the Component Name field. The Action and Reason Code values control what values are available from the Action/Action Reason prompts. You see these values only when you are administering the PAR (personnel action request) using the component and activity.

Reason Code Enter the reason code for the component that appears in the Component Name field. The Action and Reason Code values control what values are available from the Action/Action Reason prompts. You see these values when you are administering the PAR using the component and activity.

WIP Status to Ungray

WIP Status Select the WIP status that is to be available for input.

Status Field Only? Select if this is a status field only.

Reviewing Sample System Parameters

This section discusses how to:

- Review Administer Workforce PAR and WIP system parameters.
- Review a sample system — WIP status code parameters.

- Review a sample system — WIP parameters setup.

Reviewing Administer Workforce PAR and WIP System Parameters

The tables in this section contain the sample system PAR and WIP parameters for the PeopleSoft Human Resources Administer Workforce business process. Our sample system assigns and uses the following WIP status codes, PAR status codes, and the users who access them.

WIP Status	PAR Status Code	Who Can Assign This Status
Initiated	INI	Employee, Supervisor, Human Resources
Requested	REQ	Employee, Supervisor, Human Resources
1st Authorized	1st	1st Level Reviewer: Supervisor or Manager
2nd Authorized	2nd	1st Level Reviewer: Supervisor or Manager
Approved/Signed	SIG	2nd Level Reviewer: Supervisor or Manager
Approved	APP	Human Resources
Authorized	AUT	1st Level Reviewer: Supervisor or Manager
Reviewed	REV	2nd Level Reviewer: Supervisor or Manager
Processed by Human Resources	PRO	Human Resources
Return for More Information	RET	Supervisor, Manager, Human Resources
Withdrawn	WTH	Employee or Supervisor requesting the action
Disapproved	DIS	Supervisor, Manager, Human Resources

WIP Status	PAR Status Code	Who Can Assign This Status
Corrected	COR	Human Resources
Canceled	CAN	Human Resources
IRR Reported (individual retirement record reported)	IRR	Human Resources

Reviewing a Sample System - WIP Status Code Parameters

The WIP status types are linked to the various WIP status codes in the sample system, as follows:

Status Type	WIP Status Code
Work-in-progress	Initiated
Work-in-progress	Requested
Work-in-progress	1st Auth (first authorization)
Work-in-progress	2nd Auth (second authorization)
Work-in-progress	APP (approved)
Work-in-progress	AUT (authorized)
Work-in-progress	REV (reviewed)
Work-in-progress	Approved/Signed
Work-in-progress	Returned (returned for more information)
Work-in-progress	Withdrawn
Work-in-progress	Dis (disapproved)
Corrected	Cor (corrected)
Canceled	Can (canceled)

Status Type	WIP Status Code
Completed	PRO (processed by HR)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Reviewing a Sample System - WIP Parameters Setup

The WIP parameters are set up in the sample system as follows:

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
1st AUTH	1st AUTH		1st	EE_1ST_ AUTH	1st, Request	1st, Request - Both Status Field Only
2nd AUTH	2nd AUTH		2ND	EE_2nd_ AUTH	1st, 2nd	1st, 2nd - Both Status Field Only
APP/SGN	APP/SGN			EE_ APPROVAL	2nd, SIG	2nd - Status Field Only; SIG
APPL HIRE	APPL HIRE		PRO	EE_ APPLICANT_ HIRE	PRO	PRO, INI
APPROVE	APPROVE			GVT_ VACANCY_ APPR	APP, REV	REV
AUTHORIZE	AUTHORIZE			GVT_ VACANCY_ AUTH	AUT, REQ	REQ
CANCEL	CANCEL			EE_ CANCELLATION	CAN,PRO	COR,PRO - Both Status Field Only
CONC_HR	CONC_HR		PRO	EE_CONC_ HIRE		PRO, INI

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
CORRECTION	CORRECTION	Insert, Delete	COR	EE_ CORRECTION	COR, PRO	COR, PRO
EMPL REQST	EMPL REQST	Insert	REQ	EE_EMPL_ REQ	1ST, 2ND, COR, DIS, PRO, INI, REQ, RET, SIG	INI, REQ
HIRE	HIRE		PRO	EE_HIRE		PRO, INI, REQ
HR PROC	HR PROC	Insert, Delete	PRO	EE_HR_ PROC	1ST, 2ND, CAN, COR, DIS, PRO, REQ, RET, SIG, WTH	1ST, 2ND, CAN, COR, DIS, PRO, INI, REQ, RET, SIG, WTH
IRR CORR	IRR CORR	Insert	PRO	EE_IRR_ CORR	IRR	PRO
IRR SUPP	IRR SUPP	Insert	PRO	EE_IRR_ SUPP	IRR	PRO
LEAVE REQ	LEAVE REQ		REQ	FG_EE_ LEAVE_ REQ		REQ
PROCESS	PROCESS		PRO	GVT_ VACANCY_ PROC	APP, AUT, PRO, REQ, REV	APP, AUT, PRO, REQ, REV
REQUEST	REQUEST		REQ	GVT_ VACANCY_ RQST	INI, REQ	INI, REQ
REVIEW	REVIEW			GVT_ VACANCY_ RVWD	AUT, REV	AUT
SUP REQST	SUP REQST	Insert	REQ	EE_SUP_ REQ	PRO, INI, REQ	INI, REQ

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
TERMINATN	TERMINATN	Insert	REQ	FG_EE_ TERMINATION		REQ
W3_PERS_ DT	W3_PERS_ DT		PRO	W3_GVT_ PERS_ DATA	PRO	PRO, REQ

CHAPTER 33

Setting Up PeopleSoft HelpDesk for HR – 360° View

This chapter provides an overview of PeopleSoft Enterprise HelpDesk for HR and discusses how to:

- Extract and display HRMS information.
- Set up security for PeopleSoft HelpDesk for HR.
- Set up direct reports for PeopleSoft HelpDesk for HR.

Understanding PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR – 360° View provides a complete view of a person's HRMS data. This PeopleSoft Enterprise CRM application is set up and operated from CRM but extracts and displays data stored in PeopleSoft HRMS.

As part of the PeopleSoft HelpDesk for HR setup, you must:

- Set up HRMS security giving HelpDesk agents access to the data of the people they will be serving.
- Set up the direct report structure for the managers in your organization.

See Also

PeopleSoft Enterprise Components 8.9 PeopleBook: PeopleSoft HelpDesk

Extracting and Displaying PeopleSoft HRMS Information

PeopleSoft HelpDesk for HR extracts and displays the following information from PeopleSoft HRMS:

- Personal
- Job
- Position summary
- Payroll summary
- Benefits summary
- Dependent and benefits
- Direct reports

You cannot modify the information from the HelpDesk pages.

Setting Up Security for PeopleSoft HelpDesk for HR

Data permission security for PeopleSoft HelpDesk for HR works the same way as it does for all of HRMS. The HelpDesk agents using PeopleSoft HelpDesk for HR must be have access to data in order to view it on the 360 Degree View page.

See Also

Chapter 6, "Setting Up and Administering HRMS Security," page 57

Setting Up Direct Reports for PeopleSoft HelpDesk for HR

To set up Direct Reports for PeopleSoft HelpDesk for HR, use the Direct Reports Setup component (SS_LINK_TBL).

PeopleSoft HelpDesk for HR can only retrieve the appropriate reporting structure for a person if you have set up the access type on the Direct Reports Setup page.

Page Used to Set Up Direct Reports for PeopleSoft HelpDesk for HR

Page Name	Object Name	Navigation	Usage
Target Information page	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup	Set up the access type for the HD_360_COMPONENT.

Setting Up Direct Reports Access Type

To set up the access type:

1. Access the Direct Reports Setup component and select the component HD_360_COMPONENT.
2. On the Target Information page choose the Access Type *By Supervisor Id*.
3. Save the page.

CHAPTER 34

Setting Up and Working with Self-Service Transactions

This chapter provides an overview of self-service transactions and discusses how to:

- Configure self-service transactions.
- Review transactions.
- Set up access to direct reports data.
- Use workflow with self-service transactions.

Understanding Self-Service Transactions

Self-service transactions are designed to be extensions of a core PeopleSoft application. They enable workers to update their personal information or to perform some basic task required by their job.

When the self-service transactions were designed there were two things to consider when a worker entered new data:

- Do you want that new information to update the HR database or do you want a system administrator to update the database?
- Do you want the transaction to go through an approval process? This means that once the new information is submitted, a notification is sent to someone who has to look at this information and approve it before the database can be updated.

Configuring Self-Service Transactions

To configure self-service transactions, use the Self Service Workflow Configurations component (WF_CO_CONFIG).

This section provides an overview of rules for self-service transactions and discusses how to:

- Set up approvals and database updates.
- Set up administrator notification rules.
- Set up component interface rules.

Understanding Rules for Self-Service Transactions

You can set rules that define whether the transaction:

- Goes through an approval process.
- Updates the database or sends a notice to the administrator to complete the transaction manually.
- Who to notify when problems occur during the processing of the transaction or when a transaction successfully completes.

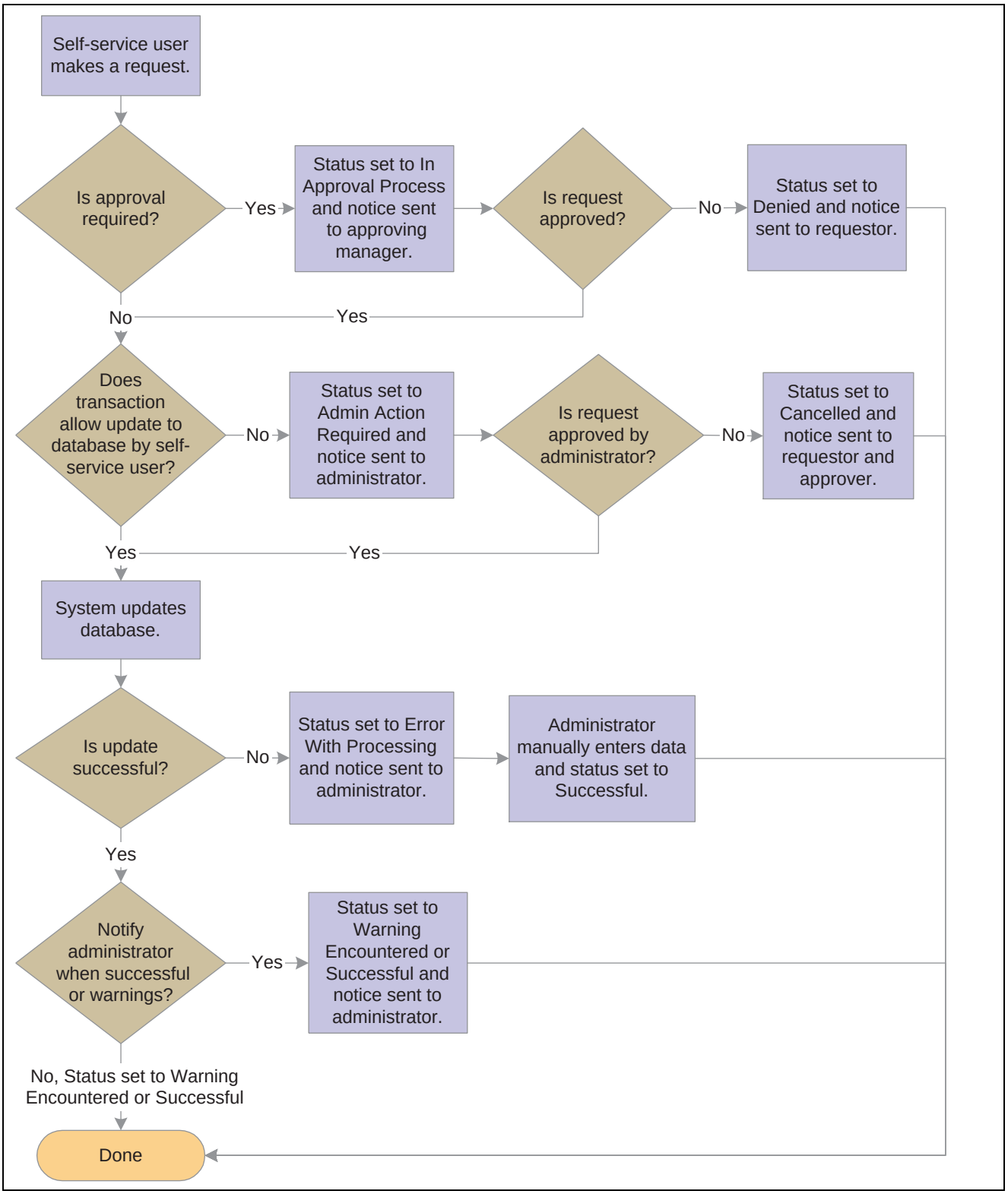
Which Transactions Can Be Configured

The following self-service transactions were designed so users could define how processing for each self-service transaction would behave:

- Performance Document
- Address Change
- Change Full/Part Time Status
- Change Location
- Marital Status
- Name Change
- Promotion
- Reporting Change
- Retire Employee
- Salary Change
- Terminate Employee
- Training Enrollment
- Training Enrollment by Manager
- Transfer

Overview of the Self-Service Processing

The following diagram maps out the process a self-service transaction takes when the transactions is set up to follow the configuration rules.



Process flow for transactions using Process Configuration

Note. If a user ID is not tied to the role entered in the Route to Role field on the Approval Rule Set page, an error notification is sent to the administrator and the error can be viewed using the Self-Service Inquiry page. If an alternate user is entered on the General Profile Information page, make sure the User ID entered has permission to access the necessary pages.

Exceptions to the Rules

Some transactions update the worker's job data. These self-service rules cannot override information controlled by Position Management.

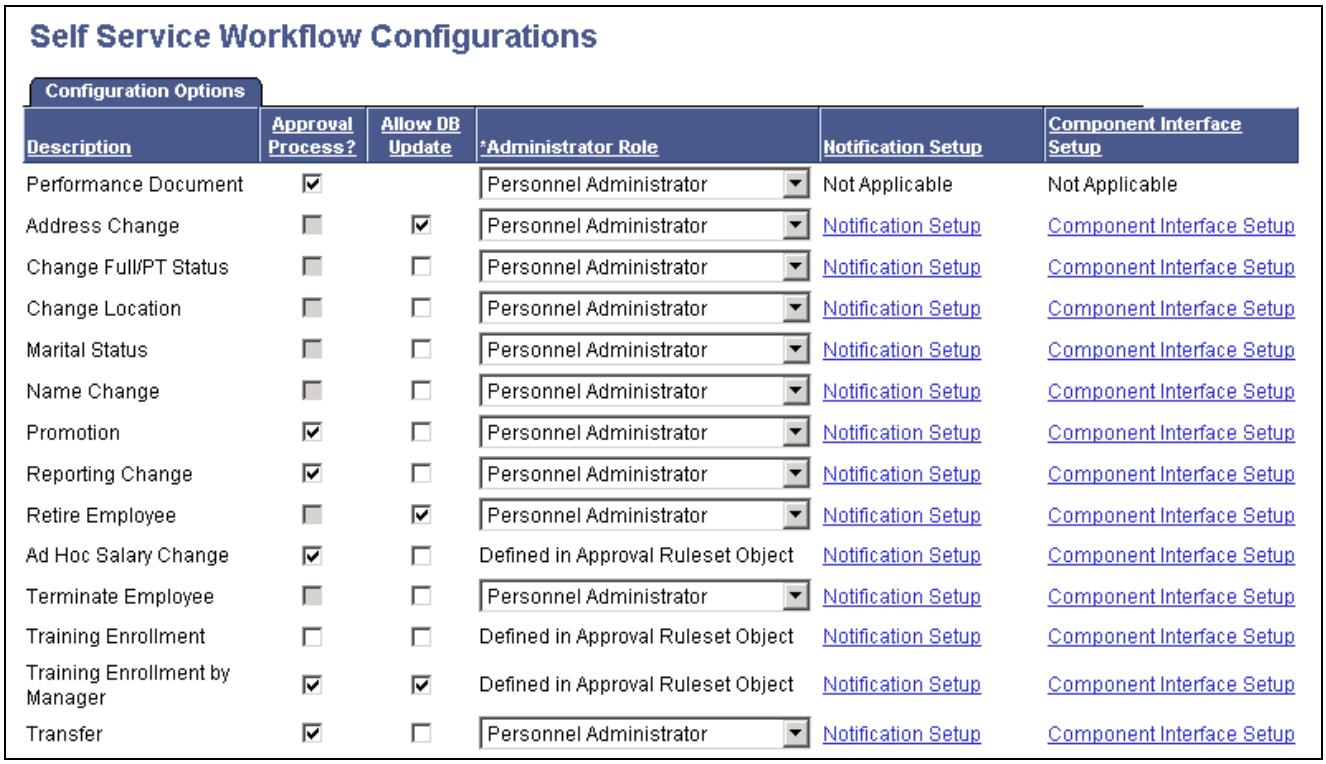
If Position Management Is Set To	And a Worker's Job Is	Then Auto-Update of Database
None	Not Applicable	Is allowed.
Partial	In a position	Not allowed. Exception to this rule is when a manager is requesting a reporting change for a worker. If the worker is in a position and an ID was entered in the Supervisor ID field automatic update is allowed.
Full	In a position	Not allowed. Exception to this rule is transferring and promoting a worker. This is because managers promote or transfer workers by selecting a new position number, not changing the existing one. So, automatic updates will insert the new position number and update all the related fields; position data is not touched.

Pages Used to Set Up Rules for Self Service Transactions

Page Name	Object Name	Navigation	Usage
Self Service Workflow Configurations	WF_CO_CONFIG	Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Self Service Workflow Configurations	Determines whether transaction should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.
Admin Notification Setup	WF_HR_TRANS_NOT	Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Self Service Workflow Configurations Click the Notification Setup link on the Self Service Workflow Configurations page.	Defines if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.
SS Component Interface Setup	SS_TRANS_CIDTL_SEC	Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Self Service Workflow Configurations Click the Component Interface Setup link on the Self Service Workflow Configurations page.	Defines the name of the component interface used by the transaction and location of error and warning messages.

Setting Up Approvals and Database Updates

Access the Self Service Workflow Configurations page.



Self Service Workflow Configurations page

Description Lists the self-service transaction delivered with system that is designed to work with the Process Configuration Process.

Approval Process? This check box is only available to those transactions designed to use an approval process. If selected, the system will require Manager level approval. If not selected, manager level approval is not required.

Allow DB Update If selected, this check box allows the transaction to update the database. If not selected, an administrator will be notified of the change and need to complete the process request. Administrators can complete the request on the Workflow Inquiry page or in the Self-Service transaction pages.

Administrator Role Identifies the role of the person who is responsible for reviewing the results of the transaction if errors occur.

If Notify on Success or Notify on Warnings is selected on the Admin Notification Setup page, this role receives notifications when processing is successful or warnings are encountered.

Notification Setup Click this link to display the Admin Notification Setup page.

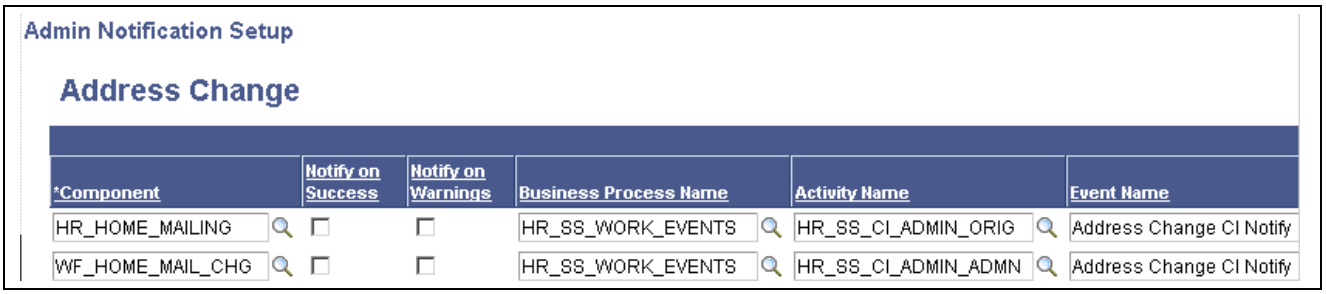
Component Interface Setup Click this link to display the SS Component Interface Setup page.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Setting Up Administrator Notification Rules

Access the Admin Notification Setup page.



Admin Notification Setup page

Component The name of the transaction.

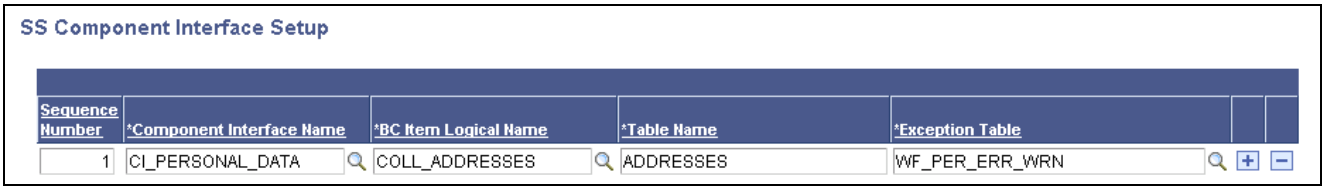
Notify on Success Applicable only if Allow DB Update is selected on the Configuration Options page. Select to have the role selected on the Configuration Options page receive an email when automatic updates are successful.

Notify on Warnings Select to have the role selected on the Configuration Options page receive an email when warning messages are generated during a successful HR database update.

Business Process Name, Activity Name, and Event Name This is predefined system data that can be changed if you want to use a different business process.

Setting Up Component Interface Rules

Access the SS Component Interface page.



SS Component Interface Setup page

Note. You do not need to modify this page unless you use component interfaces or exception tables that you have created or modified. This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Transactions

To review transactions, use the Workflow Inquiry component (WF_SS_STAGED).

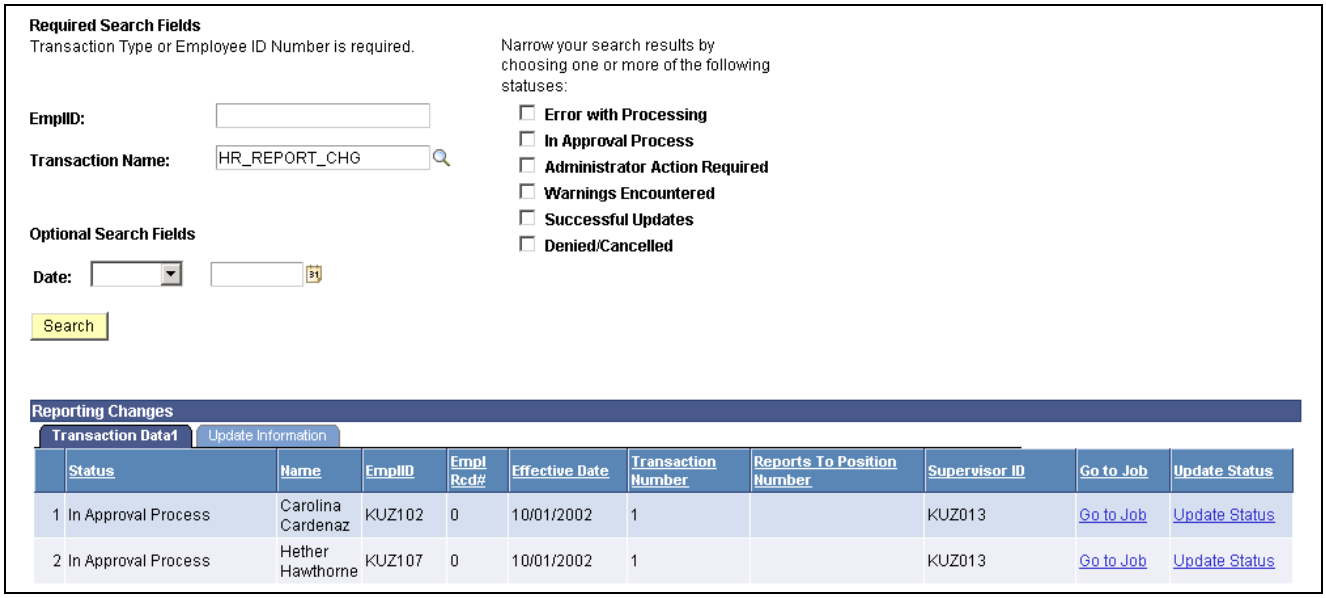
This section discusses how to review transaction activity.

Page Used to Review Transactions

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Administrators review activity for self-service transactions.

Reviewing Transaction Activity

Access the Workflow Inquiry page.



Workflow Inquiry page

Required Search Fields

To see the activity for a specific worker enter the ID in the EmplID field. Make sure to tab out of the field.

To see the activity for <name of transaction> select <object name for transaction> in the Transaction Name field. Make sure to tab out of the field.

To select activity with a specific status, select the check box next to the name of the status. You can select one or more statuses.

Optional Search Field

To see the activity for transaction that occurred on a specific date, enter the date in the Date field.

Search

Click this link to find transaction that match the search criteria. Results are displayed below the Search button.

Search Results

Information about the transaction displays. Click the various tabs to display information relevant to the transaction:

- Click the Errors or Warnings links to display error and warning messages.
- Click the Go To link to display the component page relevant to the transaction.
- Click the Update Status link to update the status.

Setting Up Access to Direct Reports Data

To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

This section discusses how to:

- Determine access to manager self-service.
- Set up direct reports.
- Set up transaction instructional messages.

Note. If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" chapter.

See Chapter 35, "Working with Common Components," Configuring Direct Reports Functionality, page 684.

Pages Used to Set Up Direct Reports

Page Name	Object Name	Navigation	Usage
Target Information	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information	Set up worker data access for the Manager self-service option.
Instructional Text	SS_LINK_TBL2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Instructional Text	Add instructional messages to the Select Employee page (OPRROWS) for this transaction component.service.

Determining Access to Manager Self-Service

The system determines who can access the manager self-service components and data by determining the answers to these questions:

- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the manager self-service components when you define their component access on the Permission List page. In the Direct Reports Setup component, you specify whose data a user can see for a particular manager self-service transaction.

The system determines what kind of reporting relationship exists between managers and their staff. Reporting relationships are determined on two pages: the Work Location page (JOB_DATA1) and the Department Profile page (DEPARTMENT_TBL_GBL). On the Work Location page, you indicate who a worker's manager is. On the Department Profile page, you indicate who manages a department and the staff who report to that department.

Note. This section does not apply to the manager role in PeopleSoft Enterprise eRecruit Manager Desktop.

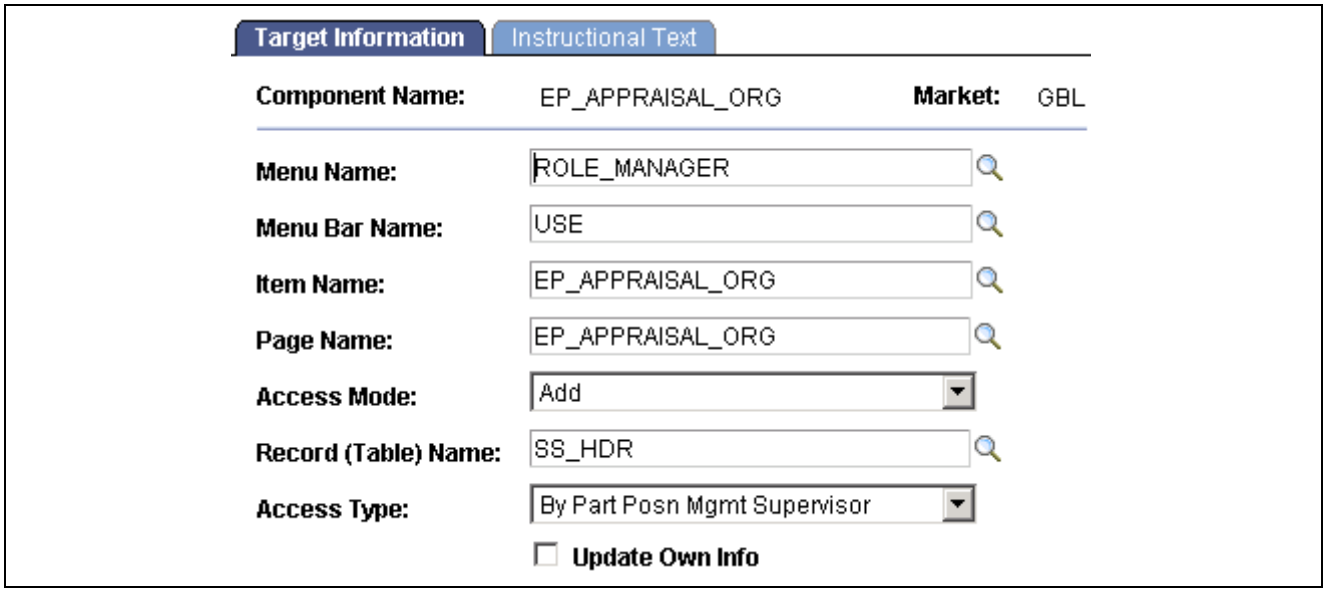
See Chapter 12, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 286.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Employee Job Location and Position Information.

See Chapter 12, "Setting Up Organization Foundation Tables," Defining Basic Information About a Department, page 278.

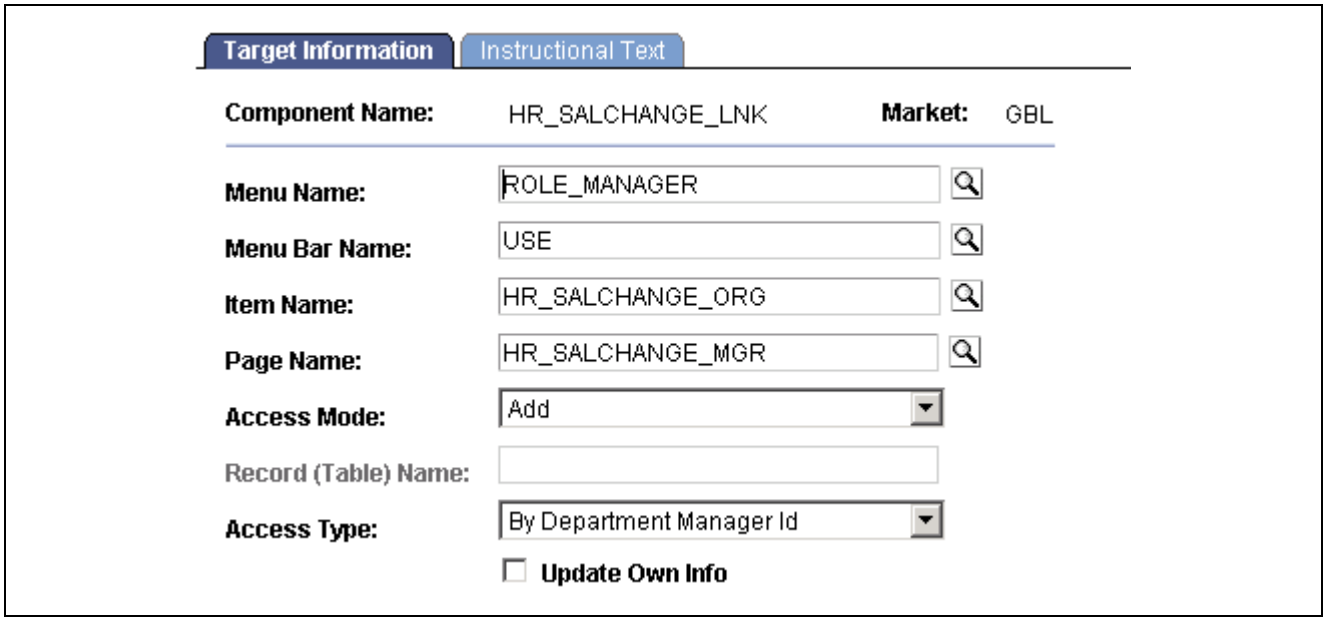
Setting Up Direct Reports

Access the Target Information page.



Target Information page

Note. To determine technical names of the system objects, use PeopleSoft Application Designer.



Target Information page

Component Name Enter the component name as defined on the menu in PeopleSoft Application Designer.

The component name is the name of the Select Employee page that the system displays when the user selects a Manager self-service transaction. It isn't the name of the transaction component.

Menu Name Select *ROLE_MANAGER.* All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.

Menu Bar Name Select the name of the menu bar that the transaction component is under.

Item Name Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page.

The transaction component contains pages that the manager uses to view or manipulate staff data.

Page Name Enter the object name of the transaction component's page. The object name for each Manager self-service transaction is listed in the introduction table of the page discussion.

If a transaction component has more than one page, enter the name of the transaction page that the system displays first (usually the first page in the component) when a user selects a person name.

Access Mode Select which action the user performs in the transaction. Options are *Add, Update/Display, Update/Display All,* and *Correction.*

Record (Table) Name Enter the object name of the record that makes up the page of the transaction component.

Access Type This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options are:

- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use Partial Position Management. The

system searches for reporting relationship based on Report To first, and then for Supervisor ID.

- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info (update own information) Not applicable to self service. Select to allow managers to update their own information in this transaction component.

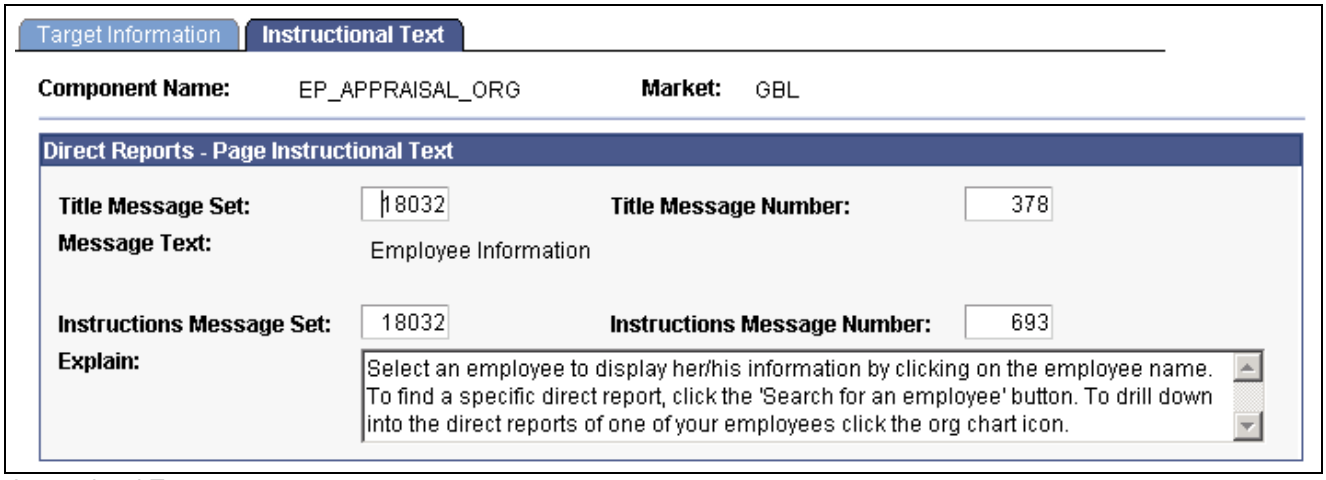
See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Chapter 6, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 99

Setting Up Transaction Instructional Messages

Access the Instructional Text page.



Instructional Text page

Direct Reports - Page Instructional Text

Title Message Set and **Title Message Number** Enter the title message set and number of the transaction instructions title that the system displays on this component's Select Employees page.

Message Text Displays the text of the transaction instruction title that is associated with the Title Message Number. The system displays this text on this component's Select Employees page.

Instructions Message Set and **Instructions Message Number** Enter the number of the instructions message set and number for the instruction message that the system displays on this component's Select Employees page.

Explain Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page.

Tells the user how to select the employees whose data they want to view or manipulate.

Using Workflow with Self-Service Transactions

To use workflow with self-service transactions, use the Set Workflow Defaults component (WF_SYSTEM_DEFAULTS), Transaction Categories component (EO_TRAN_CATS), Workflow Transactions component (EO_TRANSACTIONS), System Workflow Rules component (EO_SYS_WF_RULES), Workflow Status component (HR_WF_STATUS), and Workflow User Preferences component (HR_SS_WF_EE_PREF).

This section discusses how to:

- Activate workflow message defaults.
- Set user notification preferences.
- Define rules for workflow notifications.

See Also

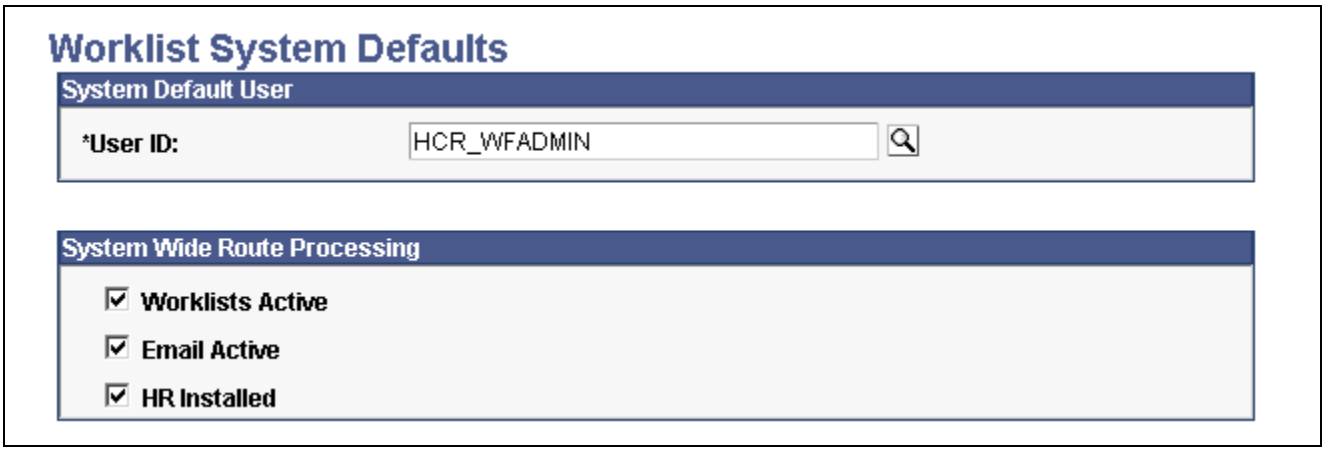
Enterprise PeopleTools PeopleBook: Workflow Technology

Pages Used to Activate Workflow

Page Name	Object Name	Navigation	Usage
Worklist System Defaults	WF_SYS_DEFAULTS	PeopleTools, Workflow, Defaults & Messages, Set Workflow Defaults	Set default parameters for workflow messages.
Workflow Transaction Categories	EO_TRAN_CATS	Set Up HRMS, Common Definitions, Self Service, Transaction Categories, Workflow Transaction Categories	Defines the category for self-service transactions. Generally, all self-service transactions are assigned to HR_TRANSACTIONS. This data is supplied by PeopleSoft and it is recommended that you not change this information.
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Self Service, Workflow Transactions	Assign the self-service transaction to a category set up in the Workflow Transaction Categories page. This data is supplied by PeopleSoft and it is recommended that you not change this information.
System Workflow Rules	EO_SYS_WF_RULES	Set Up HRMS, Common Definitions, Self Service, System Workflow Rules	For every SetID where you plan to use workflow, set the rules for workflow notification.
Workflow Status	HR_WF_STATUS	Set Up HRMS, Common Definitions, Self Service, Workflow Status	For each self-service transaction, specify what workflow is triggered. Changes to the approval path can be made, but is not recommended.
Workflow User Preferences	HR_SS_WF_EE_PREF	Self Service, Workflow User Preferences	Set up a user's notification method for workflow messages.

Activating Workflow Message Defaults

Access the Worklist System Defaults page.

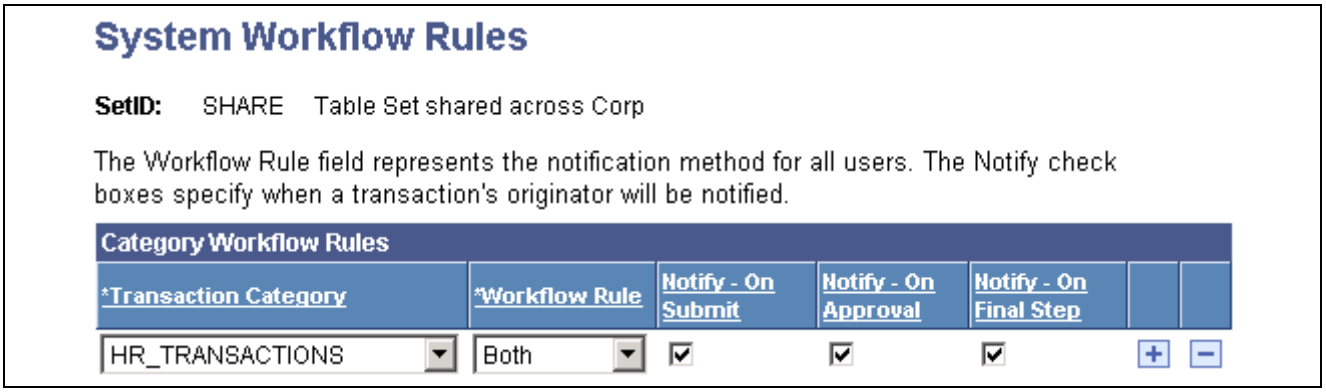


Worklist System Defaults page

Make sure the Worklist Active, Email Active, and HR Installed check boxes are selected.

Defining Rules for Workflow Notifications

Access the System Workflow Rules page.



System Workflow Rules page

For different rules to exist for different business units specify these rules at the SetID level.

Note. You must specify this information when you implement PeopleSoft HRMS.

Transaction Category Select a transaction category.

Workflow Rule Define how the system notifies users when they're required to perform a function. Values include:

- *Email:* Notify the user via email.
- *Worklist:* Notify the user by placing an entry in the user's worklist.
- *Both:* Notify the user by both email and worklist.
- *None:* No notification.
- *User:* Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.

Notify User - Entry Select if users are to receive confirmation when initiating transactions.

Notify All Select if users are to be notified each time someone processes one of their transactions.

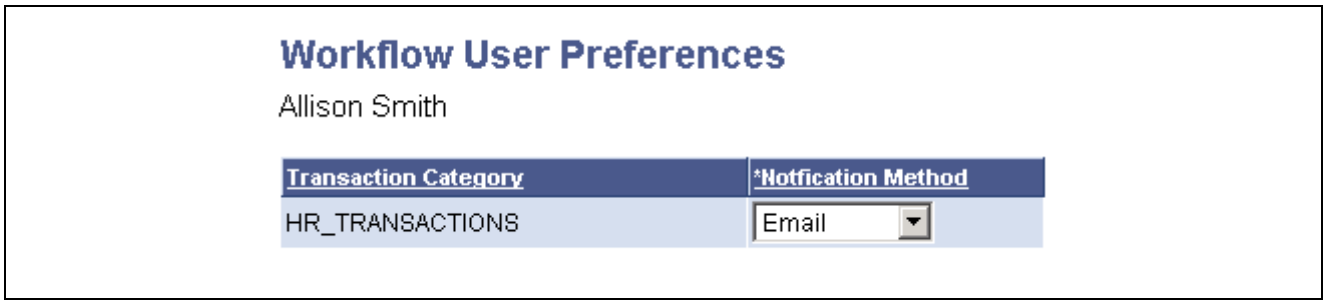
Notify - Final disposition Select if users are to be notified when the final disposition has been made for the request.

See Also

Appendix B, "Delivered Workflows for PeopleSoft HRMS," page 755

Setting User Notification Preferences

Access the Workflow User Preferences page.



Workflow User Preferences page

Select the method of workflow notifications.

CHAPTER 35

Working with Common Components

This chapter provides an overview of PeopleSoft HRMS common components and discusses how to:

- Configure direct reports functionality.
- Configure person search.
- Configure the HR notepad.
- Set up the text catalog.

Understanding PeopleSoft HRMS Common Components

This section lists common elements and discusses common component pages.

Common Elements Used in this Chapter

Object Owner ID Identifies the application in which a common component is used. You must configure the component to enable the application before the application can call the component.

Sub ID Used to further partition application entries by function. This field is called Sub Application in the Invoke Person Search API page.

Common Component Pages

PeopleSoft provides common pages to perform functionality across multiple Human Capital Management (HCM) applications. These pages are implemented as plug-in applications that you can easily configure and imbed into a application via provided APIs.

These applications are typically used to capture, store and present information for a particular generic function within the context of a calling application (for example, a application such as eRecruit, ePerformance or Benefits Administration).

Data Structures

Each plug-in application manages its own data source. All applications that embed the plug-in share the same data structure that uses a configurable key structure to accommodate the different requirements that each application has for organizing this data. Each application defines, or registers, the actual keys that are used when the plug-in runs within the context of the application that has embedded it. You register the keys by making an entry for the application in the plug-in's configuration page, which is keyed by the object owner ID of the embedding application.

User Interface

The use of plug-ins enables all applications that embed a plug-in to present the data consistently. For example, the same format is used to capture and present context-sensitive notes, whether the user is in eRecruit, ePerformance, Payroll for North America, or Benefits. To provide context-sensitive instructional text, labels, and so forth, each of the plug-in applications uses the text catalog to provide context sensitivity while maintaining a consistent style across all of HCM.

Configurable Behavior

Some embedding applications need the ability to enable, disable, or modify the plug-in functionality. Applications register these configuration options inside the plug-in's configuration page—the same place it registers its keys.

HCM plug-ins, except the text catalog, are embedded in an application by placing a graphic button on a page, and a simple API call on the button's FieldChange PeopleCode. The Text Catalog is generally invoked via an API in component-build, and/or PageActivate code.

Warning! Be careful when modifying configurations. PeopleSoft does not support some modifications, for example changing key values, that might cause other functionality in the application to not work as intended.

Configuring Direct Reports Functionality

To configure direct reports functionality, use the Configure Direct Reports UI (HR_DR_UI_CFG) and component.

This section provides an overview of direct reports and discusses how to:

- Configure components and transactions for direct reports functionality.
- Select the actions and fields that appear on the direct reports UI.
- Test the direct reports API.
- View exceptions and data returned by a method.
- View the trace log of method executions.
- Test the direct reports user interface.

See Also

PeopleSoft Enterprise ePerformance 8.9 PeopleBook, "Generating Documents," Generating Documents for Direct Reports

Understanding Direct Reports Functionality

Direct reports information is used throughout HCM applications, especially in the manager self-service applications. Typically, direct reports information is used in a way that involves navigating an organizational hierarchy. You can use direct report information in:

- Drill-down mode, enabling managers to select workers for processing in a self-service application.
- Chain of command mode, which determines workflow for approvals and notifications.

There are two major components that implement direct reports functionality:

- Data service.

  The data service navigates an organization structure and returns a list of workers that report to a particular manager or a management hierarchy for a particular worker. The data service is completely unaware of its context, which enables to service both online and batch requests.

- User Interface.

  This is a common, configurable user interface (UI) that is totally de-coupled from data management. It receives information from the data service and presents it in a streamlined, consistent, reusable UI that enables users to visually navigate an organization structure and select one or more workers for processing.

Note. You should have a good understanding of PeopleTools and PeopleCode before you attempt to configure direct reports for use by applications.

Direct Reports for Self Service Applications

There are two methods of setting up direct report functionality. If you are setting up direct reports for the following applications, use the Direct Reports Setup (SS_LINK_TBL) component:

- PeopleSoft Enterprise eDevelopment
- PeopleSoft Enterprise eCompensation
- HRMS Portal Pack
- PeopleSoft Enterprise ePay
- PeopleSoft Enterprise Stock Administration

Note. Otherwise, use the Configure Direct Reports UI component described in this section.

See Also

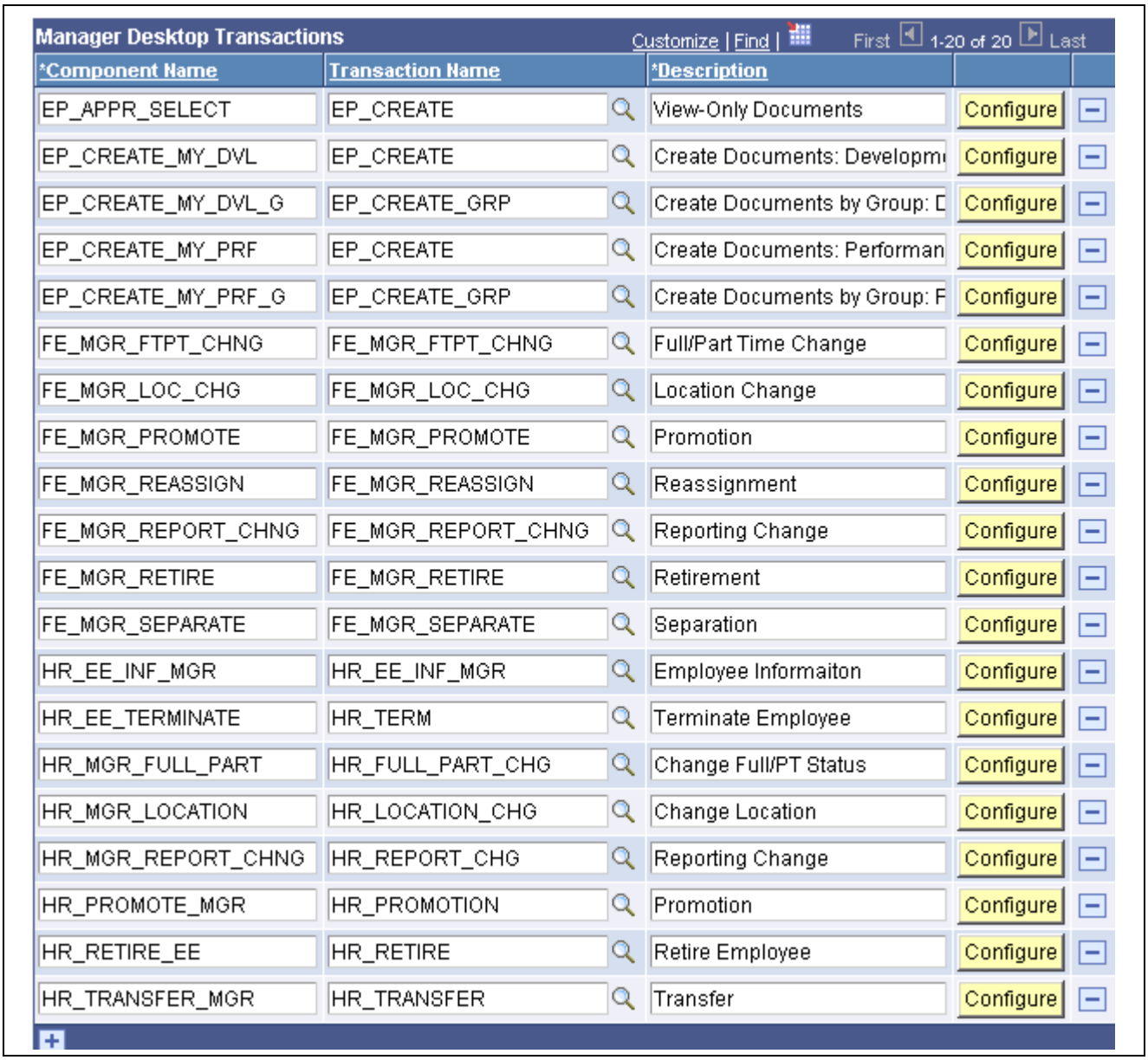
Chapter 34, “Setting Up and Working with Self-Service Transactions,” Setting Up Access to Direct Reports Data, page 675

Pages Used to Configure Direct Reports Functionality

Page Name	Object Name	Navigation	Usage
Manager Desktop Transactions	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions	Configure the components and transactions that include the direct reports data functionality.
Configure Direct Reports: Configure	HR_DR_UI_CFG_2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions Click the Configure button for an application on the Configure Direct Reports UI page.	Select the actions and fields that appear on the direct reports UI for a transaction.
Invoke Direct Reports API - Set/Execute	HR_DRPT_API_EXEC	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute	Test the direct reports API.
Invoke Direct Reports API - Execution Results	HR_DRPT_API_RSLTS	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Execution Results tab on the Invoke Direct Reports API - Set/Execute page.	View the exceptions and data returned by a method.
Invoke Direct Reports API - Trace Results	HR_DRPT_API_TRACE	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Trace Results tab on the Invoke Direct Reports API - Set/Execute page.	View the trace log of a method execution.
Invoke Direct Reports UI API	HR_DRPT_API_UITEST	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports UI API, Invoke Direct Reports UI API.	Test the direct reports user interface.

Configuring Components and Transactions for Direct Reports Data Functionality

Access the Manager Desktop Transactions page.



Manager Desktop Transactions

Customize | Find | First 1-20 of 20 Last

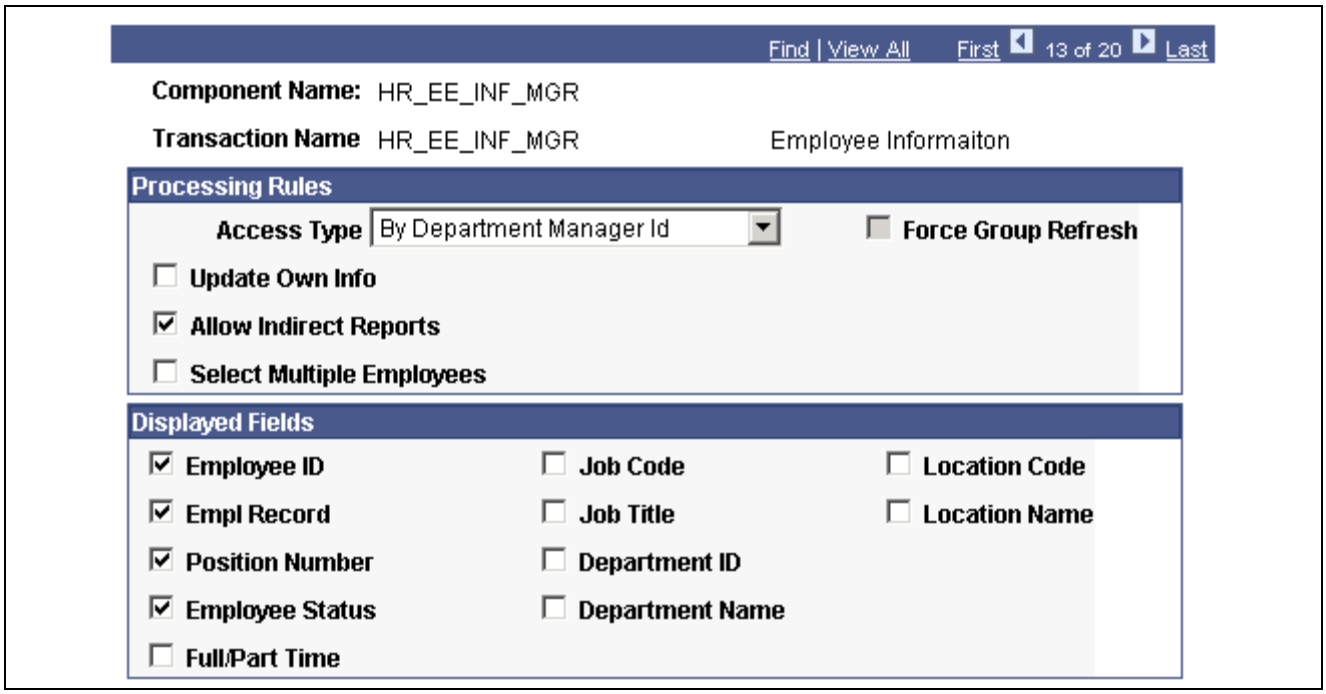
*Component Name	Transaction Name	*Description	
EP_APPR_SELECT	EP_CREATE	View-Only Documents	Configure
EP_CREATE_MY_DVL	EP_CREATE	Create Documents: Developm	Configure
EP_CREATE_MY_DVL_G	EP_CREATE_GRP	Create Documents by Group: D	Configure
EP_CREATE_MY_PRF	EP_CREATE	Create Documents: Performan	Configure
EP_CREATE_MY_PRF_G	EP_CREATE_GRP	Create Documents by Group: F	Configure
FE_MGR_FTPT_CHNG	FE_MGR_FTPT_CHNG	Full/Part Time Change	Configure
FE_MGR_LOC_CHG	FE_MGR_LOC_CHG	Location Change	Configure
FE_MGR_PROMOTE	FE_MGR_PROMOTE	Promotion	Configure
FE_MGR_REASSIGN	FE_MGR_REASSIGN	Reassignment	Configure
FE_MGR_REPORT_CHNG	FE_MGR_REPORT_CHNG	Reporting Change	Configure
FE_MGR_RETIRE	FE_MGR_RETIRE	Retirement	Configure
FE_MGR_SEPARATE	FE_MGR_SEPARATE	Separation	Configure
HR_EE_INF_MGR	HR_EE_INF_MGR	Employee Informaiton	Configure
HR_EE_TERMINATE	HR_TERM	Terminate Employee	Configure
HR_MGR_FULL_PART	HR_FULL_PART_CHG	Change Full/PT Status	Configure
HR_MGR_LOCATION	HR_LOCATION_CHG	Change Location	Configure
HR_MGR_REPORT_CHNG	HR_REPORT_CHG	Reporting Change	Configure
HR_PROMOTE_MGR	HR_PROMOTION	Promotion	Configure
HR_RETIRE_EE	HR_RETIRE	Retire Employee	Configure
HR_TRANSFER_MGR	HR_TRANSFER	Transfer	Configure

Manager Desktop Transactions page

Displays a list of components and transactions for which direct reports functionality is enabled. You can add a new component and transaction or click the Configure button to specify how the direct reports API and UI function within the context of the component and transaction.

Selecting the Actions and Fields that Appear on the Direct Reports UI

Access the Configure Direct Reports: Configure page.



Configure Direct Reports: Configure page

Processing Rules

Access Type

Select the reporting relationship to use for determining who reports to whom. This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options are:

- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system

presents the user with a list of people whose job record indicates that they report to that user's position.

- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info Select to indicate that the user can update their own records. When you select this check box, the user's information is returned in the results list along with their direct reports or management hierarchy.

Allow Indirect Reports Select to return indirect reports of the user. This navigates down the organizational hierarchy and returns direct reports of direct reports and so forth until the lowest reporting level is reached.

Select Multiple Employees Select to enable the user to select more than one worker from the search results. If this field is selected, a check box appears next to the names in the results list, otherwise a radio button appears.

Note. You should not modify this value on delivered transactions, as they are built for selection of single or multiple values and if you change the setting, the transaction might not work.

Force Group Refresh Select to run the Group Build process (GBP002) to refresh the group membership prior to displaying direct reports. If you do not select this check box, the group members as of the last scheduled run of the process appear on the page. The system only makes this check box available if you select the access type *By Group ID*.

Displayed Fields

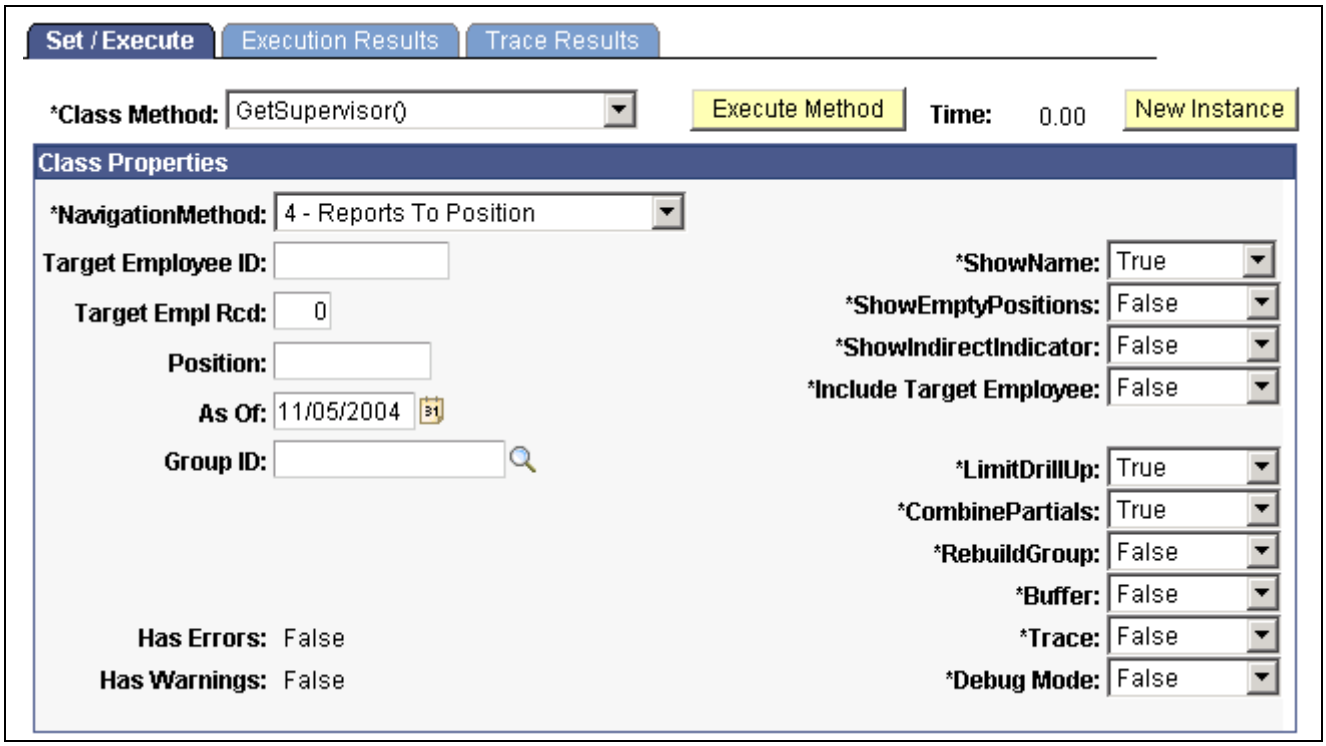
Select one or more fields to appear on the direct reports list within when rendered by the application.

See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," page 667

Testing the Direct Reports API

Access the Set/Execute page.



Set/Execute page

Class Method Select a method from the available options:

- *GetSupervisor()*

  Gets the supervisor for the target worker. This method is useful if the application needs to determine the target worker's supervisor, but not the supervisor's direct reports. For example, to send a notification to an worker's supervisor, the application must determine the identity of the supervisor.

- *DrillDown()*

  Logically navigates down one level in the reporting structure to expose all of the direct reports for the worker . This is the most common use of the application class — this method returns the direct reports for an worker/job.

- *DrillUp()*

  Logically navigates up one level in the reporting structure to expose the worker's supervisor and all the supervisor's direct reports.

- *GetPeers()*

  Invokes the GetSupervisor() method for the target worker, and then invokes DrillUp() to expose all of the direct reports for this supervisor (which is the same as returning all the peers for a particular person).

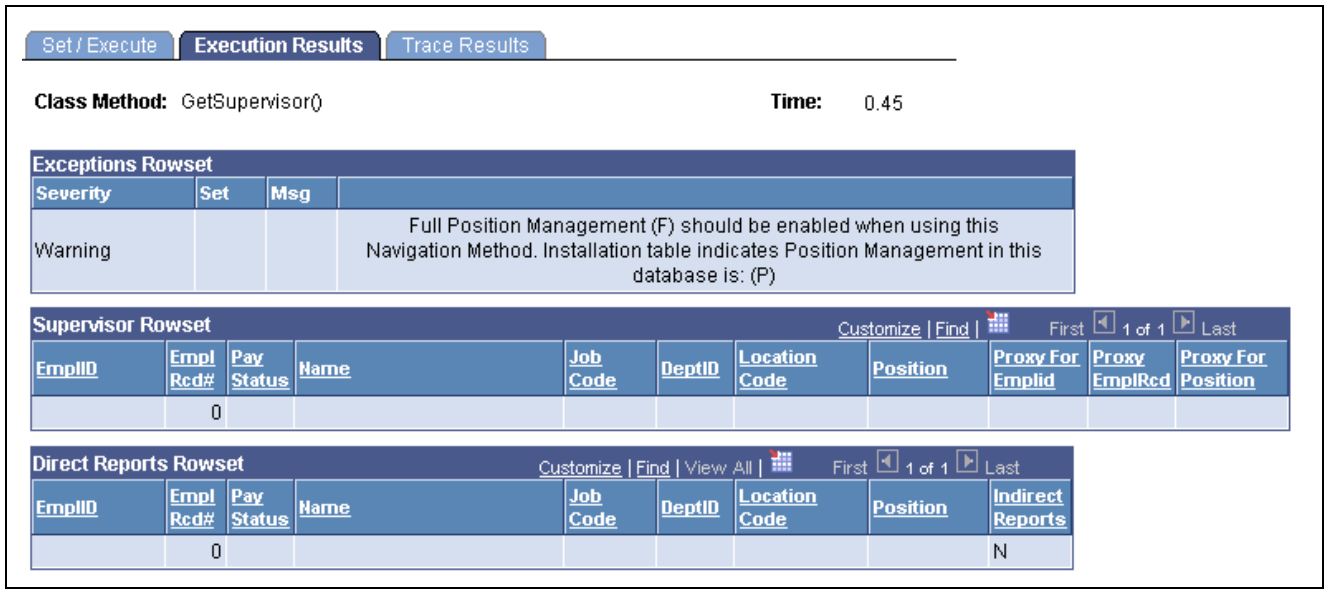
Execute Method Click to execute the method using the class properties you set.

Class Properties

The properties and their default values, if any, of the selected class appear in this page region. You can change any of these before executing the method.

Viewing Exceptions and Data Returned by a Method

Access the Execution Results page.

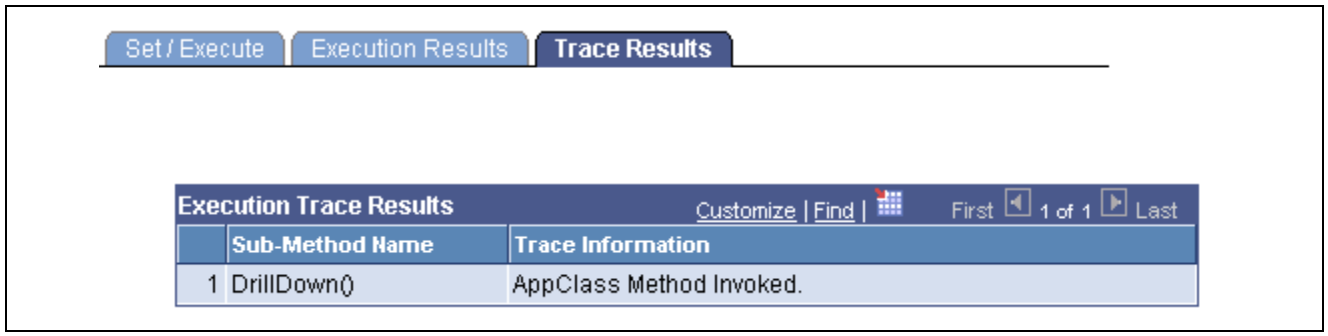


Execution Results page

This page enables you to view results of the method execution.

Viewing the Trace Log of Method Executions

Access the Trace Results page.

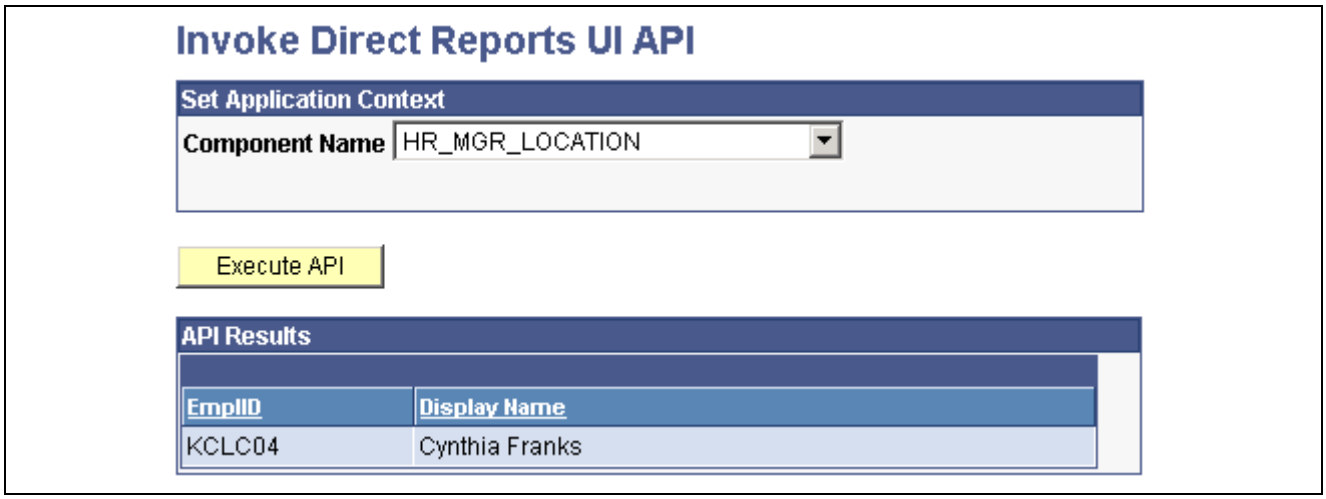


Trace Results page

Data appears on this page only if you select *True* for the Trace class property.

Testing the Direct Reports User Interface

Access the Invoke Direct Reports UI API page



Invoke Direct Reports UI API page

Select a Component Name and click Execute API. The direct reports plug-in executes within the context of the component and returns the results to the API Results grid.

For example, the results shown above were returned by selecting *Cynthia Franks* from within the Location Change component.

Configuring Person Search

To configure the person search, use the Configure Person Search (HR_PSS_CONFIG) component

This section provides an overview of simple person search and discusses how to:

- Configure components for simple person search.
- Test simple person search.

Understanding Simple Person Search

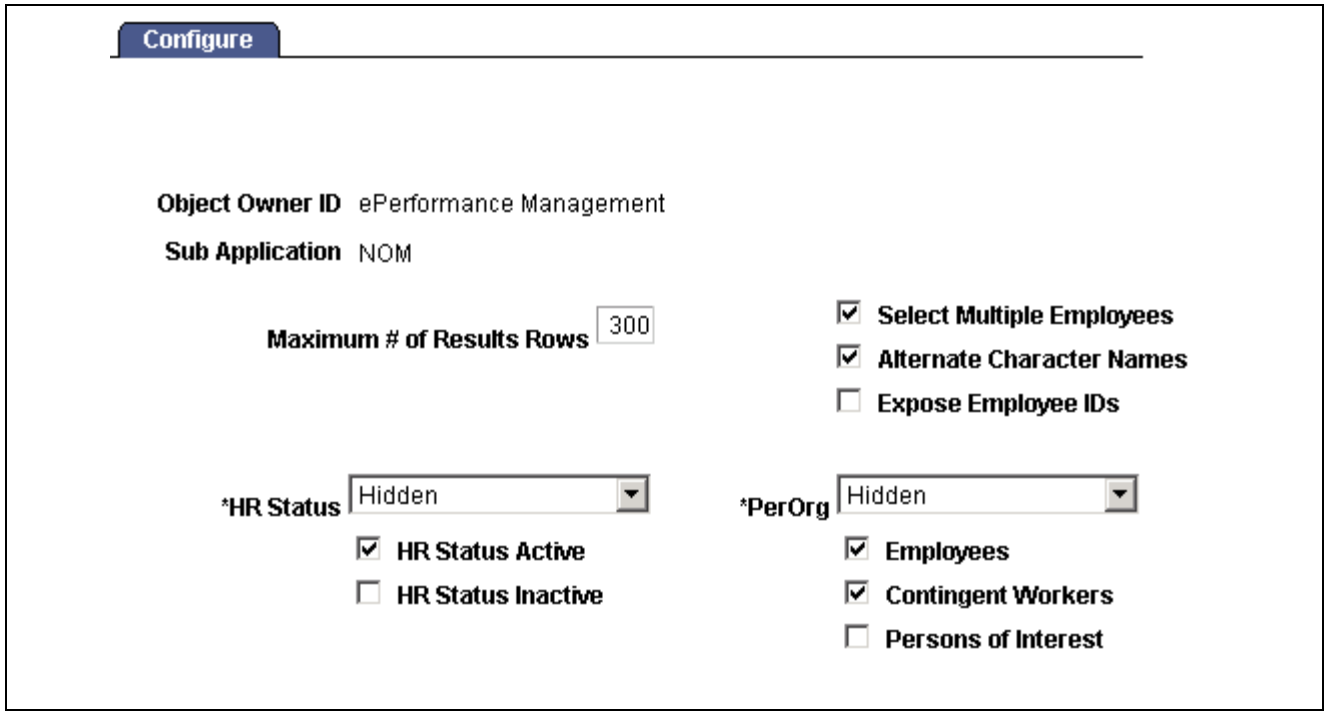
This page enables users of an application to search for and select a person to process. Using this application, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

Pages Used to Configure Simple Person Search

Page Name	Object Name	Navigation	Usage
Configure	HR_PSS_CONFIG	Set Up HRMS, Common Definitions, Person Search Match, Configure Simple Person Search, Configure	Configure components for simple person search.
Invoke Person Search API	HR_PSS_TEST_API	Set Up HRMS, Common Definitions, Person Search Match, Invoke Person Search API, Invoke Person Search API	Test the simple person search within the context of an application.
Person Search - Simple	HR_PSS_SEARCH	This page is invoked from several calling applications.	Search for and select a person.

Configuring Components for Simple Person Search

Access the Configure page:



Configure page

You select the options that govern how an application searches for and returns person information on the Simple Person Search page within an application.

Maximum # of Results Rows Enter the maximum results rows to return to the calling application. Any rows that meet the search criteria are returned and appear in the results list. If a search returns more than the maximum number of rows is found, the user prompted with a message that the search returns more than the maximum number of people and asking them to narrow the search.

HR Status Select one of these values:

- *Hidden*

  HR status values for the persons found by the search do not appear in the results list.

- *Display Only*

- HR status values for the persons found by the search appear in the results list.

- *Enterable*

  Enables the user to search by HR status values. These appear as check boxes on the Person Search page.

HR Status Active Select to return rows for active workers. This check box is selected by default.

HR Status Inactive Select to return rows for inactive workers.

Select Multiple Employees Select to enable the user to select more than one person from the search results. If you select this field, a check box appears next to the names in the results list, otherwise a radio button appears.

Alternate Character Names Select to enable the user to search for names by entering the search string in alternate character format. If you configured the system to enable the entry of names in alternate character format, this check box is selected by default.

Expose Employee IDs Select to have the person's ID appear in the results details. This field is clear by default.

Per Org(Person Organizational Relationship) Select one of these values to control how the person's relationship to the organization is used on the Person Search page:

- *Hidden*

  The organization relationship do not appear in the results list.

- *Display Only*

  The organization relationship appears in the results list.

- *Enterable*

  Enables the user to select the person organization relationships to include in the search. These appear as check boxes on the Person Search page.

Employees Select to return employees in the search results. This field is selected by default.

Contingent Workers Select to return contingent workers, for example, temps or contractors, in the search results. This field is clear by default.

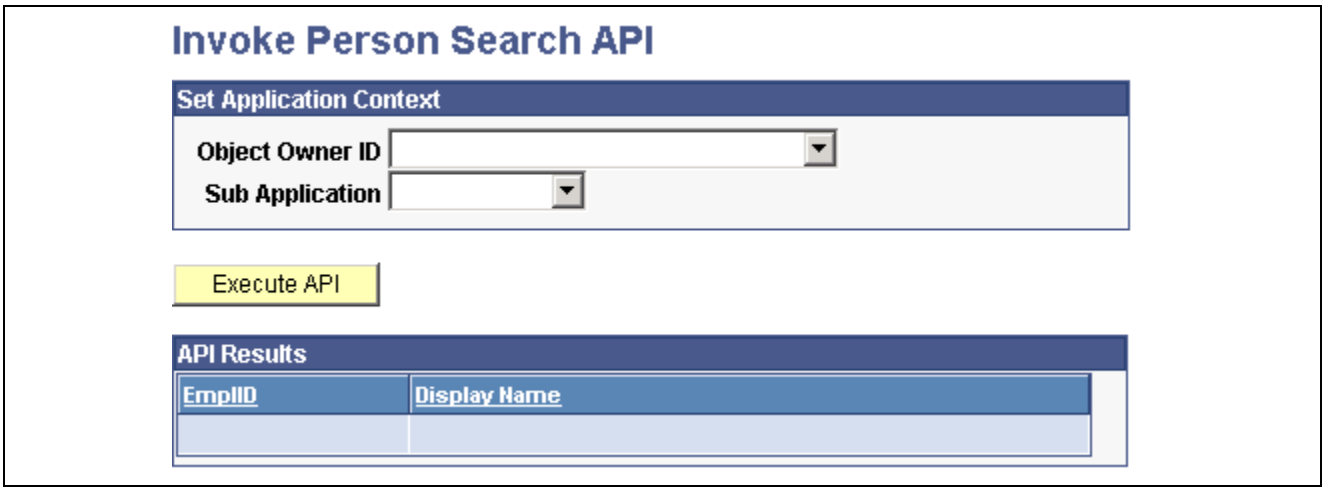
Persons of Interest Select to return other persons of interest, for example, retirees or job applicants, in the search results. This field is clear by default.

See Also

Chapter 3, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Organizational Relationships, page 11

Testing Simple Person Search

Access the Invoke Simple Person Search page.



Invoke Person Search API page

This page enables you to test the configuration of the Simple Person Search page within the context of an application and sub application that you select. When you click Execute API the search page is rendered as you configured it for the application. You can enter any search criteria to view how the results appear.

Configuring the HR Notepad

To configure the HR Notepad, use the HR Notepad Configuration (HR_NP_CONFIG) component.

This section provides an overview of the HR Notepad and discusses how to:

- Configure HR Notepad for application use.
- Set up keys for storing notes.
- Configure application note page links.
- Test the Notepad configuration.

Understanding the HR Notepad

A notepad is a logical grouping of text-based notes, or a collection of notes that a user has entered within the context of an application. For example, an employee might have a performance notepad within the context of ePerformance, and a manager might have a recruiting notepad within the context of eRecruit.

You can integrate the plug-in application that maintains the HR Notepad (Notepad) into any HCM application. This application enables the user to record logical notes that are relevant to a row of application data. A common data structure, partitioned by application, is used to store notes.

The Notepad provides a consistent user interface (UI) that enables users to create, edit, view, and delete text-based notes. The Notepad UI is a single component that contains two pages for selecting and maintaining notes, a secondary page for displaying warnings and errors, and a secondary page for viewing note history. All text elements on the pages are defined in the text catalog, which enables you to easily configure the pages. You can enable access to Notepad functions from within an application's online components or directly from the application or menu.

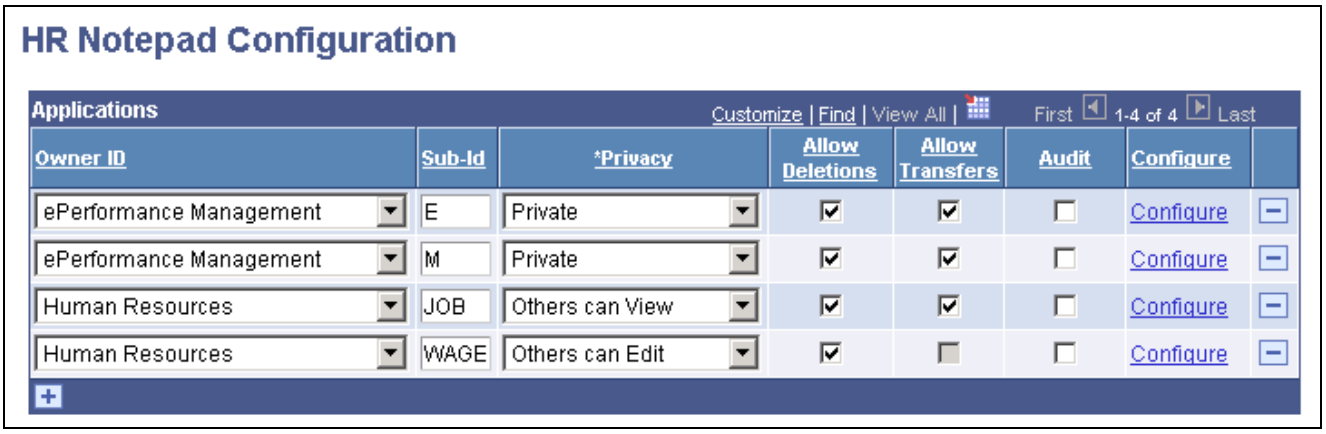
Although the Notepad UI is consistent across all applications, detailed Notepad presentation and behavior specific to a given application are defined in a configuration table entry for the application. This entry defines the behavior of the Notepad UI and the keys that are used for the particular application. You can use this configuration table to integrate the Notepad pages into applications for which PeopleSoft does not currently deliver Notepad functionality, add Notepad functionality to applications that you build with PeopleTools, or modify the appearance of Notepad pages.

Pages Used to Configure the HR Notepad

Page Name	Object Name	Navigation	Usage
HR Notepad Configuration - Select Application	HR_NP_CONFIG_HDR	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration	Configure the HR Notepad for use by an application.
HR Notepad Configuration - Configure Keys	HR_NP_CONFIG2	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration Click the Configure link for an application on the HR Notepad Configuration page.	Set up the keys for storing notes.
HR Notepad Configuration - Configure Links	HR_NP_CONFIG3	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration Click the Configure link for an application on the HR Notepad Configuration page.	Configure the links that appear on application note pages.
Invoke HR Notepad API	HR_NP_TEST_API	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration	Test the notepad configuration.

Configuring the HR Notepad for Application Use

Access the HR Notepad Configuration - Select Application page.



HR Notepad Configuration - Select Application page

Privacy Select from these options:

- *Private:* Only the owner of the note can access the note.
- *Others Can View:* Anyone can view existing notes in this partition, but only the note owner can update an existing note.
- *Others Can Edit:* Anyone can view and edit existing notes in this partition.

Allow Deletions Select to permit users delete a notes.

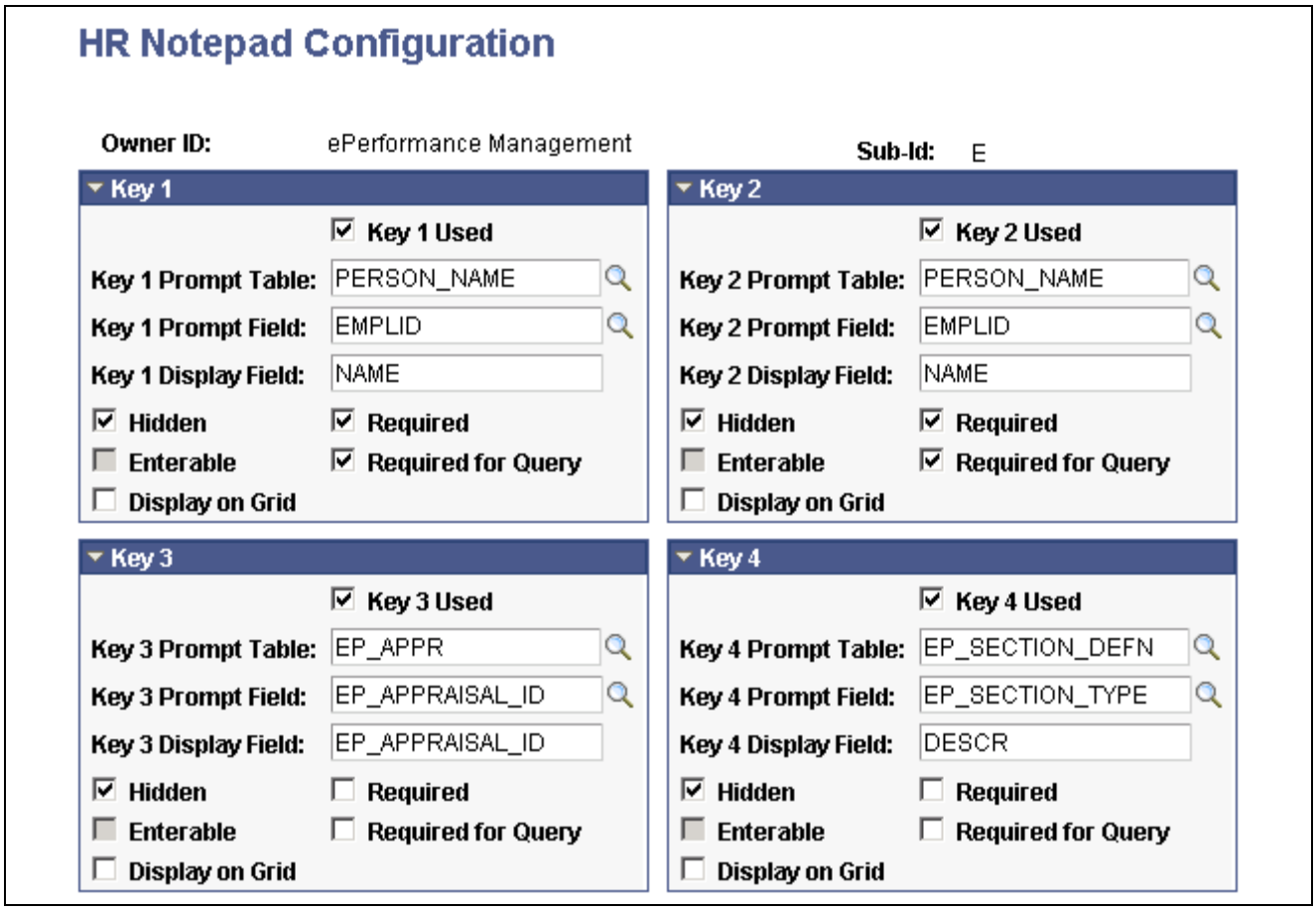
Allow Transfers Select to permit users who entered and therefore are the owner of a note to transfer ownership of a note to another individual.

Audit When selected, this check box enables the Audit Changes feature for the partition. The system will automatically retain a history of all changes made to existing notes, including transfers and deletions.

Configure Click to access to the Configure Keys page.

Setting Up Keys for Storing Notes

Access the HR Notepad Configuration - Configure Keys page.



HR Notepad Configuration - Configure Keys page

This page consists of four regions, one for each of the context keys. The description and use of these fields are identical to the *Key 1* fields described below.

Key 1 Used Select to indicate that the partition uses this particular context key. When selected, all of the controls in the Key 1 page region are enabled.

Key 1 Prompt Table Select the table that is used to provide a prompt list and validate the entry when a user enters a value into the Key 1 search field in the UI.

Key 1 Prompt Field Select the field within the prompt table that is used to provide the values in the prompt list. You must enter a value in this field if you enter a value in the Key 1 Prompt Table field.

Key 1 Display Field Select the field in the prompt table that appears in the UI as a related field for the value of Key 1. This field is optional. If not specified, then there is no related-display field for the context key. For example, you do not specify a Display Field for a date or number context key.

Hidden Select to indicate whether this key field is exposed on the UI pages. This field is selected by default.

Required Select to indicate that this key field is required when adding a note. This field is clear by default.

Enterable Select to indicate that the user is permitted to enter a value into this key field in the UI search criteria. This field is selected by default. You might clear this

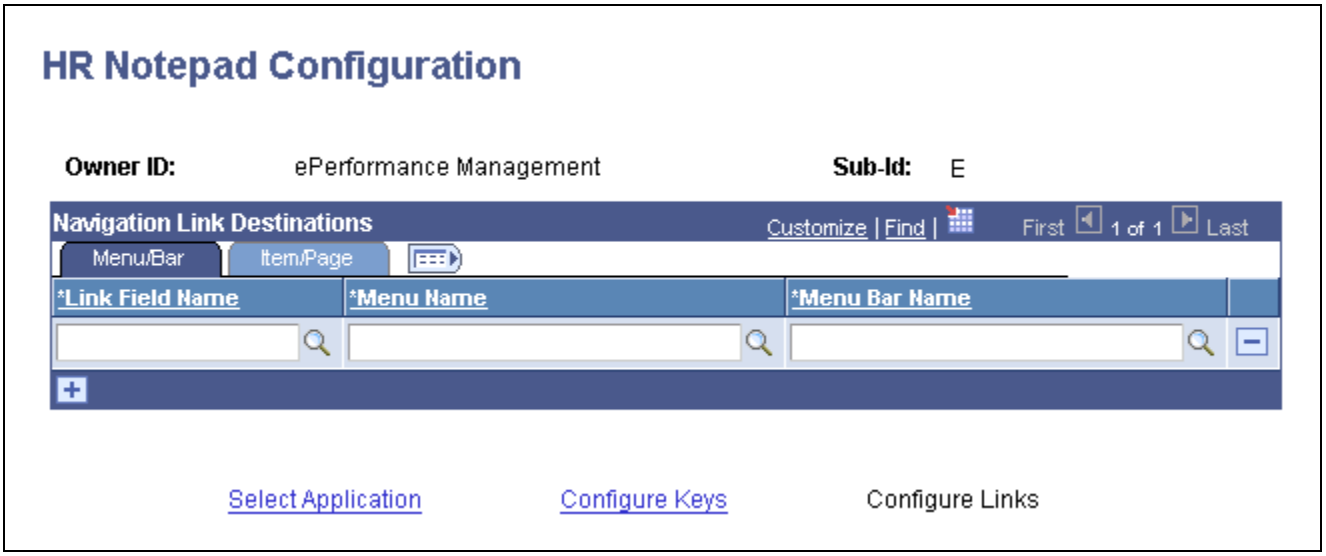
field in cases which the key is automatically populated by the API and exposed on the UI, but you do not want the user to change it.

Required for Query Select to indicate that the user must populate the key in the UI search criteria to see the list of notes that meet the search criteria, or to add a new note. This field is clear by default.

Display in Grid Select to display the context key value in the list of notes that meet the search criteria. You usually select this check box for any context key that has Required for Query cleared.

Configuring Application Note Page Links

Access the HR Notepad - Configure Links page.



HR Notepad - Configure Links: Menu Bar page

Use this page to define the navigation that takes place when the user clicks one of the navigation links at the bottom of the Notepad UI.

Link Field Name Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.

Menu Name Select the name of the menu to which the user is transferred when they click the link. The prompt table for this field is a view of all menus in the database.

Bar Name Select the name of the menu bar to which the user is transferred when they click the link. The prompt table for this field is a view of all menu bars for the menu specified in the Menu Name field.

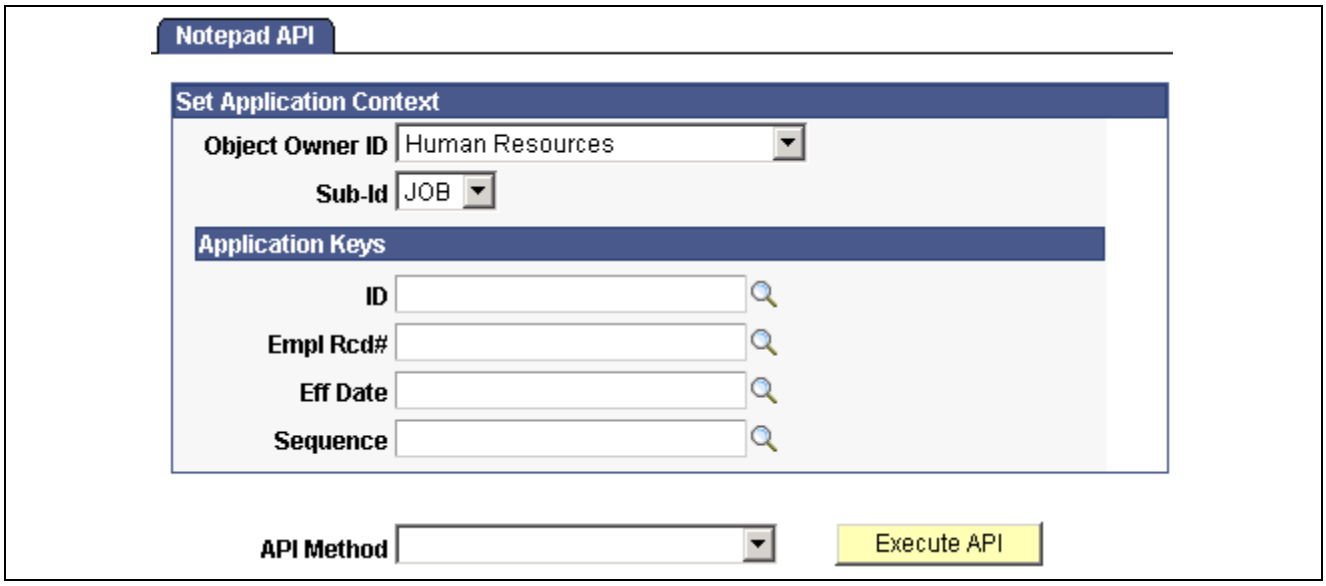
Bar Item Name Select the name of the menu bar item to which the user is transferred when they click the link. The prompt table for this field is a view of all items for the menu bar specified in the Bar Name field.

Panel Item Name Select the name of the page to which the user is transferred when they click the link. The prompt table for this field is a view of all pages for the bar item specified in the Bar Item Name field.

Mode Select the operation mode for the page from the values *Add*, *Update/Display*, and *Correction.*

Testing the Notepad Configuration

Access the Notepad API page.



Notepad API page

Use this page to test the Notepad configuration for an application and sub-ID, if applicable.

The application keys that appear on this page are the ones that are defined for the Object Owner ID and Sub-ID. When you first access this page, only the Object Owner ID field is enterable. After you enter the Object Owner ID, the Sub-Id field is populated with any sub ids for the application. The application keys that appear correspond to the application keys that you configure on the HR Notepad Configuration - Configure Keys page

API Method Select the method to test.

- *Add()*
- *Edit()*
- *InvokeNotepad()*
- *View()*

Execute API Click to execute the API method with the keys you entered.

Setting Up the Text Catalog

To set up the text catalog, use the Configure Text Catalog (HR_SSTEXT_CFG) and Translate Text Catalog (HR_SSTEXT_TEXT) components.

This section provides an overview of the text catalog, lists common elements, and discusses how to:

- Configure the text catalog.

- Designate keys for text catalog entries.
- Define text catalog entries.
- View text catalog entries as HTML.
- Define translation for text catalog entries.
- Test text retrieval.
- View effective dates and context keys for a text ID.

Understanding the Text Catalog

The Text Catalog feature stores standard text that appears on the self-service pages within HRMS applications, including field labels, button names, links, page instructions, and warnings. It also includes the text and subject lines of automated email notifications. PeopleSoft HCM provides predefined text entries, but you can modify them by using the Text Catalog feature.

Entries in the Text Catalog feature are context-sensitive, meaning that a particular piece of text on a page can vary depending upon the page's usage or context. In this way, For example, instructional messages that appear for managers can differ from the messages that appear for workers.

Text Catalog Keys

Context-sensitivity is accomplished through the use of keys that enable the application to retrieve applicable text catalog entries. The keys for each application differ to meet the needs of the application.

Although you can have multiple versions of the same text, you do not have to set up a separate entry for every possible scenario. You can create one generic entry where all key values are blank, and then add entries for the situations that vary from the norm. Blank key values function as wildcards.

Warning! When the system looks for a match, it stops searching if the search keys narrow the possible choices to a single row—the lower-order search keys are ignored. If you do not set things up correctly, the system may return the wrong results. Plan ahead before making changes, particularly for complex scenarios. Random changes can lead to errors that are difficult to debug later.

You can test changes by using the Test Text Catalog page. To test an entry, enter the text ID that is associated with the text, plus any combination of key values, and click the Test button to view the text that the system retrieves for the keys values you entered.

Text IDs

To update a text entry, you need its ID. Use the Display Text ID option on the Configure page to find this information. When you activate this option, the text IDs appear in place of the corresponding text on self-service pages, warnings, and emails.

To view the correct text IDs, you need to create the conditions that cause the page, warning, or email to appear. For example, you might need to sign in using a particular role.

Note. You may want to activate this option, print a copy of the self-service pages, and then deactivate it. This provides a hardcopy reference of all the text IDs used on each self-service page.

Common Elements Used in this Section

Text ID The unique identifier that you entered to access entries in the text catalog.

Usage The place where the entry is used: *Email Body, Email Subject, Error/Warning, Field Label, Grid/Scroll Heading, Groupbox Title, Hyperlink/Button, Page Instructions,* or *Page Title.* The only text entries that you cannot modify are translate values and error messages that appear in Microsoft Windows error boxes. You can use this field to search the Maintain Text Catalog page when you don't have the text ID, but you do have the specific text.

Effective Date The date on which a particular text catalog entry becomes active. Delivered text is defined as system data in the PeopleSoft HRMS database and has an effective date of 1/1/1900.

Important! To prevent future updates to PeopleSoft ePerformance from overwriting any text entries that you add or modify, use a later effective date when you add new text entries, and insert a new effective date when you modify delivered text.

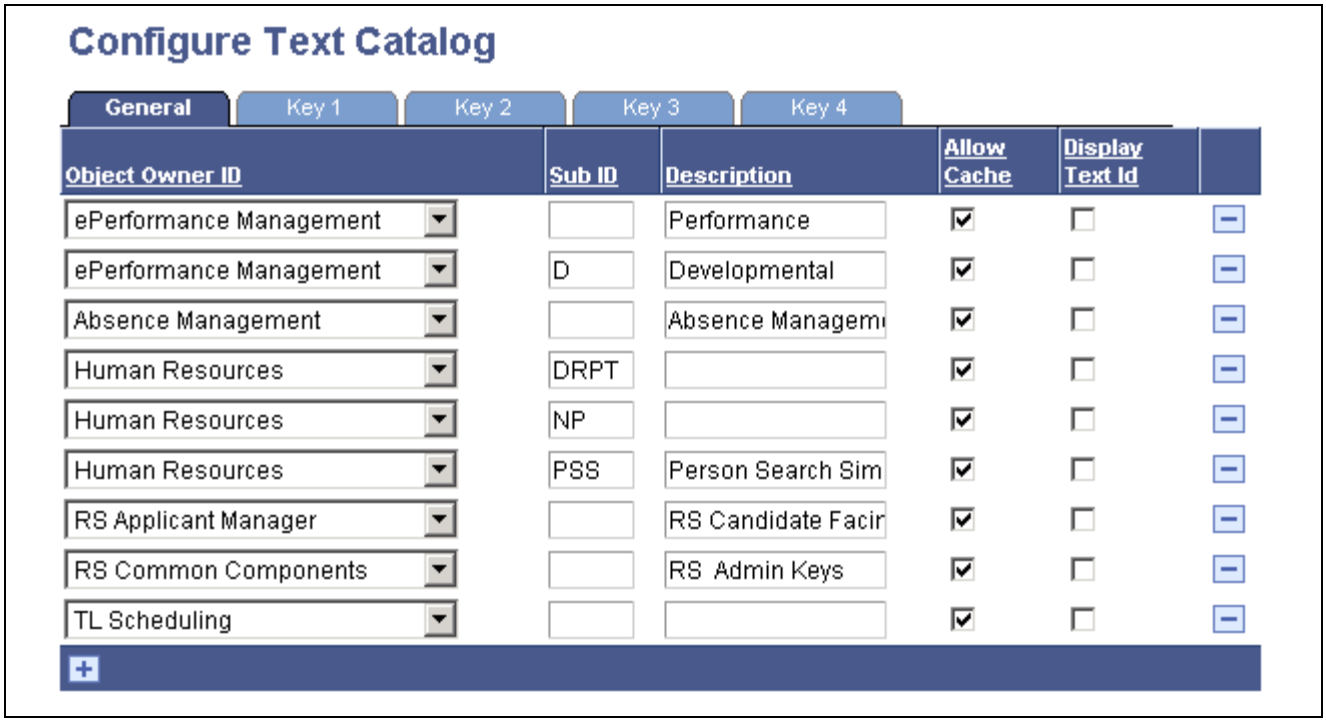
Pages Used to Work with the Text Catalog

Page Name	Object Name	Navigation	Usage
Configure Text Catalog: General	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog	Configure the text catalog for an application.
Configure Text Catalog: Key 1, Configure Text Catalog: Key 2, Configure Text Catalog: Key 3, Configure Text Catalog: Key 4	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog Select the Key 1, Key 2, Key 3, or Key 4 tab on the Configure Text Catalog: General page.	Designate keys that are used to store and retrieve text catalog entries.
Maintain Text Catalog	HR_SSTEXT_TEXT	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog	Define text catalog entries, and define the values for context-sensitive keys.

Page Name	Object Name	Navigation	Usage
Maintain Text Catalog	HR_SSTEXT_HTML	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog Click the View / Edit as HTML link on the Maintain Text Catalog page. • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog Click the View / Edit as HTML link on the Maintain Text Catalog page.	View text catalog entries as HTML.
Text Catalog - View All Keys	HR_SSTEXT_ALLKEYS	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog Click the link on the Maintain Text Catalog page or the Test Text Catalog page. • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog Click the link on the Maintain Text Catalog page or the Test Text Catalog page.	View versions and context-key entries for a particular text ID and effective date combination.
Self-Service Text Translation - Descriptions	HR_SSTEXT_LANG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Self-Service Text Translation, Descriptions	Select and describe the languages into which a text catalog entry is translated.
Self-Service Text Translation - Catalog Test	HR_SSTEXT_LANG2	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Self-Service Text Translation, Catalog Text	Enter translations for text catalog entries
Test Text Catalog	HR_SSTEXT_TEST	Set Up HRMS, Product Related, ePerformance, Text Catalog, Test Text Catalog	Test the text retrieval for a text ID, using any combination of key values.

Configuring the Text Catalog

Access the Configure Text Catalog: General page.



Configure Text Catalog: General page

Use this page to add or remove applications from the text catalog and to configure options that affect the operation of the text catalog within an application. The page shot above shows the PeopleSoft HCM applications that are delivered with the text catalog feature enabled.

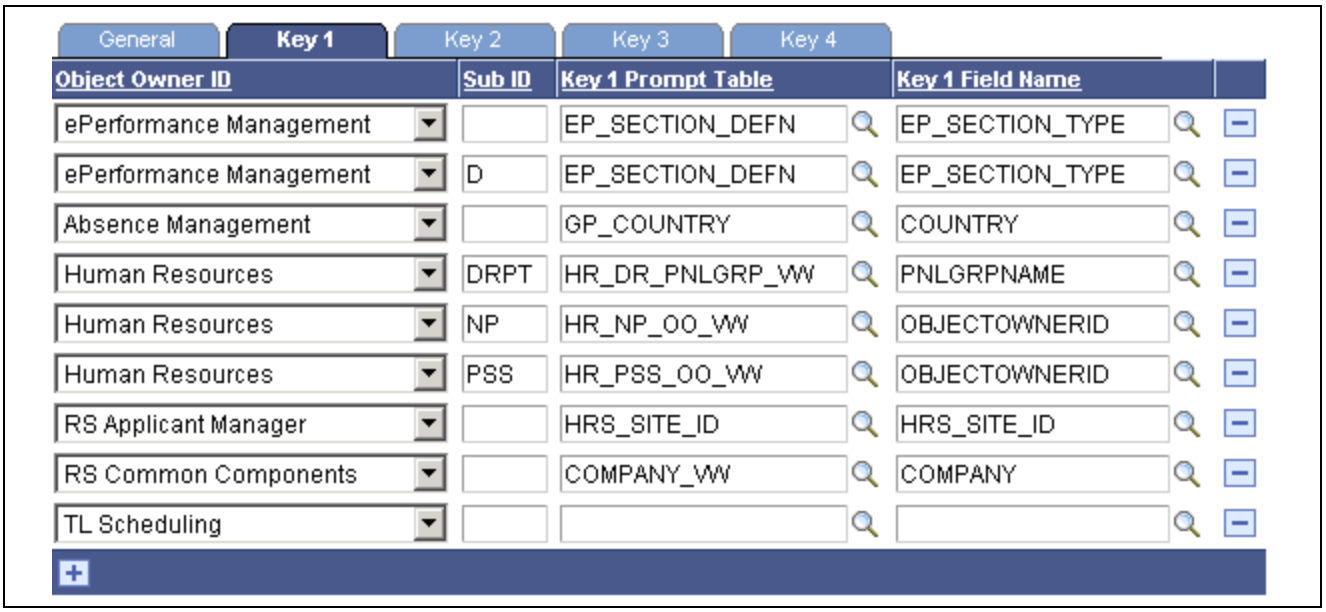
Allow Cache Select this check box to load the entire contents of the text catalog into cache upon access to the application. This enhances system performance because the system does not have to do a database call every time it needs to retrieve a text catalog entry.

Display Text ID Select to have the system identifiers of the text entry appear instead of the corresponding text. You can use this option to find out which text ID corresponds to a particular piece of text that you want to modify.

Designating Keys for Text Catalog Entries

Access the Configure Text Catalog: Key 1 page.

Note. The Key 2, Key 3, and Key 4 pages are identical in appearance and usage to the Key 1 page.



Configure Text Catalog: Key 1 page

Key 1 Prompt Table Select the object name of the prompt table that defines the values by which the text catalog is partitioned for an application.

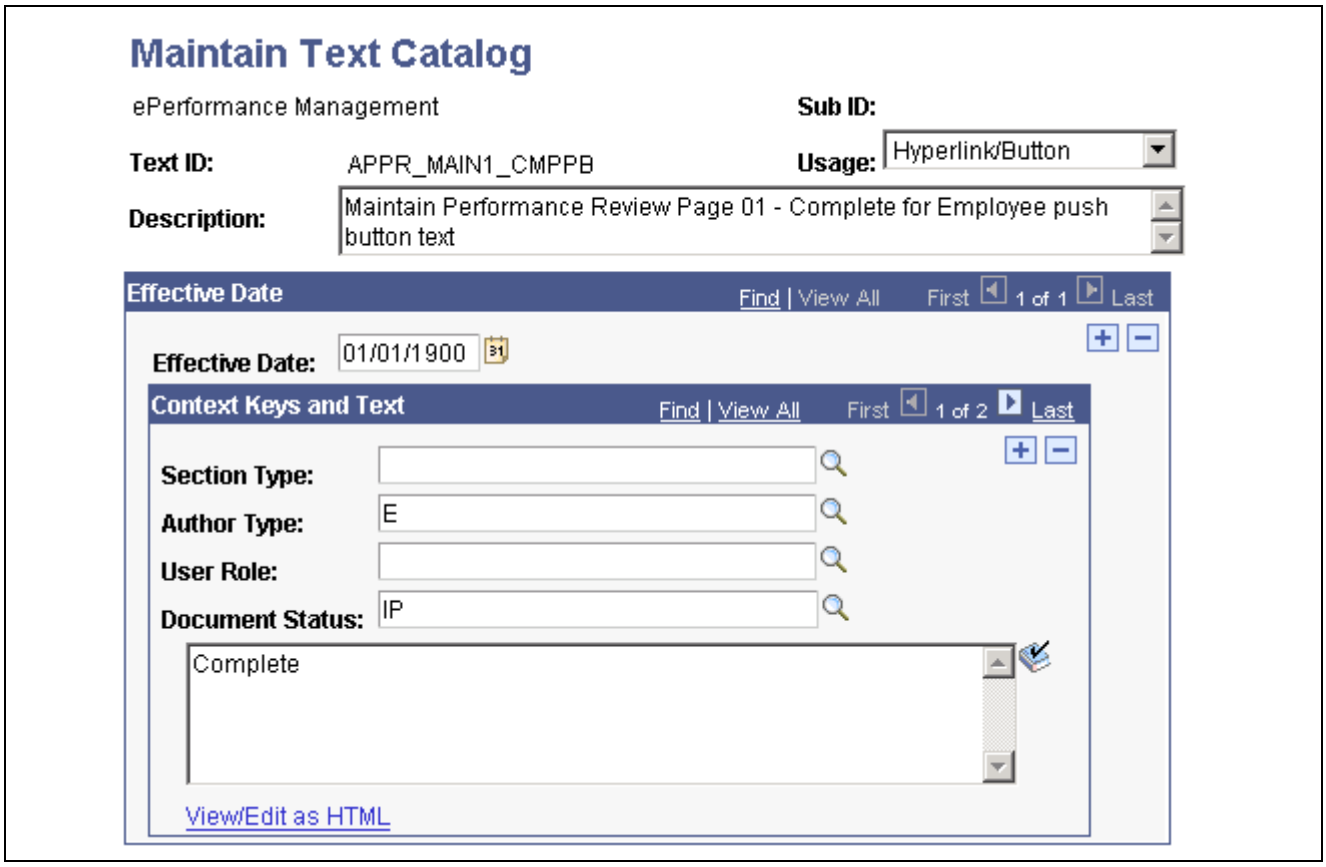
The values in this prompt table appear when a text catalog entry is defined and modified. You select the value that pertains to the context in which the entry appears on self-service pages or notifications.

Key 1 Field Name Select the field in the prompt table that contains the value that appears in the prompt list for this key.

Note. If you enter a value for the prompt table, you must also enter a value for the field name in the same row.

Defining Text Catalog Entries

Access the Maintain Text Catalog page.



Maintain Text Catalog page

Context Keys and Text

The context keys that appear on this page are determined by the text catalog configuration for the application. Use the context keys to target the message or text to a particular audience or specify the conditions under which the text is appropriate.

Note. A blank value for any key is a wildcard and means that the entry appears in all contexts of the key.

For example, the page shot above shows a configuration of a button for the ePerformance application. The button text that is defined in the text box applies only to employees and only when the evaluation status is *In Progress*.

For each text ID and effective date combination, define a complete wildcard entry in which you leave all key fields blank. This entry, known as the root entry, is the default text entry that's used when no section type, author type, user role, or document status is specified.

View/Edit as HTML Click to view and edit the HTML tags if the text will appear in an HTML area on the page.

Text Substitution

The text strings that are substituted for specific tokens, such as %1 and %2, are different for each application that uses substitution in the text catalog. They are delivered with the application.

Token substitution in the text catalog works in the same way as in the PeopleTools Message Catalog. You supply the values for the tokens in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on performance documents. To use this feature, you must know PeopleCode.

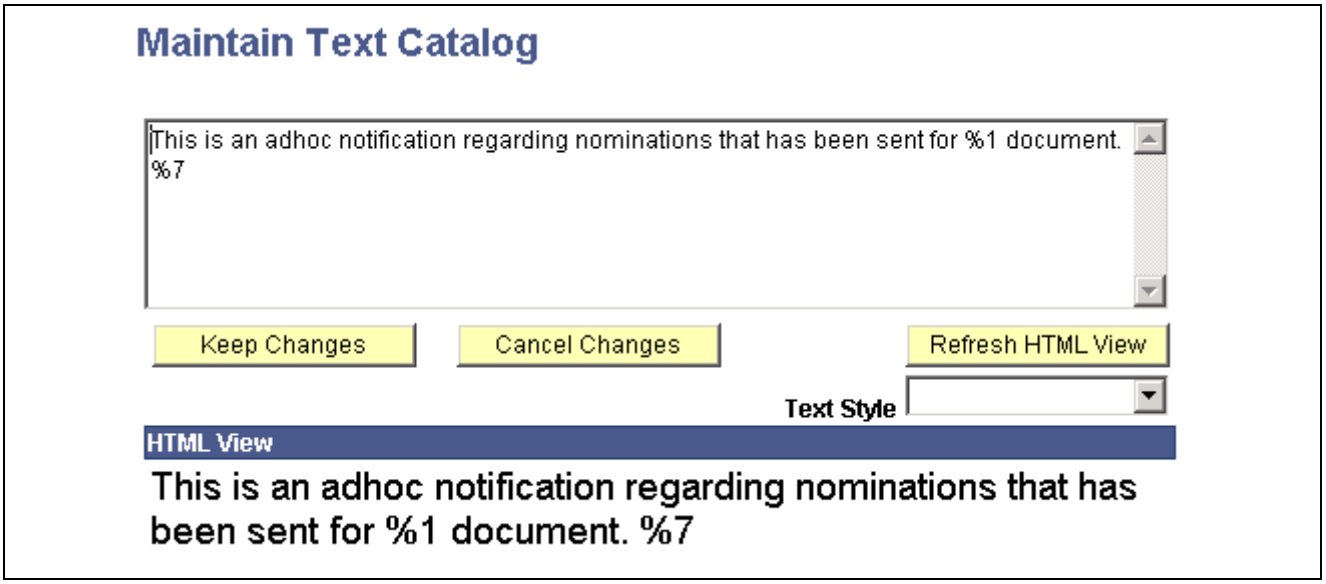
If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the text catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Viewing HTML for Text Catalog Entries

Access the Maintain Text Catalog: HTML View page

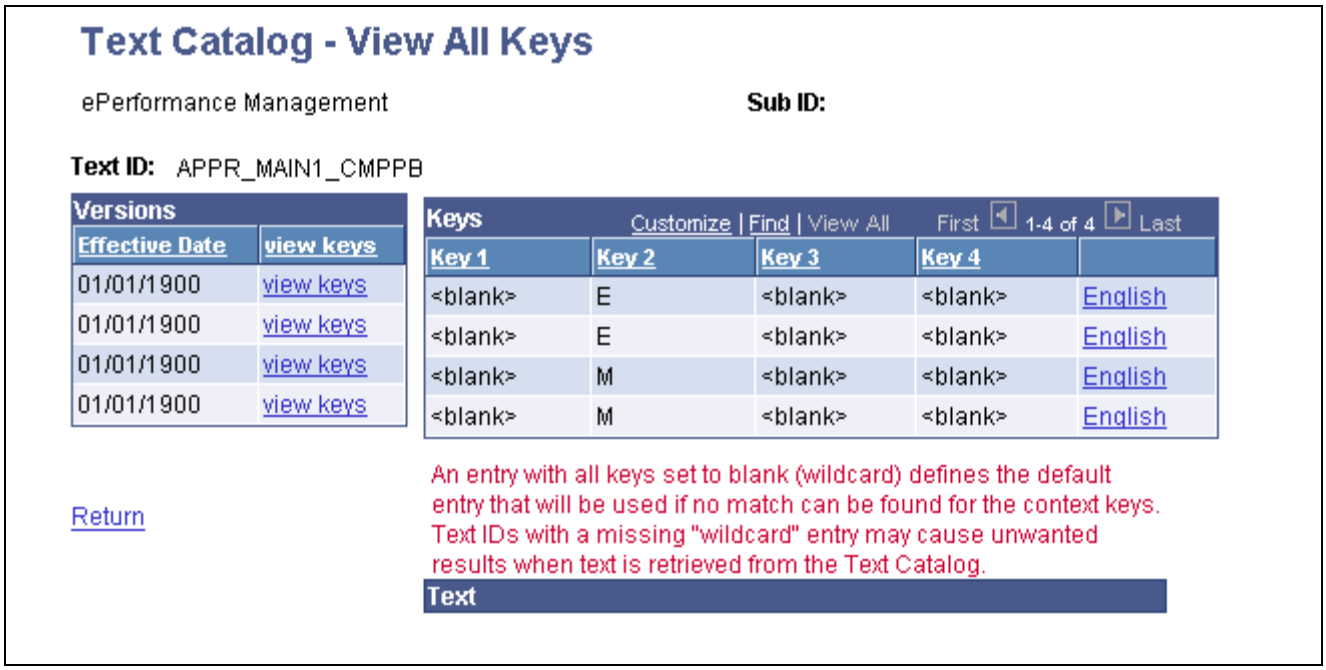


Maintain Text Catalog: HTML View page

Text Style Select the style to apply to the text. After you apply a style (for example, *Bold* or *Error* to a text entry, the HTML View page region shows how the text will appear on self-service pages.

Viewing Effective Dates and Context Keys for a Text ID

Access the Text Catalog - View All Keys page.



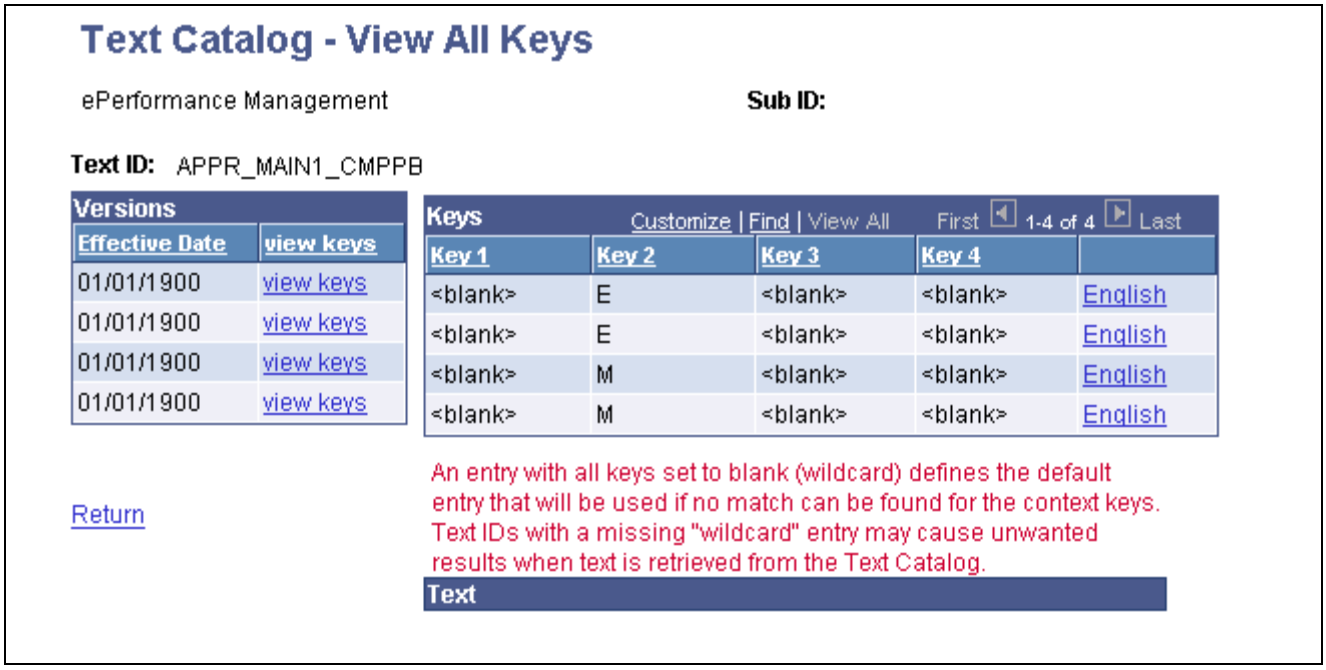
Text Catalog - View All Keys page

The Versions group box lists all effective-dated versions of the selected text ID.

Click the View Keys link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

Viewing Effective Dates and Context Keys for a Text ID

Access the Text Catalog - View All Keys page.



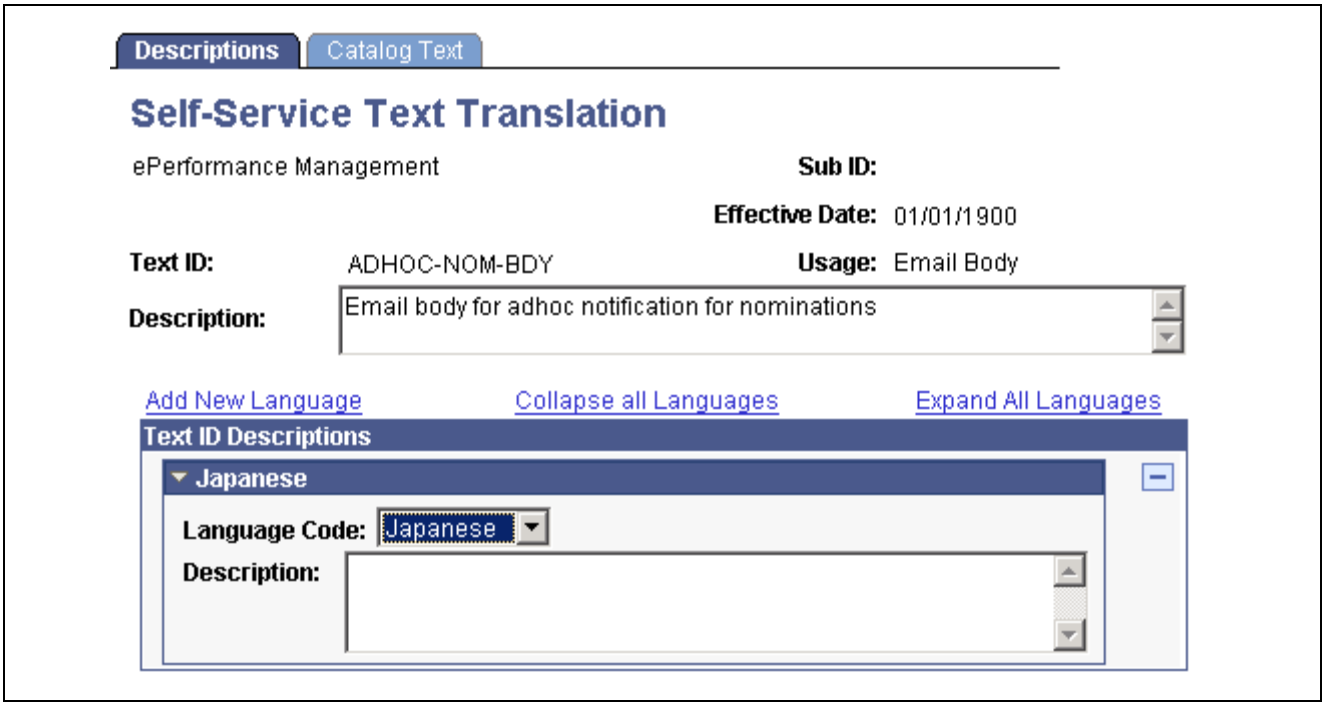
Text Catalog - View All Keys page

The Versions group box lists all effective-dated versions of the selected text ID.

Click the View Keys link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

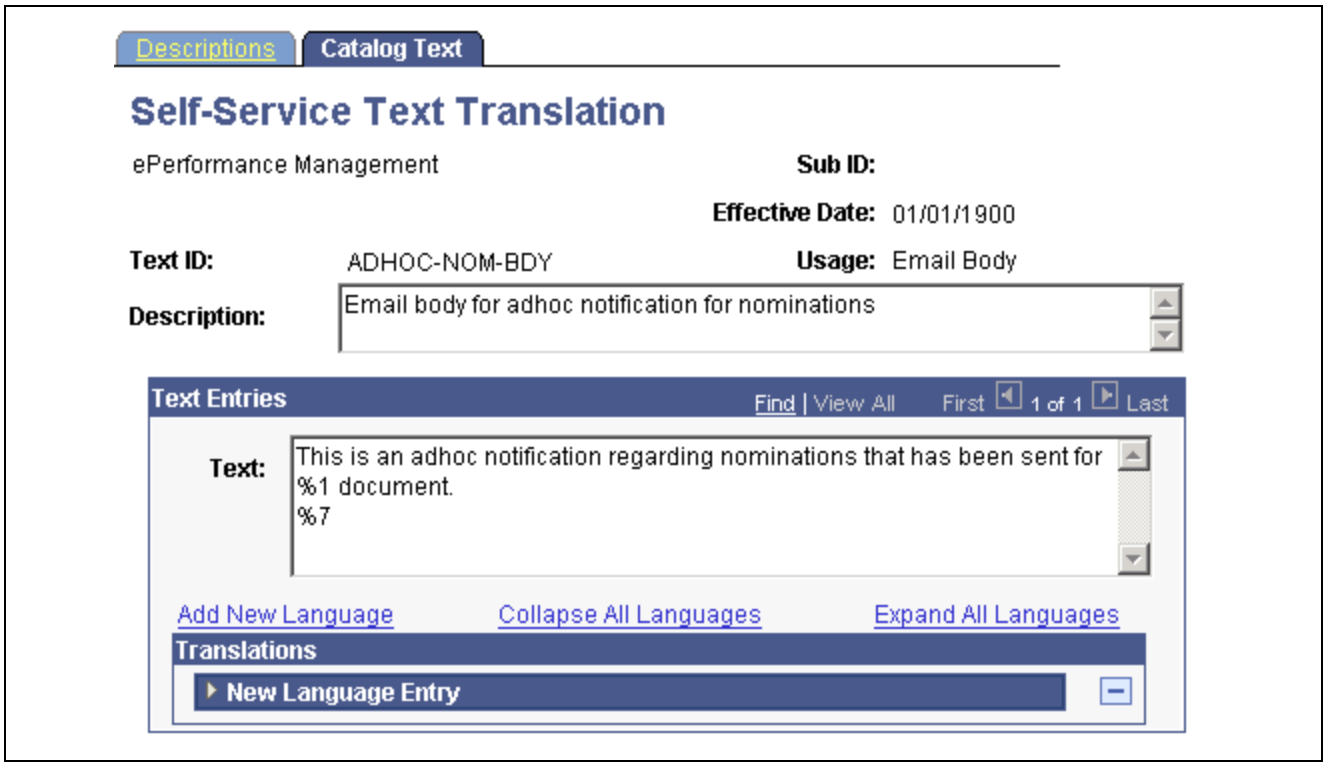
Translating Text Catalog Entries

Access the Translate Text Catalog page.



Self-Service Text Translation: Descriptions page

Use this page to view a text catalog entry and the languages into which it is translated. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages appears. You can add and remove languages on this page, but you cannot enter translation text.

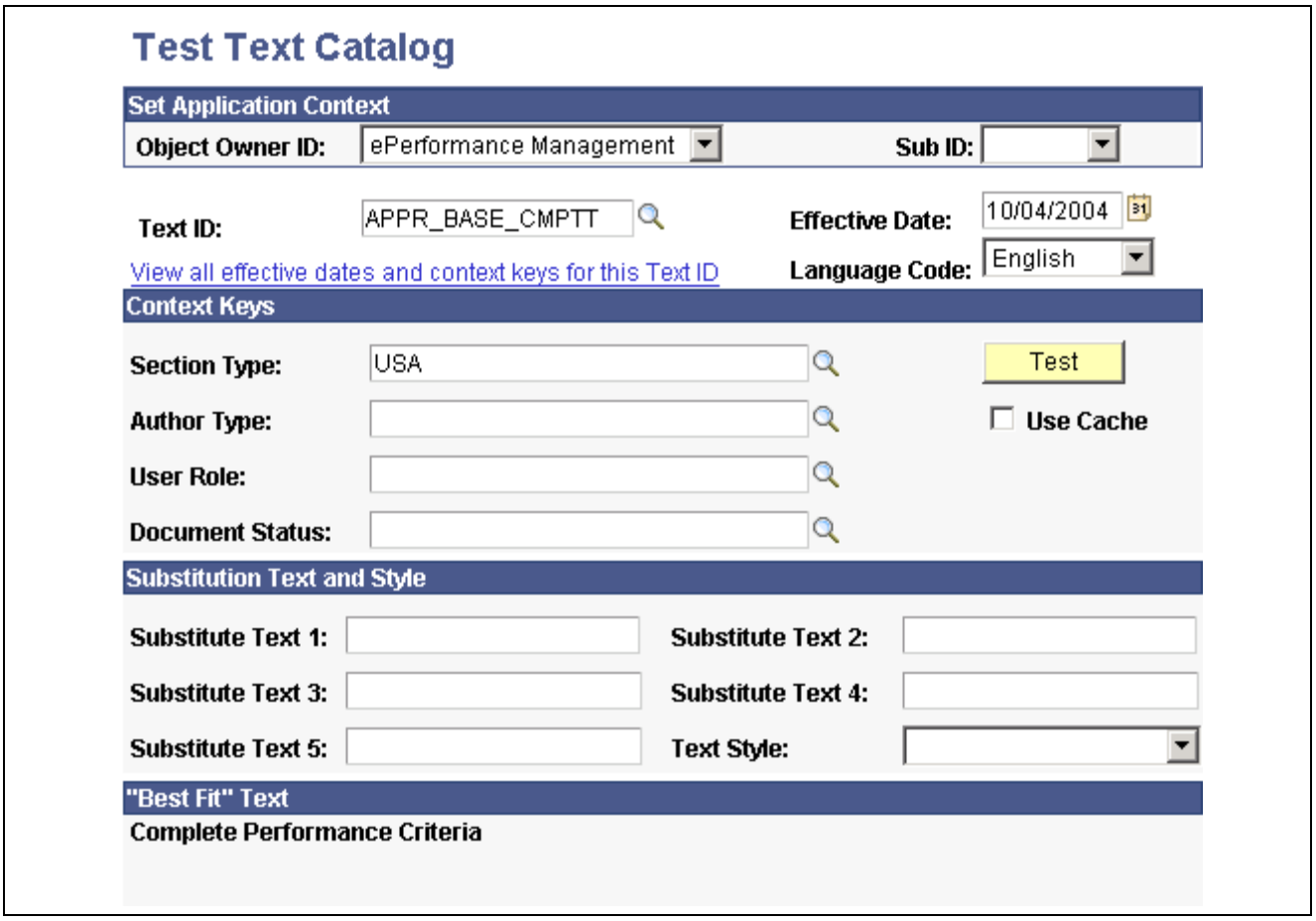


Self-Service Text Translation: Catalog Text page

Use this page to enter translations into the text catalog. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages and translation entries appears. You can add and remove languages on this page and view the text you are translating.

Testing Text Retrieval

Access the Test Text Catalog page.



Test Text Catalog page

This page enables you to enter parameters for testing how the entries in the text catalog appear on self-service pages, given a set of parameters that you enter.

To test the text retrieval:

1. Enter the text ID for the text.
2. (Optional) Enter values for any key fields.
   - If you leave all key fields blank, the system returns the root text when you click the Test button.
   - If you enter values for key fields, the system searches for the text with the best fit.
3. (Optional) Enter values in one or more of the Substitution Variable fields.

   When you click the Test button, the system replaces the variable (%1, %2, %3, %4, and %5) in the text entry with the value that you enter here.
4. (Optional) Select a text style to see the returned text rendered in a particular HTML style.

   This features helps you visualize how the text appears on the self-service page. Values are *Add'l Inst* (additional instructions), *Bold, Error, Page Inst* (page instructions), and *Page Title.*
5. Click the Test button.

   The text entry that best matches the search criteria and context keys for the selected text ID appears.

CHAPTER 36

Working with PeopleSoft Directory Interface for PeopleSoft HRMS

This chapter provides an overview of PeopleSoft Directory Interface for HRMS customers. This chapter discusses how to:

- Load data for HRMS.
- Use PeopleSoft Directory Interface with HRMS.

Note. If you have also licensed PeopleSoft Enterprise Campus Solutions, please refer to the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Working with PeopleSoft Directory Interface for PeopleSoft Campus Solutions"*

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HRMS database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

See Also

PeopleSoft Enterprise Components 8.9 PeopleBook: PeopleSoft Directory Interface

Loading Directory Data Using the DSMAPINPUT FullSync Load Process

This section provides an overview of the directory load processes and discusses how to:

- Clean the temporary tables.
- Run the full data publish.
- Review transactions using message monitor.
- Run the entry membership process.

Understanding the Directory Load Process

Once you have set up PeopleSoft Directory Interface you can load the data into the directory using the Directory Load process or the DSMAPINPUT FullSync Load process.

Use the DSMAPINPUT FullSync Load process to load only people and their job data. Use the Directory Load process when you are loading location and department entries in addition to person and job data.

Note. The Directory Load process sometimes experiences performance issues when loading a large volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Load process.

Note. Both the DSMAPINPUT FullSync Load and the Directory Load processes overwrite any existing data in the directory.

Pages Used to Load the Directory Using the DSMAPINPUT FullSync Load Process

Page Name	Object Name	Navigation	Usage
Directory Load	EO_RUNCTL_DS_LOAD	Enterprise Components, Directory Interface, Load Directory, Directory Load	• Clean the temporary files • Run the Entry Membership process.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Use to load person and job data into the directory.
Overview	AMM_OVERVIEW	PeopleTools, Integration Broker, Monitor, Monitor Message, Overview	Use to review the status of the DSMAPINPUT_FULLSYNC message.

Cleaning the Temporary Tables

Run the Clean Temp Tables (DSMAPINPUT) process from the Directory Load page.

1. Specify the appropriate map name and click Run.
2. Select the DS_CLEANTEMP process from the list and click OK.

Note. Do *not* run the Directory Load (EO_DS_AUDIT) process at this time.

Running the Full Data Publish

The DSMAPINPUT message combines information from a person's job and personal data into one message. The DSMAPINPUT_FullSync message is based on the DSMAPINPUT message structure and is defined within the DSMANCNL message channel. The Full Data Publish utility uses the DSMAPINPUT_FullSync message and loads multiple streams of emplID data into the directory.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you make only the one you want active *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC.*

4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Table Replication Publish (EOP_PUBLISHT) process and click OK.

Review Transactions Using Message Monitor

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC message within the DSMANCNL message channel.

1. Access the Message Monitor page.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Run the Entry Membership Process

After verifying on the Message Monitor page that all message subscriptions are complete, run the Entry Membership (DSMAPINPUT) process to load members into directory groups based on the Entry Membership Rules.

1. Access the Directory Load page.
2. Specify the appropriate map and click Run.
3. Choose the DS_ENTRY process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Auditing Directory Data Using the DSMAPINPUT FullSync Process

This section provides an overview of the directory auditing processes and discusses how to:

- Clean and load the temporary tables.
- Run full data publish for DSMAPINPUT_FULLSYNC_A.
- Review transactions using message monitor.
- Load directory group members and merge LDIF files.

Understanding the Directory Audit Process

Once you have loaded data into the directory and started processing transactions, you can regularly run the Directory Audit process or DSMAPINPUT FullSync Audit process to compare the data in the database to that in the directory.

Use the DSMAPINPUT FullSync Audit process to audit only people and their job data. Use the Directory Load process when you are auditing data that includes location and department entries in addition to person and job data.

Note. The Directory Audit process sometimes experiences performance issues when loading a auditing volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Audit process.

Pages Used to Audit the Directory Using the DSMAPINPUT FullSync Audit Process

Page Name	Object Name	Navigation	Usage
Directory Audit	EO_RUNCTL_DS_AUDIT	Enterprise Components, Directory Interface, Run Directory Audit, Directory Audit	• Use to clean and load the temporary files. • Load members into directory groups using entry membership rules and merge contents of multiple LDIF files into a single file.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Use a set of rules to publish the DSMAPINPUT FullSync message.
Overview	AMM_OVERVIEW	PeopleTools, Integration Broker, Monitor, Monitor Message, Overview	Use to review the status of the DSMAPINPUT_FULLSYNC message.

Cleaning and Loading the Temporary Tables

Run the Clean Temp and Load from Dir (EODS_CLEANLD) process from the Directory Audit page.

1. Specify the appropriate map name and click Run.
2. Select the EODS_CLEANL process from the list and click OK.

Note. Do *not* run the Directory Load (EO_DS_AUDIT) process.

Running Full Data Publish for DSMAPINPUT_FULLSYNC_A

The DSMAPINPUT message combines information from a person's job and personal data into one message. The DSMAPINPUT_FullSync_A is a FullSync message that is based on the DSMAPINPUT message structure and is defined within the DSMANCNL message channel. The channel is partitioned on the emplID field to enable parallel processing. The Full Data Publish utility publishes the message. The subscription utility processes multiple streams of emplID data simultaneously. Each subscription produces a unique LDIF file containing LDAP commands for a range of people.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you make only the one you want active *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC_A.*

4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Table Replication Publish (EOP_PUBLISHT) process and click OK.

Note. You can choose to use your own message instead of DSMAPINPUT_FULLSYNC_A but you must add FULLSYNC_A to the name of the message from the directory map. For example, if PERSMSG is a configured message specified on the map for person entries, name the message PERSMSG_FULLSYNC_A.

Review Transactions Using Message Monitor

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC_A message within the DSMANCNL message channel.

1. Access the Message Monitor page.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Loading Directory Group Members and Merge LDIF Files

After verifying on the Message Monitor page that all message subscriptions are complete, run the Entry Membership and LDIF Merge (EODS_LDIFMRG) process to load members into directory groups based on the Entry Membership Rules and to merge the contents of all the LDIF files that were generated during the full table publish. You can review the merged file later, modify the contents, and import them into the directory later.

To run the Entry Membership and LDIF Merge process:

1. Access the Directory Audit page.
2. Specify the appropriate map and click Run.
3. Choose the EODS_LDIFMRG process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Using PeopleSoft Directory Interface with HRMS

This section discusses how to:

- Access sample mappings and delivered messages.
- Use sample mappings.
- Review delivered messages.

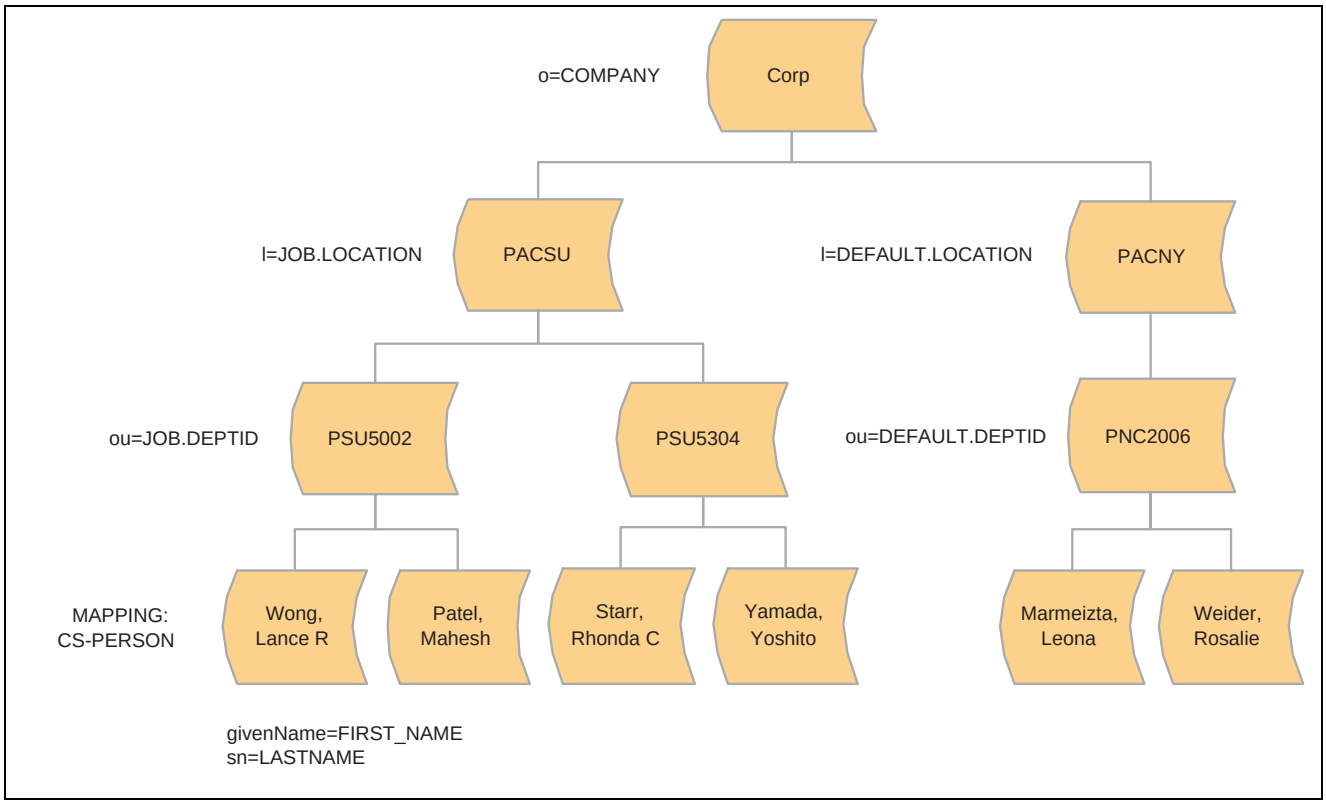
Accessing Sample Mappings and Delivered Messages

If you have licensed PeopleSoft Directory Interface for HRMS, PeopleSoft provides you with sample mappings and messages for HRMS.

Using Sample Mappings

To use sample mappings that PeopleSoft delivers, establish directory IDs in the Directory Configurations component (PSDSSETUP) and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

We developed the sample mappings assuming that you are using the tree structure illustrated below:



Sample mapping

Note. PeopleSoft delivers HR_LOCATION, HR_DEPARTMENT, and HR_PERSON as sample mappings

Reviewing Delivered Messages

The following sections describe the delivered sample messages and PeopleCode functions that are related to your directory mappings.

Directory Interface Messages

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Message Name	Directory Entry
DSLocation	Location Entry
DSDept_tbl	Department Entry

Message Name	Directory Entry
DSWorkforce_Sync	Job Entry
DSPerson_Basic_Sync	Person Entry

Note. The Directory Interface engine, using the message level HCDI_SERVICES: HCDIUtilities.runPOIandIdentifictn, populates the DSIDENTIFICTN table with HRMS values that you can use for creating directory interface maps. For example, it generates a Universal Unique Identifier string and stores it in DSIDENTIFICTN.DSUUID and a default Unique Identifier, stored in DSIDENTIFICTN.DSUID. The default unique identifier defaults to the current person's email address, or, if blank, to the First Name + Last Name.

The UID field is limited to fifty characters. The system truncates the person's name if it exceeds fifty characters.

See *Enterprise PeopleTools PeopleBook: Integration Broker*

Message Publish

The following example is Publish PeopleCode that is used in a component's SavePostChange PeopleCode:

```
Local Message &MSG;
Local Rowset &COMPONENTROWSET;
&COMPONENTROWSET = GetLevel0();
&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);
&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);
&MSG.Publish();
```

Note. When publishing mapping data, use CopyRowsetDeltaOriginal, not CopyRowsetDelta.

Message Subscription

The following example shows subscription PeopleCode in a message:

```
Declare Function ProcessMappingMessage PeopleCode FUNCLIB_DS_PC.DSMAPMESSAGE Field?
Formula;
Local Message &msgIn;
/* Build the Mapping messages from the input message */
&msgIn = GetMessage();
ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");
```

DSMAPINPUT Message

The DSMAPINPUT message, which corresponds to Directory Input, is a sample message that combines a person's job and personal data into one message. The DSWORKFORCE_SYNC message publishes person's job information. The DSPERSON_BASIC_SYNC message publishes a person's personal information.

In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the message is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT message with the employee's job and personal data. This enables you to map job and personal data for one message to one directory entry.

BuildMappingMessage Syntax

The BuildMappingMessage function populates a message with data that is stored in another message and with data from the local database. After populating the message from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the original published message, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map name])
```

The function performs the following tasks:

- Copies data in the same record from the input message into the output message.
- Searches for empty records in the output message.
- Examines data in the message for key values for empty records.
- If it finds key values for empty records, populates empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name. Otherwise, calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is in the FUNCLIB_DS_PC derived record, DSMAPMESSAGE field, Field Formula event.

Parameters

Name	*Type*	*Description*
input message	Message	Pass the message containing the originally published data.
output message	String	Specify the name of the message to be created, populated, and passed to the mapping function.
online flag	Boolean	Set to *true* if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

An example:

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

CHAPTER 37

Working with Enterprise Integration Points in PeopleSoft HRMS

This chapter provides an overview of internal integration points in PeopleSoft HRMS a describes how to work with them.

Understanding Enterprise Integration in PeopleSoft HRMS

PeopleSoft uses enterprise integration points (EIP) to integrate HRMS applications with:

- Other PeopleSoft HRMS applications inside of the database.
- PeopleSoft applications outside of PeopleSoft HRMS.
- Third-party applications.

EIPs employ a variety of technologies.

Activating Messages and Channels

EIP messages available in PeopleSoft HRMS are delivered inactive. In PeopleTools Application Designer, activate the messages that your organization uses.

- Set the status of each selected message to *Active.*
- Set the status of the corresponding message channel to *Run.*

See Also

PeopleSoft Enterprise Components for PeopleSoft HRMS and Campus Solutions 8.9 PeopleBook, "Part 6: Enterprise Integration"

Working with HRMS EIPs that Publish and Subscribe

This section provides an overview of HRMS EIPS that publish and subscribe locally and discusses how to:

- Use HRMS EIPs that subscribe locally.
- Trouble shoot problems.

Understanding HRMS EIPs that Publish and Subscribe Locally

The system uses a local publish and subscribe EIP when the database that does the publish also has a subscription on the message that will trigger other processing within that database. There are several publish and subscribe messages in HRMS and for these processes to work properly you must set up the local node and gateway.

Using HRMS EIPs that Subscribe Locally

Read the information in the *Comments* column for each product or HR business process you are using (as listed in the *Product/Industry* column). If you need the capability provided by the EIP you must activate the message and subscription in Application Designer using the Message Properties and the Message Subscription Properties pages.

When using local subscription you only need to configure the local node with an asynchronous outbound transaction but the application server must be running the publish and subscribe servers and the local gateway and node must be properly configured.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer*

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

Message	Subscription	Product/Industry	Comments
ACCOUNT_ CHARTFIELD_ FULLSYNC	AccountChartfieldFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for GL Accounts from a file or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
ACCOUNT_ CHARTFIELD_SYNC	AccountChartfieldSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports alternate account data from PeopleSoft Financials 8.4 or higher. The message is used for both local and PSFT Financials Node.
ACTUAL_TIME_ADD	ActualTimeAdd	Time and Labor	Transmits time that just got changed from an estimated amount to an actual amount through a panel. The publish points are On-Line Approvals and Record-Only Adjustments. Local subscribe to get the flat file only when T&L integrates with FDM pre 8.0 release.

Message	Subscription	Product/Industry	Comments
ACTUAL_TIME_ BATCH_ADD	ActualTimeBatchAdd	Time and Labor	Transmits time that just got changed from an estimated amount to an actual amount through a batch process. The publish points are Batch Approval and Labor Distribution/Dilution. Local subscribe to get the flat file only when T&L integrates with FDM pre 8.0 release.
ALTACCT_CF_ FULLSYNC	AltacctCfFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports alternate account data from PeopleSoft Financials 8.4 or higher. The message is used for both local and PSFT Financials Node.
ALTACCT_CF_SYNC	AltacctCfSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports alternate account data from File or PeopleSoft Financials. The message is used for both local and PSFT Financials Node.
BUDGET_POSITION_ FULLSYNC	BudgetPositionFullSync	Human Resources: Manage Commitment Accounting	Imports data from file or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
BUDGET_REF_CF_ FULLSYNC	BudgetRefCFFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports class ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
BUDGET_REF_CF_ SYNC	BudgetRefCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports class ChartField information from PeopleSoft PeopleSoft 8.4 or higher.

Message	Subscription	Product/Industry	Comments
BUS_UNIT_FS_ FULLSYNC	BusUnitFSFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the FS Business Unit from file or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
BUS_UNIT_GL_ FULLSYNC	BusUnitGLFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the GL Business Unit from file or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
BUS_UNIT_GL_SYNC	BusUnitGLSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports General Ledger business unit information from PeopleSoft General Ledger.
CHARTFIELD1_ FULLSYNC	Chartfield1FullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports chartfield 1 information from PeopleSoft PeopleSoft 8.4 or higher.
CHARTFIELD1_SYNC	Chartfield1Sync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports product chartfield 1 information from PeopleSoft PeopleSoft 8.4 or higher.
CHARTFIELD2_ FULLSYNC	Chartfield2FullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports chartfield 2 information from PeopleSoft PeopleSoft 8.4 or higher.
CHARTFIELD2_SYNC	Chartfield2Sync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports chartfield 2 information from PeopleSoft PeopleSoft 8.4 or higher.

Message	Subscription	Product/Industry	Comments
CHARTFIELD3_ FULLSYNC	Chartfield3FullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports chartfield 3 information from PeopleSoft PeopleSoft 8.4 or higher.
CHARTFIELD3_SYNC	Chartfield3Sync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports chartfield 3 information from PeopleSoft PeopleSoft 8.4 or higher.
CLASS_CF_FULLSYNC	ClassCFFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports class ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
CLASS_CF_SYNC	ClassCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports class ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
DEPBEN_SYNC	GPJP_Delete_DepBen_ Children	Global Payroll Japan	Deletes rows in GP Japan Dependent/Beneficiary children tables when the parent row is deleted
DEPT_CF_FULLSYNC	DeptCFFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports department ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
DEPT_CF_SYNC	DeptCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports department ChartField information from PeopleSoft PeopleSoft 8.4 or higher.

Message	Subscription	Product/Industry	Comments
DEPT_SYNC	TLDeptSubscription	Time and Labor	When Time and Labor is installed the system executes code to populate the TL_RI_CNTRL_TBL for changes in the Department Table.
DETAIL_CALENDAR_FULLSYNC	DetailCalendarFullSync	Human Resources: Manage Commitment Accounting	Imports data for accounting periods from file or PeopleSoft Financials 7.5 for Education and Government. Used for local and PSFT Financials node.
DSADVSR_SYNC	AdvsrSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_Prior_Msg() - to filter out non current rows from published message.
DSADVSR_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for FLAT Directory Trees.
DSADVSR_SYNC_EFF	UsingDSMAPINPUTSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for DEEP Directory Trees.
DSAPPLICANT_SYNC	SyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_Prior_Msg() - to filter out non current rows from published message.
DSAPPLICANT_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for FLAT Directory Trees.

Message	Subscription	Product/Industry	Comments
DSAPPLICANT_SYNC_EFF	UsingDSMAPINPUTSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for DEEP Directory Trees.
DSDEPT_SYNC	DeptSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_Prior_Msg() - to filter out non current rows from published message.
DSDEPT_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function.
DSLOCATION_SYNC	LocationSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_Prior_Msg() - to filter out non current rows from published message.
DSLOCATION_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function.
DSPERSON_BASIC_SYNC	DSPersonBasicSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_Prior_Msg() - to filter out non current rows from published message.
DSPERSON_BASIC_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for FLAT Directory Trees.
DSPERSON_BASIC_SYNC_EFF	UsingDSMAPINPUTSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for DEEP Directory Trees.

Message	Subscription	Product/Industry	Comments
DSPERSON_SYNC	DSPersonSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_ Prior_Msg() - to filter out non current rows from published message.
DSPERSON_SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for FLAT Directory Trees.
DSPERSON_SYNC_EFF	UsingDSMAPINPUTSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for DEEP Directory Trees.
DSSTUDENT_SYNC	SyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_ Prior_Msg() - to filter out non current rows from published message.
DSSTUDENT_SYNC_ EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for FLAT Directory Trees.
DSSTUDENT_SYNC_ EFF	UsingDSMAPINPUTSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function. Used for DEEP Directory Trees.
DSWORKFORCE_ SYNC	WorkforceBasicSyncEff	Directory Interface	Calls the Effective Dated process - Process_Effdt_ Prior_Msg() - to filter out non current rows from published message.
DSWORKFORCE_ SYNC_EFF	DSMappingSub	Directory Interface	Trigger the Directory Interface through the "BuildMappingMessage ()" function.

Message	Subscription	Product/Industry	Comments
EP_CHK_SUG	CheckSugSubscribe	ePerformance	Imports language checker suggestions from 3rd party providers.
EP_CHK_WRD	CheckWordSubscribe	ePerformance	Imports language checker word/phrases from 3rd party providers.
EP_COMP_DEV	CompDevSubscribe	ePerformance	Imports Sub-Competency development tips content from 3rd party providers.
EP_COMP_PROF	CompProfSubscribe	ePerformance	Imports competency proficiency content from 3rd party providers.
EP_COMPETENCY	CompetencySubscribe	ePerformance	Imports competency proficiency content from 3rd party providers.
EP_DEV_TIP	DevTipSubscribe	ePerformance	Imports sub-competency development tips content from 3rd party providers.
EP_RATING_MDL	RatingModelSubscribe	ePerformance	Imports rating models from 3rd party providers.
EP_REVIEW_RATING	RatingModelSubscribe	ePerformance	Imports rating model review ratings from 3rd party providers.
EP_SUB_COMP	SubCompSubscribe	ePerformance	Imports sub-competencices from 3rd party providers.
EP_SUB_DEV	SubDevSubscribe	ePerformance	Imports sub-competency development tips from 3rd party providers.
EP_SUB_PROF	SubProfSubscribe	ePerformance	Imports sub-competency proficiency content from 3rd party providers.

Message	Subscription	Product/Industry	Comments
EP_SUB_WRT	SubWrtSubscribe	ePerformance	Imports sub-competency results writer content from 3rd party providers.
ESTIMATED_TIME_ BATCH_ADD	EstimatedTimeBatchAdd	Time and Labor	Transmits a complete list of estimates from Payable Time through a batch process. The publish points are Request from projects or Publish Estimated Time panel. Local subscribe to get the flat file only when T&L integrates with FDM pre 8.0 release.
FUND_CF_SYNC	FundCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports fund ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
FUND_LOAD	FundLoad	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports fund ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
GPCH_MC_SYNC	Sync_GP_NET_DIST	Global Payroll Switzerland	Global Payroll Switzerland message to sync GP data for Multi Contract. The subscription modifies Net Distribution data.
GRANT_AWARD_ UPDATE	GrantAwardUpdate	• Human Resources: Variable Compensation • Stock Administration	Used for publishing and subscribing to award data.
HIRE_REQUEST	HireRequestSubscription	Recruiting Solutions	Used only when Recruiting is installed.

Message	Subscription	Product/Industry	Comments
HR_ACCT_CD_LOAD	HR_ACCT_CD_LOAD	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the Account Code Table from PeopleSoft Financials for Education and Government releases 7.5 through 8 SP2.
HR_CHARTFIELD_ COMBO_SYNC	HRChartFldComboSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for HRMS Speedtypes from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
JOURNAL_GEN_APPL_ ID_FULLSUNC	JournalGenApplIDFullSync	Human Resources: Manage Commitment Accounting	Imports data for the Journal Generator from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
OPER_UNIT_CF_ FULLSYNC	OperUnitCFFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the Operator Unit ChartField from PeopleSoft Financials 8.4 or higher. Used for both local and PSFT Financials Node.
OPER_UNIT_CF_SYNC	OperUnitCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the Operator Unit ChartField from PeopleSoft Financials 8.4 or higher. Used for both local and PSFT Financials Node.
PAYMENT_ERECRUIT_ ACKNOWLEDGE	Acknowledge	• eRecruit • Payroll for North America	Published by Payroll to eRecruit to identify which transactions were accepted and which were rejected.
PAYMENT_ERECRUIT_ ISSUED	ActualsFromPayrollForNA	• eRecruit • Payroll for North America	Published by Payroll to eRecruit after payments have been made to employees.

Message	Subscription	Product/Industry	Comments
PAYMENT_ERECRUIT_REQUEST	PaymenteRecruitRequest	• eRecruit • Payroll for North America	Loads transactions published by eRecruit to Payroll onto paysheets for payment in either an on or offcycle pay run.
POST_HIRE_REQUEST	RSPostHireRequest	Recruiting Solutions	Used only when Recruiting is installed.
PRODUCT_CHARTFIELD_FULLSYNC	ProductChartfieldFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports product ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
PRODUCT_CHARTFIELD_SYNC	ProductChartfieldSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports product ChartField information from PeopleSoft PeopleSoft 8.4 or higher.
PROGRAM_CF_FULLSYNC	ProgramCFFullSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the Program ChartField from PeopleSoft Financials 8.4 or higher. Used for both local and PSFT Financials Node.
PROGRAM_CF_SYNC	ProgramCFSync	• Human Resources: Manage Commitment Accounting • Payroll for North America	Imports data for the Program ChartField from PeopleSoft Financials 8.4 or higher. Used for both local and PSFT Financials Node.
PROJECT_ACTIVITY_FULLSYNC	ProjectActivityFullSync	Human Resources: Manage Commitment Accounting	Imports data for Projects from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.

Message	Subscription	Product/Industry	Comments
PROJECT_FULLSYNC	ProjectFullSync	Human Resources: Manage Commitment Accounting	Imports data for Projects from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
RESOURCE_CAT_ FULLSYNC	ResourceCatFullSync	Human Resources: Manage Commitment Accounting	Imports data for Resources from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
RESOURCE_SUB_CAT_ FULLSYNC	ResourceSubCatFullSync	Human Resources: Manage Commitment Accounting	Imports data for Resources from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
RESOURCE_TYPE_ FULLSYNC	ResourceTypeFullSync	Human Resources: Manage Commitment Accounting	Imports data for Projects from file or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
ROLE_MAINT	HC_Role_Refresh_SJT_ OPR	HRMS Data Permission Security	Enables you to have changes made to roles that contain permission lists with data permission automatically updated to the security join table SJT_OPR_CLS. You can also choose to run the update manually. See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.

Message	Subscription	Product/Industry	Comments
TIME_DEVICE_EMPL_ ATT_FULLSYNC	TimeDeviceEmplAttFullSync	Time and Labor	Transmits a full set of employees to the Time Collection Device. Local subscribe to get the flat file.
TIME_DEVICE_EMPL_ ATT_SYNC	TimeDeviceEmplAttSync	Time and Labor	Transmits incremental updates of employees to the Time Collection Device. Specifically, it can add or delete specific employees from a certain time collection devices. Local subscribes to get the flat file.
TIME_DEVICE_PER_ HRS_FULLSYNC	TimeDevicePerHrsFullSync	Time and Labor	Transmits a full set of hours worked by an employee through that point of the period. Local subscribes to get the flat file.
TIME_DEVICE_ PROFILES_FULLSYNC	TimeDeviceProfilesFullSync	Time and Labor	Transmits a full set of task profiles that should be made available at a time collection device. Local subscribes to get the flat file.
TIME_DEVICE_ RESTRICT_FULLSYNC	TimeDeviceRestrictFullSync	Time and Labor	Transmits a full set of restriction profiles that should be made available at a time collection device. Local subscribes to get the flat file.
TIME_DEVICE_RPT_ ELMNT_FULLSYNC	TimeDeviceRptElmntFullSync	Time and Labor	Transmits a full set of reporting elements that should be made available at a time collection device. Local subscribes to get the flat file.
TIME_DEVICE_RPTG_ CODE_FULLSYNC	TimeDeviceRptgCodeFullSync	Time and Labor	Transmits a list of time reporting codes associated with each time collection device. Local subscribes to get the flat file.

Message	Subscription	Product/Industry	Comments
TIME_DEVICE_ SCHEDULE_ FULLSYNC	TimeDeviceScheduleFullSync	Time and Labor	Transmits a full set of schedules that can be used at a time collection device in conjunction with restriction profiles to limit when and if time reporters can punch in at certain times. Local subscribes to get the flat file.
TIME_DEVICE_ SUPERVSOR_ FULLSYNC	TimeDeviceSupervsorFullSync	Time and Labor	Transmits a list of supervisors associated to each time collection device. Local subscribes to get the flat file.
TIME_DEVICE_TASK_ VALS_FULLSYNC	TimeDeviceTaskValsFullSync	Time and Labor	Transmits a full set of task element values that should be made available at a time collection device. Local subscribes to get the flat file.
TIME_DEVICE_ TEMPLATES_ FULLSYNC	TimeDeviceTemplatesFullSync	Time and Labor	Transmits a full set of task templates that should be made available at a time collection device. Local subscribes to get the flat file.
TIME_REPORTING_ CODE_FULLSYNC	TimeReportingCodeFullSync	Time and Labor	Transmits the complete, current list of time reporting codes and their attributes. Local subscribes to get the flat file.

Message	Subscription	Product/Industry	Comments
USER_PROFILE	HC_Refresh_SJT_OPR_CLS	HRMS Data Permission Security	Enables you to have changes made to the data permission of user profiles automatically updated to the security join table SJT_OPR_CLS. You can also choose to run the update manually. See Chapter 6, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 112.
VAR_CMP_PAYMENT_ACKNOWLEDGE_GP	VarCompPaymentAcknowledged	• Global Payroll • Human Resources: Variable Compensation	Global Payroll publishes Variable Compensation Payroll Acknowledged to notify Variable Compensation when it has validated (errored or rejected, depending on validation result) a request for awards payment and processed (paid) accepted requests.
VAR_COMP_PAYMENT_ACKNOWLEDGE	VarCompPaymentAcknowledged	• Payroll for North America • Human Resources: Variable Compensation	Payroll for North America publishes Variable Compensation Payment Acknowledge to notify Variable Compensation when it has validated (errored or rejected, depending on the validation result) the request for payment awards and processed accepted (paid) requests.
VAR_COMP_PAYMENT_REQUEST	VarCompPaymentRequest	• Payroll for North America • Human Resources: Variable Compensation	Variable Compensation publishes Variable Compensation Payment Request to notify Payroll for North America to publish Variable Compensation Rewards.

Message	Subscription	Product/Industry	Comments
VAR_COMP_PAYMENT_REQUEST_GP	VarCompPaymentRequestGP	• Global Payroll • Human Resources: Variable Compensation	Variable Compensation publishes Variable Compensation Payment Request to notify Global Payroll to publish Variable Compensation Rewards.
WORKFORCE_SYNC	CopySubstantiveJob	Human Resources: Administer Workforce business process	Use only if using the Administer Workforce business process's temporary assignments. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments. Used to put a substantive job on hold when a temporary assignment is created.
WORKFORCE_SYNC	GPBR Terminations	Global Payroll Brazil	Used to insert two variable elements in the supporting element override at payee level for all the terminations. The two variables contain the Termination Version and the Termination Reason
WORKFORCE_SYNC	GPCH_Sync_Legal_Job	Global Payroll Switzerland	This subscription works only if GP Switzerland is installed and only on Swiss Multi Contract companies. It keeps in sync the job records and job record rows by adding, deleting, modifying jobs and job rows, depending on the job row representing a Legal Contract, Sending Contract or a Single Contract. It subscribes a GP Swiss message to update GP data.

Message	Subscription	Product/Industry	Comments
WORKFORCE_SYNC	GPUS_JobSynch	Global Payroll USA	Used to insert a new row for tax location, marital status, and payee tax data when a new row with hire, rehire, or termination actions, is entered at the job level.
WORKFORCE_SYNC	GPUS_JobSync	Global Payroll USA	When a employee is hired or transferred, this messages creates Tax Profile, Tax Distribution and Tax Data for the employee. Populates the following tables: GPUS_FWT_EE, GPUS_SWT_EE, GPUS_EE_TAX_OTH, and GPUS_TAX_DST_EE. Used only when GPUS is installed and paygroup is GP.
WORKFORCE_SYNC	Professional Compliance	Human Resources: Manage Professional Compliance business process.	See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Professional Compliance*, "Getting Started with Manage Professional Compliance," Manage Professional Compliance Business Process Implementation.
WORKFORCE_SYNC	Termination_version_job	Global Payroll Mexico	Used to insert two variable elements in the supporting element override at payee level for all the terminations. The two variables contain the Termination Version and the Termination Reason
WORKFORCE_SYNC	TLJobSubscription	Time and Labor	Populates the RI control table.
WORKFORCE_SYNC	SCH_ PrimarySchedAssign	Time and Labor	

Message	Subscription	Product/Industry	Comments
WORKFORCE_SYNC	SDI_Hire_termination_ job	Global Payroll Mexico	Used to insert a new row in the SDI Data record (Social Security related information) when a new row with hire, rehire, or termination actions is entered at the job level.
WORKFORCE_SYNC	Termination_Add_Appt	(JPN) HRMS	Terminates all Additional Appointments associated with a Main Appointment when the Main Appointment is terminated.
WP_PSHARING_MSG	Profit-Sharing Payroll Interf.	• Global Payroll • Human Resources: Profit-Sharing	Profit sharing is a French specific compensation module used to compute employees workers' participation and profit sharing amounts. Profit sharing module publishes payment request with this message.

Trouble Shooting Problems

Below are some problems that may occur when you use local publish and subscribe messages.

Problem	Possible Solution
The message didn't publish.	• Verify that the application server is running the publish and subscribe services. • Verify that the message is active.
The system published the message but keeps it marked with a status of New.	Verify that the channel for that message is running.

Problem	Possible Solution
The system marks the message as Done but the subscription did not fire.	• Verify that the message subscription is active. • Verify that there is an OutSync transaction for the message on the local node. • Verify that the message channel isn't blocked. Cancel all messages that have not been processed in the channel or use the script below to clear out all entries. • Verify that the IntegrationGateway.properties file is correct. For example, the Tools release in the properties file must exactly match the release you are using. • Verify that the local node is configured. • Verify that you can ping the local node. • Verify that the gateway is configured.
The system marked the message as Done but the subscription did not finish successfully.	Check the Message Errors page to determine what is wrong with the subscription PeopleCode.

Working with Other HRMS EIPs

EIPs that support particular business processes are documented throughout PeopleSoft HRMS PeopleBooks.

Note. To research the technical details of any enterprise integration point (EIP) used by PeopleSoft applications, refer to the Interactive Services Repository that can be found in the Application Development, Integration and Portals section of Customer Connection.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Variable Compensation, "Managing Awards Approval and Payout"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Professional Compliance, "Setting Up Manage Professional Compliance"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering the Interface with PeopleSoft Enterprise Time and Labor"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering Interfaces with PeopleSoft HRMS and PeopleSoft Enterprise Expenses"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering the Interface with PeopleSoft Enterprise General Ledger"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Administering the Interface with PeopleSoft Payables"

PeopleSoft Enterprise Stock Administration 8.9 PeopleBook, "Administering Variable Compensation Grants," Variable Compensation Integration

PeopleSoft Enterprise Time and Labor 8.9 PeopleBook, "Using Time Collection Devices (TCDs)," Receiving Time from a TCD

PeopleSoft Enterprise Time and Labor 8.9 PeopleBook, "Integrating with PeopleSoft Financials and Enterprise Performance Management"

PeopleSoft Enterprise Time and Labor 8.9 PeopleBook, "TCD Interface"

PeopleSoft Enterprise Integration 8.9 PeopleBook

APPENDIX A

PeopleSoft HRMS Application Diagnostic Plug-ins

This chapter provides an overview of application diagnostics and lists the diagnostic plug-ins delivered with HRMS.

Understanding Application Diagnostics

Enterprise PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Centre.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the global support center analyst working with you.
- Support for rowset retrieval.

HRMS has delivered a number of diagnostic plug-ins, which are application-specific queries, with this version. We will post any plug-ins we develop post-GA on Customer Connection.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Running Diagnostics with Diagnostic Framework"

Delivered Application Diagnostic HRMS Plug-Ins

These tables list the diagnostic plug-ins delivered by application.

Human Resources Manage Base Benefits

Manage Base Benefits delivers the one plug-in.

BA_EVENT_DIAGNOSTICS

The BA_EVENT_DIAGNOSTICS plug-in (Benefits Event Definition and Rules Setup Information):

- Uses the following additional parameters:
  - Event Rule ID

- Effective Date

- Provides a diagnosis of the Benefit Event Setup and Coverage Code Rules associated with it.

  Data is extracted from the three primary tables: BAS_EVENT_RULE, BAS_EVENT_CLASS, and BAS_CVG_CD_RULE. Use this diagnostic to view the underlying data as it is defined in the database for the processing to be used by the Benefits Administration processing.

Human Resources Manage Base Compensation and Budgeting

Manage Base Compensation and Budgeting delivers the one plug-in.

SP_DIAGNOSTICS_SALARY_STEP

The SP_DIAGNOSTICS_SALARY_STEP plug-in (Salary Step Details):

- Uses the following additional parameters:
  - SetID
  - Sal Admin Plan
  - Grade
  - Effective Date
- Provides a diagnosis of salary step details for a given plan.

ePerformance

ePerformance delivers two plug-ins:

- Document Templates

Note. This diagnostic script can also be used with Manage Employee Reviews.

- Debug/Trace Results

Document Templates

The Document Templates plug-in:

- Uses the following parameters:
  - Template ID
  - Effective Date
- Provides a diagnosis of the structure of the document template that created a particular document. This provides critical information to the support analyst for resolving an issue with a document. These tables, all keyed by template ID and effective date, are dumped:
  - Template Header (EP_TMPL_DEFN)
  - Process Participant Roles (EP_TMPL_PARTIC)
  - Document Sections (EP_TMPL_SECTION)
  - Role-Level Rules (EP_TMPL_ROLE)
  - Common Content: Items (EP_TMPL_ITEM)
  - Common Content: SubItems (EP_TMPL_SUBITEM)

Debug/Trace Results

The Debug/Trace Results plug-in:

- Uses the following parameters:
  - Document ID
  - User Role
- Provides a diagnosis of the Debug/Trace results table view (EP_DBG_DIAG_VW) that is created by the built-in Debug/Trace facility. This information is keyed by document ID and user role.

  Additionally, a Send to PeopleSoft link on the Calculation Debug/Trace inquiry page enables the user to navigate to the Application Diagnostics launch page and send this data to PeopleSoft.

Global Payroll

Global Payroll provides the following plug-ins:

- GP_DIAG_000
- GP_DIAG_005
- GP_DIAG_010
- GP_DIAG_020
- GP_DIAG_030
- GP_DIAG_040
- GP_DIAG_100
- GP_DIAG_200

GP_DIAG_000

The GP_DIAG_000 plug-in (Return General Information):

- Uses the following parameters:
  - Calendar Group ID
  - Operating System
  - Country Code
- Provides a diagnosis of the following tables and information:
  - PSRELEASE: Release information.
  - PSOPTION: License information.
  - PS_INSTALLATION: HRMS installation information.
  - PS_GP_PIN: Last element number.
  - PS_GP_INSTALLATION: Global Payroll installation information.
  - PS_MAINTENANCE_LOG: Bundles and fixes applied to the database.
  - PS_GP_COUNTRY: Country information.

Note. If COUNTRY parameter is empty, the system returns country information for the calendar group. If country parameter is equal to *ALL,* the system returns all countries.

GP_DIAG_005

The GP_DIAG_005 plug-in (Return Log File):

- Uses the full file path and file name to the location of file as a parameters.
- Provides a diagnosis of the file specified in the “Full Path + the log file name” field.

GP_DIAG_010

The GP_DIAG_010 plug-in (Return SQL Store Statement):

- Uses the COBOL Program Name as a parameter.
- Provides a diagnosis of PSSQLSTMT_TBL, which returns all SQL statements used for the COBOL name specified in the COBOL PROGRAM Name field.

GP_DIAG_020

The GP_DIAG_020 plug-in (Return AE Program Definition):

- Uses the Application Engine Name as a parameter.
- Provides a diagnosis of the following Application Engine information:
  - PSAEAPPLDEFN
  - PSAEAPPLSTATE
  - PSAESECTDTLDEFN
  - PSAESTEPDEFN
  - PSAESTEPMSGDEFN
  - PSAESTMTDEFN
  - PSSQLTEXTDEFN

GP_DIAG_030

The GP_DIAG_030 plug-in (Return Element Definition):

- Uses Element Name 1 - 5 as a parameter.
- Provides a diagnosis of the following tables, based on the element type returned, for each of up to five element definitions:
  - Element name information: PS_GP_PIN
  - Take Element: GP_ABS_TAKE, GP_ABS_TAKE_CFG, GP_ABS_TAKE_DAY, GP_ABS_TAKE_ELM, GP_ABS_TK_FCST
  - Accumulator Element: GP_ACCUMULATOR, GP_ACM_MBR
  - Array Element: GP_ARRAY, GP_ARRAY_FLD, GP_ARRAY_KEY, GP_ARRAY_PRC
  - Bracket Element: GP_BRACKET
  - Count Element: GP_COUNT
  - Date Element: GP_DATE
  - Duration Element: GP_DURATION, GP_DUR_GNRN
  - Earning - Deduction Element: GP_ERN_DED, GP_ELM_DFN_SOVR, GP_PIN_CMPNT, GP_RCP_DED

- Element Group Name: GP_ELEM_GRP, GP_ELEM_GRP_MBR
- Fictitious Calculation Element: GP_FC_IN, GP_FC_OUT, GP_FC_OUT_DTL, GP_FC_SEG, GP_FC_TBL
- Formula Element: GP_FORMULA, GP_FORMULA_CLUE, GP_FORMULA_DTL, GP_FORMULA_VAR
- Generation Control Element: GP_GCTL, GP_GCTL_DTL
- Historical Rule Element: GP_HIST_ELEM, GP_HIST_RULE
- Process Element: GP_PROCESS, GP_PROCESS_DTL
- Proration Element: GP_PRORATION
- Rate Code Element: GP_RATE_CODE
- Section Element: GP_SECTION, GP_SECTION_DTL
- System Element: GP_SYSTEM_PIN
- Variable Element: GP_VARIABLE
- Write Array Element: GP_WA_ARRAY, GP_WA_FLD

GP_DIAG_040

The GP_DIAG_040 plug-in (Return Array/WA Audit):

- Uses the Country Code as a parameter.
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_ARRAY_D: All arrays of a country not synchronized with the record definition.
  - PS_GP_DIAG_WA_D: All write arrays of a country not synchronized with the record definition.

GP_DIAG_100

The GP_DIAG_100 plug-in (Return Set-up Data):

- Uses the following parameters:
  - Calendar Group ID
  - Calendar ID
- Provides a diagnosis of the following tables and information:
  - PS_GP_PYENT: Pay entity information.
  - PS_GP_PYENT_DTL: Pay entity detail information.
  - PS_GP_CAL_RUN: Calendar group information.
  - PS_GP_CAL_RUN_DTL: Calendar group detail information.
  - PS_GP_CALENDAR: Calendar information.
  - PS_GP_RUN_TYPE: Run type information.

GP_DIAG_200

The GP_DIAG_200 plug-in (Return Employee Information):

- Uses the following parameters:

  - EmplID
  - Employee Record Number
  - Calendar Group ID
  - Calendar ID
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_JOB_D: Payroll information (but no compensation data).
  - PS_GP_DIAG_EMPL_D: Dates.
  - PS_GP_DIAG_CTR1_D: Contract information.
  - PS_WKFCNT_TYPE: Related contract information.
  - PS_GP_DIAG_CTR2_D: Related contract information.
  - PS_GP_PAYEE_DATA: Payee information.
  - PS_GP_DIAG_PI_D: Positive input (but no amount data).
  - PS_GP_NET_DIST_DTL: Banking and payment information.
  - PS_GP_RTO_TRGR: Trigger information.
  - PS_GP_SEG_TRGR: Related trigger information.
  - PS_GP_DIAG_P_SEG_D: Payroll result headers (but no gross and net data).
  - PS_GP_DIAG_MSG_D: Payroll error messages.

Time and Labor

Time and Labor provides the following plug-ins:

- TL_DIAGNOSTICS_TA_EMPL_PAY
- TL_DIAGNOSTICS_TA_EMPL_GRP
- TL_DIAGNOSTICS_TA_TACODE
- TL_DIAGNOSTICS_TA_RPTD_TIME
- TL_DIAGNOSTICS_PT_INV_PAYTIME
- TL_DIAGNOSTICS_PT_DUP_SEQ
- TL_DIAGNOSTICS_PT_INV_OFFSET
- TL_DIAGNOSTICS_SETUP_TIMEPRD
- TL_DIAGNOSTICS_SETUP_TIMEZONE
- TL_DIAGNOSTICS_SETUP_RULEPGM
- TL_DIAGNOSTICS_SETUP_ EXWRKGRP
- TL_DIAGNOSTICS_SETUP_TCD

TL_DIAGNOSTICS_TA_EMPL_PAY

Payable time for employees are displayed for the given date range. The exceptions created (if any) for that date range are also displayed.

The TL_DIAGNOSTICS_TA_EMPL_PAY plug-in:

- Uses the following parameters:
  - EmplID
  - Employee Record
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_PT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TRC, A.TL_QUANTITY, A.PAYABLE_STATUS FROM PS_TL_PAYABLE_TIME A
  - SQL for the View: TL_DU_TA_EX_VW

    SELECT A.EXCEPTION_ID, A.EMPLID, A.EMPL_RCD, A.DUR, A.EXCEPTION_SOURCE, A.MSG_DATA1 FROM PS_TL_EXCEPTION A
  - Create SQL:

    SELECT %DateOut(EARLIEST_CHGDT), TA_STATUS FROM PS_TL_TR_STATUS WHERE EMPLID= :1 AND EMPL_RCD = :2

TL_DIAGNOSTICS_TA_EMPL_GRP

If the Run Control ID has a dynamic group included, the list of employees in the group is resolved. These employees are checked if they are Active between the Process Through Date and Process Through Date – 31 days.

The TL_DIAGNOSTICS_TA_EMPL_GRP plug-in:

- Uses the Run Control ID as a parameter.
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_GRP_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.EFFDT, A.EMPL_STATUS FROM PS_JOB A
  - SQLExec:

    SELECT %DATEOUT(A.THRUDATE) FROM PS_TL_TA_RUNCTL A WHERE A.RUN_CNTL_ID=:1 AND A.OPRID=:2
  - CreateSQL:

    SELECT DISTINCT A.EMPLID, A.EMPL_RCD FROM PS_JOB A WHERE (EXISTS (SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID='Z' AND B.INCLUD_EXCLUDE_IND='+' AND A.EMPLID=B.EMPLID AND A.EMPL_RCD=B.EMPL_RCD) OR EXISTS(SELECT 'X' FROM PS_TL_GROUP_DTL B1 WHERE B1.GROUP_ID IN (SELECT B.GROUP_ID FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID <> 'Z') AND A.EMPLID=B1.EMPLID AND A.EMPL_RCD=B1.EMPL_RCD)) AND NOT EXISTS(SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B2 WHERE B2.RUN_CNTL_ID=:1 AND B2.GROUP_ID='Z' AND B2.INCLUD_EXCLUDE_IND='-' AND A.EMPLID=B2.EMPLID AND A.EMPL_RCD=B2.EMPL_RCD) AND EMPL_STATUS='A' AND (A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J1 WHERE A.EMPLID=J1.EMPLID AND A.EMPL_RCD= J1.EMPL_RCD AND J1.EFFDT <=%DATEIN(:2)) OR A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J2 WHERE A.EMPLID=J2.EMPLID AND A.EMPL_RCD=J2.EMPL_RCD AND J2.EFFDT >%DATEIN(:2) AND J2.EFFDT <=%DATEIN(:3) AND J2.EMPL_STATUS='A'))

TL_DIAGNOSTICS_TA_TACODE

The TL_DIAGNOSTICS_TA_TACODE plug-in (listing of SQL Object IDs and SQL statements used in the time administration process):

- Uses the SQL Object ID as parameter.
- Provides a diagnosis of the SQL for the View: TL_DU_TA_SQL_VW.

  SELECT A.SQLID, A.SQLTEXT FROM PSSQLTEXTDEFN A

TL_DIAGNOSTICS_TA_RPTD_TIME

This lists the reported time details of an employee in a give date range based on the reported status (input parameter). If the EmplID is not given as input this lists all the employees with the specific reported status in the given date range.

The TL_DIAGNOSTICS_TA_RPTD_TIME plug-in:

- Uses the following parameters:
  - EmplID
  - Reported Time Status
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_RPT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_VW B WHERE B.FIELDNAME = ’REPORTED_STATUS’ AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQL for the View: TL_DU_TA_RPL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_LNG B WHERE B.FIELDNAME = ’REPORTED_STATUS’ AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME=’REPORTED_STATUS’ AND %Upper(A.XLATLONGNAME) = :1
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME= ’REPORTED_STATUS’ AND %Upper(A.XLATLONGNAME) = :1
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME=’REPORTED_STATUS’
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME= ’REPORTED_STATUS’

TL_DIAGNOSTICS_PT_INV_PAYTIME

The TL_DIAGNOSTICS_PT_INV_PAYTIME plug-in (lists payable time where payable status is rejected by payroll for a date range):

- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_PT_PT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY , B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A , XLATTABLE_VW B WHERE ((A.PAYABLE_STATUS =’RP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’CL’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’TP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’SP’ AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME=’PAYABLE_STATUS’ AND B. FIELDVALUE = A.PAYABLE_STATUS
  - SQL for the View: TL_DU_PT_PTL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY , B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A , XLATTABLE_LNG B WHERE ((A.PAYABLE_STATUS =’RP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’CL’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’TP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’SP’ AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME = ’PAYABLE_STATUS’ AND B. FIELDVALUE = A.PAYABLE_STATUS

TL_DIAGNOSTICS_PT_DUP_SEQ

The TL_DIAGNOSTICS_PT_DUP_SEQ plug-in (lists duplicate sequence numbers for the offsets) provides a diagnosis of SQL for the View: TL_DU_PT_SEQ_VW:

SELECT A.SEQ_NBR, COUNT(*) FROM PS_TL_PAYABLE_TIME A GROUP BY A.SEQ_NBR HAVING COUNT(*) > 1

TL_DIAGNOSTICS_PT_INV_OFFSET

The TL_DIAGNOSTICS_PT_INV_OFFSET plug-in (lists the Payable time offsets rejected by Payroll) provides a diagnosis of SQL for the View: TL_DU_PT_OFF_VW:

SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.SEQ_NBR, A.TL_QUANTITY, A.PAYABLE_STATUS, A.RECORD_ONLY_ADJ, A.ORIG_SEQ_NBR FROM PS_TL_PAYABLE_TIME A WHERE EXISTS (SELECT ‘X’ FROM PS_TL_PAYABLE_TIME C WHERE A.EMPLID =C.EMPLID AND A.EMPL_RCD =C.EMPL_RCD AND A.DUR=C.DUR AND A.ORIG_SEQ_NBR=C.SEQ_NBR AND C.ORIG_SEQ_NBR <> 0 AND C.RECORD_ONLY_ADJ = ’N’ AND C.PAYABLE_STATUS NOT IN (’ES’,’NA’) AND C.TL_QUANTITY > 0 AND NOT EXISTS (SELECT ’X’ FROM PS_TL_PAYABLE_TIME A2 WHERE A2.EMPLID =C.EMPLID AND A2.EMPL_RCD =C.EMPL_RCD AND A2.DUR=C.DUR AND A2.ORIG_SEQ_NBR=C.SEQ_NBR AND A2.TL_QUANTITY < 0)) OR EXISTS (SELECT ‘X’ FROM PS_TL_PAYABLE_TIME C1 WHERE A.EMPLID =C1.EMPLID AND A.EMPL_RCD =C1.EMPL_RCD AND A.DUR=C1.DUR AND A.ORIG_SEQ_NBR=C1.SEQ_NBR AND C1.ORIG_SEQ_NBR =0 AND C1.RECORD_ONLY_ADJ = ’N’ AND C1.PAYABLE_STATUS NOT IN (’ES’,’NA’) AND EXISTS (SELECT ’X’ FROM PS_TL_PAYABLE_TIME A1 WHERE A1.EMPLID=C1.EMPLID AND A1.EMPL_RCD =C1.EMPL_RCD AND A1.DUR=C1.DUR AND A1.TL_QUANTITY < 0 AND A1.ORIG_SEQ_NBR=C1.SEQ_NBR))

TL_DIAGNOSTICS_SETUP_TIMEPRD

The plug-in displays the Period IDs that are not built over the given date range, along with the workgroup from PS_TL_WRKGRP_TBL.

The TL_DIAGNOSTICS_SETUP_TIMEPRD plug-in:

- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of SQL for the View: TL_DU_ST_TP_VW:

  SELECT PERIOD_ID, WORKGROUP FROM PS_TL_WRKGRP_TBLCreateSQL:SELECT DISTINCT A.PERIOD_ID FROM PS_TL_TIME_PERIODS A WHERE A.PERIOD_ID NOT IN (SELECT DISTINCT B.PERIOD_ID FROM PS_TL_CALENDAR B WHERE ((%DateIn(:1)>B.START_DT AND %DateIn(:2)<B.END_DT) OR (%DateIn(:1)<B.END_DT AND %DateIn(:2) >B.START_DT)))

TL_DIAGNOSTICS_SETUP_TIMEZONE

The Plug-in obtains the time zone of the employee using the input EmplID and displays the time zone offsets within the given date range.

The TL_DIAGNOSTICS_SETUP_TIMEZONE plug-in:

- Uses the following parameters:
  - EmplID
  - Start Date
  - End Date
- Provides a diagnosis of SQLExec:

  SELECT B.TIMEZONE FROM PS_TL_EMPL_DATA B WHERE B.EMPLID= :1 AND B.EFFDT=(SELECT MAX(EFFDT) FROM PS_TL_EMPL_DATA A WHERE A.EMPLID=:1 AND A.EFFDT<=%DateIn(:2) AND A.TIME_RPTG_STATUS=‘A’)

TL_DIAGNOSTICS_SETUP_RULEPGM

The plug-in is used to display the list of workgroups that do not have Rule Programs associated to them.

The TL_DIAGNOSTICS_SETUP_RULEPGM plug-in provides a diagnosis of SQL for the View: TL_DU_ST_RUL_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.RULE_PGM_ID = ’ ’

TL_DIAGNOSTICS_SETUP_ EXWRKGRP

The plug-in displays the list of all exception time reporter type workgroups with missing Schedule ID. Workgroups of exception time reporter type are displayed if a Schedule ID is not attached to them.

The TL_DIAGNOSTICS_SETUP_ EXWRKGRP plug-in provides a diagnosis of SQL for the View: TL_DU_ST_SCH_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.TIME_RPTG_TYPE = ’E’ AND A.SCHEDULE_ID=’ ’

TL_DIAGNOSTICS_SETUP_TCD

The plug-in verifies the TCD setup data. For the given TCD ID input, the plug-in traces the TCD (message node name), message name, message status, transaction status and type of transaction. It also verifies checks for the Integration type. Displays whether the Inbound, outbound directories are specified for Flat file type of integration.

The TL_DIAGNOSTICS_SETUP_TCD plug-in:

- Uses the TCD ID as a parameter.
- Provides a diagnosis of:
  - SQL for the View: TL_DU_ST_TCD_VW

    SELECT A.RQSTMSGNAME, A.MSGNODENAME, B.MSGSTATUS, C.XLATSHORTNAME, A.EFF_STATUS FROM PSNODETRX A, PSMSGDEFN B, XLATTABLE_VW C WHERE A.RQSTMSGNAME=B.MSGNAME AND C.FIELDNAME=’TRXTYPE’ AND C.FIELDVALUE=A.TRXTYPE
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_VW A WHERE A.FIELDNAME = ’INTEGRATION_TYPE’ AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID=:1 AND B.EFFDT = (SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_LNG A WHERE A.FIELDNAME = ’INTEGRATION_TYPE’ AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID =:1 AND B.EFFDT=(SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))CreateSQL:SELECT FILE_OUTPUT_DIR, FILE_ARCHIVE_DIR FROM PS_TL_INSTALLATION

APPENDIX B

Delivered Workflows for PeopleSoft HRMS

This appendix provides general workflow information and discusses the delivered workflows for the following PeopleSoft Enterprise Human Resources applications:

- Administer Training
- Administer Workforce
- Manage Base Compensation and Budgeting
- Manage Employee Reviews
- Manage French Profit Sharing
- Manage French Public Sector
- Manage Professional Compliance
- Manage Variable Compensation
- Plan Careers

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

General Workflow Information

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

Note. While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

Note. You must set up workflow for PeopleSoft self service applications using pages on the Set Up HRMS, Common Definitions, Self Service menu.

See Chapter 34, "Setting Up and Working with Self-Service Transactions," Using Workflow with Self-Service Transactions, page 679.

Creating Role Users Using a Message Agent

PeopleSoft HRMS includes a message agent that enters all of people with an active job record as role users automatically.

While you could manually assign each employee to a role on the User Profile component, this process is tedious if you're designating many employees as users. Some workflow processes could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

Functionality	Query
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Delivered Workflows for Administer Training

This section discusses PeopleSoft Human Resources Administer Training workflows. The workflows are listed alphabetically by workflow name.

Approve Training Request Event

This section discusses the approve training request event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to HR Technical/Administrator notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	HR Technical/Admin
Email Template	Approve Training WL
Business Process	Approve Training Request
Business Activity	APPROVE_TRAINING_REQ_USF
Business Event	Approve Training Request Event

Authorize Training Event

This section discusses the authorize training event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to Training Administrator for authorization.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Training Administrator
Email Template	Authorize Training Request WL
Business Process	Authorize Training Request
Business Activity	AUTHORIZE_TRAINING_REQ_USF
Business Event	Authorize Training Event

Request Training Event (CSE)

This section discusses the request training event (cse) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	COURSE_ENROLLMENT1
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (CSE)
Business Process	Course Session Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (CSE)

Request Training Event (SCE)

This section discusses the request training event (sce) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	CRSE_ENRL_WL
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (SCE)
Business Process	Student Course Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (SCE)

Request Training Event (ST)

This section discusses the request training event (st) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (ST)
Business Process	Student Training
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (ST)

Send Confirmation

This section discusses the send confirmation workflow.

Description

Event Description	Upon a student being enrolled in a class, the student will receive an email with the details of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Confirmation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Confirmation

Send Cancellation

This section discusses the send cancellation workflow.

Description

Event Description	When a course has been cancelled, the enrolled students will receive email with the details of the course in which he/she is enrolled and that has been cancelled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Cancellation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Cancellation

Send Rescheduling

This section discusses the send rescheduling workflow.

Description

Event Description	When a course has been rescheduled, the enrolled students will receive email with the new schedule of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Rescheduling
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Rescheduling

Delivered Workflows for Administer Workforce

This section discusses Administer Workforce workflows. The workflows are listed alphabetically by workflow name.

(USF) 60 Day Review

This section discusses the 60 Day Review workflow.

Description

Action Description	Upon the '60 Day Tenure Notices' process being run to identify Tenure Conversions, a worklist item is sent to the supervisor(s) of all employees who will reach their Tenure Conversion dates within the next 60 days. Upon the '60 Day Probation Term Notices' process being run to identify Probation Terms, a worklist item is sent to the supervisor(s) of all employees who will reach their Probation Termination dates within the next 60 days. Upon the '60 Day WGI Notices' process being run to identify WGI's (Within Grade Increases), a worklist item is sent to supervisor(s) of all employee for whom WGI's are due within the next 60 days.
Notification Method	Worklist

Workflow Objects

Event	GVT_60_DAY_REV
Workflow Action	Manual
Role	Supervisor-Part Posn Mgt
Email Template	Ten Conv WL Notice PT WL Notice WGI WL
Business Process	60 Day Notice Select
Business Activity	ROUTE_TO_WORKLIST
Business Event	Notice Ten Conv Event Notice Prob Term Event Notice WGI Event

(USF) Generic

This section discusses the Generic workflow.

Description

Event Description	This is a common email and workflow event for administrator self-service notifications.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_HR_PROC
Workflow Action	Manual
Role	Roleuser By EMPLID
Email Template	Email Notification FE_HR_ADMIN_WL
Business Process	FE_NOTIFY_HR_ADMIN
Business Activity	FE_NOTIFY_HR_ADMIN
Business Event	Email Notification Notify HR Admin

Hire Employees

This section discusses the Hire Employee workflow.

Description

Event Description	The business event, Hire Employee, is triggered whenever a new employee is hired. The entire Hire Employee business process takes place within this one event. The system utilizes workflow to send notification about the new hire to various roles within the organization required to take action. Upon hiring an employee in France, the system also routes email/worklist items to the Personal Administrator for various events.
Action Description	Benefits Administrator - The system directs an email to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs an email to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. (USF) MIS Administrator - Sends an email to the MIS Administrator to let him/her know about the new hire. Login ID's and/or PC equipment can be set up appropriately. Payroll Administrator - The system directs an email to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs an email to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. Variable Compensation Administrator - The system routes an email to the Variable Compensation Administrator to let him/her know about the new hire and determine if this new hire can be included into a compensation plan. Benefits Administrator - The system directs a worklist item to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs a worklist item to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. Payroll Administrator - The system directs a worklist item to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs a worklist item to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. An email is sent to the Personal Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date.

Action Description (continued)	An email is sent to the HR Administrator (FRA) when an employee is hired into the system with a start date in the future. This reminder warns them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) when an employee is hired into the system and additional information regarding the employee is needed.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA_EMP EE_HIRE
Workflow Action	Automatic
Role	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator Variable Compensation Administrator HR Administrator FRA Worklist Administrator
Email Template	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator VC_HIRE_EMAIL Single Hiring Statement SHS_EMAIL_DELAY Complete Employee Info
Business Process	Administer Workforce Recruit Employees ADMINISTER_WORKFORCE_USF REPORT_REGULATIONS

Business Activity	Hire Workforce Hire Workforce (USF) HIRE_WORKFORCE_FRA
Business Event	Hire Employee VC_HIRE_EVENT SHS_HIRE_EVENT SHS_HIRE_DELAY SHS_HIRE_INFO

Maintain Job Data

This section discusses the Maintain Job Data workflow.

Description

Action Description	Upon a change to an employee's service date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a job action change has been performed on an employee with multiple jobs, a worklist item is sent to the Benefits Administrator notifying them to review the Primary Job indicators and Flags. An email is sent to notify the Variable Compensation Administrator to review the changes and take appropriate action if necessary. Upon a change to an employee's Benefits System, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a change is made to an employee's Job record, if the action added or changed matches the Stock Action list (defined in Stock Action Reasons), then a worklist item is sent to the Stock Administrator to take appropriate action. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the Works Council for review. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email is sent to notify the employee. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the new manager informing them of the decision. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the current manager informing them of the decision. Works Council Specific - When the HR Administrator requests a job change for an employee, the request is routed via email and worklist item to the Works council for review and approval.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA WC_JOB_CHG_REQ_HR EE_HR_PROC
Workflow Action	Automatic

Role	Benefits Administrator VC Administrator Stock Administrator Roleuser By EMPLID Works Council Representative
Email Template	Benefits Administrator Benefits Administrator1 Benefits Administrator2 Benefits Administrator3 Variable Comp Administrator Stock Admin Works Council Employee New Manager Current Manager Works Council
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF WORKS_COUNCIL_NOTIFICATION ADMINISTER_STOCK
Business Activity	Maintain Job Data Maintain Job Data (USF) WC_HR_DECISION WC_RJC_HR STOCK_ACTION

Business Event	Change in Service Date MultiJob Change Job Change Primary Jobs Audit Change in Benefits System Stock_Action_List Notify WC Notify EE Notify New Manager Notify Current Manager

Maintain Personal Data

This section discusses the Maintain Personal Data workflow

Description

Action Description	Upon a change to an employee's birth date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. (CAN) Upon a change to an employee's Province of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur. Upon a change to an employee's state of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur.
Notification Method	Email, Worklist

Workflow Objects

Event	PERSONAL_DATA EE_HR_PROC
Workflow Action	Automatic
Role	Benefits Administrator Payroll Administrator
Email Template	Benefits Administrator Payroll Administrator Payroll Administrator1
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF
Business Activity	Maintain Personal Data Maintain Personal Data (USF)
Business Event	Change in Birth Date Change Province in Canada Change State in U.S.

(USF) PAR Processing

This section discusses the PAR Processing workflow

Description

Action Description	Upon the First Authorizer approving a PAR, a worklist item is sent to the Second Authorizer for review/approval as the next step in the process. When a request is routed to the First Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the First Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon the Second Authorizer approving a PAR, a worklist item is sent to the final approver in the process for Approval and Signature. When a request is routed to the Second Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the Second Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a request is routed to HR for final approval and signature, a worklist item is sent to the HR Administrator notifying them of the transaction to be processed. When a request is disapproved or returned by the final approver, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is disapproved or returned by the final approver, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon an employee submitting a PAR request, a worklist item is sent to the employee's manager for first level approval. When a request is routed to HR for approval and final processing and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to HR for approval and final processing and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a manager-submitted request is disapproved, a worklist item is sent to the employee's manager notifying them of the disapproval. When a manager-submitted request is disapproved, an email is sent to the employee notifying them of the disapproval. When an employee's manager submits a PAR request for an employee, a worklist item is sent to the first level approver (First Authorizor) for review and approval.

Action Description (continued)	Once the Retro WGI request has passed the authorization and approval processes, it goes directly to the Human Resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Retro WGI for that employee. Once the Manual WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Manual WGI for that employee. Once the Probation Termination request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once the Tenure Conversion request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once a WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the WGI for that employee.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_1ST_AUTH EE_2ND_AUTH EE_APPROVAL EE_EMPL_REQ EE_HR_PROC EE_SUP_REQ GVT_COMP_ACTN
Workflow Action	Automatic
Role	PAR Authorizer Supervisor-Part Posn Mgt Roleuser by EmplID Personnel Administrator PAR Supervisor

Email Template	2nd Authorizers Worklist Supervisor Worklist EMail Employee Approval Signature Worklist HR Worklist 1st Authorizers Worklist Retro WGI WL Manual WGI WL Except TC WL PT Comp WL TC Comp WL WGI Comp WL
Business Process	Perform 1st Authorization 1st Auth Disapprove/Return Perform 2nd Authorization 2nd Auth Disapprove/Return Perform Approval/Signature Approver Disapproval/Return Enter Employee Request HR Process Disapprove/Return Supervisor Disapproval/Return Enter Supervisor Request Processed Action
Business Activity	1st Authorization Disapprove/Return 2nd Authorization Approval/Signature Employee Request Supervisor Request PERFORM_AUTO_ACTION

Business Event	Route to 2nd Authorization Route Disapproval/Return Route for Approval Signature Route to HR Route Request to Supervisor Route for 1st Authorization Retro WGI Event Manual WGI Event Except TC Review Notice PT Complete Notice TC Complete Notice WGI Complete

Terminate Employee

This section discusses the Terminate Employee workflow.

Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.
Action Description	This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends a worklist item to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward. This event sends a worklist item to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Roleuser by EmplID Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Profit Sharing to be reviewed Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Administer Workforce
Business Activity	Terminate Workforce
Business Event	Notification Crse Enrollment Cancellation Profit Sharing Benefit Cancellation Payroll Termination Company Property Retrieval

(USF) Terminate Workforce

This section discusses the (USF) Terminate Workforce workflow

Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.
Action Description	This event sends an email to the MIS Administrator notifying them that the employee has been terminated so appropriate action can be taken to disable system accounts. This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving. This event sends a worklist item to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_HR_PROC
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Terminate Employee
Business Activity	Terminate Workforce (USF)
Business Event	Notification Crse Enrollment Cancellation Benefit Cancellation Payroll Termination Company Property Retrieval

Delivered Workflows for Manage Base Compensation and Budgeting

This section discusses PeopleSoft Human Resources Manage Base Compensation and Budgeting workflows. The workflows are listed alphabetically by workflow name.

Approve or Deny Ad Hoc Salary Changes

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Description

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Event Description	An administrator or manager approves or rejects an ad hoc salary change request.
Action Description	Employees receive an email when the administrator approves or rejects the ad hoc salary change request.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Approve or Deny Budgeted Salary Changes

This section discusses the Approve or Deny Budgeted Salary Changes workflow.

Description

Event Description	An administrator or manager approves or rejects a budgeted salary request for a group of employees.
Action Description	Manager receives an email when the administrator or approving manager approves or rejects the budgeted salary request for a group of employees.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Process Salary Change

This section discusses the Process Salary Change workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Request Salary Change

This section discusses the Calculate Budgets workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates changes to group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Event	Request Salary Change
Workflow Action	Request Salary Change
Role	Roleuser by Roleuser Query

Delivered Workflow for Manage Employee Reviews

This section discusses Employee Review workflows.

Manage Employee Reviews Notification Events

This section discusses the Employee Review notification workflow.

Description

Event Description	When employees and managers use Employee Reviews to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant.
Action Description	Email notifications are sent to inform the appropriate persons of: the availability of documents for viewing and updating; a change in the status of documents; and the transfer of documents to a new manager.
Notification Method	email

Delivered Workflows for Manage French Profit Sharing

This section discusses PeopleSoft Human Resources Manage French Profit Sharing workflows. The workflows are listed alphabetically by workflow name.

Approve Fund Release Request

This section discusses the Approve Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator approves an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request is approved.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	APP_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	APP_REL_REQ_EVENT

Error in Fund

This section discusses the Error in Fund workflow.

Description

Event Description	When the Process Interest and Payment process encounters an error an employee's fund, an email is sent to the administrator to notify them to review.
Action Description	The email notifies the administrator of an error in an employee's fund.
Notification Method	Email

Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	HR Administrator FRA
Email Template	FUN_STA_ERR_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_ERR_EVENT

Modify Financial Organization

This section discusses the Modify Financial Organization workflow.

Description

Event Description	When employees change the financial organization on the Investment page of the Agreement Personalization component (WP_AGREEMENT_CUST), workflow is generated to notify the administrator of the change.
Action Description	Worklist and an email notify the administrator of the change in financial organization.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_AGREEMENT_CUST
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	MOD_FIN_ORG_MAIL
Business Process	MOD_FIN_ORG_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	MOD_FIN_ORG_EVENT

Modify Fund Status

This section discusses the Modify Fund Status workflow.

Description

Event Description	When the fund status for a fund is modified by the Process Interest and Payment process, an email is sent to inform the member of the change.
Action Description	The email notifies employees of the change of fund status.
Notification Method	Email

Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	Employee
Email Template	FUN_STA_MOD_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_MOD_EVENT

Reject Fund Release Request

This section discusses the Reject Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator rejects an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request was rejected.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	REJ_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REJ_REL_REQ_EVENT

Request Fund Release

This section discusses the Request Fund Release workflow.

Description

Event Description	Employee submits a request for release of profit-sharing funds from the Personal Entitlements component (WP_FUND_RELEASE). Workflow is generated to notify the administrator of the request.
Action Description	From the email or worklist, the system transfers the administrator to the Employee Release Detail page where he or she can view and approve or reject the fund release request.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_FUND_RELEASE
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	REQ_FUN_REL_MAIL
Business Process	REQ_FUN_REL_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REQ_FUN_REL_EVENT

Delivered Workflows for Manage French Public Sector

This section discusses PeopleSoft Human Resources Manage French Public Sector workflows. The workflows are grouped by activity.

CAE Request (Hiring)

This section discusses the CAE Request workflow in the Hiring Activity.

Description

Event Description	When a hiring is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	HIRE
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE
Business Event	FP_CA_REQUIRE_E

Stamp Request (Hiring)

This section discusses the Stamp Request workflow in the CAE Allocation (hire process) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_STMPREQ_E

CAE Denied (Hiring)

This section discusses the CAE Denied workflow in the CAE Allocation (hire process) Activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the hiring.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_DENY_E

Stamp Denied (Hiring)

This section discusses the Stamp Denied workflow in the Stamp Assignment (hiring) Activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPDENY_E

Stamp Granted (Hiring)

This section discusses the Stamp Granted workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPGRANTED_E

Stamp Postponed (Hiring)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email to the manager.
Action Description	The email informs the manager that the hiring is postponed
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STBY_E

Delete Confirmed (Hiring)

This section discusses the Delete Confirmed workflow in the CAE Delete (hiring denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE_REFUSE
Business Event	FP_CA_DELETE_E

Grade Change

This section discusses the Grade Change workflow in the Grade Change activity.

Description

Event Description	When a grade change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CHGT_RANK
Business Event	FP_CA_RKCHNG_C

Stamp Request (Grade and CAE Change)

This section discusses the Stamp Request workflow in the Grade and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_STMPREQ_C

CAE Denied (Grade and CAE Change)

This section discusses the CAE Denied workflow in the Grade and CAE Change activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_DENY_C

Stamp Denied (New Grade)

This section discusses the Stamp Denied workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPDENY_C

Stamp Granted (New Grade)

This section discusses the Stamp Granted workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPGRANTED_C

Stamp Postponed (New Grade)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the finance controller holds or postpones the CAE for the grade change, this workflow generates an email.
Action Description	An email informs the manager that the grade change process is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STBY_C

Delete Confirmed (New Grade)

This section discusses the Delete Confirmed workflow in the CAE Delete (new grade) activity.

Description

Event Description	When the headcount manager deletes the CAE request for grade change, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_RK_CHNG_DENIED
Business Event	FP_CA_DELETE_C

Work Time Percentage Change

This section discusses the Work Time Percentage Change workflow in the Work Time Percentage Change activity.

Description

Event Description	When a Work Time Percentage (WTP) Change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for WTP.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CHGT_TPS_WORK
Business Event	FP_CA_WKRT_F

Stamp Request (WTP and CAE Change)

This section discusses the Stamp Request workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for WTP, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_STMPREQ_F

CAE Denied (WTP and CAE Change)

This section discusses the CAE Denied workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers the control to the manager who deletes the Work Time Percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_DENY_F

Stamp Denied (New WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE for work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPDENY_F

Stamp Granted (New WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPGRANTED_F

Stamp Postponed (New WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates a worklist entry.
Action Description	The email informs the manager that the approval for the Work time Percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STBY_F

Delete Confirmed (New WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New WTP) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_PT_CHNG_DENIED
Business Event	FP_CA_DELETE_F

Double Change

This section discusses the Double Change workflow in the CAE and Grade and Work Time Percentage Change activity.

Description

Event Description	When a grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers the control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CHGT_RK_TPS
Business Event	FP_CA_WKRT_K

Stamp Request (Grade, WTP, and CAE Change)

This section discusses the Stamp Request workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the Finance Controller who stamps the CAE allocation for the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_STMPREQ_K

CAE Denied (Grade, WTP and CAE Change)

This section discusses the CAE Denied workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the Grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_DENY_K

Stamp Denied (New Grade and WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager so that he deletes the CAE for grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPDENY_K

Stamp Granted (New Grade and WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPGRANTED_K

Stamp Postponed (New Grade and WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the grade / work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STBY_K

Delete Confirmed (New Grade and WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New Grade and Work Time Percentage) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_PT_CHNG_DENIED2
Business Event	FP_CA_DELETE_K

CAE De-allocation Request

This section discusses the CAE De-allocation Request workflow in the Termination activity.

Description

Event Description	When a termination is in progress, once the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who de-allocates the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_CA_DISCHG
Business Event	FP_CA_DISCH_D

Stamp Request (CAE De-allocation)

This section discusses the Stamp Request workflow in the CAE De-allocation activity.

Description

Event Description	When the headcount manager de-allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE de-allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_STMPREQ_D

De-allocation Denied (CAE De-allocation)

This section discusses the De-allocation Denied workflow in the CAE De-allocation activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_DENY_D

De-allocation Denied (Stamp)

This section discusses the De-allocation Denied workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller denies stamping of the CAE for de-allocation, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who restores the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPDENY_D

Stamp Granted (CAE De-allocation)

This section discusses the Stamp Granted workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller approves the de-allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPGRANTED_D

De-allocation Postponed

This section discusses the De-allocation Postponed workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller holds or postpones the CAE for de-allocation, this workflow generates an email.
Action Description	An email informs the manager that the termination is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Email Template	FP_CA_NOTIF
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STBY_D

CAE Request

This section discusses the CAE Request workflow in the Return activity.

Description

Event Description	When a return is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for the return
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_RETURN
Business Event	FP_CA_REINST_R

Stamp Request (Return)

This section discusses the Stamp Request workflow in the CAE allocation (simple return) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_STMPREQ_R

CAE Denied (Return)

This section discusses the CAE Denied workflow in the CAE allocation (simple return) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_DENY_R

Stamp Denied (Return)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE allocation for the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPDENY_R

Stamp Granted (Return)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPGRANTED_R

Stamp Postponed (Return)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return is postponed
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STBY_R

Delete Confirmed (Return)

This section discusses the Delete Confirmed workflow in the CAE Delete (return) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_HIRE_REFUSE2
Business Event	FP_CA_DELETE_R

Double Change (Return)

This section discusses the Double Change workflow in the Return and Grade Change activity.

Description

Event Description	When a return and grade change activity is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_RKRETURN_H
Business Event	FP_CA_RKCHNG_H

Stamp Request (Return and Grade Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_STMPREQ_H

CAE Denied (Return and Grade Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_DENY_H

Stamp Denied (Return and Grade Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPDENY_H

Stamp Granted (Return and Grade Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE for the return and grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPGRANTED_H

Stamp Postponed (Return and Grade Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade change process is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STBY_H

Delete Confirmed (Return and Grade Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and grade change) activity.

Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_REFUSE_H
Business Event	FP_CA_DELETE_H

Double Change (Return and WTP Change)

This section discusses the Double Change workflow in the Return and Work Time Percentage Change activity.

Description

Event Description	When a return and work time percentage change process is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_WKRTRETURN_B
Business Event	FP_CA_WKRTCHNG_B

Stamp Request (Return and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_STMPREQ_B

CAE Denied (Return and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_DENY_B

Stamp Denied (Return and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPDENY_B

Stamp Granted (Return and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE for the Return and work time percentage change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPGRANTED_B

Stamp Postponed (Return and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and work time percentage change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STBY_B

Delete Confirmed (Return and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and work time percentage change denied) activity.

Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_REFUSE_B
Business Event	FP_CA_DELETE_B

Triple Change (Return, Grade, and WTP Change)

This section discusses the Triple Change workflow in the Return, Grade, and Work Time Percentage Change activity.

Description

Event Description	When a return and grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_RKWKRTRETURN_Z
Business Event	FP_CA_RKWKRTCHNG_Z

Stamp Request (Return, Grade, and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return, grade, and work time percentage) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_STMPREQ_Z

CAE Denied (Return, Grade, and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade and work time percentage) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_DENY_Z

Stamp Denied (Return, Grade, and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade and work time percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPDENY_Z

Stamp Granted (Return, Grade, and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPGRANTED_Z

Stamp Postponed (Return, Grade, and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STBY_Z

Delete Confirmed (Return, Grade, and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return with grade and work time percentage change denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return with grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_REFUSE_Z
Business Event	FP_CA_DELETE_Z

Accept Tenure

This section discusses the Accept Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a Tenure Probation Period is in progress and the manager approves the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who grants tenure.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_ACCEPT_TENURE

Renew Tenure Probation Period

This section discusses the Renew Tenure Probation Period workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a Tenure Probation Period is in progress and the manager renews the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who renews the probation period.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_RENEW_TEN_PPD

Refuse Tenure

This section discusses the Refuse Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a tenure probation period is in progress and the manager refuses the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who issues the termination order.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_REFUSE_TENURE

Delivered Workflows for Manage Professional Compliance

This section discusses the Manage Professional Compliance workflows. The workflows are listed alphabetically by workflow name.

Professional Compliance Hire

This section discusses the Professional Compliance Hire workflow in the Professional Compliance Hire activity.

Description

Event Description	A person is hired and is subsequently added to the Professional Compliance business process. **Note.** This occurs only when a default Professional Compliance Type is associated with the job code of the person being hired.
Action Description	The PCMP_BUS_PROC business process: Adds the hire notification to the new hire's general supervisor's worklist. Sends an email notification to the new hire's general supervisor.
Notification Method	Email and worklist.

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Hire

Professional Compliance Add

This section discusses the Manage Professional Compliance add workflow.

Description

Event Description	A person is manually added to the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the general supervisor of the person informing them that the person has been added within the Professional Compliance business process and that further action is required.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Add

Professional Compliance Classification Change

This section discusses the Manage Professional Compliance classification change workflow.

Description

Event Description	There is a change in classification level for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of classification within the Professional Compliance business process and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Classification Change

Professional Compliance Job Change

This section discusses the Manage Professional Compliance job change workflow.

Description

Event Description	There is a job change for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of job and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Professional Compliance Recertification

This section discusses the Manage Professional Compliance recertification workflow.

Description

Event Description	The recertification Application Engine program runs for persons in the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends a notification to the compliance supervisor informing them of lapsed or upcoming license and certification expiration dates. If the certification information is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Re-Certification

Professional Compliance Termination

This section discusses the Manage Professional Compliance termination workflow.

Description

Event Description	There is a termination of a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process: Add the hire notification to the worklist. Sends an email notification to the compliance supervisor of the person informing them that the employee has been terminated and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Delivered Workflows for Manage Variable Compensation

This section discusses PeopleSoft Human Resources Manage Variable Compensation workflows. The workflows are listed alphabetically by workflow name.

Allocate Awards by Plan (Approval)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Plan (Denial)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Awards by Group (Approval)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts for group members or the award status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Group (Denial)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts for group members or the status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Group Funding

This section discusses the Allocate Group Funding workflow.

Description

Event Description	Manager or approver makes changes to the variable compensation award for a group.
Action Description	Approving manager approves or denies changes to the variable compensation award for a group.
Notification Method	Email, Worklist

Workflow Objects

Event	Funds Change Event
Workflow Action	Funds Change Event
Role	Roleuser by Emplid Qry

VC Tree Changes

This section discusses the VC Tree Changes workflow.

Description

Event Description	Manager or approver makes changes to a variable compensation tree.
Action Description	Approving manager approves or denies changes to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Event	VC Tree Change Event
Workflow Action	VC Tree Change Event
Role	VC Administrator, HR Administrator

VC Tree Delete

This section discusses the VC Tree Delete workflow.

Description

Event Description	Manager or approver makes deletions to a variable compensation tree.
Action Description	Approving manager approves or denies the deletions to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Event	VC Tree Delete Event
Workflow Action	VC Tree Delete
Role	VC Administrator

VC Tree Rename

This section discusses the VC Tree Rename workflow.

Description

Event Description	Manager or approver renames a variable compensation tree.
Action Description	Approving manager approves or denies the renaming of the variable compensation tree.
Notification Method	Email

Workflow Objects

Event	VC Tree Rename Event
Workflow Action	VC Tree Rename Event
Role	VC Administrator

Delivered Workflows for Plan Careers

This section discusses the Plan Careers workflow.

(USF) Career Plan

This section discusses the career plan workflow.

Description

Event Description	When a career plan is created or updated for an employee, a worklist entry is sent to the Supervisor.
Action Description	When a manager approves a career plan for an employee, a worklist entry is sent to the HR Developmental Staff role. When a manager disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor. When HR disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor.
Notification Method	Worklist

Workflow Objects

Event	CAREER_PLAN
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Manager Worklist
Business Process	Career Plan
Business Activity	Develop Career Plan (USF) Review Career Plan (USF)
Business Event	Submit Plan to Manager; Manager Approves Plan; Manager Disapproves Plan; HR Disapproves Plan.

APPENDIX C

PeopleSoft Application Fundamentals for HRMS Reports

PeopleSoft Enterprise Human Resources supplies a group of standard reports to help you review the entries in the various tables you use to set up controls for your Human Resources system, including departments, companies, locations, and job codes. For international purposes, you can review the currency codes and exchange rates to see if you need to update the data.

This appendix provides summary tables of basic HRMS reports and Human Resources reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

Basic PeopleSoft HRMS Reports: A to Z

These tables list basic PeopleSoft HRMS reports as well as reports for specific PeopleSoft Human Resources business processes sorted by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Basic HRMS Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER802 Geographic Location report	Produces a detailing of the Geographic Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location	PRCSRUNCNTL
FGPER803 Agency report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.	Set Up HRMS, Foundation Tables, Organization, Agency Report Table USF	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area.	Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage.	Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF	PRCSRUNCNTL
FGPER811 Handicap Table report	Prints all disabilities and their associated codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table	PRCSRUNCNTL
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA / Authority 1	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Priority Placement Table	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table	PRCSRUNCNTL
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Job Code Table	PRCSRUNCNTL
GBP001 Group Member Overlapping	Shows when members belong to more than one group.	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	Set Up HRMS, Common Definitions, Group Build, Group Membership	RUNCTL_GBP002

Report ID and Report Name	Description	Navigation	Run Control Page
PAY701 Bank/Branch	Lists banks/branches entered in the Bank/Branch table.	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	PRCSRUNCNTL
PAY710 ChartField Configuration Report	Lists ChartField codes used in transactions.	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Transaction Report	PRCSRUNCNTL
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	Set Up HRMS, Product Related, Payroll Interface, Reports, Pay Group Table	PRCSRUNCNTL
PAY717 Earnings Program Table	Prints a detailing of your pay plan definitions.	Set Up HRMS, Product Related, Payroll Interface, Reports, Earnings Program	PRCSRUNCNTL
PAY760 Combination Code Report	Lists account codes set up in the Combination Code Table.	Set Up HRMS, Common Definitions, ChartField Configuration, Combination Code Report	PRCSRUNCNTL
PER506 Security Tree Audit	Lists discrepancies between entries in the Departments component and departments on department security trees.	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Rpt	PRCSRUNCNTL
PER701 Department Table report	Lists all departments by Department ID.	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.	Set Up HRMS, Foundation Tables, Organization, Company Table Report	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries −character codes.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Rpt USA	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Table Report CAN	PRCSRUNCNTL
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	PRCSRUNCNTL
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table.	Set Up HRMS, Common Definitions, Standard Letter Report	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table	PRCSRUNCNTL
PER714 Currency Rate Table report	Prints information about exchange rates.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report	PRCSRUNCNTL

Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D. Before using this page, you must have run the CAR001 report process.	Benefits, Provide Company Cars, Print P11D Information	RUNCTL_COMPCAR001
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	Benefits, Provide Company Cars, Create List of Cars	PRCSRUNCNTL

Administer Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP013 Update Seniority Pay Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay − Load Data process (HR_CMP013_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay	RUNCTL_SENPAY2
CMP014S Update Seniority Eligibility Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig − Load Data process (HR_CMP014_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility	RUNCTL_SENPAY
CMP015 Refresh Employee Compensation	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	Workforce Administration, Collective Processes, Refresh Compensation	RUNCTL_CMP015
CMP016 Defaulting Rules Eligibility	Lists the employees eligible for the selected defaulting rules as of selected date.	Set Up HRMS, Foundation Tables, Compensation Rules, Defaulting Rules Eligibility Rpt	RUNCTL_CMP016

Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT001NL Insurance Board Notification	Reports personal data for new employees to the Dutch insurance board.	Workforce Administration, Benefit Information NLD, Reports, Insurance Board Notification	RUNCTL_INT001_NL
INT002NL Insurance Notification	Report to the DNHS (Dutch National Health Service) if an employee's income rises above a certain level.	Workforce Administration, Benefit Information NLD, Reports, Health Insurance Notification	RUNCTL_INT002_NL
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	Set Up HRMS, Product Related, Benefits NLD, Reports, Pay Groups	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
INT004NL Earnings	Reviews all the valid earnings codes that you entered into the system , along with the payroll calculation characteristics that you assign to each.	Set Up HRMS, Product Related, Benefits NLD, Reports, Earnings	PRCSRUNCNTL
INT005NL Deductions	Reviews all the valid deduction codes that are entered into the system. The SQR is sorted by plan type, deduction code, and effective date.	Set Up HRMS, Product Related, Benefits NLD, Reports, Deductions	PRCSRUNCNTL
INT006NL General Deduction/Frequency	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.	Set Up HRMS, Product Related, Benefits NLD, General Deduction/Frequency	PRCSRUNCNTL

Administer Salary Packaging Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PKG003 Packages Due for Review	Displays all employees with packages ready for review.	Compensation, Salary Packaging AUS, Create Packaging Reports, Packages Due For Review	RUNCTL_PKG003
PKG004 Package Model	Enables you to report on an applicant or an employee's salary package. The information contained in the report displays the details from the employee / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Models	RUNCTL_PKG004
PKG006 FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	Compensation, Salary Packaging AUS, Create Packaging Reports, FBT Reconciliation	RUNCTL_PKG006

Report ID and Report Name	Description	Navigation	Run Control Page
PKG007 Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on an employee only basis, requires a start and end date of the period of time you want to report on.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Details	RUNCTL_PKG007

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for workers. (SQR)	Enterprise Learning, Training Reports, SF182	RUN_FGSF182A
MXSTP001 (Format) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP002 MXSTP002 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP003 (Format) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP004 MXSTP004 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	Enterprise Learning, Training Reports, STPS DC-2B Format MEX	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/Events Certificates	Creates a Courses/Events Certificate.	Enterprise Learning, Training Reports, STPS DC-3 Format MEX	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/Events Certificates List	Creates a Courses/Events Certificates list.	Enterprise Learning, Training Reports, MEX STPS DC-4 Format	RUNCTL_STP007

Report ID and Report Name	Description	Navigation	Run Control Page
MXSTP008 (Format) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
MXSTP009 MXSTP009 (Reverse)	See above	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
PER107GR (GER) Int. Prof. Education Status (internal professional education status)	Details the current status of workers who are enrolled in an internal education training plan. Includes only workers who selected the Intern check box and didn't select *Graduated* on the Professional Education page. (Crystal)	Enterprise Learning, Training Reports, Int Prof Education Status DEU	PRCSRUNCNTL
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (Crystal)	Enterprise Learning, Course Reports, Courses	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word for Windows)	Enterprise Learning, Student Enrollment, Create Training Letters	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (Crystal)	Enterprise Learning, Course Reports, Course Session Roster	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (Crystal)	Enterprise Learning, Course Reports, Course Waiting List	RUNCTL_TRN003
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (Crystal)	Enterprise Learning, Training Reports, Training Schedules	RUNCTL_TRN004
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (Crystal)	Enterprise Learning, Training Reports, Training Facility Schedules	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Active Scenario Summary	RUNCTL_TRN010

Report ID and Report Name	Description	Navigation	Run Control Page
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Global Scenario Summary	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/certifications that students receive on successful completion of a course. (Crystal)	Enterprise Learning, Course Reports, Target Course Certifications	RUNCTL_TRN016
TRN017 Course Rating	Details ratings for sessions of a course. (Crystal)	Enterprise Learning, Course Reports, Course Rating	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	Enterprise Learning, Course Reports, Attendance Status	RUNCTL_TRN018
TRN019 Course Rating Templates	Serves as the evaluation template to be completed by students enrolled in a course session. (Crystal)	Enterprise Learning, Course Reports, Course Rating Templates	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (Crystal)	Enterprise Learning, Training Reports, Student Training History	RUNCTL_TRN020
TRN021 Training Program	Lists the training program for a worker. (SQR)	Enterprise Learning, Training Reports, Training Programs, Course Attend. School Program	RUNCTL_TRN021
TRN022 Statistics of EEs Enrolled (statistics of workers enrolled)	Lists the workers who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	Enterprise Learning, Training Reports, Statistics of EEs Enrolled, Course Statistics	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (Crystal)	Enterprise Learning, Course Reports, Course Description	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (Crystal)	Enterprise Learning, Course Reports, Course Category	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (Crystal)	Enterprise Learning, Course Reports, Course Equipment	RUNCTL_TRN025
TRN026 Course Vendors	Lists vendors that are associated with a course on the Course Table. (Crystal)	Enterprise Learning, Course Reports, Course Vendors	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (Crystal)	Enterprise Learning, Course Reports, Prerequisite Courses	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (Crystal)	Enterprise Learning, Course Reports, Target Qualifications	RUNCTL_TRN028

Report ID and Report Name	Description	Navigation	Run Control Page
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of workers in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page. (Crystal)	Enterprise Learning, Training Reports, 2483 Tax Declaration FRA	RUNCTL_TRN029
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved workers by the course duration. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Summary	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with a worker who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, worker expense, and session expense. (SQR)	Enterprise Learning, Training Reports, EE Session Cost Summary	RUNCTL_TRN032
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (Crystal)	Enterprise Learning, Training Reports, Training Instructor Schedule	RUNCTL_TRN033
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	Enterprise Learning, Training Reports, Equipment Checklist	RUNCTL_TRN034

Report ID and Report Name	Description	Navigation	Run Control Page
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Trng Plan Distribution FRA	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Trng Plan Cost Details FRA	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists the contract history for a selected worker or all workers. You can specify a date range for the report for include all contract history.	Workforce Administration, Job Information, Contract Administration, Contract Information Report	RUNCTL_CNT001
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	Workforce Administration, Job Information, Reports, Print Wage/Separation USF	GVT_PRINT_ES931
FGHR017 Personnel Actions History	Lists all workers affected by each of the job actions you enter. It prints the following information: name, department, effective date, and reason for the action. For each worker the report lists original hire date, total years of service, worker type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	Workforce Administration, Job Information, Reports, Personnel Actions History USF	RUNCTL_PER015
FGPER810 Award Type Table	Generates an award type table report.	Workforce Administration, Job Information, Reports, Award Action USF	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	RUNCTL_FGSF61

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF75 Request for Preliminary Employment Data	Produces a Request for Preliminary Employment Data form.	Workforce Administration, Job Information, Reports, Request Prelim Employ Data USF	RUN_CNTL_FGSF75
FGSF5052 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify worker and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	• Workforce Administration, Job Information, Reports, Request Personnel Action USF • Workforce Administration, Job Information, Reports, Notice of Personnel Action USF	RUNCTL_PAR
PER001 Department Action Notices	Lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Run the Refresh Employees Table process before running this report.	Workforce Administration, Workforce Reports, Department Action Notices	PRCSRUNCNTL
PER001CH CHE Company Statistics	This report provides information on worker wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.	Workforce Monitoring, CHE-Company Statistics	RUNCTL_PER001_CHE
PER002 Employee Birthdays	Lists workers, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Birthdays Report	RUNCTL_PER002
PER003 Years of Service	Lists workers who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.	Workforce Administration, Job Information, Reports, Years of Service	RUNCTL_PER003

Report ID and Report Name	Description	Navigation	Run Control Page
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each worker in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Emergency Contacts Report	PRCSRUNCNTL
PER005 Employees on Leave of Absence	Lists all employees on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the employee's expected return date or as a reminder for you to enter the return from leave information in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	PRCSRUNCNTL
PER006 Mailing Labels	Produces a three-across set of mailing labels for all employees in your PeopleSoft Human Resources database. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all employees marked as temporary, along with length of service and other details of employment.	Workforce Administration, Job Information, Reports, Temporary Employees	RUNCTL_ASOFDATE
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the employee counts as of the date you specify.	Workforce Administration, Workforce Reports, Employee Turnover Analysis	RUNCTL_FROMTHRU
PER015 Personnel Actions History	Lists all employees affected by each of the job actions you enter.	Workforce Administration, Job Information, Reports, Personnel Actions History	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all employees with addresses and home phone numbers.	Workforce Administration, Biographical, Home Address Report	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all employees with job action notices scheduled for a future date.	Workforce Administration, Workforce Reports, Pending Future Actions	RUNCTL_ASOFDT_COMP
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	Workforce Administration, Workforce Reports, Database Audit	RUNCTL_FROMTHRU

Report ID and Report Name	Description	Navigation	Run Control Page
PER032 Passport/Visa Expiration	Lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL
PER033 Citiznship/Country/Visa Audit	Lists discrepancies between employee citizenship country/status and visa data. Displays various discrepancies found for the employee citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	Workforce Administration, Personal Information, Citizenship, Citiznship/Country/Visa Audit	PRCSRUNCNTL
PER038NL NLD Law SAMEN Statistics	Produces the required SAMEN statistics information related to the number of people in the workforce born in a so-called SAMEN country, or of whom one of the parents has been born in one such country.	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report	RUNCTL_PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled employees and additional information about their disabilities.	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	RUNCTL_PER039GR
PER040GR GER Heavily Disabled Equaliz.	Calculates the required number of heavily disabled employees and the equalization amount of money if the required number of heavily disabled employees is not fulfilled.	Workforce Administration, Personal Information, Disability, Heavily Disabl Equalizatn GER	RUNCTL_PER040GR
PER054 ESP Official List	Compiles the information you need for Matricula book reporting.	Workforce Administration, Workforce Reports, Official List ESP	PER054_ESP

Report ID and Report Name	Description	Navigation	Run Control Page
PER058 Primary Job Audit	Lists all employees and/or nonemployees whose job records show potential problems.	Workforce Administration, Workforce Reports, Primary Job Audit	RUNCTL_PER058
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	Workforce Administration, Personal Information, Disability, Disability Report ITA	RUNCTL_PER060
PER063JP Appointment Notification JPN	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual employee notifications of hire, rehire, retirement, transfer, and promotion.	Workforce Administration, Job Information, Reports, Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP Appointment List JPN	Runs appointment list reports.	Workforce Administration, Job Information, Reports, Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP Completion of IC Transfer JPN	Lists employees on temporary intercompany transfer.	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066BE Termination Notification	Provides details of the contractual and compensation implications for a Belgian employer in case of a termination, based on the notification period according to the Claeys formula.	Workforce Administration, Collective Processes, Administration BEL, Create Notification	RUNCTL_PER066_BEL
PER066IT ITA Hiring Letters	Produces the hiring letter which is printed at hiring time and is signed by employee and employer. It gives details of the terms of the job, including probation period and duration.	Workforce Administration, Increase Workforce, Hire Letter ITA	RUNCTL_PER066_ITA
PER066JP Employee Assignment List JPN	Lists employees by department, including Additional Appointment employees.	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	RUNCTL_EMPLIST_JPN
PER067BEL Social Report	Reports a variety of employer/employee information required by the government.	Workforce Administration, Workforce Reports, Social Report BEL	RUNCTL_PER067BE

Report ID and Report Name	Description	Navigation	Run Control Page
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	Workforce Administration, Increase Workforce, Hire Report CAN	RUNCTL_FROMTHRU
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active employees within each defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplymt Type Rpt	RUNCTL_FTCANAC
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	RUNCTL_PER105CN

Report ID and Report Name	Description	Navigation	Run Control Page
PER106CN OEE Groups/Jobs Filled/Vacatd	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active employees within the defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, OEE Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action.	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	PRCSRUNCNTL
PER801SG Employee Listing	Provides employee information based on the run control selections of Department, Employee Name, or Employee ID.	Workforce Administration, Job Information, Reports, Employee Listing SGP	RUNCTL_EMP_LIST
SOCS_AFI_ESP AFI Report	The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. This file is submitted to the social security authorities.	Workforce Administration, Workforce Reports, AFI Report ESP	RC_SOCS_AFI_ESP
TAS001 Temp Assignment w/out End Date	Lists employees currently on temporary assignment where end dates have not been defined.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	RUNCTL_TAS001

Report ID and Report Name	Description	Navigation	Run Control Page
TAS002 Temp Assignment due to Complete	Lists employees due to complete temporary assignments within user specified date range.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	RUNCTL_TAS002

Manage Base Benefit Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants Rpt	Lists active health plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Benefits, Report, Participation, Health Plan Participants	RUNCTL_ASODATE_BEN
BEN002 Life Insurance Participants Rpt	Lists active life plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Benefits, Report, Participation, Life Insurance	RUNCTL_ASODATE_BEN
BEN003 Benefit Contributions	Summarizes benefit contributions by employee and employer.	Benefits, Reports, Contributions and Deductions, Benefit Contribution Register	RUNCTL_BEN003
BEN003CN Benefit Contributions Can.	Summarizes benefit contributions by employee and employer for Canadian companies. This report is the same as BEN003.	Benefits, Reports, Contributions and Deductions, CAN-Contribution Register	RUNCTL_BEN003CN
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for employees participating in savings plans with investment allocations. This program also creates an interface file for use by third-party administrators.	Benefits, Report, Participation, Savings Investment Distributn	RUNCTL_BEN004
BEN007 Leave Accruals	This report displays leave accrual information by leave plan and employee. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.	Benefits, Report, Participation, Leave Accrual	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN008 Section 415 Compliance Rpt	The report lists employee amounts either over or under the Section 415 limit. It includes: Company, Employee ID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.	Benefits, Reports, Regulatory and Compliance, Section 415 Compliance	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance Rpt	BEN009 reports on employees who have exceeded the Section 415 limits. It includes: Company, Employee ID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.	Benefits, Reports, Regulatory and Compliance, Section 415 Noncompliance	RUNCTL_ASODATE_BEN
BEN020 FMLA Status Report	Displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests. You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those employees who will soon be going out on leave; what follow-up is needed to support the leaves; those employees who will soon exhaust their leave entitlement.	Benefits, Track FMLA (Family Medical Lv), Status Report	RUNCTL_BEN020

Report ID and Report Name	Description	Navigation	Run Control Page
BEN021 FMLA Payroll Audit	For employees on FMLA leave or who have recently completed leaves, displays employee ID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid), and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system.	Benefits, Track FMLA (Family Medical Lv), Payroll Audit Report	RUNCTL_BEN021
BEN022 BEN023 HIPAA Medical Certificates	BEN022 prints a twelve-month history of a former employee's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	Benefits, Reports, Regulatory and Compliance, HIPAA	RUN_CNTL_HIPAA
BEN040 Billing Statement	Prints a bill for all employees with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	Benefits, Benefits Billing, Create Statements, Print Billing Statement	RUNCTL_BEN040

Report ID and Report Name	Description	Navigation	Run Control Page
BEN041 Delinquent Accnt	Displays charge and payment activity for employees who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table. You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.	Benefits, Benefits Billing, Reports, Delinquent Accounts	RUNCTL_BEN041
BEN042 Receivable Report	Displays all payment activity, include the amounts paid and how the amounts were applied. You can use this report to verify the dollar amount of payments received from employees. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.	Benefits, Benefits Billing, Reports, Accounts Receivable	RUNCTL_BEN042
BEN043 Billing History	Displays all billing account activity for a specific period of time, by employee. Use this report to answer questions from employees regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.	Benefits, Benefits Billing, Reports, History Activity	RUNCTL_BEN043
BEN044 Billing Calculation Errors	Lists billing calculation errors.	Benefits, Benefits Billing, Review Processing Results, Calculation Error Report	RUNCTL_BILL_CAL

Report ID and Report Name	Description	Navigation	Run Control Page
BEN045 Benefits Billing Audit	Displays employees with open charges and open credits; active enrollments audit; inactive enrollments audit; employees with holds longer than three months; and enrollment holds longer than three months. Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for employees with open charges and credits when an error condition exists.	Benefits, Benefits Billing, Reports, Billing Audit	RUNCTL_BEN_LANG
BEN050 Primary Jobs Audit	Identifies employees without a record in the Primary Jobs table, employees without a job in the Primary Jobs table, employees without a primary job flag turned on, employees without a primary job indicated for a specific benefit record, and, employees with more than one primary job designated for a specific benefit record number.	Benefits, Maintain Primary Jobs, Create Audit Report	RUNCTL_BEN050
BEN110 Snapshot Premium Report	List employees, their coverage, and premium amounts for specified vendor and plan type.	Benefits, Interface with Providers, Snapshot Premium Report	RUNCTL_BEN102
BEN140 Ben Billing Payment Interface	This program reads payment information from a third-party interface file and posts those payments against open accounts. Lists information about Benefits Billing payments processed by the batch interface process. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	Benefits, Benefits Billing, Billing Interface, Post Payments from File	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN141 A/R Interface	The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds employee information, the other holds the accounting information for the Benefits Billing charges and charge adjustments. Use this report to report to interface billing charges to an accounts receivable system.	Benefits, Benefits Billing, Billing Interface, Provide Billing to AR	RUNCTL_BILL_CAL
BEN701 FSA Benefit Table Listing	Lists information in the Flexible Spending Account Table. Use this report to verify that you have correctly updated and made changes to the table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Flexible Spending Account	RUNCTL_BEN_LANG
BEN702 Flat Rate Table	Prints information from the Flat Rate Table, where you define rates to be charged per selected frequency for a particular benefit program/plan.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Flat Rate Table	RUNCTL_ASODATE_BEN
BEN703 Disability Plan Table Listing	Prints information from the Disability Plan Table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Disability Plan	RUNCTL_BEN_LANG
BEN704 Age-Graded Rate Table Listing	The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and employee for each set of your age-graded rates.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Age Coverage Rate	RUNCTL_ASODATE_BEN
BEN705 Life AD/D Table Listing	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Life AD/D Plan Table	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN707 Savings Plan/ Investment Table	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the employee deductions and employer contributions and investment options.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Savings Plan	RUNCTL_BEN_LANG
BEN708 Calculation Rules Tbl Listing	Lists calculation rules information by calculation rule ID.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Calculation Rules	RUNCTL_BEN_LANG
BEN709 Benefit Plan Table Listing	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Plan	RUNCTL_BEN_LANG
BEN710 Leave Plan Table Listing	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan — Basic Attributes	RUNCTL_BEN_LANG
BEN710A Leave Plan Table (Svc Rates)	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan-Accrual and Bonus	RUNCTL_BEN_LANG
BEN711 Retirement Plan Table Listing	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Retirement Plan	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN713 Benefit Program	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, and payroll rules. This report serves as an audit trail for the information defined on the Benefit Program table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Program	RUNCTL_BEN713
BEN714 Service Rate Table Listing	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and employee portion. This report serves as an audit trail for the information defined on the Service Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Service Rate	RUNCTL_ASODATE_BEN
BEN715 Vacation Buy/Sell Plan Listing	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts. This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Vacation Buy/Sell	RUNCTL_BEN_LANG
BEN716CN Pension Plan Table Listing 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the employee and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan–Canada- Basic	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN717CN Pension Plan Table Listing 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the employee and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Rates	RUNCTL_BEN_LANG
BEN718CN Pension Plan Table Listing 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Limits	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table Listing	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement. This report serves as an audit trail for the information defined on the FMLA Plan table.	Set Up HRMS, Product Related, Base Benefits, FMLA (Family Medical LV), FMLA Plan Table Report	RUNCTL_BEN_LANG
BEN721 Limit Table List.	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan. This report serves as an audit trail for the information defined on the Limit table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Limit Table	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN731 Salary Rate Table	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID. This report serves as an audit trail for the information defined on the Salary Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Salary Rate	RUNCTL_ASODATE_BEN
BEN733 Base Benefit Audit Report	Summarizes potential employee data error conditions as related to Base Benefits business process. Includes employees without Employment records, employees without Job records, employees under 16 years old, employees with unusual dependents signed up for coverage, employees with spouses (or other dependents) both electing health benefits, employees with overage dependent coverage, and employees with incorrect health plans set up on the Benefit Program Table.	Benefits, Reports, Audits, Base Benefits Consistency Audit	RUNCTL_BEN_LANG
BEN734 Court Orders Audit Report	Lists employees not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	Benefits, Reports, Audits, Court Ordered Coverage Audit	RUNCTL_BEN734
BEN740 Billing Calendar Table Listing	Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period. Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	Set Up HRMS, Product Related, Base Benefits, Billing, Calendar Report	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
CBR001 COBRA Qualify Ltr	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Initial Letter	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Secondary Letter	RUNCTL_CBR002
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	Benefits, Administer COBRA Benefits, Terminate COBRA Coverage, Create Termination Letter	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Open Enrollment Letter	RUNCTL_CBR004
CBR005 COBRA Event Summary	Lists all employees for whom a COBRA event occurred, along with the event status.	Benefits, Administer COBRA Benefits, Review Processing Results, Event Summary Report	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	Benefits, Administer COBRA Benefits, Review Processing Results, Enrollment Report	RUNCTL_CBR006
CBR007 COBRA Audit	Displays active employees enrolled in COBRA health coverage; employees and spouses (or other dependents) electing health benefits for the same dependent ID; and employees who have overage dependents.	Benefits, Administer COBRA Benefits, Review Processing Results, Audit Report	RUNCTL_ASODATE_BEN
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	Benefits, Administer COBRA Benefits, Review Processing Results, Error Report	RUNCTL_CBR008

Report ID and Report Name	Description	Navigation	Run Control Page
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	Benefits, Interface with Providers, FEHB Reconciliation Report	GVT_RUN_FGPY017
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	Benefit, Conduct Nondiscrimination Tsts, Section 401 Testing, 401 Testing Report	RUNCTL_NDT004
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs:. *NDT005:* Eligible Cross Section Test (eligible employees test) *NDT006:* 55% Average Benefits Test *NDT007:* Concentration Test (5% Owner Test)	Benefit, Conduct Nondiscrimination Tsts, Section 129 Testing, 129 Testing Report	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	Benefits, Reports, Contributions and Deductions, PI Benefit Deductions Register	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Provider/Vendor Listing	RUNCTL_PAYVNDR
RDED001 Retroactive Deductions Requested - ‘Not Processed Status	Lists retroactive deduction requests that have not been processed.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Pending Request Summry	RUNCTL_RTRODED1
RDED002 Retroactive Deductions in Progress - ‘Calculate Status’	Lists retroactive deduction requests that have been processed.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded All Calculated	RUNCTL_RTRODED1

Report ID and Report Name	Description	Navigation	Run Control Page
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by employee ID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Paysheet Load Sumamry	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Paysheet Load Audit	RUNCTL_RTRODED3
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated employees. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Terms Calculated	RUNCTL_RTRODED3

Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Department FTE	RUNCTL_FRMTHRU_DPT
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes	Set Up HRMS, Product Related, Commitment Accounting, Reports, Encumbrance Messages	RUNCTL_BUD009

Report ID and Report Name	Description	Navigation	Run Control Page
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or employees within a department. This report can also print information about a specific position or employee when you enter employee or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	• Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report CAN • Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report USA	RUNCTL_BUD011
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Full-Time Equivalent Rollup Report	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	• Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Retro Distribution Audit Rpt • Payroll for North America, Payroll Distribution, Commitment Accounting USA, Retro Distribution Audit Rpt	RUNCNTL_BUD020
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	• Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Predistribution Audit Rpt • Payroll for North America, Payroll Distribution, Commitment Accounting USA, Predistribution Audit Rpt	HP_RUNCTL_PDAUDIT

Report ID and Report Name	Description	Navigation	Run Control Page
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	North American Payroll, Payroll Distribution, GL Interface Reports, Gross and Fringe	HP_RCTL_GRSFR_RPT

Manage Competencies Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMM007 Licenses, Certificates Renewal	Lists which employees need to renew a license or certificate. **Note.** This report from the PeopleSoft Human Resources Manage Competencies business process is also available on the Administer Training menu: PER703 Course Table.	Workforce Development, Competency Management, Track Person Competencies, Licenses/Certificate Renewal	RUNCTL_CMM007
NVQ001 (GBR) UK NVQ - Employee Status	Lists employees assigned to an NVQ and their status.	Workforce Development, Competency Management, NVQ Reports, Employee Status	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units.	Workforce Development, Competency Management, NVQ Reports, Unit Listing	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units.	Workforce Development, Competency Management, NVQ Reports, NVQ Listing	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ − Unit/Element Listing	Lists the elements associated with NVQ units.	Workforce Development, Competency Management, NVQ Reports Unit/Element	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes an employee's NVQ Unit plan (defined on the Track NVQ - Plan NVQ Units page). First run the NVQ - Initialize Plan process to generate this report.	Workforce Development, Competency Management, NVQ Reports, Employee Plan	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER011 Competency Inventory	Lists employees in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new employees and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.	Workforce Development, Competency Management, Track Person Competencies, Competency Inventory	RUNCTL_PER011
PER537 Competency Listing	Lists competency types and the competencies associated with each type; also lists descriptions and categories.	Set Up HRMS, Common Definitions, Competencies, Competency Listing	PRCSRUNCNTL
PER538 Accomplishment Listing	Lists all defined accomplishments. Does not include National Vocational Qualifications (NVQs) for the UK.	Set Up HRMS, Common Definitions, Accomplishments, Accomplishment Listing	RUNCTL_PER538

Manage French Profit Sharing Reports

Report ID and Report Name	Description	Navigation	Run Control Page
WP0001FR Individual Report	Provides employees with details of their profit sharing amount when these are calculated, or when an employee leaves the organization. This report can be delivered with the employee's payslip.	Compensation, Profit Sharing FRA, Manage Profit Sharing, Individual Report	RUNCTL_WP_IND_RPT
WP0002FR Agreement Report	This report is for administrators and lists all the employees that are eligible for a selected agreement and includes the status of the employees' funds, gross and net profit sharing amount, deductions, and investment method.	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Report	RUNCTL_WP_AGRT_RPT

Manage French Public Sector Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FP_PROM Promotable Employees	Lists the employees promotable by a given date. To be launched after the FPA800 SQR.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	RUNCTL_FPAPROM
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists employees that have been evaluated and those who have not.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	RUNCTL_FPA025
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	Workforce Administration, Workforce Reports, Individual Orders Edit FPS	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	Workforce Administration, Workforce Reports, Collective Orders FPS	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	Workforce Administration, Workforce Reports, Collective Order Updates FPS	RUNCTL_FPA115
FPA400 Part-Time Schedule	Lists part-time employees, whose part-time will end soon	Workforce Administration, Workforce Reports, Part-Time Schedule FPS	RUNCTL_FROMTHRU
FPA405 Current PPd Schedule	Lists employees nearing the end of their probation period.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Current Probation Schedule Rpt	RUNCTL_FROMTHRU
FPA-AFFE Assignment − Request tbc	Lists requests for assignment changes that need to be approved	Workforce Administration, Workforce Reports, Assignment − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	Workforce Administration, Workforce Reports, Career − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPACNTR Contribution Call Letters	Contribution call letters contain the employee's address and the contribution amounts. Launch this report after FPA1100 SQR.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150

Report ID and Report Name	Description	Navigation	Run Control Page
FPACNTR2 Contribution Call Letters	See above.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPAEE_CA Employee Career/Action	Lists employee career data.	Workforce Administration, Job Information, Reports, Employee Career/Action FPS	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists employee civil service position data	Workforce Administration, Job Information, Reports, CS Position/Employee FPS	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment − Request Rejected	Lists rejected assignment change requests.	Workforce Administration, Workforce Reports, Assignment − Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPAHISTC Career − Request Rejected	Lists rejected career change requests.	Workforce Administration, Workforce Reports, Career − Request Rejected FPS	RUNCTL_FPACRYSTAL1
FPAHISTP CSPosition − Request Rejected	Lists rejected civil service position requests.	Workforce Administration, Workforce Reports, CSPosition − Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTS Compensation − Request Rejected	Lists rejected compensation change requests.	Workforce Administration, Workforce Reports, Compensation − Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time − Request Rejected	Lists rejected work time change requests.	Workforce Administration, Workforce Reports, Work Time − Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists civil service change requests requiring approval.	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA_RAT List of Employees to be Rated (employee ID)	Lists employees to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPARAT2 List of Employees to be Rated (employee/department list)	See above.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPA-REMU Compensation − Request tbc	Lists compensation change requests requiring approval.	Workforce Administration, Workforce Reports, Compensation − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time − Request tbc	Lists work time change requests requiring approval.	Workforce Administration, Workforce Reports, Work Time − Request tbc FPS	RUNCTL_FPACRYSTAL1

Report ID and Report Name	Description	Navigation	Run Control Page
FPMACT1 Action List − Report 1	Lists action definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List − Report 1	PRCSRUNCNTL
FPMACT2 Action List − Report 2	Lists action definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List − Report 2	PRCSRUNCNTL
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/CS Position	PRCSRUNCNTL
FPMACTPR Retro Prcs Action Rules	Lists the retroactivity rules for action codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Prcs Action Rules	PRCSRUNCNTL
FPMACTST Actions/Status	Lists actions authorized by status.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/Status	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Occupation	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Corps	PRCSRUNCNTL
FPMINDEX Index Value	Lists index/amount values.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Index Value	PRCSRUNCNTL
FPMJOBCD Job Code	Lists job code definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Job Code	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Civil Service Position	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Type of Point	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FPMRANK1 Grade List − Report 1	Lists grade definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List − Report 1	PRCSRUNCNTL
FPMRANK2 Grade List − Report 2	List grade definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List − Report 2	PRCSRUNCNTL
FPMSALST Sal Grade Table/Scale-Steps	Lists salary grade table − steps.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Sal Grade Table/Scale-Steps	PRCSRUNCNTL

Manage Labor Administration Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR015 (USF) Union Membership	(For U.S. federal government users) Lists each union organization and the workers who are members. Before you run this report you must run the Refresh Employees Table process.	Workforce Administration, Labor Administration, Reports, Union Membership USF	PRCSRUNCNTL
HRLAY001 Layoff Roster	Report on the setup and roster list information of a layoff roster.	Workforce Administration, Labor Administration, Reports, Layoff Roster Report	HR_RUNCTL_LAY001
HRLAY002 Bumping	This report displays worker Job Data history and job hierarchy enabling you to determine who has bumping rights in the event of a layoff.	Workforce Administration, Labor Administration, Reports, Bumping Report	HR_RUNCTL_LAY002
HRLAY003 Seniority	lists workers, their seniority dates, and the values for those dates.	Workforce Administration, Labor Administration, Reports, Seniority Report	HR_RUNCTL_LAY003
HRLAY004 Candidate List	This report lists the workers with recall rights that have not expired.	Workforce Administration, Labor Administration, Candidate List Report	HR_RUNCTL_LAY004
HRLAY005 Recall Roster	Report on the setup and roster list information of a recall roster.	Workforce Administration, Labor Administration, Recall Roster, Recall Roster Report	HR_RUNCTL_LAY005

Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY006 Layoff Roster Post Processing	When you process a layoff from the Process Layoff page, the process generates this report, listing those workers laid off. **Note.** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page.	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button.	HR_RUNCTL_LAY
HRLAY007 Recall Rights Post Processing	• When you process a layoff from the Process Layoff page, the process generates this report, listing those workers who have received recall rights. **Note.** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page. • When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing the recall rights of the workers who were rehired.	• Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_LAY, HR_RUNCTL_REINSTAT
HRLAY008 Recall Post Processing	When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing those workers recalled or reinstated.	• Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_REINSTAT

Report ID and Report Name	Description	Navigation	Run Control Page
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against workers within a specified date range. The report itemizes actions by date, by incident, and by worker.	Workforce Administration, Labor Administration, Reports, Discipline Action Summary	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company.	Workforce Administration, Labor Administration, Reports, Grievance Detail	RUNCTL_OHS_NONE
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific workers.	Workforce Administration, Labor Administration, Reports, Employee Disciplinary Action	RUNCTL_OHS005
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions.	Workforce Administration, Labor Administration, Reports, Grievance Summary	RUNCTL_OHS_FROMTO
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the workers who are members. Run the Refresh Employees Table process before running this report.	Workforce Administration, Labor Administration, Reports, Union Membership	PRCSRUNCNTL
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more workers are required to submit this report.	Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA	RUNCTL_PER053
PER055 Union Fees	(ESP) Shows the workers and fees per union and month.	Workforce Administration, Labor Administration, Reports, Union Fees ESP	RUNCTL_PER055_ESP
PER059 Union Report ITA	(ITA) There are two Italian union reports. You can run a union report generating a list of workers and worker information by union. You can also run a union report listing the number of workers belonging to each union, sorted by category.	Workforce Administration, Labor Administration, Reports, Union Report ITA	RUNCTL_PER059
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	Workforce Administration, Labor Administration, Reports, Labor Relations Letters	RUNCTL_PER061
WP001 Employees Due Advancement	Create a list of all of the workers that the Process Wage Progression process will advance.	Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression	RUN_UPD_WP_ADVC

Report ID and Report Name	Description	Navigation	Run Control Page
WP002 Exceptions	Lists all workers within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Exception Rpt, Exceptions Report	RUN_WP002

Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR009 (USF) Job Code/Position Audit	Cross references position numbers and job codes. (SQR)	Organizational Development, Position Management, Position Reports, Job Code/Position Audit	RUNCTL_FGASOFDT
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Organizational Development, Position Management, Position Reports, Vacant Position USF	RUNCTL_FGHR010
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF	RUNCTL_FGHR025
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History USF	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History USF	RUNCTL_FGASOFDT
FGHR028 (USF) Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception Override USF	RUNCTL_FGHR028
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (Crystal)	Organizational Development, Position Management, Position Reports, Occupation Series USF	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGOF8 (USF) OF8 Report	This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.	Organizational Development, Position Management, Position Reports, OF8 Report USF	RUNCTL_FGOF8
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (Crystal)	Organizational Development, Position Management, Position Reports, Position Title Table USF	PRCSRUNCNTL
FGPER823 (USF) Job Code	Print a list of all the job codes with effective dates.	Organizational Development, Position Management, Position Reports, Job Code USF	PRCSRUNCNTL
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	Organizational Development, Position Management, Position Reports, Position Status	RUNCTL_ASOFDATE
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions	RUNCTL_POS002
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History	RUNCTL_ASOFDT_COMP
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
POS006 Create Organizational Report	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.	Organizational Development, Position Management, Create Organizational Structure, Create Organizational Report	RUNCTL_POS006
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Create Organizational Report. (SQR)	Organizational Development, Position Management, Create Organizational Structure, Build Position Structure	RUNCTL_ASOFDATE
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Organizational Development, Position Management, Position Reports, Vacant Position	PRCSRUNCNTL
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception/Override	RUNCTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	Workforce Monitoring, Professional Compliance, Reports, Compliance Plans	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	Workforce Monitoring, Professional Compliance, Reports, RI Observation	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	Workforce Monitoring, Professional Compliance, Reports, RI Review	RUN_CNTL_PCMP4

Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	Compensation, Variable Compensation, Award Reports, Actual Award Report	RUNCTL_VC_REP
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	Compensation, Variable Compensation, Variable Comp Reports, Budget	RUNCTL_VC_REP
VC003 Calculate Awards Report	View the results of the Award Calculation process.	Compensation, Variable Compensation, Award Reports, Calculate Awards	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances. The detailed report lists all employees in a plan by group and their carryover balances. The summary report lists the total carryover balance for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Carryovers	RUNCTL_VC_REP
VC005 Employee History Report	For each employee, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each employee's grand total values for all plans.	Compensation, Variable Compensation, Award Reports, Employee History	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.	Compensation, Variable Compensation, Variable Comp Reports, Funds Allocation	RUNCTL_VC_REP
VC007 Guarantee Report	View the employee guarantees. The detailed report lists all employees in a plan by group and their guarantees. The summary report lists the total guarantees for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Variable Comp Reports, Guarantee	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to employees. The report lists only awards that are beyond the status of Initial Calculation. The detailed report lists all employees in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value. The summary report lists the total non-monetary units for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Non Monetary	RUNCTL_VC_REP
VC009 Plan History Report	The report provides information about the plan definition and lists award values, proration, and approver information by payout period for the plan ID that you specify on the run control page.	Compensation, Variable Compensation, Award Reports, Plan History	RUNCTL_VC_REP
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page. The detailed report lists all employees in a plan by group, the employee's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan. The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.	Compensation, Variable Compensation, Award Reports, Variance	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	Compensation, Variable Compensation, Variable Comp Reports, Organization and Group Goals	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of employees who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the employees' managers can use this information to ensure that these individuals get the appropriate awards.	Compensation, Variable Compensation, Variable Comp Reports, Tree Consistency Report	RUNCTL_VC_REP
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Stock Administration.	Compensation, Variable Compensation, Award Reports, Subscription Errors	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies employees who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	Compensation, Variable Compensation, Variable Comp Reports, Tree Member Overlap	RUNCTL_VCP001

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
APP001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females. This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	RUN_CNTL_REG
APP002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	RUN_CNTL_REG

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Regulatory Reports, OSHA-200 Log	RUNCTL_CALENDARYR
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations. This report is compliant with the EEOC requirements for single and multi-establishment reporting. A single-establishment employer needs to file one report, while a multi-establishment employer must file separate reports.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	RUNCTL_PER016
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of employee counts for the private sector.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	RUNCTL_PER017
PER019 Terminations Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group. It counts employees in each group, counts terminations, and expresses both counts as a percentage of the total population of active employees. It also calculates the termination rate. This report does not include employees whose Sex or Ethnic Group has not been indicated.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	RUN_CNTL_REG
PER022 EE0-5 Job Analysis	Supplies standard job category counts for school-related categories.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
PER024 Job Group Analysis	Analyzes the makeup of your workforce by establishment, EEO job group, job title, and salary grade. For a given job title and salary grade, the report provides totals by minorities, by gender, and by ethnicity within gender. Use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	RUN_CNTL_REG2
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce by job groups within each establishment. These totals are further broken down by minority and gender, and then by ethnicity within each gender.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	RUN_CNTL_REG2
PER025 Workforce Analysis	Tracks hiring practices by department based on job titles, including the salary grade assigned to the title and the total number of employees and minorities who hold the title. Use the report to analyze patterns of discrimination in hiring practices. The report shows the percentage of minorities in each department.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	RUN_CNTL_REG2
PER027 VETS-100 Process	The report details the number of special disabled veterans, Vietnam-era veterans, and other protected veterans in your workforce by job category and hiring location, as well as the total number of employees, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	RUNCTL_PER027
PER027B VETS-100 Analysis	Reports on the VETS-100 data created by the VETS-100 process.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	RUNCTL_PER027C
PER027C Vets-100 Submit	Creates the digital file for submission to the government. You must run the VETS-100 Process before running this report.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	RUNCTL_PER027C

Report ID and Report Name	Description	Navigation	Run Control Page
PER030 Job Group Roster	Lists personal and job data for employees such as ethnic group, gender, date they received the title, salary grade, hourly rate, monthly rate, department name, original hire date and job title at hire. Employees are grouped by their associated job group and establishment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	RUN_CNTL_REG2
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	RUNCTL_PER031
PER036 PRWORA - New Hire	This report provides the information employers furnish to the Federal Directory of New Hires after hiring a new employee.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, FEDERAL PRWORA - New Hire	RUNCTL_PER036
PER036S PRWORA - New Hire	Provides the information employers furnish to the State Directory of New Hires after hiring a new employee.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, STATE PRWORA - New Hire	RUNCTL_PER036_S
PER040 IPEDS-S	The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	RUNCTL_PER040

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements

(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ASCO	Prints a list of the ASCO reporting codes.	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

(BRA) Meeting Regulatory Requirements Reports for Brazil

Report ID and Report Name	Description	Navigation	Run Control Page
BRCGED01 CAGED Report	The CAGED (*Cadastro Geral de Empregados e Desempregados)* report generates a file containing the monthly turnover of employees by establishment. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employee that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	CAGED_RC_BRA
BREREG01 Employee Registry	The Employee Registry report generates a file containing employees' employment data, including hire date, retirement date, length of social security contributions.	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	EMPL_REG_RC_BRA

(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	Description	Navigation	Run Control Page
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements	RUNCNTL_PER102CN

Report ID and Report Name	Description	Navigation	Run Control Page
PER715CN Pay Equity Table	Lists job evaluation information. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity Table	PRCSRUNCNTL
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, National Occupation Codes	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	Description	Navigation	Run Control Page
DIS001 Disability	Calculate the theoretical number of disabled employees who should work for the company and list the disabled employees, excluding temporary workers, trainees, and apprentices. For companies with more than 20 employees. (SQR) Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability	RUNCTL_DIS001_FRA
ELE001 Election	Provides the results of the staff representative elections for employees and management. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report	RUNCTL_ELE001
REG004FR BIAF report	This statutory report is for employees on fixed-term contracts and details the employee's training entitlement.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF	RUNCTL_BIAF_FRA
HRSHSFRA Single Hiring Statement	A statutory report that is filed at the time of hiring new employees. The system uses information from your employee, company, and establishment tables to generate the report.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement	SHS_FRA_RUN_CTL

Report ID and Report Name	Description	Navigation	Run Control Page
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more employees. (SQR) Before running this report, define which contract types to include in the report using the Contract Type Group page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce	RUNCTL_REG001_FRA
REG002FR Personal Register	Lists employees for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality	RUNCTL_REG003_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary. (Crystal) Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey − Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	RUNCTL_SOC001

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
APP001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current employee count and the number of terminations.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Termination Analysis	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis	RUNCTL_PER025UK
PER030UK Job Group Roster	Lists your employees in job groups.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	RUNCTL_ASOFDATE
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments	RUNCTL_UKNI

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF	RUNCTL_FGHR012

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR013A VETS-100 by SubAgency	Generates a Veterans employment report by sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by SubAgency USF	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by POI USF	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF	RUNCTL_FGHR014
FGHR014B EEO Groups by Series/SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF	RUNCTL_FGHR014
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing. Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDFF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Error Report	RUNCTL_FGHR019B
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF	RUN_FGSF113A
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF	RUN_FGSF113G

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(USF) Performing Central Personnel Data File Edit Processing"

Monitor Absence Reports

Report ID and Report Name	Description	Navigation	Run Control Page
ABS001 Absence Listing	Provides information about an employee's absence history. **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of employee absence periods.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods	RUNCTL_ABS001
ABS003 Time Lost Due to Absence	Provides employee absence information. **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	RUNCTL_ABS003
ABS004UK Bradford Score	Lists employee absences for the regulatory region of GBR only. It lists department, employee name, employee ID, employee type, job title, total number of absences, total number of days absent, and the Bradford Score. The Bradford Score column of this report is calculated based on the following information: • Total number of absences (A) • Total number of days absent (B) • A^2 X B **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR	RUNCTL_ABS004UK
ABS005NL Illness Registration (1)	Calculates the illness totals, percentages, and frequencies.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS006NL Illness Registration (2)	Same as above.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL

Report ID and Report Name	Description	Navigation	Run Control Page
ABS007NL Longterm Illnesses NLD	Provides a report of employees who have longterm illnesses from which they haven't fully recovered and are subject to the Dutch law *Wet Poortwachter*. You can use an employee checklist to track the status of an employee's illness. **Note.** This report can be run from PeopleSoft Human Resources or Global Payroll for the Netherlands. Based on the setting of the GPNLD installation flag, the report retrieves absence data from human resources or payroll tables.	• Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD • Global Payroll, Absence and Payroll Processing, Absence Reports, Longterm Illnesses NLD	RUNCTL_ABS007_NL
ABS792NL Create Statistics	Create absence statistics for a company in the Netherlands. Run this process before creating an Illness Registration report. Run for a certain month of the year.	Workforce Administration, Absence and Vacation, Absence Reports, Create Illness Statistics, Create Statistics	RUNCTL_ABS702_NL

Monitor Health and Safety Reports

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	Workforce Monitoring, Health and Safety, Reports, WCB Form 7 CAN	RUNCTL_OHS001CN
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	Workforce Monitoring, Health and Safety, Reports, Work Accident FRA	OHS001FR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select.	Workforce Monitoring, Health and Safety, Reports, Accident DEU	RUNCTL_OHS501GR
OHS001UK Injury/Dangerous Occurence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. **Note.** To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous Occ. GBR	RUNCTL_OHS_UK
OHS002GR Reportable Accident/Illness	Produces a Reportable Accident /Illness report for Germany.	Workforce Monitoring, Health and Safety, Reports, Reportable Accident/Illness DEU	RUNCTL_OHS002GR
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).	Workforce Monitoring, Health and Safety, Reports, Illness GBR	RUNCTL_OHS_UK

Report ID and Report Name	Description	Navigation	Run Control Page
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Non-Employees In Incidents	RUNCTL_OHS_FROMTO
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	Workforce Monitoring, Health and Safety, Reports, Incident Location Summ DEU	RUNCTL_OHS003GR
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. This report is only available in German. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Illness DEU	RUNCTL_OHS504GR
OHS008BC Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	Workforce Monitoring, Health and Safety, Reports, WCB Incident CAN	RUNCTL_OHS_INC

Report ID and Report Name	Description	Navigation	Run Control Page
OHS009 Incident Detail	In addition to the occurrence information, the report lists all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.	Workforce Monitoring, Health and Safety, Reports, Incident Detail	RUNCTL_OHS_INC
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Summary	RUNCTL_OHS_FROMTO
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Location Incident Summary	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Claim Summary Overview	RUNCTL_OHS_FROMTO
OHS013 Employees In Incidents	Summarizes employees involved in incidents that have occurred within a specified date range. It notes whether the employee has suffered an injury or illness (Crystal)	Workforce Monitoring, Health and Safety, Reports, Employees In Incidents	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for an employee involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Lost Work	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
OHS014ES Incident Without Lost Work	Generates a list of accidents that didn't result in lost workdays. This report prints the Employee Name, Gender, NSS, Accident Date, and Accident Type. This report must be printed by Work Center. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident w/o Lost Wages ESP	RUNCTL_OHS_FROMTO
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the employee filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Claim Detail	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Vehicle Incident Summary	RUNCTL_OHS_FROMTO
PER002CH Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	Workforce Monitoring, Health and Safety, Reports, Accident CHE	RUNCTL_PER002_CHE

Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARPLAN Employee Career Plan	Lists an employee's career plan as entered by different evaluators (Crystal).	Workforce Development, Career Planning , Career Reports, Career Plan	RUNCTL_CAR001
CARTRAIN Employee Career Training Plan	Lists an employee's training plan to meet career goals (Crystal).	Workforce Development, Career Planning , Career Reports, Career Training	RUNCTL_CAR002

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for an employee. (SQR). An IDP includes an employee profile, employee competencies, employee training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.	Workforce Development, Career Planning , Career Reports, Individual Development Plan, IDP	RUN_FGHR022
PER034 Internal Resume	Creates a resume-like document from the data contained in PeopleSoft tables. (SQR). Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards	Organizational Development, Succession Planning, Create Internal ResumeOrganizational Development, Succession Planning USF, Create Internal ResumeRecruiting, Reports, Internal Resume	RUNCTL_PER034

Manage Base Compensation and Budgets Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.	Compensation, Salary Planning, Salary Plan Reports, Salary Structure	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment. The report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.	Compensation, Salary Planning, Salary Plan Reports, Job Grading by Evaluation Pts	RUNCTL_ASOFDATE
CMP003 Compa-Ratio Analysis	The report lists each employee in the salary grade and the midpoint amount of the salaries in that grade. For each employee, the report lists job code, title, name, and department ID. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.* The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the employee's salary to the midpoint amount of the salary grade. If the employee's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.	Compensation, Salary Planning, Salary Plan Reports, Ratio Analysis	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
CMP004 Below Minimum Analysis	The Below Minimum Analysis report lists the salary grades containing employees under the minimum, the associated minimum amount, the employee's annual rate, and the amount below both in dollars and as a percentage. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	Compensation, Salary Planning, Salary Plan Reports, Below Minimum Analysis	RUNCTL_ASOFDATE
CMP005 Above Maximum Analysis	For each employee, the report shows the job code and title, name, department ID, the maximum amount, the employee's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	Compensation, Salary Planning, Salary Plan Reports, Above Maximum Analysis	RUNCTL_ASOFDATE
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the employees' previous and new compensation package. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.	Compensation, Salary Planning, Salary Plan Administration, Update By Plan/Paygroup	RUNCTL_CMP008

Report ID and Report Name	Description	Navigation	Run Control Page
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to employees' job records before you run the Load Data process (HR_SP_CI) to actually insert new job records. This report displays the employees' previous and new Sal Admin Plan (salary administration plan), Grade, and Step. Generate this report after running the Update by Job Code application engine process. The report displays the employees' previous and new salary administration plan, grade, and step. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Job Code process run control page.	Compensation, Salary Planning, Salary Plan Administration, Update by Job Code	RUNCTL_CMP010
CMP011 Salary History by Employee	Displays each salary change for an employee during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Salary Planning, Compensation Reports, Salary History by Employee	RUNCTL_CMP011
CMP014 Salary History by Group	Provides the salary changes for the employees in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Salary Planning, Compensation Reports, Salary History by Group	RUNCTL_CMP014

Report ID and Report Name	Description	Navigation	Run Control Page
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	Compensation, Salary Planning, Percentage Increase JPN, Salary Simulation Report	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	Compensate Employees, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	Compensate Employees, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt	RUNCTL_LMS_REPORT
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them. The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of an employee have an associated rate code class. Run this report before you run the calculation process.	Compensate Employees, Forecast Compensation FRA, Process Forecast, Rate Codes w/out Class Rpt	RUNCTL_LMS_RATE_CL
PER008 Review Audit	Lists all employee reviews for the employees in a group.	Compensation, Salary Planning, Employee Review History, Review Audit	RUNCTL_PER008
PER012 Departmental Salaries	This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.	Compensation, Salary Planning, Compensation Reports, Salary History by Department	RUNCTL_ASOFDATE_LC
PER013 Employee Compensation Changes	Lists employees who have had compensation rate changes within a selected time period.	Compensation, Salary Planning, Compensation Reports, Employee Compensation Changes	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for an employee during a specified time period.	Compensation, Salary Planning, Compensation Reports, Salary History by Company	RUNCTL_PER023
PER041 Merit Increase Report	Lists the merit increases and their approval status for the employees in a merit group.	Compensation, Salary Planning, Merit Increases, Report Merit Increases	RUNCTL_SP_MERIT

Report ID and Report Name	Description	Navigation	Run Control Page
PER062JP (JPN) Grade Advance Candidate List	Lists employees who are eligible to advance from the grade you enter.	Compensation, Salary Planning, Salary Plan Reports, Grade Advance Candidates JPN	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B

Performance Management Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Lists missing documents for a group of employees (Group ID) and a given document type and date range.	Workforce Development, Performance Management, Reports, Missing Documents	RUNCTL_EP_RPT
HEP002 Late Documents	Lists manager documents whose due date has passed.	Workforce Development, Performance Management, Reports, Missing Documents	RUNCTL_EP_RPT

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to employees.	Compensation, Report Total Compensation, Cube Contents, Total Comp Statement Report	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	Compensation, Report Total Compensation, Cube Contents, Group Summary Compensation Rpt	TC_GRP_RUN_CNTL
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	Compensation, Report Total Compensation, Cube Contents, Group Detail Compensation Rpt	TC_GRP_RUN_CNTL

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	Workforce Development, Faculty Events, Load Teaching Data CAN, FT Survey Stats CAN Rpt	RUNCTL_HPH905CN
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report	RUNCTL_EVENTS
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	Workforce Development, Faculty Events, Manage Cases, Case Review Status Rpt, Case Review Report	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	Workforce Development, Faculty Events, Tenure Reports, Employee Tenure Status	RUNCTL_EGPP03
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group. Administer Flexible Service also uses this report.	Workforce Development, Faculty Events, Tenure Reports, Tenure Calculation, Tenure Calc	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date. With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.	Workforce Development, Faculty Events, Tenure Reports, Tenure Years of Service, Tenure Service List	RUNCTL_EGPP06

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	Workforce Administration, Flexible Service EG, Employee Service Report	RUNCTL_EGPP04
PER049 Employee Service Calculation Results	Lists the results of the Normal Run background process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	Workforce Administration, Flexible Service EG, Calculated Service Report	RUNCTL_EGPP05

Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (Crystal).	Workforce Administration, Global Assignments, Track Assignment, Employees on Assignment Report	RUNCTL_PER717

PeopleSoft HRMS Reports: Selected Reports

This section provides detailed information on individual reports. The reports are listed by report ID.

PER044 - Multiple Seniority Components − Basic Report

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.
- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.
- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Administering Seniority Pay"

PER033 - Citizenship/Country/Visa Audit − Administer Workforce

The report flags six different types of discrepancies. Specifically, it flags employee records when the following pairs of data exist:

Citizenship Status	• Native or Naturalized. • Not Native or Naturalized.
Country of Citizenship	• Not the local country. • The local country.
Visa Record	• Exists for the local country. • Doesn't exist for the local country.

The report puts a page break between categories.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Managing Citizenship and Visa or Permit Information

PER058 - Primary Job Audit − Administer Workforce

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for an employee's primary job only, you create an accurate employee count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have employees who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your employee job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for employees with multiple jobs.

This report lists all employees and/or nonemployees whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.
- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Updating Person and Job Information," Running Job Data Reports

PER066JP - JPN Employee Assignment List Report

This report lists employees by department and supervisor level including employees with additional appointments.

To run the report, at least one Department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by Department then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.
- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Employees without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL if the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

POS006A - Build Position Structure − Manage Positions

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.
- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Maximizing Position Data," Running the Organizational Structure Reports

POS008 - Exception/Override − Manage Positions

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data," Verifying Position Data

PKG006 - Salary Packaging FBT Reconciliation − Administer Salary Packaging

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the employees who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each employee and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

Note. The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging, "Managing Salary Packages," Running Salary Packaging Reports

HRH905CN - StatsCan FT Survey − Track Faculty Events

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada's summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

VC011 − Organization and Group Goals − Manage Variable Compensation

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.

- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Variable Compensation, "Using Weighted and Matrix Goals to Manage Plans," Running the Organization and Goals Report

VC013 − Subscription Error − Manage Variable Compensation

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award, the report identifies the employee, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)
- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Request by User (Reject All)

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Variable Compensation, "Managing Awards Approval and Payout," Reporting Related to Award Payout and Distribution

BEN004 - Savings Investment Distributions − Base Benefits

This report lists the total deductions made to date and the total company contributions for employees participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for employees in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

BEN733 - Base Benefit Audit − Base Benefits

The Base Benefits Audit Report provides a summary of potential employee data issues as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

The audits performed are Employees without Employment records, Employees without Job records, Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage, Employees with incorrect health plans set up on the Benefit Program Table, and audits for consistency of marital and dependent relationships.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

CBR005 - COBRA Event Report − Base Benefits

This report provides data about COBRA beneficiaries at the Event Level. The report will list all employees to whom an event has occurred. The qualified status indicates whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

CBR007 - COBRA Audit − Base Benefits

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and employees who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

CBR008 - COBRA Administration Error − Base Benefits

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

NDT004 - 401(k)/401(m) Nondiscrimination Testing − Base Benefits

Specify 401(k) or 401(m) for the report output.

If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001:* This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002:* You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003:* This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

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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