PeopleSoft®

EnterpriseOne Human Resources 8.9 PeopleBook

September 2003

EnterpriseOne
Human Resources 8.9 PeopleBook
SKU REL9EHR0309

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Human Resources Overview

J.D. Edwards understands that no such thing as a standard human resources department exists. Management depends on you to respond to workforce and industry changes, government regulations, and your organization's policies and procedures. The information that you need is unique and often complex.

The J.D. Edwards Human Resources system tracks the information that you need to meet both your immediate and long-range goals, as well as the demands of change and growth within your company and industry. You can access and compile the information quickly and provide quick answers to questions. Because the Human Resources system manages many mundane and repetitive tasks, you have more time to play a strategic role on your organization's management team.

In addition to the features that are included in the Workforce Management Foundation system, the Human Resources system provides the following features:

- Recruitment processing
- Requisition management
- Applicant tracking
- Position budget management
- Compensation management
- Pay-grade step progression
- Competency management
- Performance management
- Health and safety management

Human Resources System Integration Overview

The J.D. Edwards Human Resources and Payroll systems integrate seamlessly and share a central database. This integration provides the following advantages:

- Eliminates redundant data entry
- Makes business practices more efficient
- Enables the staff to focus its attention and efforts on other activities

To facilitate data entry for both Payroll and Human Resources system users, you enter a great deal of human resources-related information into the Workforce Management Foundation system. This system contains the central database for all of the information that human resources and payroll users typically share. For example, you use the foundation system to track the following information:

- Complete employee information
- Job information
- Pay type, deduction, benefit, and accrual (PDBA) information

- Time accounting information

The Human Resources system contains additional features, such as benefits administration, recruitment management, and position control, that are specific to human resources users.

Both human resources and payroll users can enter information into the foundation system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need to perform their jobs. Typically, your system administrator sets up system security during system implementation. The system administrator can set up security for an entire form, for individual fields on a form, or for certain programs, based on a user's role in the organization.

To simplify your processes and facilitate communication within your organization, the Human Resources system also integrates with other J.D. Edwards systems, including the following systems:

Address Book You use the Address Book system to maintain employee information such as name, address, and tax ID.

General Accounting You can use the Human Resources system to create salary budgets by business unit and update them in the general ledger.

Accounts Payable You can set up the Payroll system, which is closely integrated with the Human Resources system, to create A/P vouchers for deductions and benefits that occur during payroll.

The following table shows how features of the Human Resources system integrate with the Benefits Administration feature and the Payroll system:

Workforce Management System Integration	Benefits Administration	Human Resources	Payroll
• Quick Hire		X	
• Pay Types, Deductions, Benefits and Accrual Setup	X		X
• Time Entry			X
• Automatic Accounting Instructions			X
• Job Information	X	X	X
• Employee Information	X	X	X
• Employee Self-Service	X	X	X
• Employee History and Turnover Tracking		X	

See Also

- *System Features* in the *Workforce Management Foundation Guide* for more information about features that are common to human resources, payroll, and time accounting.

Workflow

The workflow feature provides the ability to automate virtually every business process. With workflow, companies are no longer forced to rely on paper routing through interoffice mail and voice mail messages.

For instance, to change an employee's salary in the past, a compensation specialist had to route a change request form to the appropriate manager by way of interoffice mail and wait for the manager to approve the change and reroute the form back to the human resources department. The manager might meanwhile leave several voice mail messages to determine the status of the request. After the human resources department received the approved form, the compensation specialist then updated the salary change in the human resources database. Often, the compensation specialist needed to make retroactive adjustments to compensate the employee for time that was lost during the approval process.

Using workflow, a salary change can be immediately requested and approved using e-mail. After it is approved, the salary change can be automatically updated in the database.

Using workflow, companies can eliminate many unnecessary steps in their business processes, thereby saving time and money. Workflow processes can easily be created and customized to streamline nearly every business practice.

Self-Service

Self-service applications transfer many responsibilities from human resources staff directly to employees. For example, when employees get married, they might need to change their name, address, tax withholding, and benefit elections. Using self-service, employees can make these changes to the system through their company's intranet site, rather than filling out paperwork in the human resources department and having a clerk enter the changes into the system.

Self-service applications can be set up to initiate workflow processes. For example, when an employee address change reflects a move to a different taxing locality, a workflow message can be automatically generated to notify the payroll department.

See Also

- *Self-Service Overview* in the *Workforce Management Self-Service Guide* for more information about self-service features

Flexibility

One of the most important features of the J.D. Edwards solution is the flexibility of the system. Instead of relying on programmers and system analysts, end-users can easily customize forms on their desktop to meet their individual needs.

You can set processing options to customize operations. When an organization's needs or business processes change, you can change the system to reflect those needs and processes within minutes. This flexibility enables the J.D. Edwards system to remain the comprehensive solution in the growing and changing world of human resources.

Human Resources - The Competitive Advantage

The following table presents typical problems with tracking human resources information, as well as the J.D. Edwards business activator that resolves each problem, and the return on investment from using the J.D. Edwards Human Resources system.

You must track data that is needed to maintain Affirmative Action plans.	You can ensure compliance with Affirmative Action plans by tracking data that is updated annually for current employees, former employees, and applicants. You can track ethnicity, gender, veteran status, and disability status. You can use this information, as well as reasons for changes, turnover statistics, date changes, and other country-specific data changes within the employee information to compile statistics needed for Affirmative Action plan reports. You can also run point-in-time reports to capture data as of a specific date. Affirmative Action plan reports include Workforce Analysis, Affirmative Action Exception, and Hired Applicants by EEO Job Category. The system saves you time and the research effort that you usually spend compiling data.
Your company needs to review this year's budget and estimate one for next year. This effort is time-consuming and often based on guesswork.	Your managers can use the Create Next Year's Budget program (R081820) to establish a new budget that is based on the existing position structure, and they can even build in an automatic base salary increase. Using the Cross Year Budget Comparison program (R081430), you can determine whether trends exist within the budget from one year to the next, which helps to evaluate the forecast for next year. Using the Work with Position Activity form (W08111A), your managers can review the activity that has occurred within a position for the previous year. Using Position Control, your managers can review the positions that are within their budgets, and can then review how much one person's budgeted and actual salary affects the total budget for the department. You save time with the automated budgeting measures, and you increase the accuracy of the budget information.
You must track the skills and accomplishments of each employee and be able to access that information at the time that such skills are needed.	You can use the Competency Management feature to maintain a bank of employee skills and accomplishments and to search for specific skills. The system allows time and cost savings and uses employee resources better. Lengthy research and tracking efforts are not needed, and efficiency is increased because you can search for specific skills and experience within the workforce. Employees can use employee self-service to update their competencies and skills.
Your managers must complete	Managers can use the Competency Management feature to

accurate performance appraisals that reflect the skills and performance achievements of the employees.	enter the skills and accomplishments of each employee and the competencies required by the jobs in which employees work. You can develop job descriptions from the competencies that are required for the job, and from the job descriptions you can create performance evaluations. Because you can respond quickly to a market or organization change by reallocating resources, your company can continue to remain competitive. The system improves accuracy and consistency in evaluations and increases employee morale. Managers can use self-service to complete performance appraisals online, as well as to be notified of any upcoming reviews for their direct reports.

Understanding User Defined Codes for Workforce Management Systems

Many fields throughout the Workforce Management systems accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of your business environment.

User defined codes are stored in tables that relate to a specific system and code type. For example, 07/PY represents system 07 (Payroll) and user defined code type PY (Pay Cycle Codes). User defined code tables define which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message. For example, in the Pay Cycle field, you can enter only those codes that are included in user defined code table 07/PY.

You can access all of the user defined code tables through a single user defined code form. After you choose a user defined code form from a menu, you can change the system code and user defined code type to access another user defined code table. The system stores user defined codes in the User Defined Codes table (F0005). You can also print a list of all user defined code tables to review.

Caution

User defined codes are central to J.D. Edwards systems. You must be thoroughly familiar with user defined codes before you change them.

You might need to set up some additional user defined codes that are specific to the countries in which you conduct business.

See Also

- *User Defined Codes* in the *Foundation Guide* for complete instructions for setting up user defined codes
- The global solutions guide for your country for country-specific information about user defined codes

User Defined Codes for Human Resources

The following user defined codes apply specifically to the J.D. Edwards Human Resources system.

Applicant Status (08/AS)

You use applicant status codes to define steps in the hiring process, such as initial contact and first interview, that the applicant has completed. When you enter or change the status of an applicant on the Applicant Information form (W08401C), the system adds a record to the supplemental data type for applicant status. You can use supplemental data to review the history of changes made to the applicant status field.

Approval Type (05/AP)

You use approval type codes to specify the type of change that needs approval. For example, you might use COMP as the approval type code for a compensation change.

Based Date from Length of Service (08/RW)

You use based-on date from length of service codes to identify the date to use when calculating an employee's length of service. For example, for some calculations, you might consider length of service to be the time that the employee has spent in his or her current job. Therefore, you might use a code to specify the data item Date in Current Job to calculate length of service. You might also use hire date or start date if you are calculating length of service that is based on the time that the employee has spent with the company.

Branch/Location (01/01)

You use branch or location codes to define the branch or geographic location for which an applicant is being considered. This code can be helpful for tracking and reporting applicant information. For example, by using this information, you can track which branch or location has the best applicant response.

Budget Status (08/PC)

You use budget status codes to indicate the status of position budgets. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or an approved requisition. Positions with a closed budget status are not included when you run the Create Next Year's Positions program (R081820).

Candidate Status (08/CN)

You use candidate status codes to track the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from UDC 08/CN. You can group candidate requisition status codes based on the hard-coded special handling code values in the table. The following table lists these hard-coded values:

CAN	Any candidate code
DET	Any code that indicates that the position is detached or no longer filled
FIL	Any code that indicates that the position has been filled

REJ	A code that indicates that the candidate is rejected
TMP	A code that indicates that the position is filled temporarily

Candidate requisition status codes that have a special handling code of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to Filled and Closed.

Compensation Model Types (08/PM)

You use compensation model type codes to designate the type of compensation model that you create. You can create the following three types of compensation models:

- Public. Can be viewed by the owner of the model, as well as other employees.
- Master. Used for final submission.
- Private. Can be viewed only by the owner of the model.

Data Item for Column or Row Factor (08/RH)

You use data item column and row factor codes to designate the data items that you are using in the Define Increase Type Guidelines program (P08820). Codes entered in this user defined code table should match the data item names of the fields that you want to use to define compensation review guidelines. For example, if an employee's performance appraisal level is used to determine increase guidelines, you would enter data item PAPL in UDC 08/RH.

Establishment Search Types (08H/ES)

You use establishment search type codes to define the search types that can be used as establishments for health safety management reporting purposes. For example, if companies are the only organizational unit within your organization that can be considered establishments for health safety management reporting, you would enter the search type code that defines company, as it is set up in UDC 01/ST, in UDC 08H/ES. Similarly, if both business units and companies can be considered establishments, you would enter the codes for business unit and company, as they are set up in UDC 01/ST, in UDC 08H/ES. All codes entered in UDC 08H/ES must first be set up in UDC 01/ST.

Hazardous Material Codes (08/HM)

You use hazardous material codes to specify the type of hazardous chemical or material, if any, that is involved in a work-related accident.

Input Method Codes (08/RB)

You use input method codes to determine the type of entry that you use for basic compensation calculations. Examples of codes that you might enter are Fixed Amount and Percentage.

Method of Application (08/MA)

You use method of application codes to define how an applicant applied for a job within your organization. Examples of codes that you might use for methods of application are Phone, Fax, Mail, and In Person.

Occupational Illness (08/H5)

You use occupational illness codes to define the exact nature of an occupational illness for health safety management reporting purposes. The sequence of the illness codes that J.D. Edwards provides corresponds exactly to the sequence on the OSHA 300 Summary report. If you plan to print the OSHA 300 Summary report that J.D. Edwards provides and send it to the US Department of Labor, you should not change the sequence of the codes. For example, you can change user defined code A, Skin Disease or Disorder, to code R, Rash, if that better meets your needs. However, the corresponding column on the OSHA 300 Summary report always refers to Occupational Skin Diseases or Disorder. If you are not sending the report to OSHA, you can change the codes, descriptions, and sequence to suit your organizational needs.

Occurrence Location (08/H2)

You use occurrence location codes to define the exact physical location where an event (injury or illness) occurred. Examples of occurrence locations are the computer room, loading dock, and cafeteria. Occurrence location codes are used in health safety management reporting.

Part of Body (08/H4)

You use part of body codes to indicate the part of the body that is affected by a work-related injury or illness. Examples of part of body codes include Right Hand, Left Foot, and Lower Back. This information is used in health safety management reporting.

Pay Type Categories (05/V1)

You use pay type category codes to group pay types into predefined categories that are used in the standard verification of employment letter. Pay type category codes include base, overtime, commission, bonus, and other pay.

Position Status (08/PL)

You use position status codes to define the current activity level of a position. When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field to indicate that the position is vacant.

Requisition Status (08/RS)

You use requisition status codes to describe the status of the position that is associated with a requisition. J.D. Edwards provides several codes that you can use for requisition status purposes. The following two of these codes are hard-coded and should not be changed:

- Approved (AA)
- Filled and Closed (99)

Statuses that indicate that a requisition is approved should begin with the letter A. If you are using the Enterprise Workflow Management system to automate the process of approving requisitions, the system automatically updates the requisition status when the appropriate person approves the requisition. This update overwrites any existing value in the field.

Rounding Rule Code (08/RR)

You use rounding rule codes to specify the rounding rule for an increase amount or a prorated amount. If you use prorating in the compensation review, the prorate amount is rounded. Otherwise, the increase amount is rounded.

Setup Subclass (08/T2)

You use setup subclass codes, along with employee setup task codes, to define tasks that must be performed in the Manager's Employee Setup Workflow process. For example, to further define the employee setup task "setup computer," you might use a setup subclass code to identify the type of computer that should be set up.

Setup Task Status (08/S2)

You use setup task status codes to identify the status of a task in the Manager's Employee Setup Workflow process. Examples of setup task status codes are Pending and Complete.

Setup Task Types (08/T1)

You use setup task type codes to identify primary categories or classifications of employee setup tasks. For example, you might use the setup task type code IT to categorize a task as something that needs to be completed by an IT employee, such as setting up a computer.

Recruitment Process Features

While many organizations are accustomed to using a paper-based process to organize their recruiting efforts, the J.D. Edwards system offers an automated solution.

The requisition, application, and hiring processes are automated and paperless in the system. Using J.D. Edward's features, such as Enterprise Workflow Management, managers no longer need to notify human resources about vacancies. The managers can access the system directly, create electronic requisitions, and forward them by e-mail to human resources and the approving managers. With electronic approvals, the human resources department knows immediately when the approval has been granted. When this approval occurs, a recruiter can begin to search for candidates and can electronically attach an applicant record to the requisition as people submit resumes.

With each step of the applicant evaluation process, a human resources representative can update the requisition with new information, such as "Applicant has completed second interview." Using the Applicant Supplemental Database, the human resources representative can include additional company-specific information in the applicant's record, such as scores on skills evaluation tests, competency information, and previous job experience. Using the Supplemental Data Multiskill Search program (P080250), the human resources representative can quickly assess those applicants whose experience and education most closely match the requirements of the job. Reporting on applicant demographics is easy using J.D. Edward’s various standard reports, which are based on the applicant records that the human resources representative has entered throughout the recruiting process.

Converting a candidate to an employee within the system is an easy process. The human resources representative transfers the data that has already been entered for the candidate to the employee database. The human resources representative is then prompted for other key employee information that is required. Throughout this process, managers and approving authorities can access the system to review the status of the search and review the qualification of the applicants.

The recruitment process includes requisitions and applicant information.

Requisition Management

You enter a requisition to begin the process of filling a vacancy within your organization. A requisition is a record or document that contains information about the open position (an employee's assignment for a fiscal year) and job (the duties that an employee performs for your organization). A vacancy is a job opening or unfilled headcount (number of people) in a position.

After you enter a requisition, you typically need to wait for the appropriate person to approve it before you can begin the process of filling the requisition. Enterprise Workflow Management automates tasks that were formerly paper-based. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network. You can track a requisition from its initial creation to its approval or rejection to its close.

You can associate a candidate with one or more requisitions. When you hire an applicant or transfer an employee to a new position, the system automatically indicates that the requisition is closed.

Because recruiting is expensive, you need to know where your efforts have been most effective. You can track how long a requisition is open before it is filled. You can also track the costs associated with filling the requisition, such as advertising, travel, and recruiter fees.

Entering Requisition Information

You enter requisition information to begin the process of filling one or more vacancies within your organization. The requisition contains job and position information that you can use to match a candidate to a vacancy.

You can also track additional information that is unique to your organization or your industry. For example, if you need a senior consultant who speaks fluent Spanish, you can track Spanish fluency on the requisition.

To help you manage your workflow, you can enter requisition information before the appropriate manager has approved it and indicate that it is waiting for approval. Then, after the manager approves or rejects the requisition, you can update its status.

You can use Enterprise Workflow Management to facilitate the process of getting approval for a requisition. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network.

After you enter requisition information, you can review the information to verify that it is correct. You can review detailed information about individual requisitions or about all of the requisitions for a specific business unit or job type. For example, you can review all of the requisitions in business unit 701 to determine which of them have been approved and the name of the person who approved them.

Entering Initial Requisition Information

You enter initial requisition information to identify a new vacancy within your organization. For example, you might enter the following types of initial requisition information:

- Fiscal year
- Home business unit
- Job type
- Job step

You can also attach the following types of objects to a requisition:

- Text documents
- Scanned images
- Links to other J.D. Edwards applications and other software packages

For example, you can attach a Microsoft Word document that lists approval or rejection information for the requisition.

Basic requisition information is the minimum amount of information that you should track. It includes information such as the status of the requisition and the job to which it applies. Additional information includes optional items, such as pay information and information that is unique to your organization.

► To enter initial requisition information

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, click Add.
2. On Requisition Information, complete the following field to assign a specific requisition number:
   - Requisition Number

   If you leave this field blank, the system assigns the next available number.
3. Click the Primary Information tab and complete the following fields:
   - Requisition Status
   - Home Business Unit
   - Security Business Unit
   - Requested By
4. Complete any of the following fields, as necessary:
   - Requisition Date
   - Effective From Date
   - Effective Thru Date
   - Fiscal Year
   - Position ID
   - Job Type/Step
   - Approved By
   - Headcount
   - Approval Date
5. Click the Secondary Information tab and complete any of the following fields, as necessary:
   - Pay Grade/Step
   - Pay Class(H/S/P)
   - Overtime Exempt
   - Expected Salary
   - FTE

- Hours
- Last Filled By
- Filled Date

6. To attach objects to the requisition, choose the Additional Information tab, and then enter the information.
7. Choose the Category Codes tab and complete any applicable fields.
8. To complete the requisition, click OK.

   If you have enabled Enterprise Workflow Management for requisition approvals, and you entered a "waiting for approval" requisition status, the Requisition Workflow Pending Review Notification form appears when you save the requisition.

9. On Requisition Workflow Pending Review Notification, click OK.

See Also

- *Working with Media Objects* in the *Foundation Guide* for information about entering text and attachments
- *Updating the Status of a Requisition* in the *Human Resources Guide* for information about using the workflow process to approve a requisition

Processing Options for Requisition Information (P08102)

Defaults Tab

These processing options allow you to specify the default information that the system uses.

1. Enter a '1' to default Pay Grade, Pay Grade Step, Pay Class and Overtime Exempt from the Job Information Table.

0 = Do not use default data. (Default if blank)

1 = Use default data

Use this processing option to specify whether the system enters default job information in the requisition record when you change the job type or job step. The system supplies default values from the Job Information table (F08001) for the Pay Grade, Pay Grade Step, Pay Class, and Overtime Exempt fields.

2. Address Number of Default Approver

Use this processing option to specify the address number of the employee who approves requisitions. To override this approver, you can add recipient rules to the workflow process.

3. Address Number of Default Recruiter

Use this processing option to specify the Address Number of the recruiter. The workflow process sends an e-mail message to the recruiter. To override the recruiter you can add recipient rules to the workflow process.

User Level Tab

This processing option allows you to specify whether a manager (employee) or a human resources administrator will use the application.

1. User level

1 = Manager/Employee Level

2 = HR Administrator Level

Use this processing option to specify whether a manager/employee or an HR Administrator will use the application. Valid values are:

1

Manager/Employee

2 or Blank

HR Administrator

If set to level 2 (Manager/Employee), and the Requisition is not approved (status WW), the Requisition Status will be disabled.

Entering Supplemental Data for Requisitions

From the Requisition Supplemental Data menu (G08BSDR1), choose the appropriate option.

Supplemental data is any type of additional information that you want to track about the following items or individuals:

- Requisitions
- Jobs
- Employees
- Applicants
- Dependents and beneficiaries
- Health safety management

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

Requisitions might include the following types of supplemental data:

- Requirements
- Approval steps
- Requisition notes
- Requisition activity
- Requisition review

The method that you use to enter supplemental data for requisitions is the same method that you use for any other type of supplemental data that you track.

See Also

- ❑ *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, and reviewing supplemental data

- *Reviewing Requisition Reports* in the *Human Resources Guide*

Working with Requisitions

After you enter basic requisition information, you typically need to wait for approval from the appropriate person before you can begin recruiting candidates. If you have enabled the workflow process for requisition approvals, the system automatically updates the status of a requisition. If you are not using the workflow process, you must update the status manually.

You can attach candidates' records to a requisition to track the progress of the candidates as you interview them and evaluate their qualifications. When you hire a candidate to fill a requisition, the system automatically updates the filled head count for the requisition. (The filled head count is the number of people who have been hired to fill the requisition.)

When you hire enough candidates to meet the head count for the requisition, the system automatically indicates that the requisition is filled and closed. You cannot hire candidates for a requisition that is filled and closed. If necessary, however, you can reopen a closed requisition by increasing its head count and changing the requisition status.

Updating the Status of a Requisition

Your organization might require that a new requisition be approved by a higher level of management before it can be filled. In this case, when you (the requestor) enter a requisition, you can indicate that it is waiting for approval. When the approving manager approves or rejects the requisition, the requisition status must be updated accordingly.

Typically, you wait until a requisition is approved before you begin searching for candidates to fill the requisition. The system does not allow you to hire a candidate to fill a requisition unless the requisition status is "approved."

The demonstration data for your system includes a workflow process for requisition approvals. You can enable this workflow process when you set up your system. If the workflow process is enabled, the following events happen after you enter a requisition:

- The system automatically notifies the person who is authorized to approve requisitions (the approving manager) that a requisition is waiting for approval.
- When the approving manager approves or rejects a requisition, the system automatically updates the requisition status. If the manager approves the requisition, the system also updates the Approved By field.

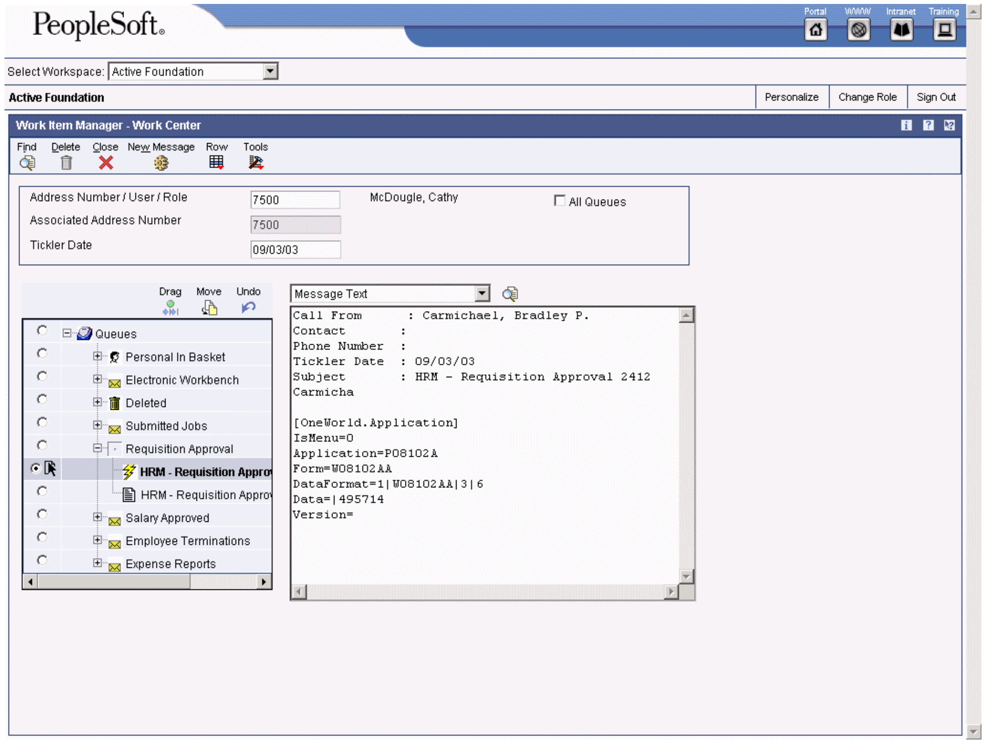
If you have activated this workflow process, you do not need to manually update the requisition status when the requisition is approved or rejected. Instead, the system automatically updates the requisition status for you. If you are not using the workflow process, you or the approving manager must manually update the status of the requisition.

► **To update the status of a requisition using workflow**

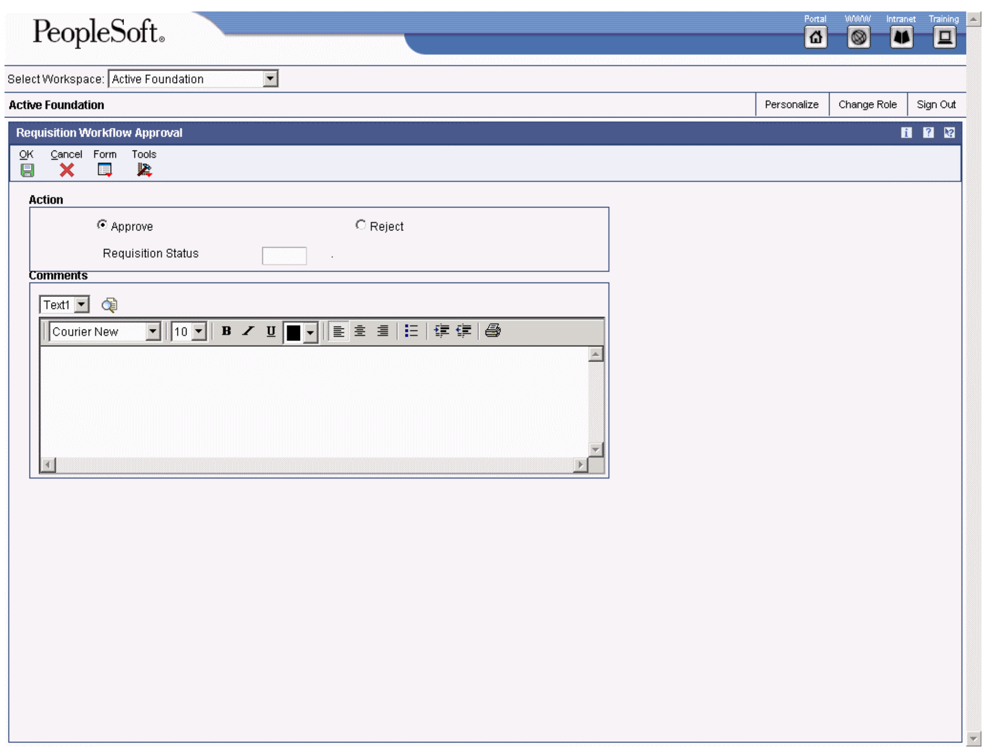
The following steps describe how the approving manager completes the workflow process after the requestor completes the steps for entering requisition information.

The approving manager receives a workflow message saying that a requisition is waiting for approval. The message containing the requisition appears in the Requisition Approval mailbox in the Work Center program (P012501).

From the Workflow Management menu (G02), choose Work Item Manager.



1. On Work Item Manager, to approve or reject the requisition, choose the message containing the requisition, and then click the Requisition Workflow Approval icon.
2. Click Requisition Workflow Approval on the right side of the form.



3. On Requisition Workflow Approval, click the following option:
   - Approve
4. Complete the following field:
   - Requisition Status
5. Enter an optional text message.

   The system stores the message text in an audit table so that you can refer to it later, if necessary.
6. Click OK.

   The system updates the requisition with the new status code, adds the name of the person who approved the requisition, and notifies the requestor that the requisition has been evaluated. If the manager approves the requisition, the system also sends a message to the appropriate recruiter.

► **To update the status of a requisition manually**

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition that you need to approve, complete one or more of the following fields and click Find:
   - Home Business Unit
   - Position ID
   - Requisition Number
   - Requisition Status
   - Job Type/Step
   - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, complete the following fields, and then click OK:
   - Requisition Status
   - Approved By
   - Approval Date

Attaching a Candidate Record to a Requisition

When you determine that a candidate might be suitable to fill a vacancy, you can attach the candidate's record to the requisition. Attaching candidate records to a requisition simplifies the process of tracking the status of each candidate as you interview and evaluate candidates for the vacancy.

After you attach candidate records to a requisition, you can easily review the status of all of the candidates who are being considered for a requisition. You can limit your review to include only applicants, only employees, or both applicants and employees. For applicants, you can further limit the search to include only those with a specific applicant status, such as applicants who have passed the tests that are required for employment with your organization.

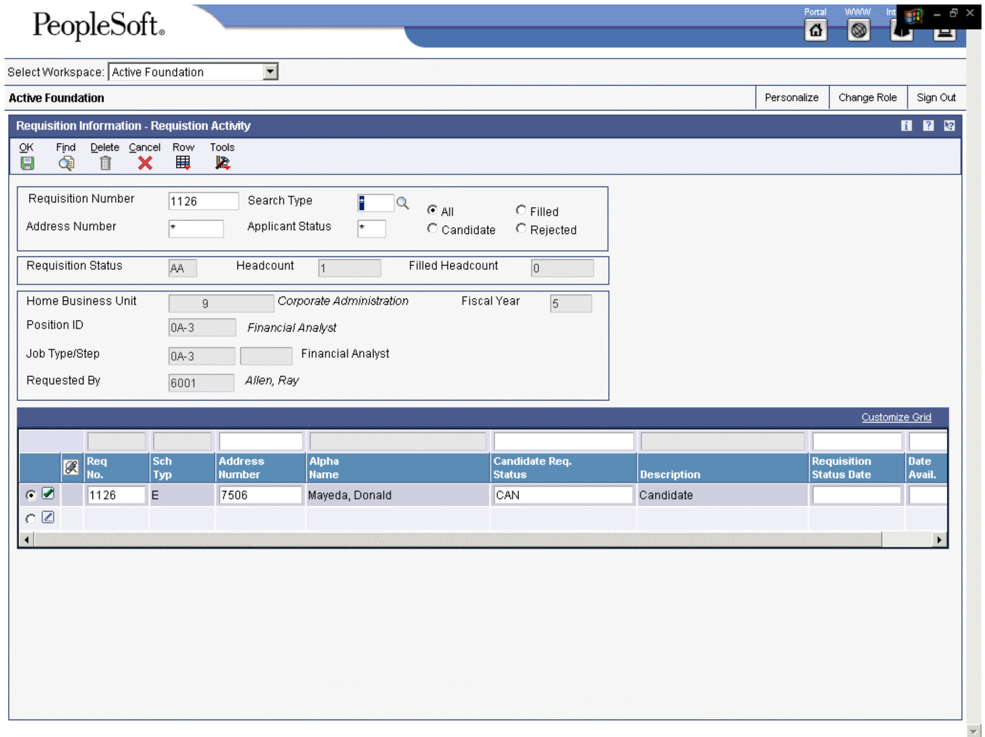
You can also update the candidate's requisition status as necessary. For example, when you decide that a candidate is not suitable for the vacancy, you can reject the candidate.

When you are ready to fill a requisition, you hire an applicant or assign an employee to the requisition. The system automatically changes the candidate's status to indicate that the candidate has filled the requisition.

► To attach a candidate record to a requisition

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition to which you need to attach a candidate record, complete one or more of the following fields and click Find:
    - Home Business Unit
    - Position ID
    - Requisition Number
    - Req Status
    - Job Type
    - Job Step
    - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, choose Req. Activity from the Form menu.



4. On Requisition Activity, complete the following field:
   - Address Number
5. Complete the following fields in the detail area of the form, and then click OK:
   - Candidate Req. Status
   - Requisition Status Date
   - Date Avail.

Reopening a Requisition

In some cases, you might need to reopen a requisition that has been filled and closed. For example, assume that you receive the necessary funding to increase the head count for a position that had previously reached its maximum filled head count. If you have a filled and closed requisition that references the position, you can save time by reopening the existing requisition instead of creating a new one.

▶ To reopen a requisition

From the Requisitions menu (G08BR1), choose Requisition Information.

1. On Work With Requisitions, to locate the requisition that you need to reopen, complete one or more of the following fields and click Find:
   - Home Business Unit
   - Position ID
   - Requisition Number
   - Requisition Status
   - Job Type
   - Job Step
   - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, change the information in the following field:
   - Requisition Status
4. Complete the following field and click OK:
   - Headcount

Reviewing Requisition Reports

After you enter requisition information, you can print reports to review the information and verify that it is correct. You can also review information about groups of requisitions, such as their approval status, their filled status, and the candidate records that are attached to them.

Reviewing the Requisition Supplemental Data Report (R080416)

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Supplemental Data Report.

To review complete information for one or more requisitions, print the Requisition Supplemental Data report. You can review this information online for a single requisition using the Requisition Supplemental Data Inquiry program (P08102). However, this report allows you to print information for multiple requisitions at one time.

You can list requisitions either by requisition number or alphabetically by requisition description. You also choose whether the report includes text information.

Reviewing the Requisition Data by Data Type Report (R080406)

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Data by Data Type Report.

To review a list of all of the requisitions that contain information in a particular supplemental data type, print the Requisitions by Data Type report. You can review this same information online using the Requisition Data by Data Type program (P050210).

Processing Options for Requisition Data by Data Type Report (R080406)

Options
Enter a '1' to bypass printing text information on the report.

Default of blank will print the text.

Reviewing the Requisition Review - Position Report (R081490)

From the Requisitions menu (G08BR1), choose Requisition Review - Position.

To determine the approval status of a group of requisitions, print the Requisition Review - Position report. You can print two versions of this report. One version lists the requisitions by job description, and the other version lists them by position description.

Processing Options for Requisition Review – Position (R081490)

Detail Type

1. Which field would you like to see on the report. Blank (default) = Position Description, 1 = Job Description.

Applicant Tracking

In today's job market, one opening in your company can result in hundreds of resumes. You need to be able to quickly identify the applicants who meet the requirements of an open requisition. With the J.D. Edwards Human Resources system, you can manage extensive information about each applicant, such as desired salary, available date, education, prior experience, and foreign language proficiency.

You can then search for applicants who meet specific criteria. The system's extensive search capabilities help you reduce a list of applicants to those whom you want to seriously consider. You can then provide your managers with a list of qualified applicants.

You can use the detailed information that you track about applicants to do the following things:

- Link applicants to requisitions
- Evaluate the qualifications of each applicant
- Meet government reporting requirements

You might track the following standard types of applicant information:

- Personal information, such as name, address, and tax identification number
- The job and position for which each applicant applies

- Governmental reporting information, such as that required to meet Equal Employment Opportunity (EEO) and Canadian Employment Equity requirements

The system also gives you the flexibility to track any other type of information that your organization needs. You can use the supplemental data feature to track entire categories of auxiliary information for applicants, such as job skills or professional licenses.

When you hire an applicant, the system automatically updates the person’s employee master record to indicate that he or she is an employee. You can also set up your system to require someone to enter payroll information before the hiring process is complete.

Entering Applicant Information

Before you can begin evaluating applicant information, you must add a record that contains personal information about the applicant to the database.

You can track detailed information about applicants so that you can evaluate applicants' qualifications and match applicants to open requisitions. You can also track the applicant information that you need to meet government reporting requirements.

After you enter initial information for an applicant, you can enter supplemental data, which is any additional information that you want to track for an applicant.

When you hire an applicant, the system can update one of the following tables:

- Unedited Quick Hire Transaction File (F060116Z)
- Employee Master Information table (F060116)

If you click the Initiate Hire option after you add an applicant record, the system updates the Unedited Quick Hire Transaction File table. This table is part of the Employee Quick Hire program (P060116Q). The applicant record does not become an employee record in the Employee Master table until you run the Process Pending Employees report (R060116P). This report copies the applicant record from the Unedited Quick Hire Transaction table to the Employee Master Information table and changes the search type from applicant to employee.

The Unedited Quick Hire Transaction File table does not automatically update the Employee Master Information table, so you can review and revise the applicant records before they are copied to the Employee Master Information table. You can review and revise applicant records with the Employee Work File Revisions program (P060116P), and then run the Process Pending Employees report to update the Employee Master Information table (F060116).

If you click the Hire option after you add an applicant record, the system updates the Employee Master Information table and changes the search type on the record from applicant to employee.

See Also

- ❑ *Attaching a Candidate Record to a Requisition* in the *Human Resources Guide* for information about associating applicants with requisitions
- ❑ *Working with New Employee Information* in the *Workforce Management Foundation Guide* for information about updating the Employee Master table

Adding New Applicant Records

Before you can track applicant information or search for an applicant who has a specific skill, you must add a record for the applicant. This record includes the following personal information about the applicant:

- Job applied for
- Country code
- Date available to work

Basic information includes information about the applicant, such as the job for which the applicant is applying.

Address book information includes information such as the applicant's name, address, and phone number. Entering address book information automatically adds the applicant to the Address Book system. After you enter address book information for an applicant, you can locate the applicant's record in the database by name. You do not need to know the applicant number.

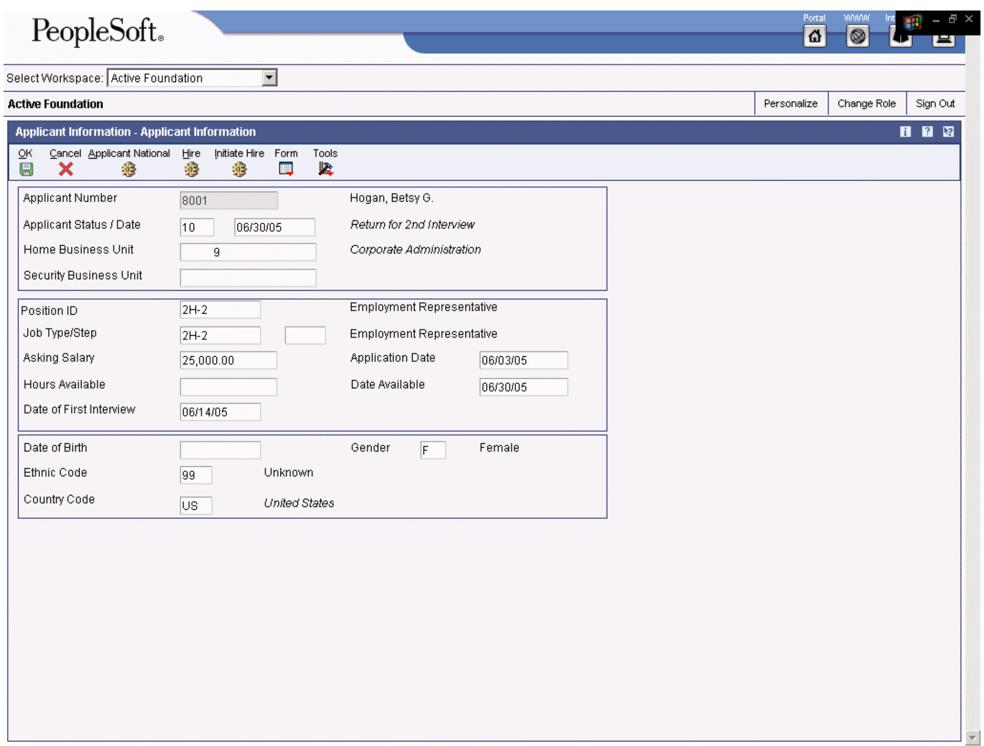
Country-specific information is information that is required only in the country where the applicant works. For example, in the United States, country-specific information includes information that is required for government reporting, such as veteran and disability status.

Adding new applicant records includes entering basic applicant information, plus address book and country-specific information.

▶ To enter basic applicant information

From the Applicants menu (G08BA1), choose Applicant Information.

1. On Work With Applicants, click Add.



2. On Applicant Information, complete the following fields:
    - Applicant Number
    - Applicant Status / Date
    - Gender
    - Ethnic Code
    - Country Code
3. To associate the applicant's record with a specific job, complete the following fields:
    - Home Business Unit
    - Job Type/Step
4. Complete any of the following optional fields:
    - Security Business Unit
    - Position ID
    - Date Available
    - Date of First Interview
    - Asking Salary
    - Hours Available
    - Date of Birth
5. If you want to compare the applicant’s competencies with the competencies that are required for a particular job, choose Gap Analysis from the Row menu.
6. On Work with Employee Competency Gap Analysis, complete the following fields and then click Find:
    - Job Type/Step
    - Organizational Business Unit
    - Effective Date
    - Type Structure
7. Review the information, and then click OK.
8. On Applicant Information, to add text or objects to applicant information, choose Attachment from the Form menu.
9. On Media Object Viewer, click the Text button, enter the text, and then click Save.

When you enter applicant information, you can use the attachment feature to attach additional text or objects, such as a scanned copy of the applicant's resume, to the applicant record.

10. On Applicant Information, click OK.

After you have completed these steps, the Address Book Revision form appears. Follow the steps to enter address book information for an applicant.

Note

If you are using the J.D. Edwards Payroll system to report applicant information to the Equal Employment Opportunity Commission (EEOC), you must enter all applicants into the database, regardless of the applicant's qualifications.

After you have completed the steps to enter address book information for an applicant, the Work With Applicants form appears. Follow the steps to enter country-specific information for an applicant.

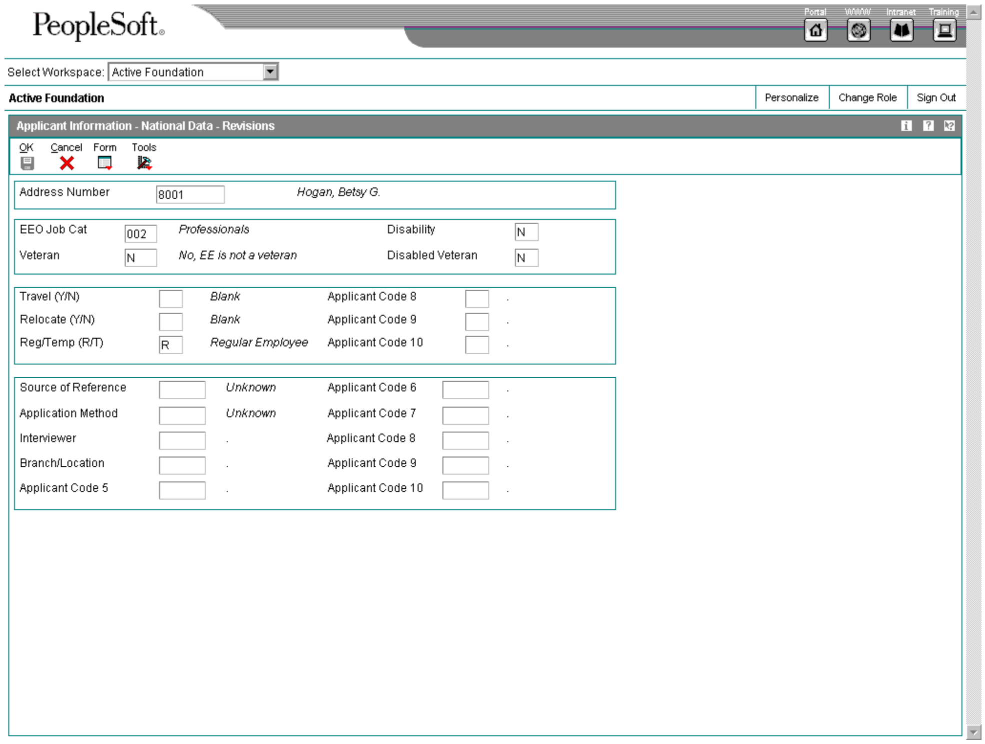
See Also

- *Reviewing Gap Analysis Online* in the *Human Resources Guide* for additional information about comparing the applicant’s competencies with the competencies that are required for a particular job
- *Working with Media Objects* in the *Foundation Guide* for information about entering text and attachments
- *Address Book Maintenance* in the *Address Book Guide* for more information about entering address book information for an applicant

► To enter country-specific information for an applicant

After you complete the steps to enter address book information for an applicant, the Work With Applicants form appears. You enter country-specific information for each applicant. When you enter country-specific information, the system displays fields only for the information that applies to the country code that you entered for the applicant. Many of the fields that appear on the Applicant Information - National Data - Revisions form are user defined fields that you can customize to meet the specific needs of your organization. The following steps apply to an applicant in the United States.

1. On Work With Applicants, locate and choose the applicant's record, and then click Select.
2. On Applicant Information, choose Applicant National from the Form menu.



3. On Applicant Information - National Data - Revisions, complete the following fields to enter government reporting information:
    - EEO Job Cat
    - Veteran
    - Disability
    - Disabled Veteran
4. Complete any of the following optional fields:
    - Travel (Y/N)
    - Relocate (Y/N)
    - Reg/Temp (R/T)
    - Source of Reference
    - Application Method
    - Interviewer
    - Branch/Location
5. Complete any of the other user defined fields, as necessary.

6. Click OK.

Processing Options for Applicant Information (P08401)

Hire Tab

These processing options allow you to transfer specific applicant information to the Employee Master Information table (F060116) or the Unedited Quick Hire Transaction File table (F060116Z) after you add an applicant record.

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1. Status Code

Use this processing option to specify the user defined code (08/AS) that your organization uses to indicate that an applicant is hired. When you complete the steps to hire an applicant, the system automatically updates the applicant's status with the code that you enter.

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2. Requisition Information

Default = No

1 = Yes

Use this processing option to specify whether you want the system to automatically transfer information that you entered for the requistion, including the position ID, home business unit, job type, job step, and security business unit, to the applicant's record when you enter an applicant.

When you hire an applicant, the system transfers this information to the applicant's employee record. Valid values are:

1

Yes. Transfer requisition information to the applicant and employee records.

Blank

No. Do not transfer requisition information.

If you enter 1 for this processing option, you must enter a requisition number for each applicant when you enter the applicant record.

3. Job Information

Default = No

1 = Yes

Use this processing option to specify whether you want the system to automatically transfer information that you entered for the job to the employee record when you hire an applicant. The system does not automatically transfer this job information to the applicant record. Valid values are:

1

Yes. Transfer job information to employee records.

Blank

No. Do not transfer job information.

If you enter 1 for this processing option, you must enter a job type for each applicant when you enter the applicant record. If your organization uses job steps, you must also enter a job step for each applicant.

4. Transfer Supplemental Data

   Default = No

   1= Yes

Use this processing option to specify whether you want the system to automatically transfer applicant supplemental data to the employee supplemental database when you hire an applicant. The system transfers the information that you entered in the applicant supplemental data types to the equivalent supplemental data types for employees. Valid values are:

1

Yes. Transfer supplemental data for applicants.

Blank

No. Do not transfer supplemental data for applicants.

5. Notification Message

   Address Book Number = Yes

   0 = No

Use this processing option to specify the address book number of the person that you want to notify when you choose Initiate Hire to hire an applicant. Typically, the person that you notify is the person who is responsible for entering employee information for new employees.

Delete Tab

This processing option allows you to automatically delete certain information.

1. Delete Supplemental Data and

   Address Book Record

   Default = No

   1 = Yes

Use this processing option to define whether you want the system to automatically delete the supplemental data that you entered for an applicant when you delete the applicant's record. Valid values are:

1

Yes. Delete supplemental data for applicants.

Blank

No. Do not delete supplemental data for applicants.

Add Tab

This processing option allows you to specify whether the system requires you to complete the Date of Birth, Gender, and Ethnic Code fields.

6. Date of Birth, Gender, and Ethnic Code Required

   Default = No

   1 = Yes

Use this processing option to specify whether the system requires you to complete the Date of Birth, Gender, and Ethnic Code fields when you enter applicant information. Valid values are:

1

Yes. Date of Birth, Gender, and Ethnic Code fields are required.

Blank

No. Date of Birth, Gender, and Ethnic Code fields are not required.

Note: Date of birth is required by Canada for tax purposes.

Versions Tab

These processing options specify the version for the Resource Competency Information (P05100), Competencies Gap Analysis (P08008), and Address Book Revisions (P01012) programs.

---

1. Resource Competency Information

   Version

   Blank = ZJDE0001

Use this processing option to define the version of the Resource Competency Information program (P05100) that you want to use when you add or change information. If you leave this field blank, the system enters the default version, ZJDE0001.

2. Gap Analysis Version

Blank = ZJDE0003

Use this processing option to define the version of the Competencis Gap Analysis program (P08008) that you want to use when you add or change information. If you leave this field blank, the system enters the default version, ZJDE0003.

3. Address Book Version

Blank = ZJDE0003

Use this processing option to define the version of the Address Book program (P01012) that you want to use when you add or change information. If you leave this field blank, the system enters the default version, ZJDE0003.

Entering Supplemental Data for Applicants

From the Applicant Supplemental Data menu (G08BSDA1), choose the appropriate option.

Supplemental data is any type of additional, user defined information that you want to track about the following items or individuals:

- Requisitions
- Applicants
- Employees
- Jobs
- Dependents

- Beneficiaries
- Health safety management

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

You might include the following types of supplemental data for applicants:

- Applicant status history
- Work experience
- Education
- Job skills
- References

The method that you use to enter supplemental data is the same for any other type of supplemental information that you track.

See Also

- *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Applicant Reports* in the *Human Resources Guide*

Hiring an Applicant

When you offer an applicant a job and the applicant accepts, you need to indicate that the applicant is hired. When you hire an applicant, you can either complete the employee record yourself or send a message to the person in your organization who is responsible for creating new employee records in the database.

When the person who hires applicants typically is the same person who creates new employee records, you can save time and eliminate redundant data entry by setting up your system to automatically copy applicant information to the employee database when you hire an applicant. You can copy both initial applicant information, such as name, address, and position information, and applicant supplemental data.

Because you typically need to retain applicant records for government reporting requirements, copying applicant information to the employee database does not delete the information from the applicant database.

When you hire an applicant, you can enter additional employee information. To ensure that you enter the information that is required to process the employee through a payroll cycle, you can use a processing option to require someone to enter that information before the hiring process is complete.

After you hire an applicant, the system automatically updates the person's Address Book record to indicate that he or she is an employee.

You can also efficiently hire a high volume of new employees using the Employee Quick Hire program P060116Q).

See Also

- *Adding Employee Records for Applicants, Rehires, and New Hires* in the *Workforce Management Foundation Guide*

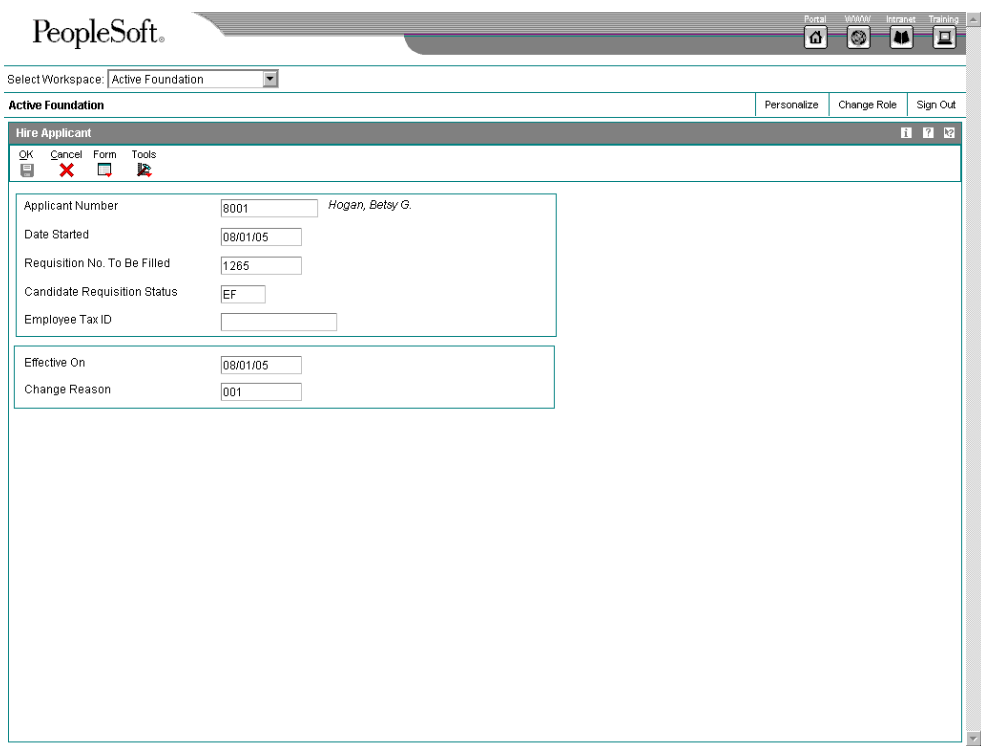
Before You Begin

- ❑ Set up your system to transfer selected types of supplemental data when you hire an applicant. See *Setting Up Cross-Reference Tables for Supplemental Data* in the *Workforce Management Foundation Guide.*
- ❑ Review the processing options for this program and for the Employee Information program (P0801). To transfer supplemental data for applicants to the employee supplemental database, you must set up the appropriate processing options.
- ❑ Verify that the applicant status is set up in the Supplemental Data Setup program (P00091). See *Defining Types of Supplemental Data* in the *Workforce Management Foundation Guide*.

► To hire an applicant

From the Applicants menu (G08BA1), choose Applicant Information.

1. On Work With Applicants, locate the applicant.
2. Choose the applicant's record, and then click Select.
3. On Applicant Information, do one of the following:
   - Click the Hire button to hire the applicant and enter complete employee information for the applicant.
   - Click the Initiate Hire button to hire the applicant and send an e-mail message to the person who needs to enter complete employee information for the applicant.



4. On Hire Applicant, complete the following fields and click OK:
   - Date Started

- Requisition No. To Be Filled
- Candidate Requisition Status
- Effective On
- Change Reason

5. Click OK to either hire the applicant or send notification to the person who will complete the hiring process.
6. On History Effective Date Confirmation, click OK.
7. On Hire Applicant, click OK.

   If you clicked the Hire button to hire the applicant, the Employee form appears.

8. On Employee, complete the remaining steps to add a new employee record.

See Also

- ❑ *Adding Employee Records One at a Time* in the *Workforce Management Foundation Guide* for more information about adding a new employee record

Creating Applicant Letters

To send written information to applicants, you can use the mailmerge features of your J.D. Edwards software to efficiently produce letters for small, infrequent mailings. Using the Print Applicant Letters program (P08450), you can choose one or more applicants, specify a form letter, and print customized copies for each recipient. You can also choose a specific group of applicants for whom you want to print letters, such as all applicants who have been called for an interview.

You can use either of the following two methods to customize the contents of letters that you print for specific individuals:

- Enter direct changes to a selected form letter just before you print it.
- Edit an existing form letter or create a new letter using the MailMerge Workbench Setup program (P980014).

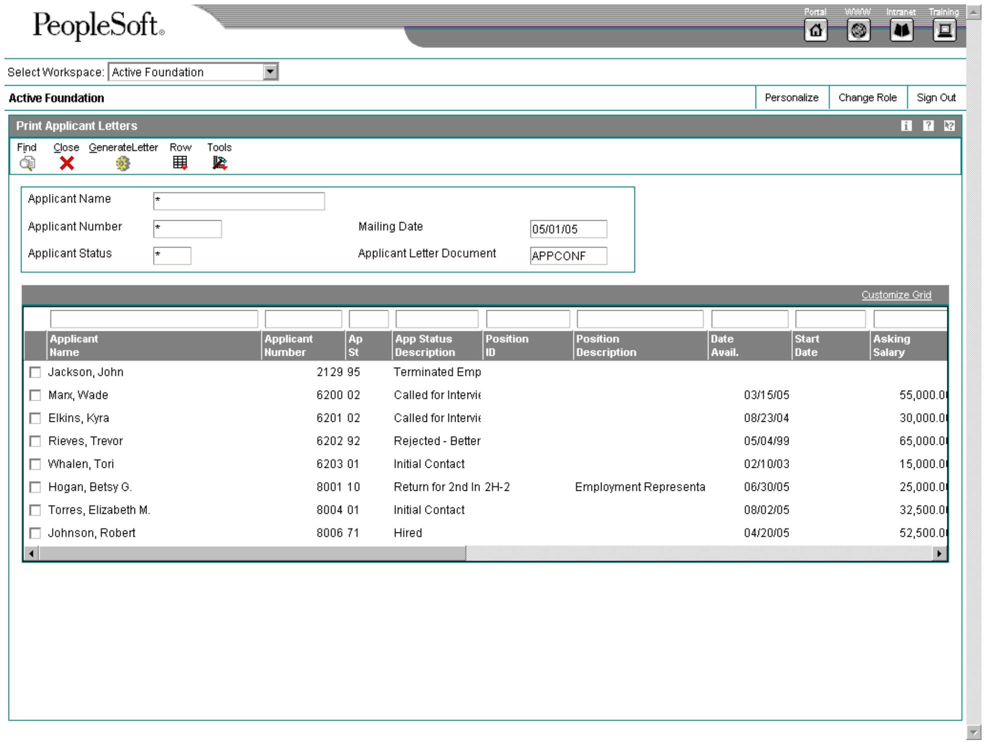
Before You Begin

- ❑ Create or customize letters that you can use with the merge process. See *MailMerge Workbench* in the *Foundation Guide*.

► To create an applicant letter

From the Applicants menu (G08BA1), choose Print Applicant Letters.

1. On Print Applicant Letters, to create multiple letters, click Find to display all applicants, and then choose multiple applicant records from the detail area.



2. To create a single letter, complete one or more of the following fields, click Find, and then choose the applicant record:
   - Applicant Name
   - Applicant Number
   - Applicant Status
3. If you want to print a date other than the current system date on your letter, complete the following field:
   - Mailing Date

     If the letter has been set up to use this value, this date prints on your letter.
4. Complete the following field to choose the desired letter template:
   - Applicant Letter Document
5. Choose Generate Letter from the Row menu.

   The system displays a copy of your letter, including the merged information. You can modify the letter if necessary.
6. On MailMerge, choose Print from the Form menu.

See Also

- ❑ *MailMerge Workbench* in the *Foundation Guide* for more information about using the MailMerge feature

Processing Options for Print Applicant Letters (P08450)

Process Tab

This processing option specifies the letter template to use for the applicant letters.

Applicant Letter Document Name

Use this processing option to specify which letter template will be used when generating applicant letters.

Reviewing Applicant Reports

To review detailed information about applicants, you can print applicant reports. The following tasks are easy to do with these reports:

- Search for applicants who have specific skills
- Satisfy government reporting requirements
- Evaluate the hiring practices of your organization

To review a summary of applicant information, as well as detailed supplemental information for each applicant, you can print applicant listing and applicant supplemental data reports. You can review applicant supplemental information by individual employee or by data type.

To satisfy the requirements of the EEOC, you can print the Applicant Listing - EEO Listing report (R084483). You use this report to show that your organization provides equal opportunities for all of the applicants who apply to your organization. Managers within your organization can also use these reports to analyze hiring and promotion practices within your organization.

See Also

- *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about reviewing supplemental data online
- *Working with Multiskill Search* in the *Workforce Management Foundation Guide* for information about locating applicants who meet multiple criteria

Reviewing the Applicant List Report (R084480)

From the Applicants menu (G08BA1), choose Applicant List.

To review detailed applicant information, print the Applicant List report. You can use this report to list all of the applicants or just specific applicants, such as those who have reached a certain point in the hiring process. This report lists detailed information, such as the applicant's available date and asking salary.

Reviewing the Applicant Listing by Position Report (R084481)

From the Applicants menu (G08BA1), choose Applicant Listing by Position.

To review a list of all applicants who have applied for a specific position, print the Applicant Listing by Position report.

Reviewing the Applicant List - Job Type/Step Report (R084482)

From the Applicants menu (G08BA1), choose Applicant List-Job Type/Step.

To review a list of all of the applicants, arranged according to their job type and step, print the Applicant List-Job Type/Step report. This report includes the number of applicants in each job type and step, along with the status of each applicant.

Reviewing the Applicant Supplemental Data Report (R080411)

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Supplemental Data Report.

To review complete supplemental information for one or more applicants, print the Applicant Supplemental Data report. This report compiles all of an applicant's supplemental information into an easy-to-read, resume-style format.

The information that prints on this report is the same information that you can review online by using Applicant Supplemental Data Inquiry program (P08401). However, the report allows you to print information for multiple applicants at the same time.

Processing Options for Applicant Supplemental Data Report (R080411)

Processing Tab

These processing options specify the information that prints on the report.

1. Enter a '1' if you wish to bypass printing the Tax ID. (Default of blank will print the number.)

Use this processing option to specify whether to print the tax ID on the report. A default of blank automatically prints the tax ID. Valid values are:

Blank

Print the tax ID

1

Do not print the tax ID

2. Enter a '1' if you wish to bypass printing the Asking Salary. (Default of blank will print the number.)

Use this processing option to specify whether to print the asking salary. A default of blank automatically prints the asking salary. Valid values are:

Blank

Print the asking salary

1

Do not print the asking salary

3. Enter a '1' if you wish to bypass printing any extended narrative associated with the data.

Use this processing option to specify whether to print any extended narrative text that is associated with the data. A default of blank automatically prints any extended narrative text. Valid values are:

Blank

Print extended narrative text

1

Do not print extended narrative text

Reviewing the Applicant Data by Data Type Report (R080401)

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Data by Data Type Report.

To review a list of all of the applicants who have information entered in a particular supplemental data type, you can print the Applicant Data by Data Type report. For example, you can review applicants whose supplemental data includes job skills information. The information that prints on this report is the same information that you can review online using Applicant Data by Data Type program (P050210).

You can review information either by data type or by applicant. For each applicant, the system lists data types in alphabetical order.

Processing Options for Applicant Data by Data Type Report (R080401)

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Position Budget Management

A position is an employee's assignment for a fiscal year. You use positions to budget for employee salaries. Positions and their budgets are also called position budgets.

Position control is the process of creating, maintaining, and monitoring position budgets. You do not need to create positions to use your Human Resources and Payroll systems. However, to use positions, you must have a position budget.

You define a position budget to establish, monitor, and control budgets for employee position assignments. To enable your accounting department to track the salary amounts that are budgeted for positions, you must define position accounts. You define position accounts either in the Human Resources system or the General Accounting system, depending on which department within your organization is responsible for determining salary amounts for position budgets.

You can attach employee records to a position budget and then review position budget information to ensure that the salary, hours, and full-time equivalent (FTE) for your employees compare favorably to those that you budgeted for the position.

You can revise position budget information when a position budget changes or when you need to correct a data entry error.

To illustrate the reporting relationships among the positions in your organization, you can create parent/child relationships by position. Documenting parent/child relationships can help you determine whether you need to create additional positions or reduce the number of positions in your organization.

The Human Resources system provides comprehensive tools for position budget management so that you can improve your management of employee salary costs. The system allows you to perform the following tasks:

- Review the approved headcount for a position before you create a requisition
- Track position effective dates and the resulting budget calculations
- Automatically update position activity when you change an employee record
- Compare projected salaries through year-end with the approved budget for each position
- Determine year-end costs by developing projections based on hours, salary amounts, headcount, or full-time equivalents
- Track positions and headcount by company and department
- Post position budgets and accounts to the general ledger

Defining Position Budgets

You define position budgets to establish, monitor, and control budgets for employee position assignments. In the same way that a project manager allocates time and material resources for a special project, your organization can create position budgets for its employee resources. For each position, your organization plans for and manages the following types of components:

- Salary expenditures

- Hours worked
- Full-time equivalents (FTEs)
- Headcount (number of employees)

When you define a position budget, the system updates the Position Master table (F08101).

You can define your position budgets manually; or you can let the system automatically define them for you, based on the job and employee information that you have already entered into the system.

When defining a position budget, complete the following steps:

1. Identify the need for one or more employees
2. Approve the need for the employees
3. Set up a budget for the employee salary and hours worked
4. Assign the appropriate FTEs and headcount to the position
5. Monitor hiring to ensure that you do not exceed the position budget

For each fiscal year, you can define only one position budget for each position ID within a particular business unit. However, you can use the budgeted FTE to budget for more than one employee to be assigned to a particular position ID.

After you activate the appropriate system options and create your position budgets, the system automatically creates a position activity record whenever you enter a position ID for an employee. The system uses the values in the activity record to generate the projected year-end values. The activity record includes the following information:

- Employee
- Assigned position
- Date on which the employee was assigned to the position
- Employee's salary
- Standard hours per year
- FTE
- Projected year-end amounts for salary, FTE, hours, and headcount, based on assignment date

Example: Budget Processing

You need a stock clerk position in your warehouse. To fill this position, you need enough employees to equal 10 FTEs. The plant manager approves the need for this position, specifying that, to expedite training, you should hire no more than 14 people to fill the position (some of the employees can work part-time). When you define the position budget, you enter the following data:

Salary	200000.00 (annual)
FTEs	10
Headcount	14

The person with the appropriate authority approves the position. When you hire employees to fill the position, the system immediately alerts you if you exceed the budgeted amounts for salary, hours, FTE, or headcount.

Before You Begin

- ❑ Set up position control information in the system options. See *Setting Up System Options* in the *Workforce Management Foundation Guide.*
- ❑ Set up your business units and fiscal periods. See *Setting Up Business Units* and *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- ❑ If you want to associate job type codes with each position, define those job type codes. See *Defining Jobs* in the *Workforce Management Foundation Guide*.

Defining Position Budgets Manually

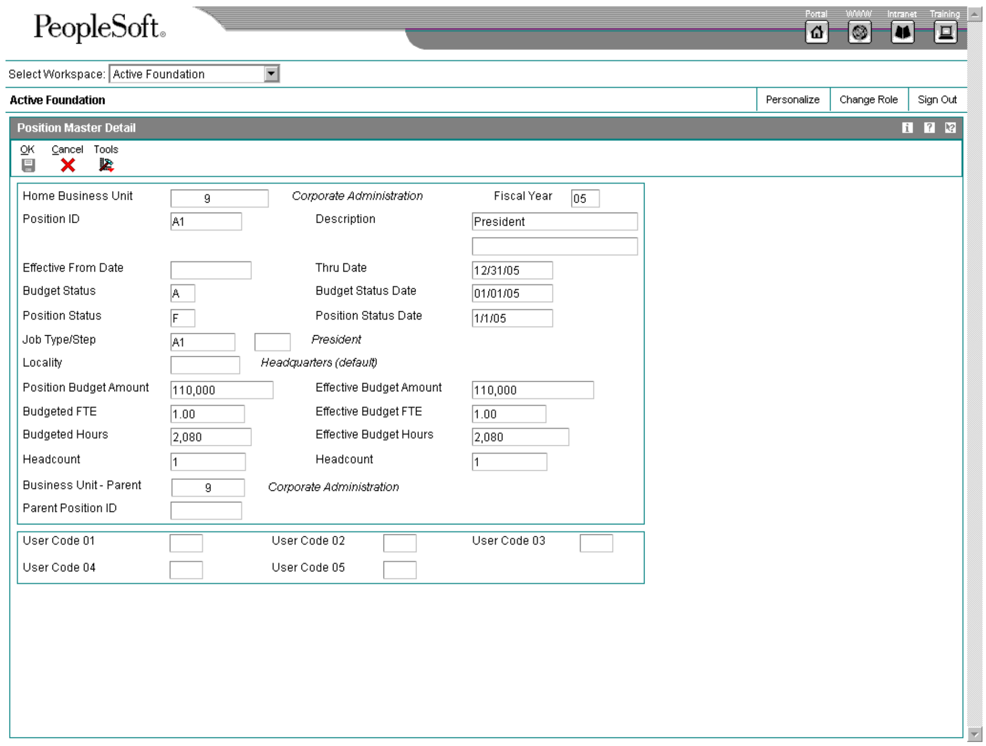
You typically define position budgets manually when one or both of the following situations occur:

- The initial position budget (the position budget for the first fiscal year for which you are using position control) does not equal the salary, standard hours per year, and FTEs for the employee whom you intend to assign to the position. In this case, if you create position budgets automatically, you need to manually revise the budget values.
- You want the identifier for the position (the position ID) to be different from the corresponding job type. When you create position budgets automatically, the program uses the corresponding job type for the position ID.

► To define a position budget manually

From the Daily Processing menu (G08BP1), choose Position Entry.

1. On Work With Positions, click Add.



2. On Position Master Detail, complete the following fields:
    - Home Business Unit
    - Fiscal Year
    - Position ID
    - Description
    - Position Budget Amount
    - Budgeted FTE
    - Budgeted Hours
    - Headcount
3. To associate a job with the position budget, complete the following fields:
    - Job Type/Step
    - Locality
4. To enter status information, complete the following fields:
    - Effective From Date

- Thru Date
- Budget Status
- Budget Status Date
- Position Status
- Position Status Date

5. Complete any of the following additional fields:
   - Business Unit - Parent
   - Parent Position ID
6. Complete any of the other user defined fields as necessary, and then click OK.

Processing Options for Position Entry (P08101)

Defaults Tab

This processing option allows you to determine whether the Job Type and Job Step fields are required on the Position Master Detail form.

---

1. Job Type/Step Entry

Blank = Issue a warning if Job Type/Step is left blank.

1 = Require entry of Job Type/Step.

Use this processing option to indicate whether the Job Type and Job Step fields are required on the Position Master Detail form. If these fields are required, you cannot close and save the Position Master Detail form without complete the Job Type and Job Step fields. If these fields are not required,the system displays a warning message when you leave these field blank;however you can save your work and close the form. Valid values are:

Blank Issue a warning if the Job Type and Job Step fields are left blank.

1 Require entry of Job Type and Job Step.

If you enter 1 in this processing option, you must also use the Position ID Required field on the HRM Foundation Position Control Options form to indicate that position ID is required. The system ignores this processing option if you have set this option so that the position

ID is not required.

Defining Position Budgets Automatically

From the Position Control Setup menu (G08BP4), choose Start Position Control.

When you begin to use the position control feature, you must decide whether to enter position budgets manually or run a program that creates them automatically.

You can define position budgets automatically when both of the following situations are true:

- Your initial position budgets equal the salary, hours, FTEs, and headcount that already exist in your current employee records
- You plan to use your employees' job type codes as the position IDs

When you define position budgets automatically, the program uses the employee's job type, job type description, home business unit, and salary as the respective position ID, position description, home business unit, and salary for the position budget. The program creates and populates the following tables:

- Position Master (F08101)
- Position Budget Detail (F08111)

When you define position budgets automatically, the system enters the budget status with an approved status code. Only positions with approved budget status codes can be assigned to employee records. Furthermore, an approved requisition can reference only an approved position budget.

You might need to enter other information manually, such as effective dates or user defined information.

To modify position budget information after you have defined position budgets automatically, use Position Entry program (P08101).

The program does not include an employee's job record when it creates position budgets if any of the following circumstances exist:

- The employee is terminated prior to the beginning of the current fiscal year.
- No job type exists in the employee's record.
- The employee has a hire date that occurs after the system date of the day that you started position control. For example, if you run the Start Position Control program on August 16th, and the employee's hire date is September 1st, the employee is not included.

If more than one employee is associated with a job type within a home business unit, the system totals the values for all of the employees to generate values for the position budget.

Note

You can assign an approved position budget to an approved requisition, and then assign both of them to an employee. You can assign an unapproved position budget to an unapproved requisition, and then assign both of them to an applicant.

Processing Option for Start Position Control (R081800)

Process Tab

This processing option indicates whether to clear the Position Master table (F08101) and the Position Budget Detail table (F08111).

---

1. Clear Tables:

Blank - Do not clear tables

1 - Clear tables

Use this processing option to clear the Position Master table (F08101) and the Position Detail table (F08111).

If you do not clear these tables, the records from the Employee Master table (F060116) will be added to the records that already exist in these tables. Valid values are:

Blank

Do not clear tables.

1

Clear tables.

CAUTION: Clearing these tables erases their contents. Clear the tables only if you are certain you no longer need the information contained within them.

Entering Account Information for Positions

You enter account information for positions so that your accounting department can track the salary amounts that you have budgeted for each position. When you enter account information, you specify the accounts in the general ledger that are affected by the position budget. If you receive funding for a position from more than one source, you can divide the position budget among multiple accounts.

If your human resources department has the authority to determine salary amounts for position budgets, you can set up the system to summarize all position budgets and transfer that information to the general ledger accounts that you specify.

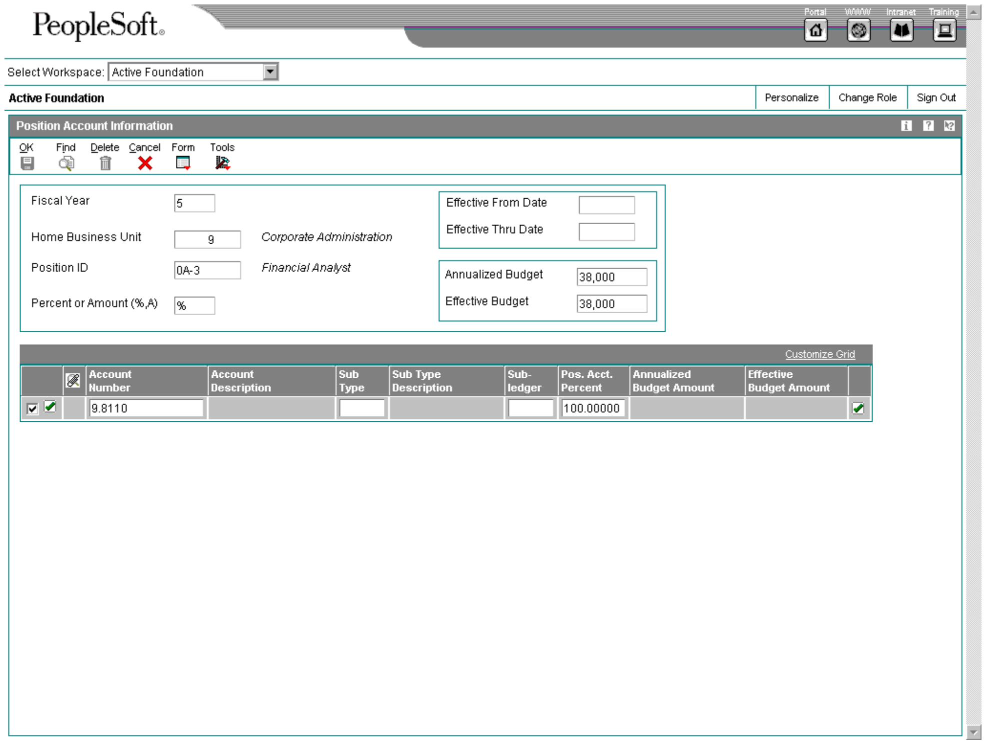
► To enter account information for positions

From the Daily Processing menu (G08BP1), choose Position Entry.

1. On Work With Positions, to locate the position for which you need to enter account information, complete one or more of the following fields and click Find:
   - Fiscal Year
   - Home Business Unit

   Note
   You can further refine your search for positions by entering a position ID in the Position ID field of the Query By Example (QBE) row.

2. Choose a record in the detail area, and then choose Position Acct Info (Position Account Information) from the Row menu.



3. On Position Account Information, to specify the method of calculation, complete the following field:
   - Percent or Amount (%,A)
4. Complete the following field in the detail area:
   - Account Number
5. If the method of calculation (Percent or Amount field) is percent, complete the following field:
   - Pos. Acct. Percent
6. If the method of calculation is amount, complete the following field:
   - Annualized Budget Amount
7. Complete the following optional fields:
   - Subledger
   - Sub Type
8. Click OK.
9. Click OK again to update the account information and return to the Work With Positions form.

See Also

- *Transferring Position Budgets to the General Ledger* in the *Human Resources Guide*

Setting Up AAIs for Position Budgets

You set up AAIs to specify the accounts in the general ledger that contain position budget information. You, or someone in your accounting department, must set up AAIs in the General Accounting system. You cannot set up these AAIs from the Human Resources system.

These AAIs determine which accounts in the general ledger are used to calculate the financials budget that appears on the Work With Business Unit by Organization form (W081200A). You can review the financials budget for a position to determine whether it corresponds to the amount that you entered for the position in the Human Resources system.

The following table lists AAIs for position budgeting. The system adds the amounts in all the accounts between and including the first and last accounts to calculate the financials budget.

HRLT	The ledger type where budget information is stored
HRSB	The first account in the range of object accounts for a business unit
HRSE	The last account in the range of object accounts for a business unit

You should create these three AAIs for each company in your organization that has position budgets. The system stores AAIs in the Automatic Accounting Instructions Master table (F0012).

See Also

- *Working with AAIs* in the *General Accounting Guide* for instructions for setting up AAIs

Transferring Position Budgets to the General Ledger

After you define your position budgets and position accounts, you can post detailed information for position budgets to the Account Ledger table (F0911) so that your accounting department can access it.

Depending on the requirements of your accounting and human resources departments, you can transfer either summary information for position budgets or detailed information.

Summary information includes monthly totals of salary amounts and hours for all of the position budgets that you specify. Detailed information includes a record of the salary amount and hours for each individual position budget.

To transfer summary information to the general ledger, you must transfer position budgets to the Account Balances table (F0902). To transfer detailed position budget information, you must post position budgets to the Account Ledger table.

You can use the Position Account Information program (P081012) to identify the general ledger accounts to which you want to transfer the information.

Caution

You transfer position budget information to the general ledger only if your human resources department is responsible for creating salary budgets. To avoid overwriting information, you should not transfer position budget information to the general ledger if your accounting department determines the salary budgets for your organization.

Before You Begin

- ❑ Define your position budgets. See *Defining Position Budgets* in the *Human Resources Guide*

See Also

- ❑ *Entering Annual Budget Amounts* and *Entering Detailed Budget Amounts* in the *General Accounting Guide*

Transferring Position Budgets to the Account Balances Table

From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Acct Bal (Account Balances).

To create or refresh your position budget accounts, you transfer summary position budget information to the Account Balances table (F0902) in General Accounting. You typically perform this task to establish an initial budget for a new year.

As you work through the budgeting process, you can transfer the following three types of position budgets to the Account Balances table:

- Requested budgets
- Approved budgets
- Final (also known as original) budgets

You use a different version of Update Position Budgets to Account Balances program (R08902) to transfer each of these types of position budgets. This program updates the Account Balances table. You or someone in your accounting department can review this information as you work through the budgeting process.

When you run the Update Position Budgets to Account Balances program for the requested position budgets, the system updates the approved and final budget fields for the same account in the Account Balances table with the same values. When you run this program for the approved budget, the system also updates the final budget for the same account in the Account Balances table with the same value. When you run the program for the final budget, the system updates only that value. In this case, the values for requested and approved budgets remain the same.

The system transfers to the general ledger only effective hour values (BU) and effective budget amounts (BA) for positions.

Caution

Because this program overwrites all of the existing information in the Account Balances table, you transfer position budgets to the Account Balances table only when you are setting up budgets for a new year. If you need to revise position budgets in the middle of the year, do not rerun this program. Instead, post position budgets to the Account Ledger table (F0911). See *Posting Position Budgets to the Account Ledger Table* in the *Human Resources Guide*.

Processing Options for Update Position Budgets to Account Balances (R08902)

Update Options

1. Enter a "1" to update account balances file (F0902)

Ledger Type

1. When entering budgets to the actual and units ledgers, the ledger type "BA" and "BU" is assumed. If you wish to enter to a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger types.

Salaries Budget Ledger:

Hours Budget Ledger:

Note: The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also the following ledger types can not be updated by this program: AA, CA, XA, YA, ZA, AC.

Fiscal Year

1. Enter the last two digits of the fiscal year.

Budget Cycle

1. Enter a "1" next to each item you wish to update in the Account Balances file (F0902). If all items are left blank, the default will only update the Final Budget.

Requested Budget:

Approved Budget:

Final Budget:

Report Type

1. Enter "0" for an Exception Report. Enter a "1" to have a Summary or a Detail Report. (See option below)

2. Enter "0" for a Summary Report. Enter a "1" for a Detail Report. This option is ignored if only an Exception Report is requested. (See option above)

Posting Position Budgets to the Account Ledger Table

From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Acct. Ledger.

To track detailed information for your position budgets, you can update the position budget information to the Journal Entry Transactions – Batch File table (F0911Z1), which is a temporary account ledger table. The accounting department posts the Journal Entry Transactions – Batch File table to the live Account Ledger table (F0911). Position budgets must have an approved status before you can post them. When you post position budgets to the Account Ledger table, you can distribute them among as many as 12 periods in the Account Balances table (F0902).

See Also

- *Posting Financial Batches* in the *General Accounting Guide* for more information about posting information to the Account Ledger table

Processing Options for Update Position Budgets to Account Ledger (R08911)

Select Tab

This processing option allows you to enter the fiscal year of the transactions that are being updated.

---

1. Fiscal Year

Use this processing option to select the records from the Position Master table that will be updated to the Journal Entry Transaction - Batch table (F0911Z1). Only the records from the fiscal year you enter will be updated.

You need to enter only the last two digits of the year. A leading zero is stripped from the view (05 becomes 5), so you could enter a single digit for years 2000 to 2009.

Process Tab

These processing options allow you to determine the way in which records will be written in the Journal Entry Transaction - Batch File table (F0911Z1), including the ledger to which they are written.

---

1. Transaction Description

Use this processing option to enter a brief description of the transaction.

This description will be included on every record that is updated to the Journal Entry Transaction - Batch table (F0901101). This description can be up to 30 characters in length.

2. Transaction Date

Use this processing option to specify the date to be posted for this transaction. If left blank, the system date will be used.

3. Budget Ledger Type

Use this processing option to specify the ledger to be updated. Valid values are stored in User Defined Code table 09/LT. If left blank, the BA ledger will be updated. If a value is entered, that ledger is updated.

This program cannot update the following ledger types: AA, AC, CA, XA, YA, ZA. An invalid record type error will occur if one of these ledger types is entered.

4. Proof/Update Mode

0 = Proof mode

1 = Update mode

Use this processing option to specify whether you run this report in proof or update mode.

In proof mode, a report will be generated showing what will be written to the Journal Entry Transaction - Batch table (F0911Z1). Use proof mode to examine data and fix any errors. Then rerun the process in update mode. Valid values are:

0 or blank

Proof Mode

1

Update Mode

Reports Tab

These processing options allow you to determine which reports this program generates. An exception report is always created. In addition, you can create either a summary report or detail report of the transactions that will be updated to the Journal Entry Transaction - Batch File table (F0911Z1).

1. Exception Report

0 = Exception report only

1 = Exception report and Summary or Detailed report

Use this processing option to determine whether to create a summary or detail report in addition to an exception report. The exception report will always be generated. The exception report lists the errors that have occurred. The value in the summary report option determines whether a summary or detailed report is generated. Valid values are:

0 or blank

Exception report only

1

Exception report and Summary or Detailed report

The following messages can appear on the exception report:

- No parent record in F08101 found
- Invalid Budget Status Code
- Invalid Account
- Invalid Sub-Ledger
- Invalid Sub-Ledger Type
- Invalid Fiscal Year
- Invalid Salary Ledger Type
- Invalid Hours Ledger Type
- Invalid Home Business Unit
- Budget Not Approved
- Non-Posting Account
- Inactive Account

2. Summary Report

0 = Summary report

1 = Detailed report

Use this processing option to create either a summary report or detail report.

If the exception report option value is 0 or blank, the summary report option is ignored. A summary report includes subtotals by account number, subledger,and subledger type. A detail report may be very long. Valid values are:

0 or blank

Summary report

1

Detailed report

Revising Position Budgets by Business Unit

After you define position budgets, you can easily review and update a group of position budgets for the same business unit and fiscal year. You can use this revision method when you need to update several position budgets that are in the same business unit.

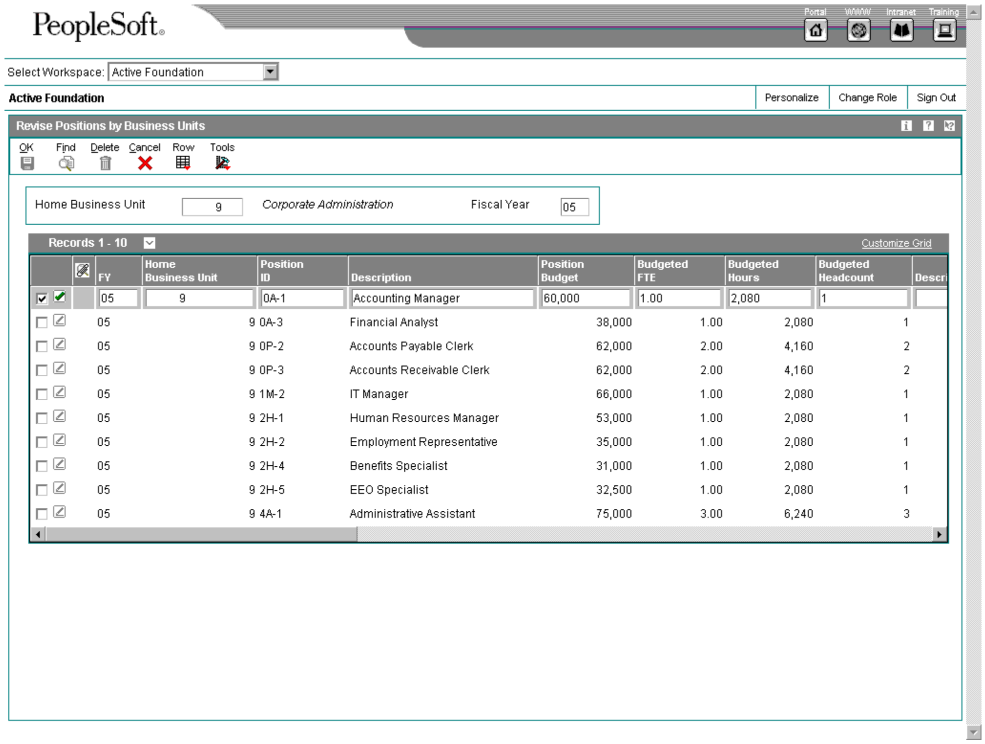
When you review the positions by business unit, you can compare the budgeted amounts for each position with the projected amounts and use this information to determine whether a position budget will be met by the end of a fiscal year.

The system calculates the budgeted and projected amounts by using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the home business unit.

► To revise position budgets by business unit

From the Daily Processing menu (G08BP1), choose Position Entry.

1. On Work With Positions, complete the following fields:
   - Home Business Unit
   - Fiscal Year
2. From the Form menu, choose Pos by Business Un (Positions by Business Units).



3. On Revise Positions by Business Units, revise the information in any of the following fields and click OK:
    - Position ID
    - Description
    - Position Budget
    - Budgeted FTE
    - Budgeted Hours
    - Budgeted Headcount
    - Eff From
    - Eff Thru
    - Job Type
    - Job Step
    - Budget Status
    - Position Status

- Position Status Date
- Reports to BU
- Reports to Position

Working with Position Activity Information

After you define and approve your position budgets, you can attach employee records to them. You attach employee records to ensure that the actual salaries, hours, and FTEs for your employees are within those that you established for your position budgets. Position activity illustrates employee movement into and out of positions. To determine appropriate position budgets, you can set up your system to store historical records of position activity.

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create position activity records when you update position-sensitive information in employee records.

You can also review position activity information to verify that it is correct. You can review position activity online, or you can print a report. You can correct position activity records if you entered incorrect position information for an employee.

Attaching an Employee Record to a Position Budget

After you define and approve your position budgets, you can attach employee records to them. You attach an employee record to a position budget to control budget expenditures and to ensure data integrity. To attach an employee record to a position budget, you enter a position ID in the employee's record.

To stay within your position budgets when you are entering employee information, the system sends you either an error or a warning message when you exceed the approved salary, hours, FTE, or headcount for the position. When you set up your system options, you define the type of message that appears when a position's effective budget is exceeded.

When you attach an employee record to a position budget, the system performs the following functions:

- Adds the salary, hours, FTEs, and headcount amounts for the employee to the projected position budget amounts through the fiscal year end.
- Adds any job information that is associated with the position to the employee's record.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee's assignment to the position, the employee's salary, FTE, and hours. The system then uses this information to determine the effect of these values on the budget through the end of the fiscal year.

Before You Begin

- ❑ Verify that you have set up position control options. See *Setting Up System Options* in the *Workforce Management Foundation Guide*.

- For each position to which you need to attach employee records, verify that the budget status is approved. See *Defining Position Budgets* in the *Human Resources Guide*.

► To attach an employee record to a position budget

From the Employee Management menu (G05BE1), choose Organizational Assignment.

1. On Work With Organizational Assignments, to locate the employee record, complete the following field and click Find:
   - Employee Identification
2. Choose the employee record and click Select.
3. On Organizational Assignment, complete the following field and click OK:
   - Position ID
4. On Change Reason, complete the following fields and click OK:
   - Effective On
   - Change Reason

See Also

- *Processing Options for Organizational Assignment (P0801ORG)* in the *Workforce Management Foundation Guide*
- *Adding Employee Records One at a Time* in the *Workforce Management Foundation Guide* for information about how processing options affect position assignments

Reviewing Position Activity

To determine whether you can stay within budgeted amounts for salary and head count through the end of the fiscal year, you can review position activity information either by position or by employee. The type of information that appears on the form varies, depending on whether you review position activity by employee or by position.

When you review information by employee, you can see all of the positions in which an employee has worked. You can also review position information for an employee who works in more than one position during a fiscal year.

When you review activity by position, you can see all of the employees who are associated with a particular position budget. You can also review projected totals for salary, headcount, FTE, and hours worked. The system calculates these totals by using all active and inactive records for the specified year, based on the home business unit that you enter.

► To review position activity

From the Daily Processing menu (G08BP1), choose Position Activity Inquiry.

1. On Work With Position Activity, to define whether you want to review information by position or by employee, choose one of the following tabs:
   - By Position

- By Employee

2. If you chose the By Position tab, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
   - Position ID
3. If you chose the By Employee tab, complete the following field and click Find:
   - Employee Identification
4. To limit either type of search to a particular employee activity, complete the following field and click Find:
   - Employee Action
5. Review the information.

Correcting Employee Position Activity

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create historical records of the information that you have changed. In addition to these employee history records, you can set up your system to create position activity records when an employee does any of the following things:

- Enters a position
- Leaves a position
- Changes positions within your organization

When you are also tracking position information for employees, the system creates position activity records when an employee does any of the following things:

- Moves from one home business unit to another within your organization
- Changes jobs or job steps
- Receives a salary change
- Changes FTE values
- Changes the number of hours worked

Tracking position activity records makes reviewing all of the employees who have worked in a specific position easy.

You can correct position activity records if you make a mistake when entering position information for an employee. For the current activity record, you can correct all of the position activity information. For historical activity records, you can correct only the requisition number and remarks.

In addition to correcting employee position activity, you can also use the Enter Employee Activity program (P081111) to enter historical position activity information that you previously stored in another system.

Caution

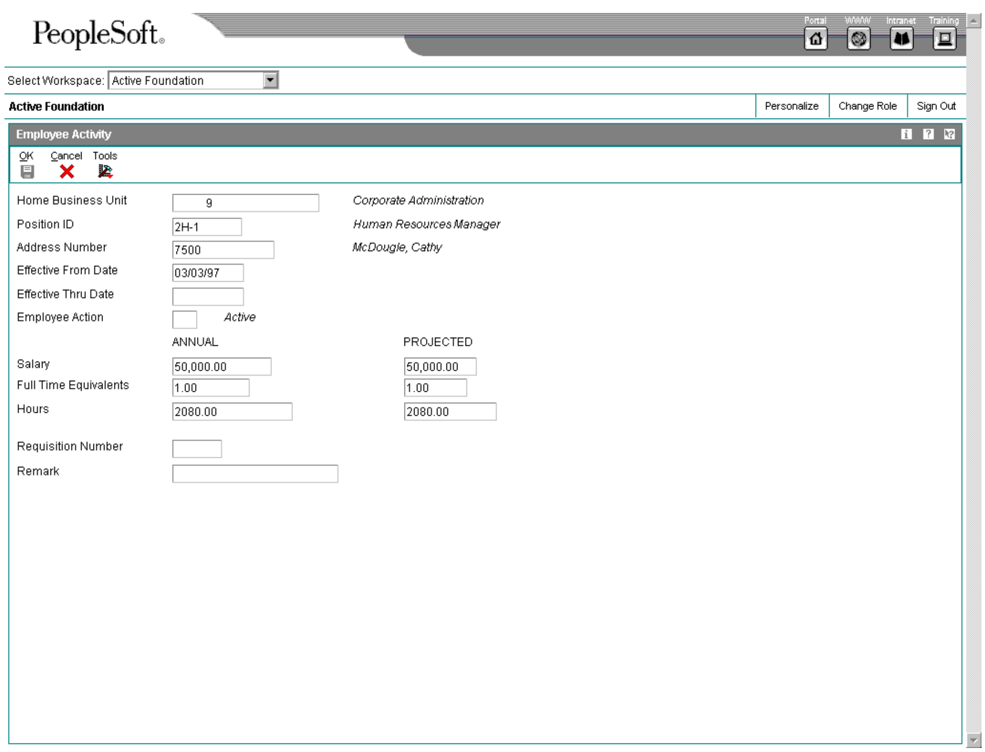
Because the system does not create an audit trail of the changes that you make when you correct position activity records, J.D. Edwards recommends that you assign high security to this program.

This program updates the Position Budget Detail table (F08111). It does not update the employee history tables or the Employee Master Information table (F060116).

► To correct employee position activity

From the Daily Processing menu (G08BP1), choose Enter Employee Activity.

1. On Work With Employee Activity, to locate the employee record, complete the following field and click Find:
   - Employee Identification
2. Choose the current activity record and click Select.



3. On Employee Activity, change the incorrect information in any of the following fields and click OK:
   - Effective Thru Date
   - Employee Action

- Salary
- Full Time Equivalents
- Hours
- Requisition Number
- Remark

If the Effective From and Effective Thru dates are outside of the range of the fiscal date pattern, you will receive an error message.

Note

As an alternate entry method, you can use the Revise Employee Activity form to correct multiple position activity records at the same time. To access this form, choose Rev. Emp Activity from the Row menu on the Work With Employee Activity form.

See Also

- *Setting Up System Options* in the *Workforce Management Foundation Guide* for information about setting up your system to create position activity records
- *Reviewing the Employee Position Activity Report* in the *Human Resources Guide* for information about reviewing all of the position activity for each employee within your organization

Reviewing Position Budget Information

To ensure that the salary amounts that you defined in your position budgets compare favorably to the actual salaries of the employees in those positions, you should periodically review position budget information. You can review this information for a specific business unit or position, or by the activity involving the position.

When you review position budget information, the system displays projected year-end salary amounts that you can compare with budgeted amounts. The system calculates these amounts based on employees' annual salaries and their associated effective dates. The system calculates projected year-end amounts by adding together the prorated annual salaries for all of the employees who served in the position during the year. If an employee does not work an entire year in the same position, the system prorates the employee's annual salary for the amount of time that the employee worked in the position during the fiscal year.

For example, assume that the following conditions exist:

- Position A2 (accountant) pays an annual salary of 42,000.
- Cathy worked in position A2 from January 1 through April 30 (85 days multiplied by 8 hours = 680 hours), so her projected annual salary for that position is 13,729.20 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 680 hours = 13,729.20).
- The position was vacant from May 1 to May 31.

- George worked in position A2 from June 1 through December 31 (153 days multiplied by 8 hours = 1224 hours), so his projected annual salary was 24,712.56 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 1224 hours = 24,712.56).

The system calculates the projected year-end amount for position A2 as 38,441.76 (13,729.20 plus 24,712.56).

Reviewing Position Budget Information by Business Unit

To compare budgeted amounts for salaries, FTEs, hours, and headcount to the corresponding actual amounts that are projected through year-end, you can review position budget information by business unit. To determine whether you are likely to remain within position budget amounts through the end of the fiscal year, you can also review projected year-end salary amounts for each business unit.

A positive open amount for salary, hours, headcount, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

► To review position budget information by business unit

From the Daily Processing menu (G08BP1), choose Business Unit by Organization.

1. On Work With Business Unit by Organization, complete any of the following fields and click Find:
   - Company
   - Fiscal Year
   - Level of Detail
   - Division
   - Home Business Unit
2. Review the information in the following fields:
   - Financials Budget
   - Position Budget
   - Effective Budget
   - Projected At Year End

Reviewing Position Budget Information by Position

To compare budgeted amounts for salaries, FTEs, hours, and headcount to the corresponding actual amounts that are projected through year-end, you can review position budget information by position. You use this information to determine whether you expect to meet or exceed your position budgets through the end of the year.

A positive open amount for salary, hours, headcount, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

The system calculates the budgeted and projected amounts by using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the company that is associated with the home business unit that you entered.

► To review position budget information by position

From the Daily Processing menu (G08BP1), choose Positions by Business Unit.

1. On Work With Positions by Business Unit, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. Review the information in the following fields in the detail area:
   - Position ID
   - Description
   - Open FTE
   - Salary Budgeted
   - Salary Eff. Budgeted
   - Salary Projected
   - FTE Budgeted
   - FTE Projected
   - Headcount

Defining Next Year's Position Budget

From the Position Control Adv/Tech Operations menu (G08BP3), choose Create Next Year's Positions.

Although a position budget is valid for only one fiscal year, you do not need to manually enter position budget information each year. You can choose from several options to automatically generate the next fiscal year's budget amounts. For example, when the position budget information for next year will be the same as the corresponding information for the current year, you can save time by running a program that automatically creates position budgets for the next fiscal year. These position budgets can be based on the position budgets for the current year in the Position Master table (F08101) or on the position activity records in the Position Budget Detail table (F08111). If your position budget is increasing or decreasing by a consistent amount, you can set processing options to increase or decrease the new budget amount and the new budget FTEs, hours, and headcounts by flat percentages.

When you run this program, the system performs the following operations:

- Creates the position, fiscal year, home business unit, position ID, and description
- Prints an exception report that lists any existing positions that have effective-through dates that are prior to the end of the current fiscal year
- Creates a position accounts table for the next fiscal year (optional)

Depending on how you set the processing options, the system does not create budgets for the following positions:

- Closed positions
- Vacant positions that had no activity during the year

The system generates an exception report that lists the positions for which no budgets were created.

Before You Begin

- ❑ Set up the fiscal date patterns for the next fiscal year. See *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- ❑ Set up a salary default source in your system options. See *Setting Up System Options* in the *Workforce Management Foundation Guide*.

Processing Options for Create Next Year's Positions (R081820)

Dates Tab

These processing options allow you to specify the year on which you are basing new position budgets and the year for which you are calculating them, as well as the effective date for pay rates or pay grade steps.

---

1. Current Fiscal Year

Use this processing option to specify the year on which you are basing new position budgets. Typically, this is the current year. Enter the last two digits of the year.

---

2. Fiscal Year

Use this processing option to specify the year for which you are creating position budgets. Typically, this is the next fiscal year. Enter the last two digits of the year.

3. Effective Dates for Pay Rates or Pay Grade Step

Use this processing option to specify the effective date of the pay rates or pay grade steps that you are using to create next year's position budget.

Enter a date in this field only if you use the pay rate or pay grade step methods of salary calculation.

Process Tab

These processing options allow you to specify the positions for which you are going to create budgets, and the table from which you create the budgets.

1. Select Position Budgets - Press F1 for valid values

Use this processing option to specify the positions for which you want to budget and whether you want the budgets created from the Position Master table (F08101) or the Position Detail table (F08111). The Position Master table contains budgeted amounts, while the Position Detail table contains the actual amounts. Valid values are:

1 All position budgets (default)

2 Position budgets with current activity

Options 1 and 2 generate budgets from the Position Master table. If you choose option 1, the system will calculate budgets for all positions in the Position Master table. If you choose option 2, the system will calculate budgets for positions that have at least one active employee in the Position Detail table.

3 Position budgets with activity during the year

4 Position budgets with current activity

Options 3 and 4 generate budgets from the Position Detail table. If you choose option 3, the system will calculate budgets for positions that have had activity during the year, even if the positions are currently vacant. If you choose option 4, the system will calculate budgets only for positions that have current activity for the year.

2. Create Budgets for Prior Positions

Blank = Do not create budgets for prior positions

1 = Create budgets for prior positions

Use this processing option to specify whether to create budgets for positions that ended prior to the beginning of the new fiscal year. A position ended prior to the beginning of the new fiscal year when the Thru Date for that position is prior to the beginning of the new fiscal year. An exception report will list all positions that are created in this manner. Valid values are:

Blank Do not create budgets for prior positions.

1 Create budgets for prior positions.

3. Create Position Accounts

Blank = Do not create position accounts

1 = Create position accounts

Use this processing option to specify whether to create position accounts, in addition to position budgets, for the new fiscal year. Position accounts let you allocate your position budgets by percentage to various accounts in the General Accounting system. Valid values are:

Blank Do not create position accounts.

1 Create position accounts.

Options Tab

These processing options allow you to specify the percentages by which to change previous budget amounts.

1. Percent Change in New Budget Amount

Use this processing option to enter the percent of increase or decrease from the old to the new budget amounts. Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5% decrease.

2 . Percent Change in Full-Time Equivalents (FTE's), Hours, Headcount

Use this processing option to enter the percent of increase or decrease from the old to the new values for full-time equivalents, hours, and headcount.

Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5%decrease.

See Also

- *Creating Parent/Child Relationships by Employee* in the *Workforce Management Foundation Guide* for information about defining organizational structures by employee

Working with Parent/Child Relationships by Position

To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure that shows the flow of information within your organization. You can create an organization structure that shows reporting relationships among the positions within your organization. These relationships are called parent/child relationships.

Before You Begin

- Set up parent/child structure types in user defined code list 01/TS. See *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide.*

Creating Parent/Child Relationships by Position

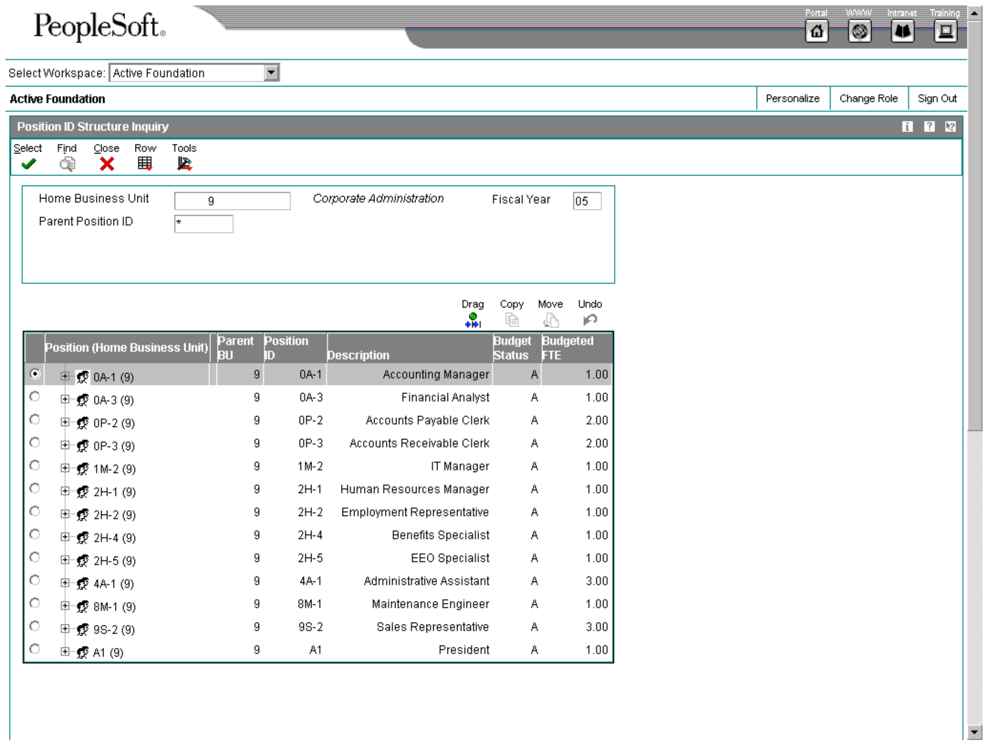
To show the reporting relationships among different positions within your organization, you can create parent/child relationships by position. For example, you can organize a reporting structure in which you define group leaders as parent positions to programmer analysts. The group leaders are, in turn, child positions to a department manager.

Defining parent/child relationships by position eliminates the need to continually revise an organizational structure when individual employees change jobs.

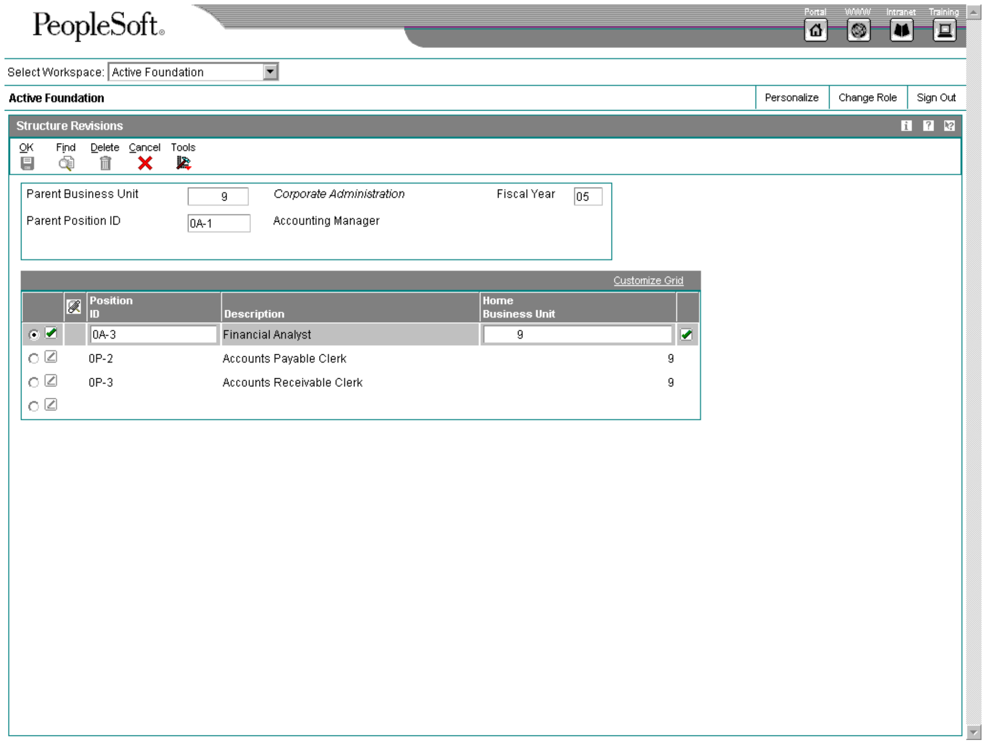
You can create parent/child relationships at any time that your management requires. For example, if your organization is in the process of resizing, you might need to create a parent/child relationship that shows the number of positions that report to the first-level managers and distribute that structure to all of the managers.

▶ To create parent/child relationships by position

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.



1. On Position ID Structure Inquiry, to locate the positions for which you are creating parent/child relationships, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
   - Parent Position ID
3. In the detail area, choose a parent or child position, and click Select.



4. On Structure Revisions, verify the information in the following field and click Find:

    - Parent Position ID

    You can change the information in this field if you need to work with a different parent position.

5. Complete the following fields in the detail area for each child relationship and click OK:

    - Position ID

    - Home Business Unit

6. On Position ID Structure Inquiry, click Find to refresh the information in the detail area.

7. Review the structure that you created.

Reviewing Parent/Child Relationships by Position

After you define parent/child relationships by position, you can analyze the reporting relationships among the positions in your organization by reviewing the following structures:

- A single-level hierarchy that shows only the subordinate positions that are directly subordinate to a parent position

- A multiple-level hierarchy that shows all of the subordinate positions that are directly subordinate to a parent position and also all of the positions that report to each subordinate

► **To review parent/child relationships by position**

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.

1. On Position ID Structure Inquiry, complete the following fields and click Find:
   - Home Business Unit
   - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
   - Position ID
3. To review the employee number of the employee who is currently in a position, choose the position in the detail area, and then choose Current Incumbents from the Row menu.
4. On Current Incumbents, review the information in the detail area.

Purging Position Information

If your system contains out-of-date position records, you can purge these records, or you can clear space on your system by archiving position records and moving them to magnetic tape or to an alternate backup system. You can also create a report of the records that this program will purge before you actually purge them.

Purging Positions

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Positions.

To purge outdated positions from the Position Master table (F08101), run the Purge Positions program (R0808151). For example, you can purge records from past years that are no longer relevant. You can also purge all of the position records from a certain fiscal year or select which records to purge using data selection.

Processing Options for Purge Positions (R0808151)

Purge Positions

1) To create a report and delete the Position Master records enter '1'. To create a report, delete the Position Master records and save it to a purge table enter '2'. Default of blank will only create the report.
* Important Note * When choosing '2', the purge table is named F08101P. This table is created every time the user chooses '2'. However, it is important to remember that the purge table is over written every time the program is executed.

Purging Position Activity

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Position Activity.

To purge employee position-activity records that are no longer needed, run the Purge Position Activity program (R0808161). For example, you might remove records of former employees.

Processing Options for Purge Position Activity (R0808161)

Purge Activity

1. Enter a Blank to only create a report (default); Enter "1" to delete records from the Position Budget Detail table (F08111); Enter "2" to delete records from the Position Budget Detail table and save the deleted records in a purge table. A report is always created.
Important Note: The purge table is F08111P. It is purged and over-written every time this program is run with Purge Activity = "2".

Reviewing Position Control Reports

To ensure that the salary amounts that you defined in your position budgets compare favorably with the actual salaries, FTEs, hours worked, and headcount of the employees in those positions, you should periodically review position budget information. To do this review, you can print position reports. You can review this information for current, previous, or future fiscal years.

You can also use position reports to review the most recent changes that have been made to position budgets.

Reviewing the Open Amounts by Position Report (R081420)

From the Daily Processing menu (G08BP1), choose Open Amounts by Position.

To review position information for salaries, FTEs, and hours worked, print the Open Amounts by Position report. Use this information to compare budgeted amounts with projected amounts through the fiscal year end. The report displays open amounts, which are the differences between budgeted and projected amounts.

The system calculates the projected amounts depending on the fiscal year for which you defined the position. When it calculates these amounts, the system uses the fiscal date pattern for the company with which the position is associated. The system uses the beginning of the fiscal year date and the end of the period-14 date for the fiscal date pattern as the start and end date ranges for the position's fiscal year. All position activity records that overlap the ranges are included in the projection calculations.

Processing Options for Open Amounts by Position (R081420)

Options

1. A value of '1' will show Effective Budgeted Amounts. A default of blank will show Budgeted Amounts.

Reviewing the Cross-Year Budget Comparison Report (R081430)

From the Daily Processing menu (G08BP1), choose Cross Year Budget Comparison.

To simultaneously review the position budgets for two fiscal years, print the Cross-Year Budget Comparison report. You can compare the budget information for two years in a side-by-side format. The report also displays the percentage change in each budget from one fiscal year to the next.

The system calculates the percentage change amounts by dividing the difference between the budget amounts for each year by the first year's budget amount, as it appears in the left column of the report.

Processing Options for Cross Year Budget Comparison (R081430)

Options

1. Enter the first fiscal year (two digits) to be displayed.

2. Enter the second fiscal year (two digits) to be displayed.

Amounts

1. Effective/Budgeted Amounts

Blank = Budgeted Amounts
1 = Effective Amounts

Reviewing the Position Control Comparison Reports (R081440)

From the Daily Processing menu (G08BP1), choose Position Control Comparison.

The demonstration data that is included with the Human Resources system includes the following three versions of the Position Control Comparison report:

- Position Control Headcount. Use this version to compare the current headcount for your positions to the budgeted headcount for the next fiscal year. Use this information to determine whether you need to do either of the following:
  - Hire additional employees to fill a position
  - Request approval for additional headcount for a position
- Position Control Budgeted FTE. Use this version to review current position activity and compare it to the FTEs that you budgeted for the upcoming fiscal year. Use the information to determine whether you need to do either of the following:

    - Hire additional employees to fill a position
    - Request approval for additional FTEs for a position
- Position Control Effective FTE. Use this version to review current position activity and compare it to the effective FTEs for a specific fiscal year. This version is the same as the Position Control Budgeted FTE version, except that it uses effective FTEs instead of budgeted FTEs.

Processing Options for Position Control Comparison (R081440)

FTE/Headcount

1. Enter the fiscal year(two digits) whose budgeted FTE or Headcount will be compared to the current FTE or Headcount.

2. Enter the Type of report you would like to see. Blank (default) = FTE, 1 = Headcount

3. For the FTE report which would you like to see Effective or Budgeted amounts. Blank (default) = Effective, 1 = Budgeted

Reviewing the Position Budgets Report (R081460)

From the Daily Processing menu (G08BP1), choose Position Budgets.

To review by fiscal year the position budgets that are established for all business units and positions, print the Position Budgets report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year. You can print one version of this report to review annual position budgets and another to review effective position budgets.

Processing Options for Position Budgets (R081460)

Pos Control

1. Budgeted/Effective Amounts

Blank = Effective Amounts
1 = Budgeted Amounts

Reviewing the Employee Position Activity Report (R081480)

From the Daily Processing menu (G08BP1), choose Employee Position Activity.

To review all of the position activity for each employee within your organization, print the Employee Position Activity report. You can analyze employee movement among positions and determine whether you need to hire additional employees or reduce the headcount for a position.

You can choose to sort this report either by employee last name or by employee number.

Data Selection

You should specify only one fiscal year for this report. Do not specify a range. If you specify a range of fiscal years, the report does not indicate which records are associated with each fiscal year.

Reviewing the Position Budgets by Job Type and Step Report (R081470)

From the Daily Processing menu (G08BP1), choose Position Budgets by Job Type & Step.

To review the position budgets for all business units and positions for each job type and job step within your organization by fiscal year, print the Position Budgets by Job Type & Step report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year.

Processing Options for Position Budgets by Job Type & Step (R081470)

Budget

1. Enter "0" or leave blank to show Effective Amounts, or "1" to show Budgeted Amounts

Compensation Management

To adequately budget for employee salaries, you must plan for employee pay changes and assess the financial impact of those changes on your salary budget.

Compensation management feature is a flexible salary-planning tool that improves the salary review process for both the human resources department and management. A human resources representative begins the salary review process by setting up all the rules and constants that define eligibility, and the guidelines for using the system. Before processing a compensation review, the human resources representative must first build work tables. After building these work tables, the human resources representative can grant managers access to them.

Each time that a manager accesses the system, a visual indicator identifies any data changes that have been made to the employee master records so that the manager is certain to have the most current employee information for making salary recommendations.

Managers can use compensation management to create compensation review models with different "what if" scenarios and save their work to a master model, a private model, or a public model. The master model is used to approve and update the salary recommendations to live tables. Private models are visible only to the person who created them. Public models are predefined by the human resources department. The public models allow private models from multiple managers to be consolidated without committing the salary review to the master model. Upper-level managers can look at public models to see the combined salary review recommendations from multiple supervisors without having to open the individual models of each of the lower-level managers.

The compensation management feature gives human resources representatives more control over the salary-planning process while freeing them from administrative tasks that are historically associated with salary planning. The benefits to the human resources department include:

- Human resources representatives can define the parameters under which supervisors can operate, thereby removing the human resources department from the process of manually looking for any activities that are outside the guidelines.
- Real-time information automatically updates supervisor rosters and budgets.
- Online forms save time and prevent security risks that are associated with mailing employee information.

Benefits to supervisors include the following:

- A Web-based user interface allows supervisors to plan salaries or approve recommendations from any location.
- Real-time information gives supervisors the most current data on which to base decisions.
- Online guidelines with visual indicators help supervisors make informed decisions and give them instant feedback about their recommendations.
- Summary information immediately tells supervisors whether the salary information that they and their subordinate supervisors are entering is within the salary budget.
- Upper management can review the progress of the staff from a budget and salary review perspective.

The compensation management feature can improve the salary review process for both the human resources department and management.

See Also

- *Compensation Management Self-Service Considerations* in the *Workforce Management Self-Service Guide*

Setting Up Compensation Management

Before you use the compensation management feature, you must define critical information that the system uses for processing. You set up this information to meet specific needs of your organization.

Before You Begin

- Define the system options for pay rate edit and position control. See *Setting Up System Options* in the *Workforce Management Foundation Guide.*
- Define increase type eligibility. See *Setting Up Eligibility Tables* in the *Human Resources – Benefits Guide*.

Setting Up Common Settings for Workforce Management

You use the common settings for human resources to control specific features of several human resources processes, such as benefits enrollment, compensation management, and self-service programs.

Setting up the common settings updates the Common Settings for HR Employee Self Service Programs table (F05004).

Common Settings for Compensation Management

Setting up the common settings for compensation management allows you to specify whether the application performs certain processes, and how.

The following table describes the common settings for data items in the Common Settings for EE Self Service Appl program (P05004). You can specify the current settings for these data items for compensation management.

Eligibility Override Reflected in Budget (CMPBDGT)	If you want the salary of an employee whose eligibility you overrode to be included in budget calculations, you need to set this setting to Yes.
Open Compensation Review (CMPOPEN)	When the human resources department gives access to the supervisors to open the compensation review process, you need to set this setting to Yes. While you are setting up compensation management and after the managers have finished the review process, set this setting to No.
Allow Override of Increase Eligibility (CMPOVEL)	To allow the manager to override the default eligibility of an employee for an increase type, set this setting to Yes.

(CMPOVEL)

Use Prorate Factor in Compensation Review (CMPPRFT)	To use prorate factors in the compensation review, set this setting to Yes.
Use Prorate amount as Spent Amount (CMPSPNT)	If you chose to use prorate factors and you want the prorated amount to be reflected in the spent calculations, set this setting to Yes. If you want the full increase amount to be reflected in the spent calculations, set this setting to No.
Synchronize Compensation Work Tables (CMPSYNC)	Use this common setting to indicate whether to synchronize the compensation work tables with employee changes. After the compensation work tables are built, set this setting to Yes to keep the compensation review work tables synchronized with the employee changes that you made to the employee master table. After the human resources department closes the compensation review process to the managers, set this setting to No.
Turn Off Add New Employee to Workfile (CMPEEWF)	If you do not want to add new or changed employee records to the Compensation RootWork Table (F08830WF), set this common setting to Yes. The system adds the records when this setting is set to No.

See Also

- *Setting Up Compensation Management* in the *Human Resources Guide*

► To set up common settings for workforce management

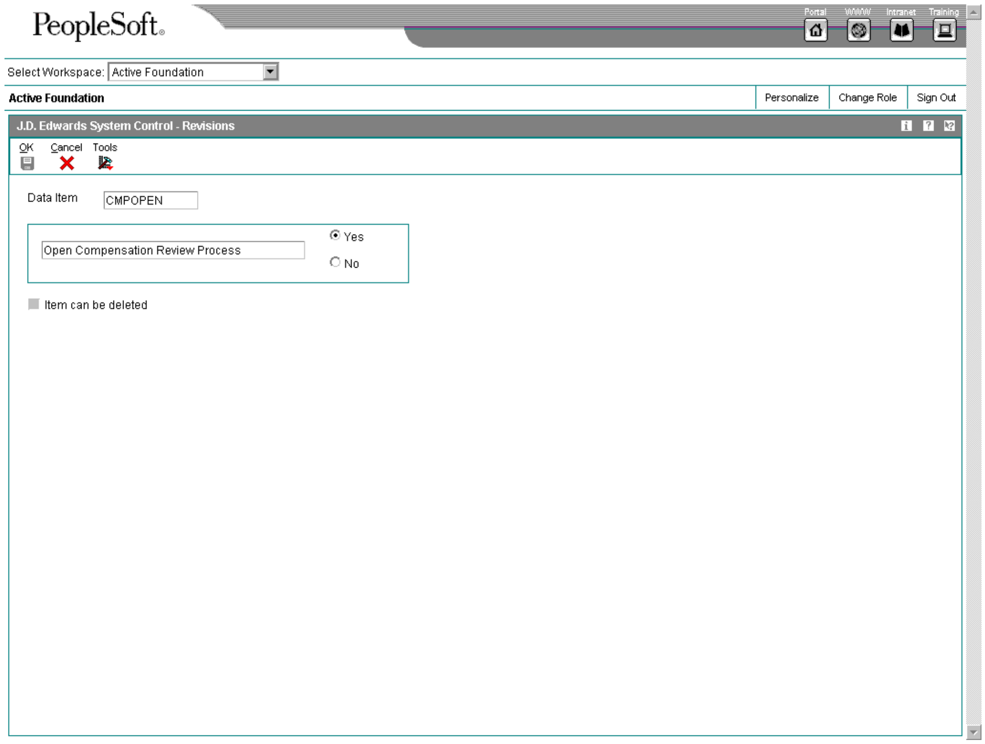
Use one of the following navigations:

From the Self Service Setup menu (G05BESS4), choose Common Settings for EE Self Service Appl.

From the Compensation Mgmt System Setup menu (G08CM14), choose HRM Common Settings.

1. On Work With HRM Common Display Settings, choose the row containing the data item for which you want to change the current setting and click Select.

   You cannot delete these data items from the system.



2. On J.D. Edwards System Control – Revisions, click the Yes or No option to specify the current setting and then click OK.
3. On Work With HRM Common Display Settings, click Add to add extra data items.

   Any data item that you add must already exist in the system.
4. On J.D. Edwards System Control – Revisions, complete the following field:
   - Data Item
5. Click the Yes or No option to specify the current setting and then click OK.
6. If you need to remove a data item that you have added, on Work With HRM Common Display Settings, choose the data item and click Delete.

   When you click Delete, the system only removes the data item from this form. You cannot delete system-supplied data items from the system.

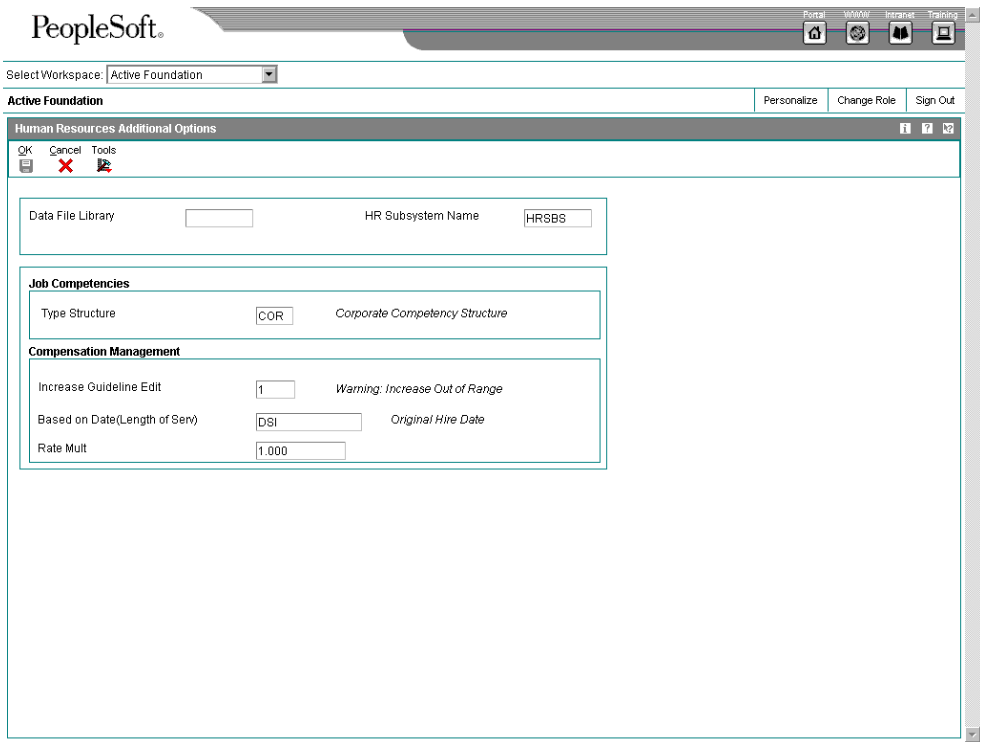
Setting Up the Additional System Options

To control certain aspects of the compensation review process, you need to set up two additional system options for compensation management. You set up one system option to specify whether to allow increase amounts to be outside of the guideline range and, if you allow the amounts to be outside the range, whether to issue a warning or a hard error. You set up the second system option to specify the date on which to base the calculation of the length of service.

▶ To set up the additional system options

From the Compensation Mgmt System Setup menu (G08CM14), choose HRM System Options.

1. On Work with HRM Foundation System Options, choose HR Addl. Options from the Row menu.
2. On Human Resources Additional Options, complete the following fields in the Compensation Management group box, and then click OK:
   - Increase Guideline Edit
   - Based on Date(Length of Serv)



Defining Increase Type Guidelines

Organizations often have specific guidelines for the kinds of compensation increases that employees are eligible to receive. These guidelines can be based on a number of evaluation factors, such as length of service, performance appraisal ratings, and the amount of time served in a current position. Often, several factors determine an employee's compensation increase.

To track the guidelines that are used in determining employee increases and to assist in administering compensation increases that are within those guidelines, you can create increase guideline tables to define the types of increases that employees are eligible to receive. Managers will then use these guidelines to make salary decisions.

You can create increase guideline tables to facilitate the following compensation increase scenarios:

- You can set up increase guideline tables using ranges for one evaluation factor. For example, if your company bases compensation increases on length of service alone, a table with established ranges for one evaluation factor, such as length of service, can store all of the necessary increase guidelines.
- You can set up increase guideline tables using ranges for two evaluation factors. For example, if your company bases compensation increases on length of service and performance appraisal rating, a table with established ranges for both of these evaluation factors can store all of the necessary increase guidelines.

Note

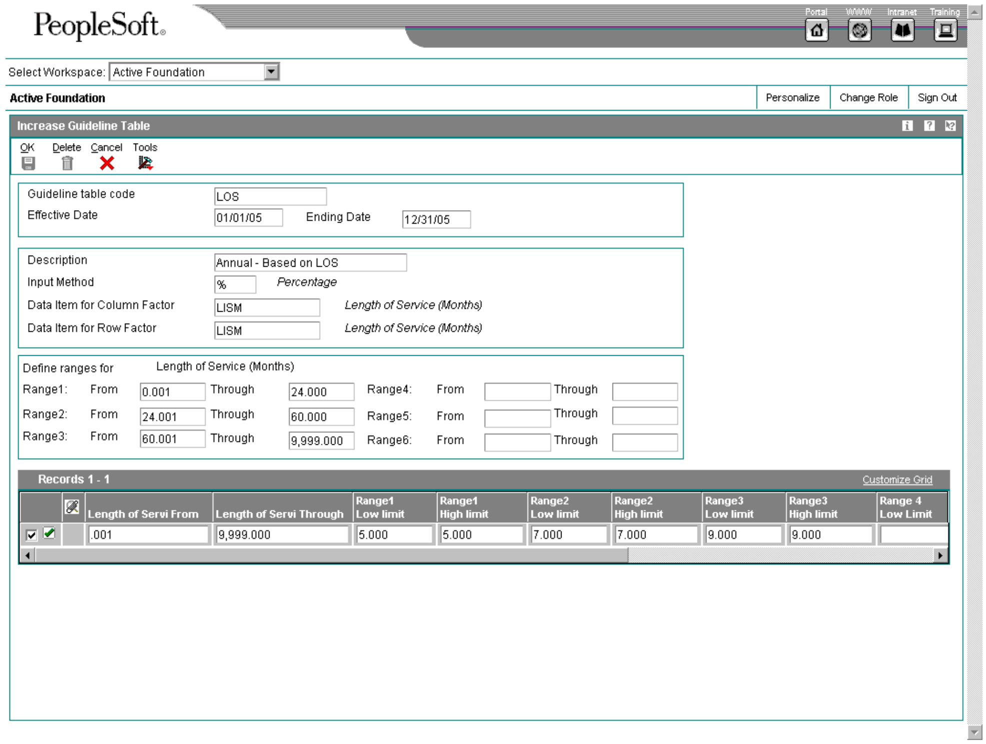
These tables are for informational use only and are not used by the system to calculate actual employee compensation increases. No employee information is updated directly as a result of these tables.

Example: Increase Guidelines Based on Length of Service

Your organization might have a compensation increase policy that is based on employees' length of service. For example, assume employees who have been employed between zero and 24 months receive 5 percent increases, employees who have been employed between 24 months and 60 months receive 7 percent increases, and employees who have been employed for more than 60 months receive increases of 10 percent.

To help administer this policy, you can set up an increase guideline table that defines the types of raises that employees are eligible to receive based on their length of service.

Using the evaluation factor of length of service, you can create three different ranges in which to group your employees. The first range includes all of the employees who have been employed between .001 and 24 months. The second range includes all of the employees who have been employed between 24.01 and 60.00 months. The last range, 60.01-9999.00, includes all of the employees who have been employed more than 60 months.



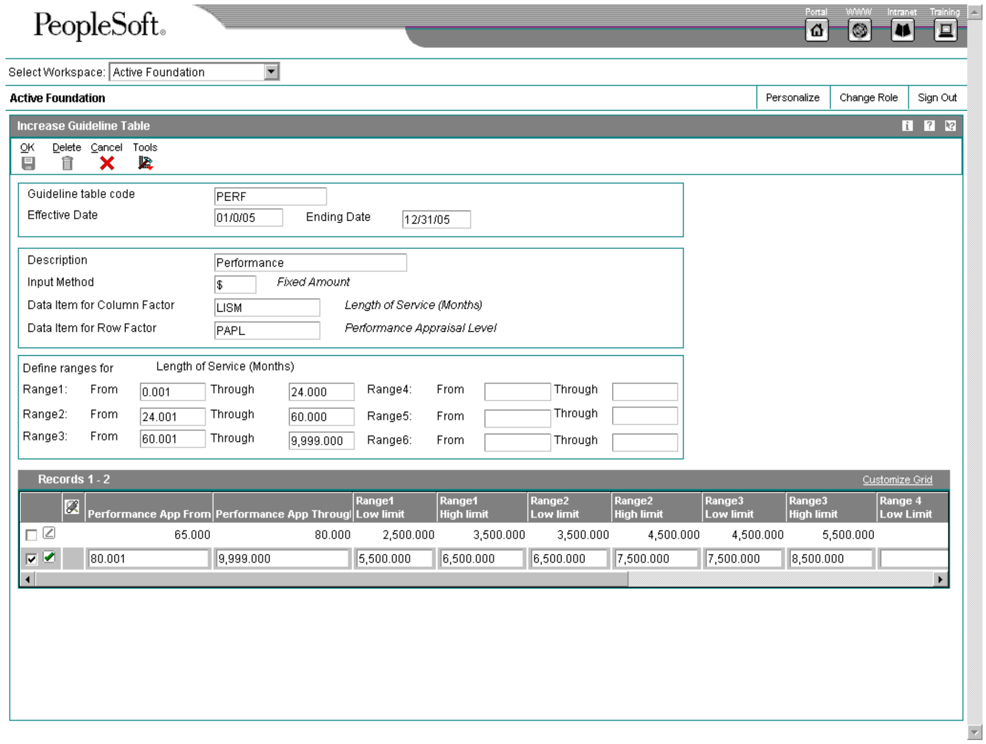
Note

You must complete both the Data Item for Column Factor field and the Data Item for Row Factor field in the Define Increase Type Guidelines program (P08820). If you are using only one evaluation factor, such as length of service, you must complete both fields with that evaluation factor.

Example: Increase Guidelines Based on Length of Service and Performance Ratings

Your company might have a compensation increase policy that is based on employees' length of service, as well as their performance appraisal ratings. For example, assume that employees who have been employed between zero and 24 months and have a performance appraisal rating of 80 or higher are eligible to receive an increase of between 5500 and 6500. Employees who have been employed between 24 and 60 months and have a performance appraisal rating that is between 65 and 80 are eligible to receive an increase of between 3500 and 4500.

To help administer this policy, you can set up an increase guideline table that defines the types of raises that employees are eligible to receive, based on their length of service and their performance appraisal ratings.



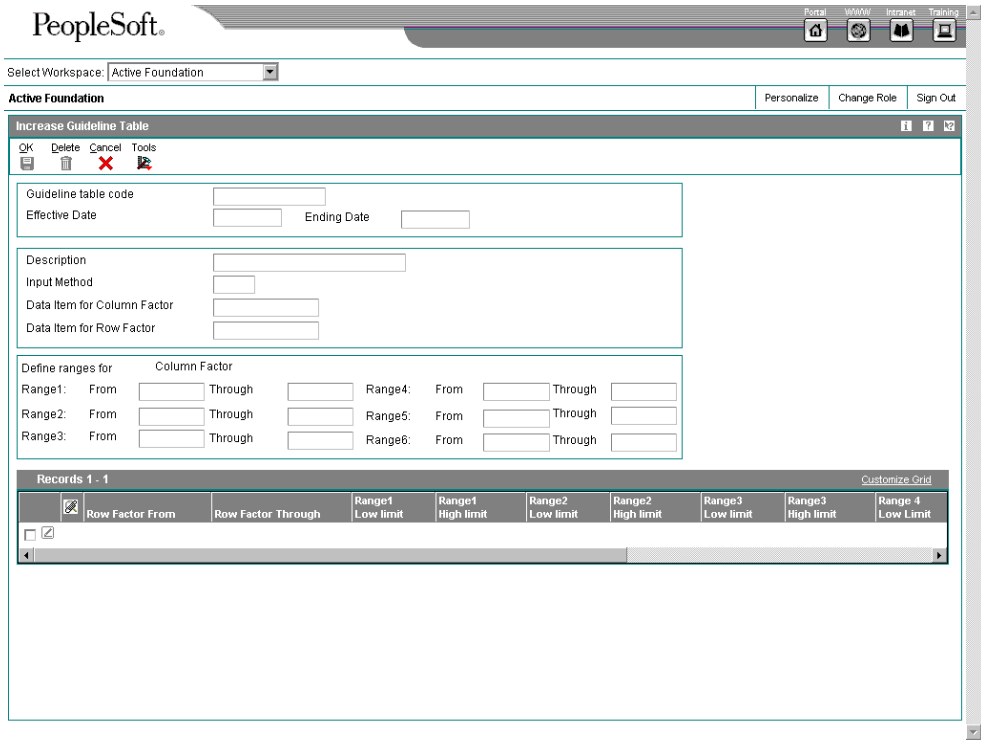
Using this increase guideline table helps to ensure that each employee receives the proper increase. For example, you can determine what the compensation increase should be for an employee who has been employed for 48 months and has received a 78 on the most recent performance appraisal. Using the previous example, this employee is eligible to receive an increase of between 3500 and 4500.

The factor that you use as the column factor or the row factor does not matter. Changing these factors does not affect the outcome of the table information; only the way that the information appears on the table affects the outcome. If you change the display of the evaluation factors, the table displays the information differently. However, an employee who has been employed for 48 months and received a 78 on the most recent performance appraisal is still eligible to receive an increase of between 3500 and 4500.

► To define increase type guidelines

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Increase Type Guidelines.

1. On Work with Increase Guideline Tables, click Add.



2. On Increase Guideline Table, complete the following fields:
   - Guideline table code
   - Effective Date
   - Description
   - Input Method
   - Data Item for Column Factor
   - Data Item for Row Factor
3. Complete the following optional field:
   - Ending Date
4. To define a range for the column factor that you specified, complete the following fields:
   - From
   - Through
5. To define additional ranges for the column factor, complete the same fields for the other ranges.
6. To define a range for the row factor that you specified, complete the following fields:

- Row Factor From
- Row Factor Through
- Range1 Low limit
- Range1 High limit

7. To define additional ranges for the row factor, complete the High and Low limit fields for the ranges that you chose in step 5.
8. Click OK.

Defining Increase Type Rules

After you set up your increase guideline tables, you need to identify your increase type rules. Organizations often have specific rules for the types of compensation increases that employees are eligible to receive. These rules can include eligibility rules, whether a job title change is allowed, rounding rules, salary guidelines, budget allocation, and the date on which a prorated factor is calculated. You set up the increase type rules to define the default information for a specific increase type.

► To define increase type rules

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Increase Type Rules.

1. On Work With Increase Type, click Add.
2. On Increase Type Rules, complete the following fields:
   - Increase Type Code
   - Company
   - Effective Date

     The system date is the default effective date.
   - Increase Type Description

     The system completes this field with the Increase Type Code description.
3. To allow job title changes, click the following option to turn it on:
   - Allow Job Title Change

     You allow a job title change only on increase types that also involve a job change, such as a promotion.
4. Complete the following optional fields.
   - Home Business Unit
   - Ending Date

- Budget Allocation%
- Rounding Rule Code
- Eligibility Table
- Increase Guidelines table
- Date to base prorate on

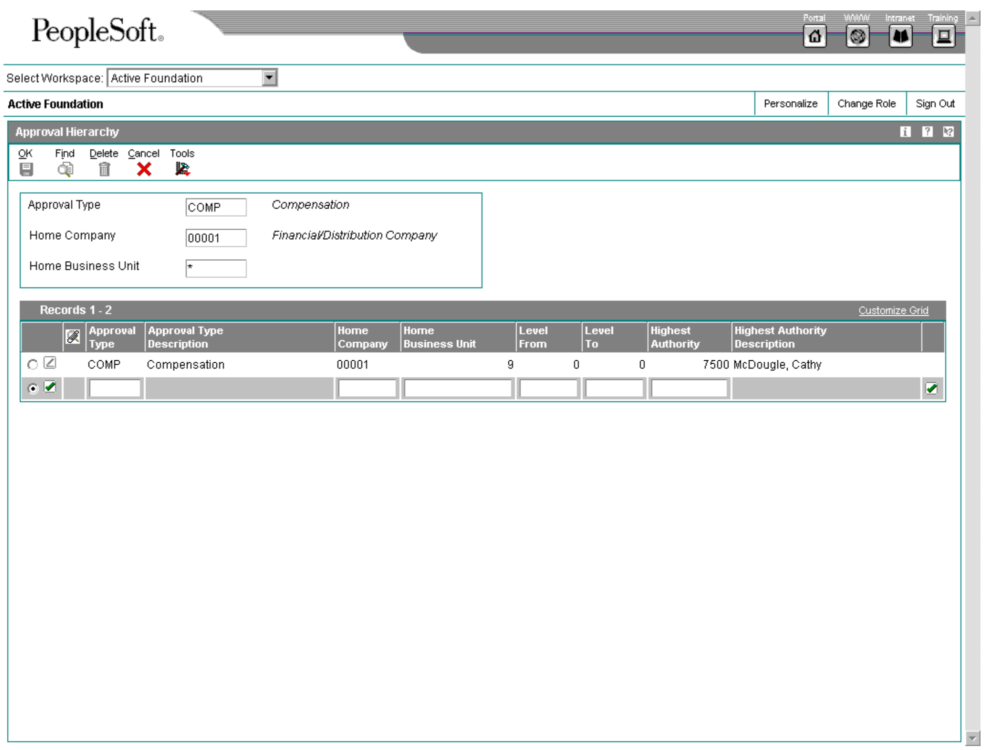
5. Click the following option to turn it on, and then click OK:
   - Allow prorate factor greater than 1.00

Setting Up the Approval Hierarchy

You set up the approval hierarchy to specify approval rules for an approval type and to identify who will be the highest authority for giving final approval to the compensation review. This person is usually someone in the human resources department.

► To set up the approval hierarchy

From the Compensation Mgmt System Setup menu (G08CM14), choose Define Approval Hierarchy Setup.



1. On Approval Hierarchy, complete the following fields in the detail area:
   - Approval Type
   - Home Company
2. Complete the following optional fields:
   - Home Business Unit
   - Level From
   - Level To
   - Highest Authority
3. Click OK.

Note

The system ignores the Level From and Level To fields. A supervisor cannot submit work for approval until the work for all subordinates is submitted. When a supervisor submits a compensation review, all levels of supervisors below the submitting supervisor must have approved it.

Defining Public Models

If you plan to use public models, you must define them in UDC table 08/PM during setup. These models are visible to all managers in the management chain.

The public model allows higher-level supervisors to open the model and view your work. When you save the model as a private model, you are the only person who has access to that model. You use the public model so that higher-level managers can make modifications and return the model to the originator. After you have incorporated all of the changes that you want to make, you create a master model. Only a master model can be submitted for approval. You cannot change the master model after you submit it.

See Also

- *User Defined Codes* in the *Foundation Guide* for complete instructions for setting up user defined codes.

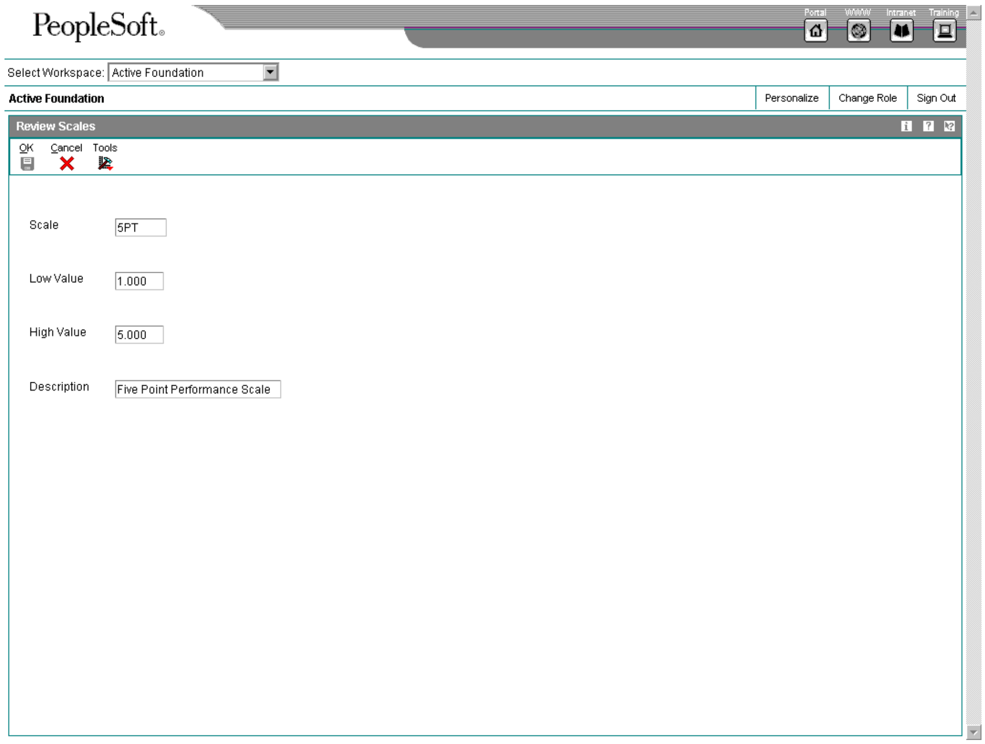
Defining the Performance Appraisal Scale

Organizations often have specific scales for employee performance appraisals. You set up performance appraisal scales to define the scales that are valid for your company.

► To define the performance appraisal scale

From the Compensation Mgmt System Setup menu (G08CM14), choose Scale Information.

1. On Work With Scales, click Add.



2. On Review Scales, complete the following fields, click OK, and then click Cancel:
   - Scale
   - Low Value
   - High Value
   - Description
3. On Work With Scales, locate and choose the record that you just added in the detail area, and then choose Define Levels from the Row menu to define the levels for the scale.
4. On Define Competency Levels, complete the following fields, and then click OK:
   - Low Value
   - High Value

Generating the Employee/Supervisor Relationship Table

From the Compensation Mgmt Advanced & Tech Oper menu (G08CM13), choose Employee/Supervisor Relationship Build.

Before you open the compensation review process to the managers, you need to build the Employee/Supervisor Relationship Level table (F05840) to generate a list that shows the hierarchy of management above each active employee, based on the information in the Employee Master Information table (F060116). The system deletes any existing records prior to writing the employee's records. One record is written for each manager above the employee. The employee's immediate supervisor is written with a level 1, the supervisor's supervisor is written with a 2, and so on.

The Employee/Supervisor Relationship Level table does not automatically reflect any changes made to the Employee Master Information table; therefore, you should build it nightly during the time that the compensation review process is open so that the table is always current.

The processing option must be set before you run the program. When a supervisor has given notice or is going to be terminated, you must decide when to remove the supervisor's name from the employee/supervisor relationship level table. Use Days Prior To Termination processing option to specify how many days prior to termination you want to exclude the supervisor from the table build. Any records for supervisors who have termination dates within the specified time period are not written to the table and are included in the exception report.

Processing Options for Employee/Supervisor Relationship Build (R05846)

Process Tab

This processing option specifies whether a terminated supervisor is included in the hierarchy that the workfile creates.

---

1. Days Prior To Termination

Use this processing option to specify the number of days prior to an employee's termination during which the supervisor will be included in the Employee/Supervisor Relationship Level table (F05840).

Generating Compensation Review Work Tables

From the Compensation Mgmt Advanced & Tech Oper menu (G08CM13), choose Compensation Review Work Tables Build.

You run the Compensation Review Work Tables Build program (R08830) to generate a list of the employees who will be reviewed. These work tables give the managers easy access to all of the information that you have set up during their compensation review process. When you build the work tables, the system reviews each employee's home company and home business unit to establish the available increase types for the employee's organization. For each increase type, the increase type rules specify whether to test for the employee's eligibility, calculate prorate factors, determine salary guidelines from the employee's performance appraisal, calculate budget allocation, and allow job title change. You can specify whether to globally apply the budget allocation percentages for the increase types as the recommended increase amounts. The recommended increase amounts are the basis for salary planning for the supervisors and can be overridden in the compensation review if you have allowed overrides during setup.

Set the CMPSYNC common setting to Yes to synchronize compensation work tables. When the compensation work tables are synchronized, any changes made to the Employee Master Information table (F060116) are automatically reflected in the compensation work tables.

See Also

- *Setting Up Common Settings for Workforce Management* in the *Workforce Management Foundation Guide*

Processing Options for Compensation Review Work Tables Build (R08830)

Default Values Tab

These processing options specify default effective dates for the compensation review work tables.

---

1. New Increase Effective Date (Required)

Use this processing option to enter the new effective date of the increase, which the system uses for history tracking only.

---

2. Next Increase Effective Date

Use this processing option to enter the next increase effective date.

Edits Tab

These processing options specify whether to apply global increases and whether to clear compensation work tables prior to building new work tables.

1. Apply Global Increase

0 = Do not apply global increase

1 = Apply the increase budget allocation

2 = Apply the increase guideline average

Use this processing option to determine whether to apply global increases as starting recommended increases. Valid values:

Blank

Do not apply global increases.

1

Apply the increase budget allocations.

2

Apply the increase guideline average.

2. Clear Compensation Review Work Tables Build

0 = Do not clear

1 = Clear

Use this processing option to specify whether to clear the Compensation Review Work Tables Build table (R08830).

Print Option Tab

This processing option specifies the print format for the Compensation Review Work Tables Build report.

1. Print Option

0 = Print summary of employee count

1 = Print summary by employee

2 = Print increase details by employee

Use this processing option to specify the format for the report. Valid values are:

Blank

Print a summary of the employee count.

1

Print a summary by employee.

2

Print increase details by employee.

Working with Compensation Management

The compensation management feature is a salary-planning tool that empowers managers or human resources administrators to make salary decisions based on real-time information. The system also provides a flexible Web tool that allows managers to make adjustment recommendations to employees' salaries.

The compensation review process begins when the human resources administrator sets up the rules and constants that define eligibility and guidelines for the use of the system. The administrator builds compensation review work tables to set up your organization's user-defined matrices for eligibility and increase guidelines. After the review work tables are built, the human resources administrator can grant supervisors access to them. While the salary review process is open, supervisors are notified of any changes made to the Employee Master Information table (F060116) each time that they access the system. Therefore, supervisors are confident that they are making salary recommendations using the most current employee information. In addition to an online visual indicator of data changes, supervisors also receive an e-mail to advise of the changes.

As a human resources administrator, you can use this application to review or change salary records of any employee. Managers using this tool can review and change only the salary records of employees who report to them. You can review each employee individually or use the quick entry feature to review the entire group at once. When you use the quick entry feature, you can apply global increases that are based on the criteria that you choose (for example, a 5 percent merit raise to all employees who are rated as outstanding).

For both input methods, you can review online the spent and remaining budget. The system displays this information for each increase type and for the total of all of the increase types. When the managers are finished making and approving compensation recommendations, the human resources administrator turns off supervisor access to the compensation management programs, and then runs a batch process to update the information to the active tables and to archive the salary planning information to historical records.

The Compensation Review Workbench program (P08826) is the initial entry point for the all of the Compensation Management features in J.D. Edwards software. It provides centralized access to the tools that you need to make salary recommendations, using budgets, rules, and approval requirements that are defined by the human resources department.

Both managers and human resources representatives can use the Compensation Review Workbench to perform the following tasks:

- Determine which subordinates are eligible for each type of adjustment
- Review employee history for position, job, and compensation data items
- Review results from employee performance reviews
- Review the recommended increase amount that the system generates, based on the criteria that the human resources department sets up
- Calculate “what if” scenarios for each employee or for all of the employees as a group, and review the effect of these scenarios on budgets
- Review salary planning information for indirect reports, such as employees who report to direct subordinates
- Review approval statuses of salary increases for indirect reports

From the Compensation Review Workbench you can access the following features:

Open	You use the Open feature to choose the compensation review model that you want to use in the salary planning process. You can choose a public or private model, or the master model.
Guide	You use the Guide feature to directly access a Web address that you define in the processing options.
Rating Distribution	You use the Rating Distribution feature to quickly review the average increase for the increase types and determine how each of the increase types is distributed to the employees, based on their performance.
Submit	When you have finished with the compensation review, you use the Submit feature to submit the compensation recommendation to the supervisor. The system notifies you if the submission has been successful.
Return	You use the Return feature to return a submitted compensation recommendation to a supervisor. After the review is returned, the supervisor can make changes to the compensation or return the work of lower-level supervisors.
Quick Entries	You use the Quick Entries feature to apply global increases, based on certain criteria, to the employees within a group.
Individual Review	You use the Individual Review feature to complete salary planning work for an individual.

Before You Begin

Verify that the human resources administrator has performed the following tasks:

- Set up the information that the system needs for processing. See *Setting Up Compensation Management* in the *Human Resources Guide*.
- Activate the common setting CMPOPEN to give managers access to make compensation reviews. Managers and supervisors can access compensation information for only their own employees. See *Setting Up Common Settings for Workforce Management* and *Common Settings for Compensation Management* in the *Human Resources Guide.*

Processing Options for Compensation Review Workbench (P08826)

Process Tab

These processing options specify the workbench type and the URL for the Compensation Review Guide.

URL for Compensation Review Guide

Use this processing option to specify the URL for the Compensation Review Guide.

New Job Tab

These processing options specify the default values that the system applies to a new job.

1. When changing employee's job, default the new job information.

'0' = Do Not Default

'1' = Default

Use this processing option to specify whether to use the default information for a new job. Valid values are:

0

Do not default

1

Default

2. Allow Override of Default Job information.

'0' = Do Not Default

'1' = Default

Use this processing option to specify whether to allow the supervisor to override the default information for a new job. Valid values are:

0

Do not allow

1

Allow

Performance Profile Tab

These processing options specify the appraisal scale name and the performance profile information that the supervisor is allowed to enter.

1. Performance Appraisal Scale Name (Required)

Use this processing option to specify the method to use for measuring an employee's level of proficiency in a particular competency. The scale uses a series of competency levels to represent standards of relative proficiency.

2. Entry of Performance Appraisal

'0' = No

'1' = Yes

Use this processing option to specify whether to allow a supervisor to enter performance appraisal information on the Individual Compensation Review form. Valid values are:

0

Do not Allow

1

Allow

3. Entry of Job Competency

'0' = No

'1' = Yes

Use this processing option to specify whether to allow a supervisor to enter job competency information on the Individual Compensation Review form. Valid values are:

0

Do not Allow

1

Allow

4. Entry of Tier or Ranking

'0' = No

'1' = Yes

Use this processing option to specify whether to allow a supervisor to enter tier or ranking information on the Individual Compensation Review form. Valid values are:

0

Do not Allow

1

Allow

Reviewing Salary Recommendations

The Compensation Review Workbench program (P08826) is the initial entry point for the salary review process. Both managers and human resources administrators use this program. The workbench provides you with a compensation-planning tool to make salary recommendations using budgets, rules, and guidelines that the human resources department sets up.

The workbench allows you to perform the following tasks:

- Maintain multiple versions of different salary recommendations
- Review the salary budget allocation, budget spent, and budget remaining by increase types
- Review and change salary recommendations of a specified supervisor

Managers access the Compensation Review Workbench program through the Manager Self Service menu (G05BMSS1). When managers access the workbench, the supervisor field is disabled and the system automatically supplies the supervisor number.

Human resources administrators access the workbench through the Compensation Mgmt Periodic Processing menu (G08CM12). When you use the workbench as a human resources administrator, the supervisor field is enabled so that you can enter a supervisor number. You can enter a supervisor number and review the records of the employees who are in that supervisor's reporting structure. You can then review or change salary recommendations and review summary information about the employees who report to that supervisor.

Entering Salary Recommendations for an Individual Employee

You can enter salary recommendations for one individual employee at a time. You can make modifications to individual eligibility or job titles, based on rules the human resources administrator set up.

► **To enter salary recommendations for an individual employee**

Use one of the following navigations:

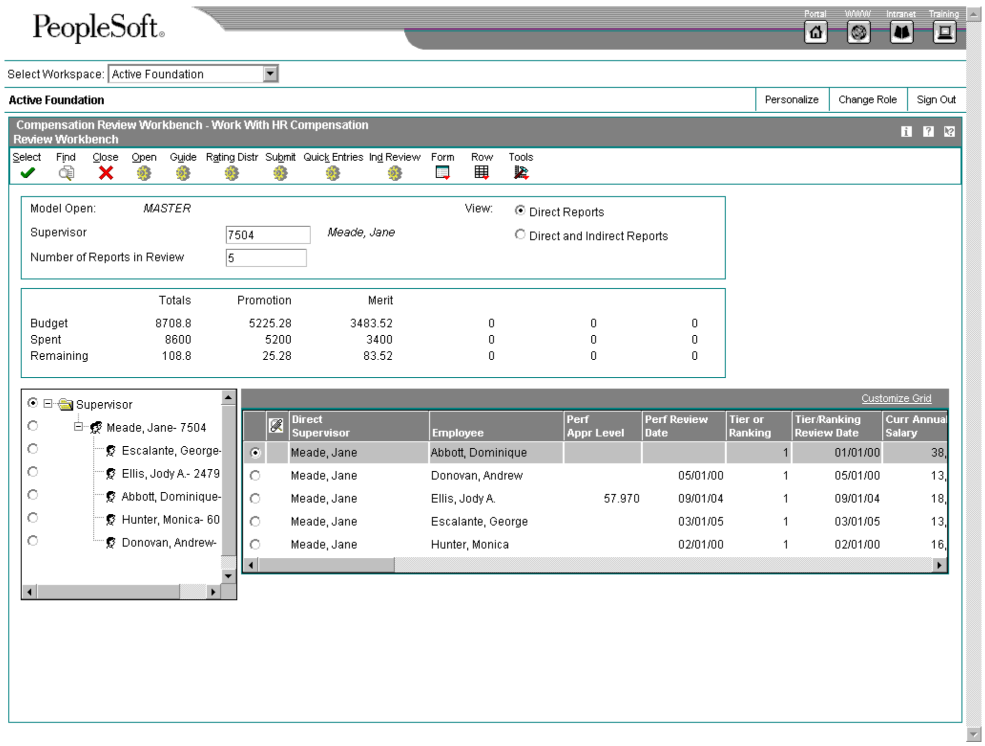
For HR administrators, from the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

For managers, from the Manager Self Service menu (G05BMSS1), choose Compensation Review Workbench.

1. On Work With HR Compensation Review Workbench or Work With Manager Compensation Review Workbench, choose one of the following options:

    - Direct Reports

    - Direct and Indirect Reports

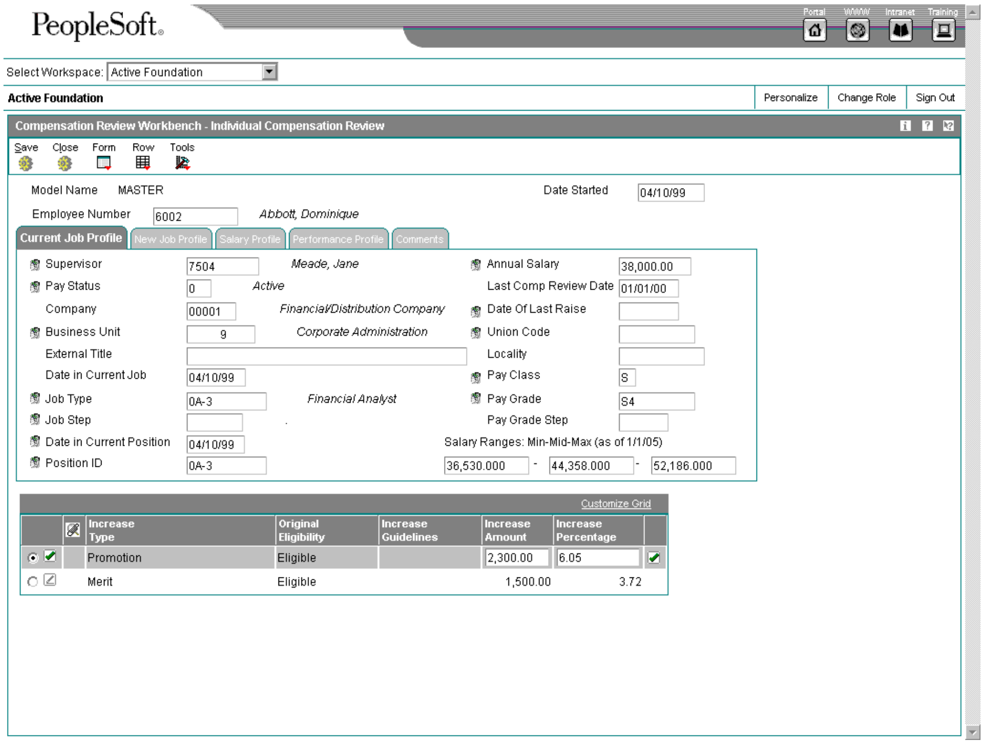


2. Complete the following field and click Find:

    - Supervisor

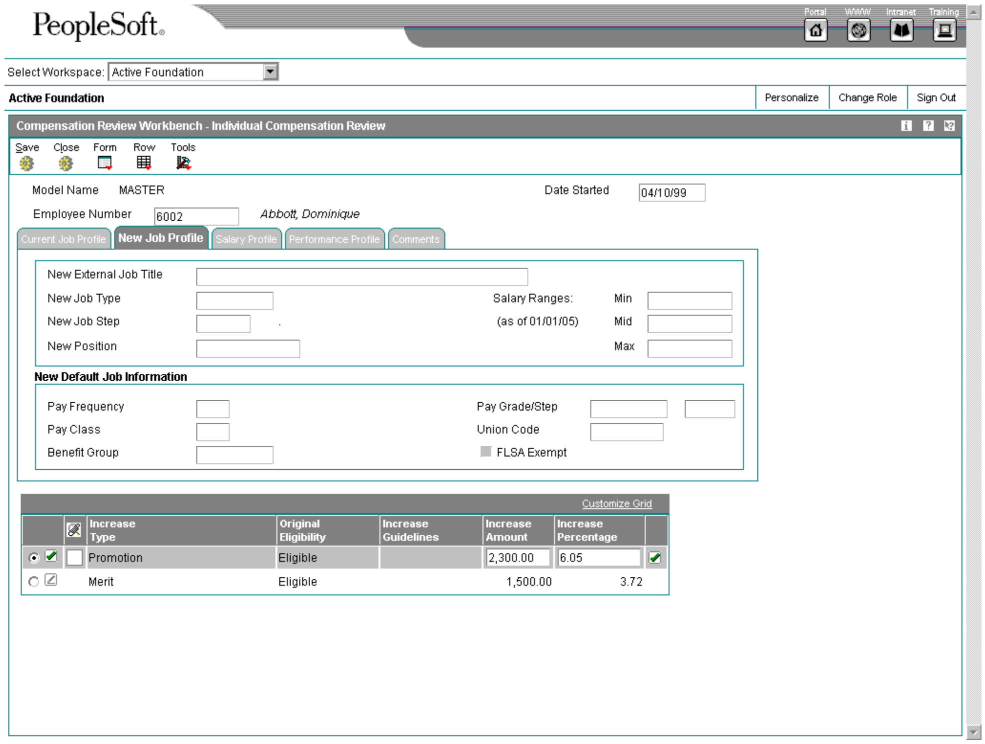
    The tree structure on the left side of the detail area shows the management hierarchy.

3. Choose the employee whose records you want to review or change from the right side of the detail area, and then choose Ind Review from the Row menu.

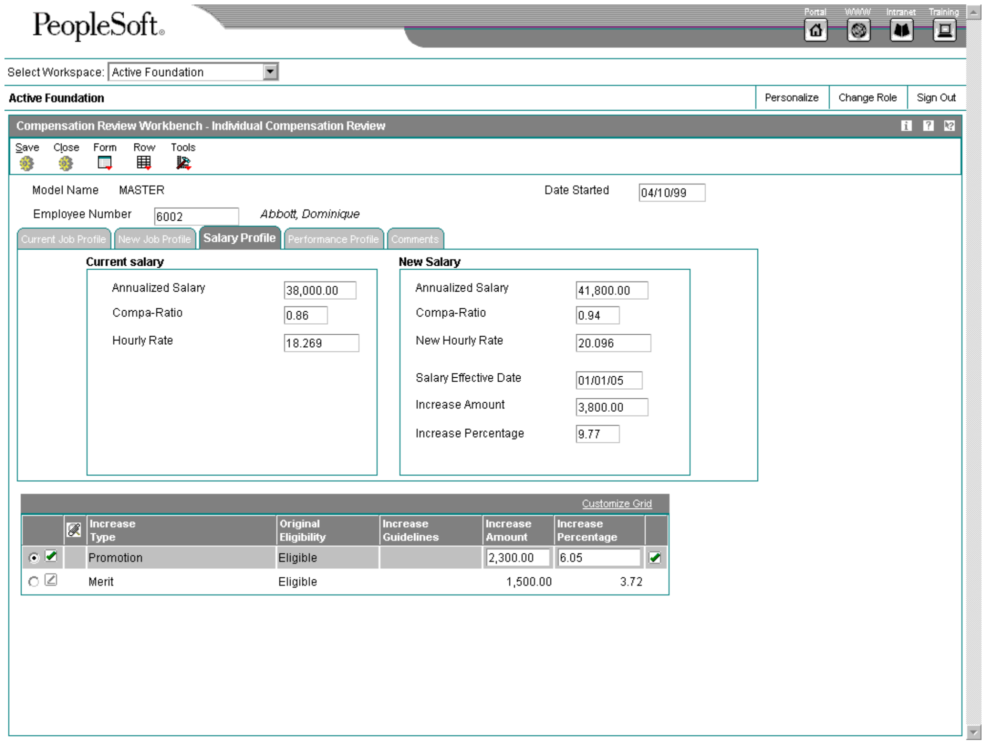


4. On Individual Compensation Review, choose the Current Job Profile tab and review the information about the employee's current job.

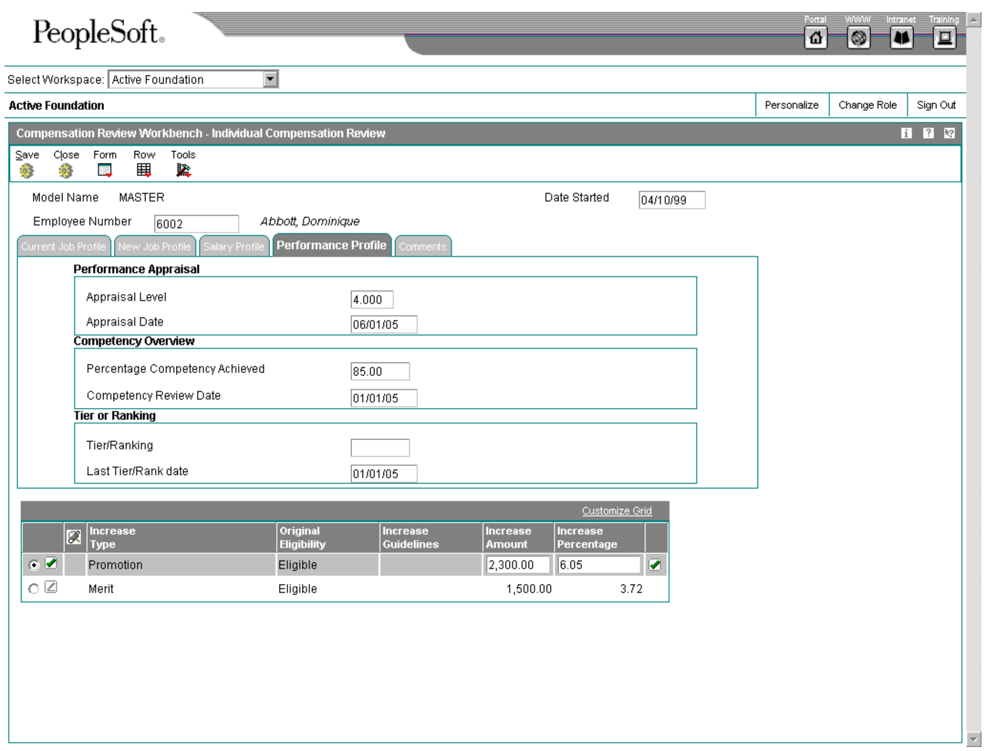
   The New Job Profile tab is enabled only if one of the increase types in the detail area allows a job title change.



5. To change an employee's job title, choose the New Job Profile tab and complete the following fields:
    - New External Job Title
    - New Job Type
    - New Job Step
    - New Position
6. In the New Default Job Information group box, complete any or all of the following optional fields:
    - Pay Grade/Step
    - Union Code
    - FLSA Exempt



7. Choose the Salary Profile tab and review the information in the header area.



8. Choose the Performance Profile tab and complete the following fields.

- Appraisal Level
- Appraisal Date
- Percentage Competency Achieved
- Competency Review Date
- Tier/Ranking
- Last Tier/Rank date

  You can complete these fields only if the processing options are set to allow input.

9. Choose the Comments tab and enter any additional information.
10. In the detail area, complete the following fields:
    - Increase Amount
    - Increase Percentage
11. Review the eligibility status of the employee for a new position.
12. Click Save.
13. On Work With HR Compensation Review Workbench, choose the next employee whose records you need to review or change, and repeat steps 4-12.
14. When you are finished reviewing and changing records, click Submit to submit the changes that you made to the records.

Entering Salary Recommendations for Groups of Employees

You can do salary planning work either by individual (individual review) or for the whole group at once (quick entries). The quick entries feature enables you to apply global increases to the employees within a group based on certain criteria, such as a performance appraisal, tier or ranking, increase type, or pay grade and pay grade step.

► To enter salary recommendations for groups of employees

Use one of the following navigations:

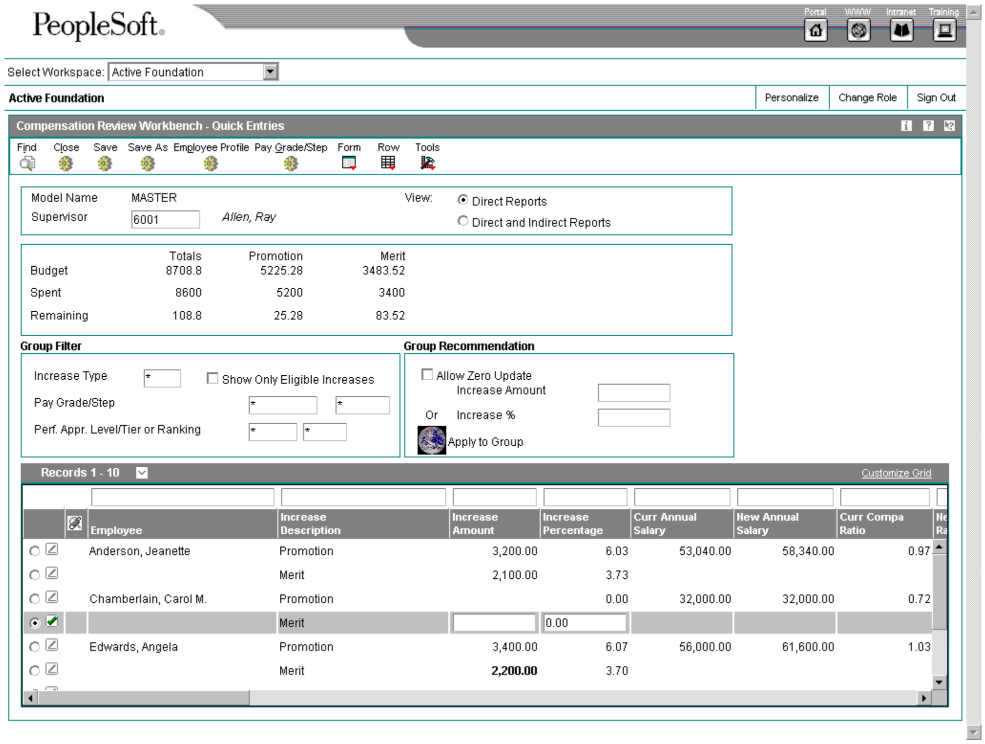
For HR administrators, from the Compensation Mgmt Periodic Processing menu (G08CM12), choose Compensation Review Workbench.

For managers, from the Manager Self Service menu (G05BMSS1), choose Compensation Review Workbench.

1. On Work With HR Compensation Review Workbench or Work With Manager Compensation Review Workbench, choose one of the following options:
   - Direct Reports
   - Direct and Indirect Reports
2. Complete the following field and click Find:
   - Supervisor

The tree structure on the left side of the detail area shows the management hierarchy.

3. Click the Quick Entries button.



4. On Quick Entries, choose one of the following options:
   - Direct Reports
   - Direct and Indirect Reports
5. To choose a group of employees who meet specific criteria, complete the following optional fields in the Group Filter group box and then click Find:
   - Increase Type
   - Show Only Eligible Increases
   - Pay Grade/Step
   - Perf. Appr. Level/Tier or Ranking
6. To make global salary changes, complete one of the following fields, and then click Apply to Group.
   - Allow Zero Update
   - Increase Amount
   - Increase %

7. Click Save or Save As to save your work.

   If you click Save As, the Save As form appears, and you must complete step 8. If you click Save, proceed to step 9.

8. On Save As, complete one of the following and then click OK:

   a. To save the salary recommendations as a master model, click the following option:

   - Master Version

   b. To save the salary recommendations as a private model, complete the following fields in the Private Model group box:

   - Model Name

   - Model Description

   c. To save the salary recommendations as a public model, complete the following field in the Public Model group box:

   - Model Name

9. On Work With HR Compensation Review Workbench, click Submit to submit the changes that you made to the records.

Reviewing Salary Approvals

After you submit salary recommendations, you can review the approval status of the recommendations. You can determine whether the recommendations were approved or rejected, the date and time when the recommendations were approved or rejected, and the name of the person who approved or rejected them.

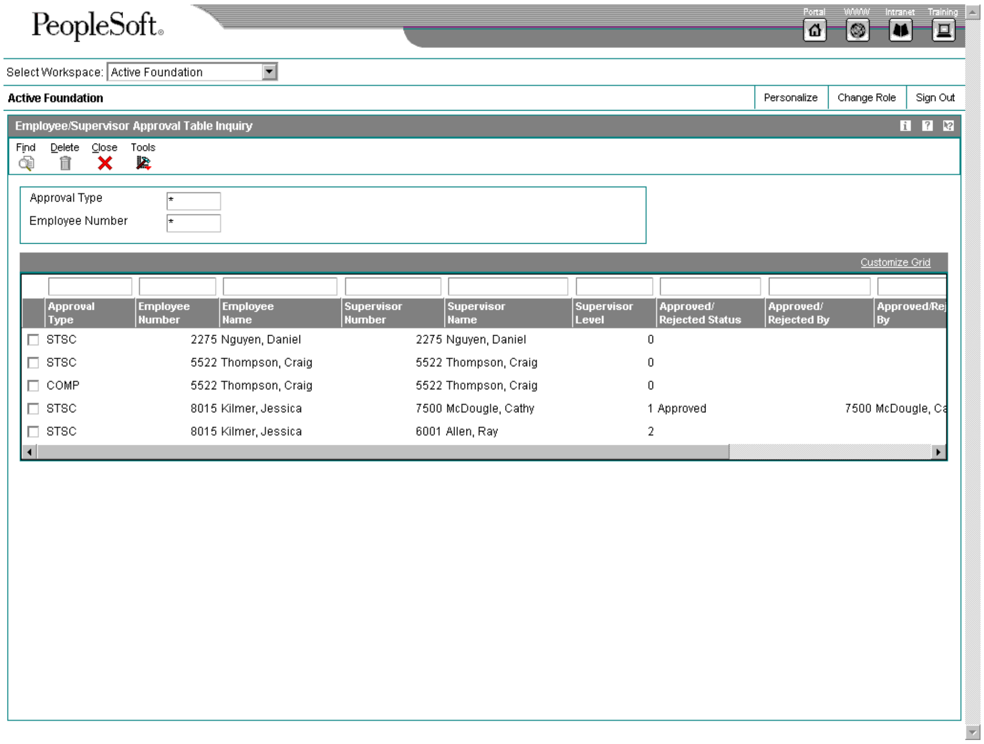
► To review salary approvals

From the Compensation Mgmt Periodic Processing menu (G08CM12), choose Approval Inquiry.

1. On Employee/Supervisor Approval Table Inquiry, complete the following fields and click Find:

   - Approval Type

   - Employee Number



2. Review the information in the detail area.

Note

You can also access the Employee/Supervisor Approval Table Inquiry form from the Row menu on the Work With HR Compensation Review Workbench form (W08810A).

Updating the Compensation Review

From the Compensation Mgmt Advanced & Tech Oper (Operations) menu (G08CM13), choose Compensation Review Updates.

After the compensation review period has closed and the final review has been submitted, the new compensation information needs to be updated to the Employee Master Information table (F060116). The Compensation Review Updates program (R08332) creates a history record for the new total salary change and updates the history table with the different increase types that make up the new salary. The increase types are associated with the appropriate change reasons.

Because the Compensation Review Updates program makes immediate changes to compensation information, you should run the update during the pay period for which the increase applies, but before pre-payroll is processed for that pay period.

After the human resources administrator closes the compensation review process, he or she should also perform the following tasks:

- Set the CMPSYNC common setting to No to turn off synchronizing of the compensation work tables.
- Set the CMPOPEN common setting to No to close the compensation review process.

After updating the Employee Master table, the system clears the work tables and purges any comments that are stored as media object text and are associated with the compensation review.

See Also

- *Setting Up Common Settings for Workforce Management* in the *Human Resources Guide*

Processing Options for Compensation Review Updates (R08832)

Process Tab

These processing options specify the process mode and the change reason to use, and whether to update performance appraisal information, tier or ranking information, and job competency information.

---

1. Process Mode

'0'=Proof Mode

'1'=Final Mode

Use this processing option to specify the mode for the system to use when processing the compensation review update. Valid values are:

0 Proof Mode

1 Final Mode

If you use proof mode, the system prints the Summary Per Employee report for you to review. The system also prints the Eligibility Override, Job Title Change, and Salaries Outside Pay Grade Range reports if you have set the processing options for these reports to print. In proof mode, the system does not update the compensation review information to any database tables.

In final mode, the system prints the reports and updates the compensation review information to the Employee Master (F060116), Employee Master Additional Information (F060120), and HR History (F08042) tables. The system also clears the work tables and purges any comments that are associated with the compensation review.

---

2. Change Reason For the New Salary and any New Job. (Required)

Use this processing option to specify the change reason for the new total salary increase.

3. Update Performance Appraisal Information.

'0' =Do not update

'1'=Update

Use this processing option to specify whether to update the performance appraisal information, in addition to the new salary and new job (if any).

Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than a 0 or 1 to 0.

4. Update Tier or Ranking Information

'0'=Do not update

'1'=Update

Use this processing option to specify whether to update the tier or ranking information, in addition to the new salary and new job (if any). Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than 0 or 1 to 0.

---

5. Update Job Competency Information

'0'=Do not update

'1'=Update

Use this processing option to specify whether to update the job competency information, in addition to the new salary and new job (if any). Valid values are:

0 Do not update to F060120

1 Update to F060120

The system changes a code other than 0 or 1 to 0.

Print Tab

These processing options specify whether to print comments in the summary by employee report; and whether to print the eligibility override, job title change, and salary outside pay grade range reports.

1. Print Comment In the Summary By Employee Report

'0'=Do not print

'1'=Print

Use this processing option to specify whether to print comments in the Summary By Employee report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

2. Eligibility Override Report

'0'=Do not print

'1'=Print

Use this processing option to specify whether to print the Eligibility Override report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

3. Job Title Change Report

'0'=Do not print

'1'=Print

Use this processing option to specify whether to print the Job Title Change Report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

4. Salary Outside Pay Grade Range Report

'0'=Do not print

'1'=Print

Use this processing option to specify whether to print the Salary Outside Pay Grade Range report. Valid values are:

0 Do not print

1 Print

The system changes a code other than 0 or 1 to 0.

Setting Up Pay Information

Before you can use your system to define the jobs within your organization, you must define pay and job evaluation information. You define pay information to set up the pay ranges or amounts that are associated with each job. You define job evaluation information to define the methods that you use to evaluate jobs. You use job evaluations to determine equitable pay ranges for jobs. You also can set up a cross-reference table by business unit to define default job information for employees in a specific business unit.

Before You Begin

- Set up the user defined codes for jobs. See *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide*.
- Review the pay range and step information that you have set up in your system options. See *Setting Up System Options* in the *Workforce Management Foundation Guide*.

Understanding Employee Compensation

Before you enter employee compensation, you must choose an appropriate pay-rate source based on your business purpose and organizational structure. The type of compensation information that you must enter for each employee and how the system calculates salaries or hourly rates depends on the pay rate source that you have set up in your system options.

The available pay rate sources include the following:

- Pay rate table
- Pay grade step table
- None (no default pay rate source)

The pay rate source that you choose depends on the nature of your work force and the planning and budgeting requirements of your organization. The pay rate source also affects how the system calculates salary and hourly rates for employees.

To understand how the pay rate source affects salary and hourly calculations, you first need to understand how the system identifies the following components:

Salary	The amount of money that the employee earns in one year.
Hourly rate	The amount of money that an employee earns in one hour.
Standard hours per year	The number of hours per year that an employee works.

The following equations explain how the system calculates a salary and hourly rate:

- Annual salary divided by standard hours per year equals hourly rate
- Hourly rate multiplied by standard hours per year equals annual salary

Scenario 1: The Pay Rate Table as the Default Pay Rate Source

When you need to associate pay rates with a specific group of employees, such as members of a union, you can use the pay rate table as the default pay rate source. The pay rate table, as set up in the Union Rates Master Revisions program (P059121), associates job types and steps with union codes. Therefore, specific hourly rates are attached to union codes when you set up hourly rates with job types and steps. The compensation information that you enter in this program is copied to the forms that you use when you hire employees.

The pay rate table is frequently used by the public sector and other industries that are closely linked to unions.

Pay rate tables are useful for positions that are compensated based on a flat rate, rather than a pay range. Pay rates can be used with hourly jobs, for which an employee is paid a set hourly rate regardless of performance or seniority. For use with unions, pay rate ranges usually need to accommodate only seniority adjustments. However, the use of pay rates can include performance adjustments. To recognize performance, you need to set up a pay type, such as bonus pay, or change the employee's job type to a job type that is attached to an increased pay rate.

To use the information in the pay rate table when you add an employee record, you complete the Job Type, Job Step, and Union Code fields, and leave the Salary and Hourly Rate fields blank. The system automatically supplies the salary and hourly rate values for the corresponding Job Type, Job Step, and Union Code found on the pay rate table.

On the Basic Compensation form (W0801CMPB), the system supplies a default value for standard hours per year, which you can override, if necessary. Overriding the standard hours per year does not affect an employee's hourly rate.

The following list provides the guidelines for changing the values on the Basic Compensation form:

Hourly rate	You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the pay rate table.
Standard hours per year	When you change the standard hours per year for an employee, the hourly rate does not change. The system recalculates the annual salary for the employee.
Full-time equivalents (FTE)	When you change the FTE field for the employee on the Basic Compensation form, you must also remove the value entered for standard hours per year. The system adjusts the employee's standard hours per year. The hourly rate remains the same.

Overriding the Default Pay Rate Source

To override the pay rate table as the default pay rate source when you add an employee record, you must enter either a salary or an hourly rate for the employee and do one of the following:

- Leave the Union Code field blank

- Enter a union code that is not included in the pay rate table

See Also

- *Scenario 3: No Pay Rate Source as the Default Pay Rate Source* in the *Human Resources Guide* for information about salary and hourly rate calculations
- *Setting Up Pay Rate Tables* in the *Human Resources Guide*

Scenario 2: The Pay Grade Step Table as the Default Pay Rate Source

To ensure that all of the employees working in a job receive the same rate of pay, and to provide for progression within a pay grade, you can use the Pay Grade Step Table program (P082003) as the pay rate source.

If your chosen pay rate source is the pay grade step table, you must use the Pay Grade Step Table (P082003) and Pay Grades By Class (P082001) programs to set up pay grades and pay grade steps. The compensation information that you provide in these programs is copied to the forms that you use when you hire employees.

Using the Pay Grade Step Table program is convenient for a company whose structure consists of many positions that allow for progressive advancement. Using the Pay Grade Step Table program to enter compensation also saves data entry time and reduces calculation errors and compensation inconsistencies.

In the Pay Grade Step Table program, a pay grade consists of a group of jobs that are equal in pay range. For example, assume all junior accountant positions and junior graphic artists in a company are in pay grade A, and pay grade A represents a pay range of 30,000-40,000. Therefore, all junior accountant and junior graphic positions need to be compensated within this pay range.

However, within each pay grade, you set up pay grade steps that represent a specific salary or hourly rate. For example, suppose that pay grade A includes pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of entering compensation information for employees. When you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can also save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

You might also prefer to use pay grades without using pay-grade steps to calculate compa-ratios for pay grades. Compa-ratios are helpful calculations for management to determine equitable pay increases for employees.

When you hire an employee, do not complete the Job Type or Job Step fields in the Employee Organizational Assignments program (P0801ORG). Instead, complete the Pay Grade and Pay Step fields on the Basic Compensation form (W0801CMPB). The system automatically updates the Basic Compensation form with the appropriate salary, hourly rate, and hours per year from the Pay Grade Step table.

The following list provides the guidelines for changing the values on the Basic Compensation form:

Pay grade step	When you change the employee's pay grade step, the system replaces the employee's hourly rate, salary, and standard hours per year with the corresponding information from the pay grade step table.
Hourly rate	You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the table.
Standard hours per year	When you change the standard hours per year for an employee, you must also delete the employee's salary. The employee's hourly rate does not change. The system recalculates the employee's salary, based on the new standard hours per year and the hourly rate for the pay grade step.
Salary	When you change the employee's salary, the hourly rate does not change. The system recalculates the employee's standard hours per year, based on the new salary and the hourly rate for the pay grade step.
FTE	When you change the FTE for an employee, you must also delete the employee's salary and standard hours per year. The system adjusts the employee's standard hours per year and salary, based on the pay grade step.

Overriding the Default Pay Rate Source

To override the pay grade step table as the default pay rate source when you hire an employee, you must enter either a salary or hourly rate for the employee and leave the Pay Grade Step field blank.

See Also

- *Scenario 3: No Pay Rate Source as the Default Pay Rate Source* in the *Human Resources Guide* for information about salary and hourly rate calculations for employees
- *Setting Up Pay Grades* and *Setting Up Pay-Grade Steps* in the *Human Resources Guide* for more information about pay grade tables

Scenario 3: No Pay Rate Source as the Default Pay Rate Source

If your organization consists of employees whose salaries and hourly rates are based on a pay range rather than specific amounts for a job or pay grade step, you can choose not to use a default pay rate source. If you choose this option, you will need to enter each salary or hourly rate individually.

This is a good option for companies that do not use predefined rates for all employees in like jobs. This option might also be preferable for an organization with few positions and few job types.

The Job Information table (F08001) calculates salary midpoints and compa-ratios.

When you add a new employee, you must enter either a salary or an hourly rate on the Basic Compensation form (W0801CMPB). The system provides a default value for standard hours per year, which you can override, if necessary. When you enter a salary for an employee, the system calculates an hourly rate, based on the salary and standard hours per year. Conversely, when you enter an hourly rate, the system calculates the salary.

The following list provides the guidelines for changing the values on the Basic Compensation form:

Salary	When you change the employee's salary, the system recalculates the hourly rate, based on the new salary and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the hourly rate, based on the new standard hours per year and the existing salary.
FTE	When you change the FTE for an employee, the salary and hourly rate calculations are not affected.

The following list provides the guidelines for changing the values on the Basic Compensation form (W0801CMPB):

Hourly rate	When you change the hourly rate for an employee, the standard hours per year are not affected. The system recalculates the annual salary for the employee, based on the new hourly rate and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the salary, based on the new standard hours per year and the employee's hourly rate.
FTE	When you change the FTE for an employee, the salary and hourly rate calculations are not affected.

See Also

- *Setting Up System Options* in the *Workforce Management Foundation Guide* for information about choosing a default pay rate source

Setting Up Pay Rate Tables

You set up pay rate tables to associate pay rates with a specific group of employees. You must set up pay rate tables if you have chosen pay rate table as your pay rate default source in the HRM System Options program (P05001S).

The following information is associated with pay rate information:

Pay rate tables	You set up pay rate tables to associate pay rates with a specific group, such as a union.
Union local and job cross-references	You set up local and job cross-references to cross-reference parent unions with local unions.

You set up hourly rates by job type and job step. Any amounts that you enter in the pay rate tables can override rates that you set up in the Employee Master Information table (F060116). As you enter time for various job types and job steps, the system locates the appropriate hourly rate.

The system uses pay rate tables in conjunction with the time entry programs. You must use a processing option in the appropriate time entry program to specify that the system use the pay rate tables.

Setting up pay rate tables allows you to do the following:

- Make rates specific to a job, business unit, or shift
- Define up to five different rates per job type and step
- Create workers compensation codes for each job type and step
- Define a flat burden factor for each job type and step
- Define a recharge billing rate

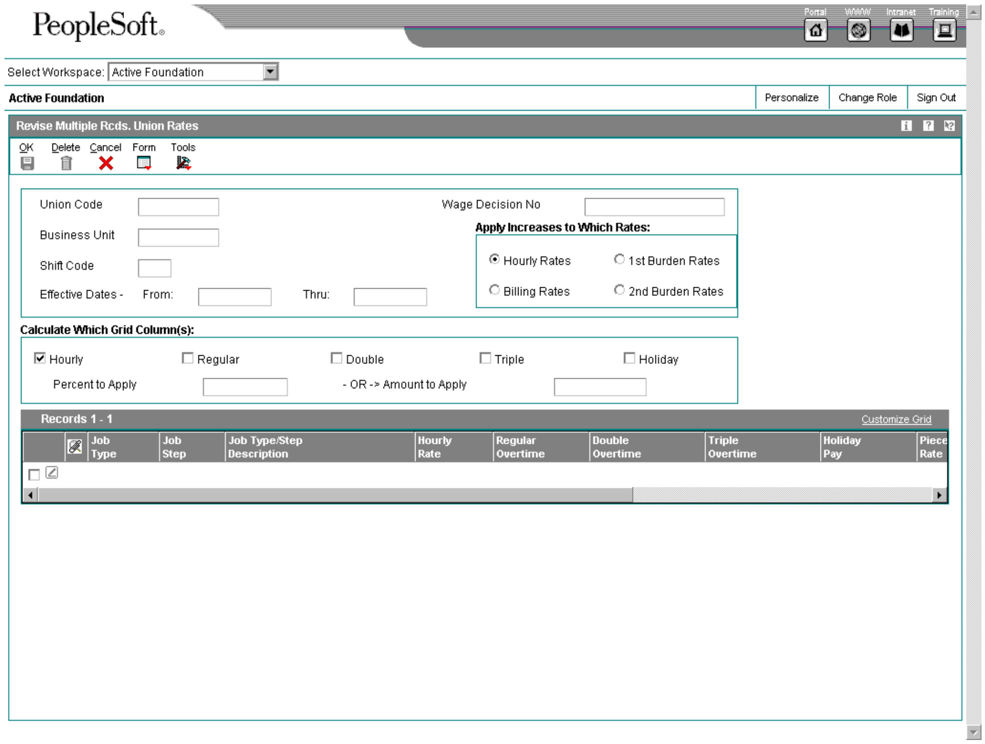
You can use Union Rates Master Revisions program (P059121) to set up and revise pay rates tables. The program allows you to set up or revise pay rate tables one at a time or in groups. The following task allows you to set up pay rate tables in groups. To set up a single pay rate table, you need to find a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

Setting up pay rate tables updates the Employee Master Information table and the Union Rates File table (F069126).

► To set up pay rate tables

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Add.



2. On Revise Multiple Rcds Union Rates, complete the following fields:
   - Union Code
   - From:
   - Thru:
   - Job Type
   - Job Step
   - Hourly Rate

     When you complete only the Hourly Rate field, the system uses the pay type multiplier for the overtime rates.
3. Complete the following optional fields:
   - Business Unit
   - Shift Code
4. Click one of the following options to choose a group of rates to enter:
   - Hourly Rates
   - Billing Rates

- 1st Burden Rates
- 2nd Burden Rates

The fields that appear in the detail area vary depending on the option that you choose.

5. To enter hourly overtime rates, complete one or more of the following fields:
   - Regular Overtime
   - Double Overtime
   - Triple Overtime
   - Holiday Pay

   When you complete only the overtime rate fields, the system does not use the pay type multiplier from Pay Type Revisions.

6. To enter billing rates, complete one or more of the following fields:
   - Billing Rate
   - Billing Regular
   - Billing Double
   - Billing Triple
   - Billing Holiday

   When you enter a value for billing rates, the system does not use the pay type multiplier.

7. To enter the first group of recharge burden rates, complete one or more of the following fields:
   - Rchg Burden Rate
   - Burden-1 Regular
   - Burden-1 Double
   - Burden-1 Triple
   - Burden-1 Holiday

8. To enter the second group of recharge burden rates, complete one or more of the following fields:
   - Burden-2 Regular
   - Burden-2 Double
   - Burden-2 Triple

- Burden-2 Holiday

9. Complete the following optional fields:
   - Piecework Rate
   - Wrk Comp Code
   - Wrk Comp SubClass
   - Labor Dist. Multiplier
   - Labor Dist. Method
10. Repeat steps 2 through 9 for each record that you want to add to the same union code.
11. When you finish entering records, click OK.

Setting Up Pay Grades

To create categories for grouping employees according to pay ranges, you can define pay grades for each pay class within your organization. A pay class defines how an employee is paid, such as salaried, hourly, and so on. For example, within the pay class Salaried you can define pay grades 1 through 10. For each of these pay grades, you define a minimum, midpoint, and maximum salary amounts. These amounts define the pay range for the pay grade. For example, the pay range for pay grade 1 might be:

- Minimum = 20,000.00
- Midpoint = 25,000.00
- Maximum = 30,000.00

This means that the annual salary for an employee in pay-grade 1 can be any amount between 20,000.00 and 30,000.00.

For each pay grade, you can define a separate pay range for each of the following factors:

- Locality
- Union
- Salary data source
- Effective date

For example, if your organization has three locations in different areas of the country, you might want the pay ranges for employees in the same job to vary according to the location in which the employees work. When you create a pay grade, you can define a separate pay range for each of the three locations:

West Area	Minimum = 25,000 Midpoint = 30,000 Maximum = 35,000
Midwest Area	Minimum = 28,000 Midpoint = 33,000 Maximum = 38,000
East Area	Minimum = 31,000 Midpoint = 36,000 Maximum = 41,000

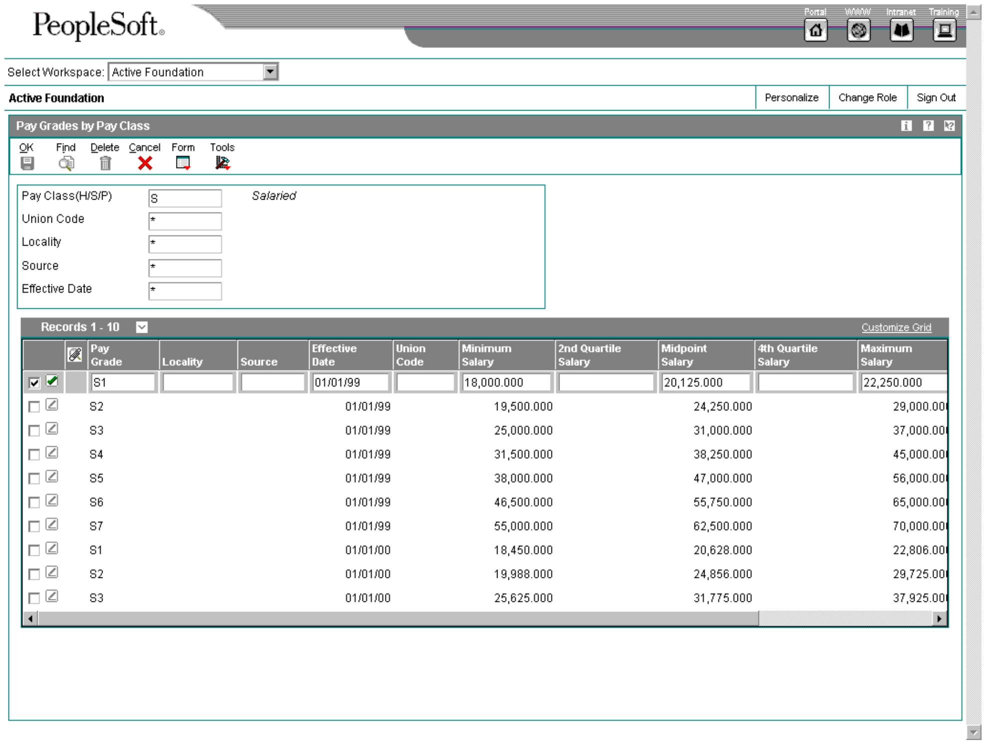
When you define pay grades by class, you create a record of the pay ranges for your organization's pay grades. The system uses these pay ranges to calculate compa-ratios for the employees whom you assign to these pay grades. When you enter employee information, either an error or a warning message appears when you enter a rate that is not within the pay range for an employee's pay grade. The type of message that appears depends on how you set up your system options.

If you are using pay-grade steps, you can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the pay grade step table.

The Pay Grades by Class program (P082001) updates the Pay Grade/Salary Range table (F082001).

► To set up pay grades

From the Job Specifications Setup menu (G05BJ4), choose Pay Grades by Class.



Pay Grade	Locality	Source	Effective Date	Union Code	Minimum Salary	2nd Quartile Salary	Midpoint Salary	4th Quartile Salary	Maximum Salary
S1			01/01/99		18,000.000		20,125.000		22,250.000
S2			01/01/99		19,500.000		24,250.000		29,000.00
S3			01/01/99		25,000.000		31,000.000		37,000.00
S4			01/01/99		31,500.000		38,250.000		45,000.00
S5			01/01/99		38,000.000		47,000.000		56,000.00
S6			01/01/99		46,500.000		55,750.000		65,000.00
S7			01/01/99		55,000.000		62,500.000		70,000.00
S1			01/01/00		18,450.000		20,628.000		22,806.00
S2			01/01/00		19,988.000		24,856.000		29,725.00
S3			01/01/00		25,625.000		31,775.000		37,925.00

1. On Pay Grades by Pay Class, complete the following fields:
   - Pay Class(H/S/P)
   - Pay Grade
   - Effective Date
   - Minimum Salary
   - Midpoint Salary
   - Maximum Salary
2. Complete any of the following optional fields and click OK:
   - Locality
   - Source
   - Union Code
   - 2nd Quartile Salary
   - 4th Quartile Salary
   - Remark

Setting Up Pay-Grade Steps

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can set up pay-grade steps. For example, you might have a pay grade A that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay-grade steps lets you automate the process of tracking pay information for employees. You can set up your system options so that, when you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay-grade step that you enter for the employee.

When you define pay-grade steps, you can save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then you enter a pay-rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay-rate multiplier.

When you set up pay-grade steps individually, you enter a pay rate for each pay-grade step. When you set up pay-grade steps using a pay-rate multiplier, you enter a base pay rate and apply a pay-rate multiplier to each pay-grade step.

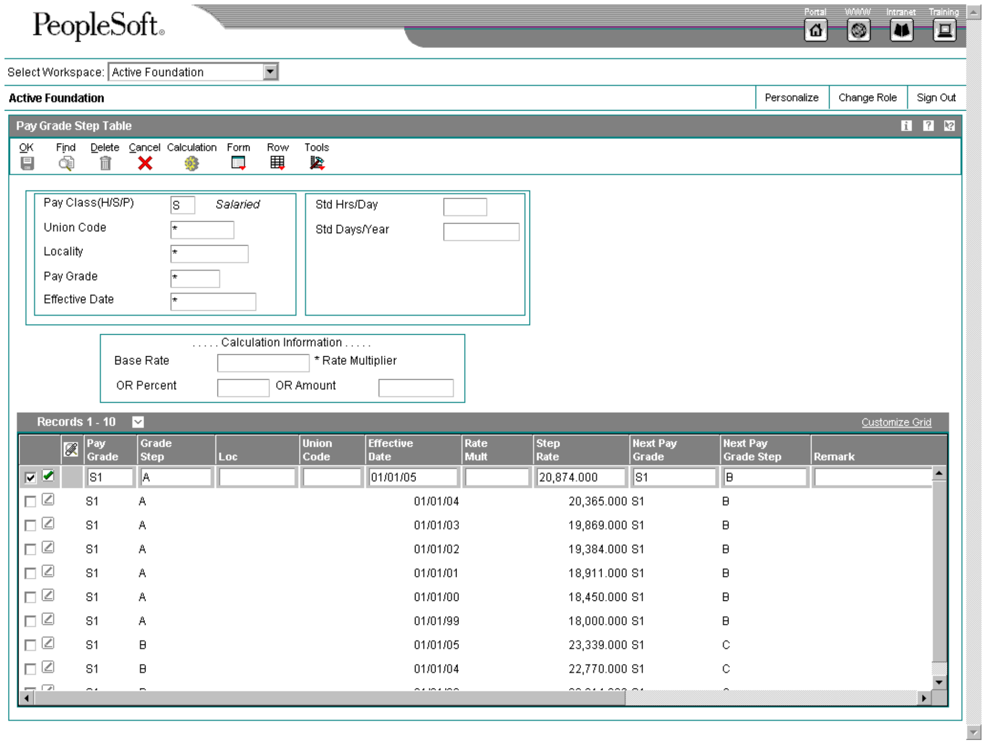
You can define pay grades at the same time that you define pay-grade steps. You do not need to define pay grades by class to use the pay grade step table.

The Pay Grade Step Table program (P082003) updates the Pay Grade/Salary Range table (F082001).

► To set up pay-grade steps individually

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, complete the following field and click Find:
   - Pay Class(H/S/P)



2. To define information that applies to all or most of the pay-grade steps that you need to add, complete any of the following fields and click Find:
   - Union Code
   - Locality
   - Std Hrs/Day
   - Std Days/Year
   - Effective Date
3. For each step that you need to set up, move to a blank line in the detail area and complete the following fields:
   - Pay Grade
   - Grade Step
   - Step Rate
4. Complete the following optional fields:
   - Next Pay Grade
   - Next Pay Grade Step

5. To define information for this step that varies from the information that you entered for the pay class, complete the following fields in the detail area,
    - Union Code
    - Loc Desc
    - Effective Date
    - Hrs Day
    - Days Year

- Click OK.

► To set up pay-grade steps using a multiplier

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, complete the following field:
    - Pay Class(H/S/P)
2. To define information that applies to all (or most) of the pay-grade steps, complete any of the following fields:
    - Union Code
    - Locality
    - Std Hrs/Day
    - Std Days/Year
    - Effective Date
3. Complete the following field:
    - Base Rate
4. For each step that you need to set up, complete the following fields in the detail area:
    - Pay Grade
    - Grade Step
    - Rate Mult
5. Complete the following optional fields:
    - Next Pay Grade
    - Next Pay Grade Step
6. To define information for this step that varies from the information that you entered for the pay class, complete the following fields in the detail area:

- Loc
- Union Code
- Effective Date
- Hrs Day
- Days Year

7. Click the Calculate button.

Setting Up Pay-Range Formulas

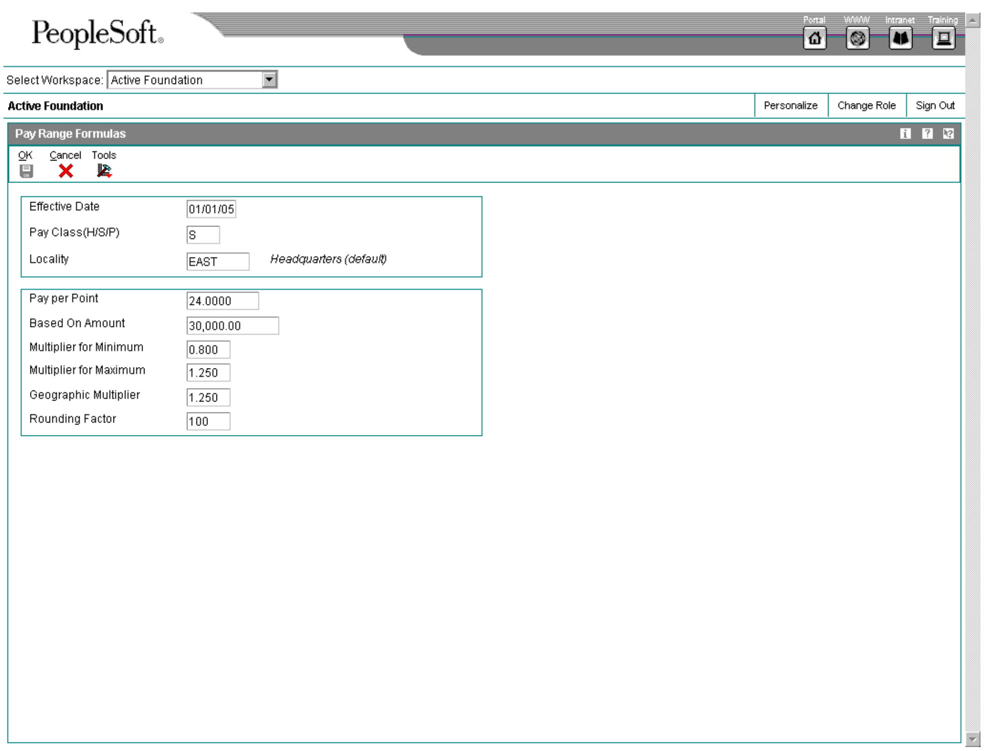
When the pay ranges for your organization's pay grades are based on variable factors, you can set up pay-range formulas that the system uses to automatically calculate pay ranges for each pay grade. These formulas are based on the job evaluation points. In addition, if a job pays more in one region of the country than in another, you can enter a geographic multiplier in the pay-range formula. The system calculates different minimums, midpoints, and maximums for the different areas, based on the minimum, midpoint, and maximum multipliers, as well as the geographic multiplier.

To use pay-range formulas, you must evaluate the jobs within your organization. You evaluate jobs to determine equitable pay ranges for them.

▶ To set up pay-range formulas

From the Job Specifications Setup menu (G05BJ4), choose Define Pay Range Formulas.

1. On Work With Pay Range Formulas, click Add.



2. On Pay Range Formulas, complete the following fields:
    - Effective Date
    - Pay Class(H/S/P)
    - Locality
    - Pay per Point
    - Based On Amount
    - Multiplier for Minimum
    - Multiplier for Maximum
    - Geographic Multiplier
3. Complete the following optional field:
    - Rounding Factor

- Click OK.

See Also

- *Entering Job Evaluation Information* in the *Human Resources Guide* for information about evaluating the jobs within your organization

Defining Job Evaluation Factors

To determine equitable pay ranges for the jobs within your organization, you can evaluate jobs. Before you can evaluate jobs, you must define evaluation methods. Typical evaluation methods include the following:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Point factor
- Hay

For each evaluation method, you must define the factors that you use to gauge the scope of each job. Typical evaluation factors include the following:

- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities
- Know-how

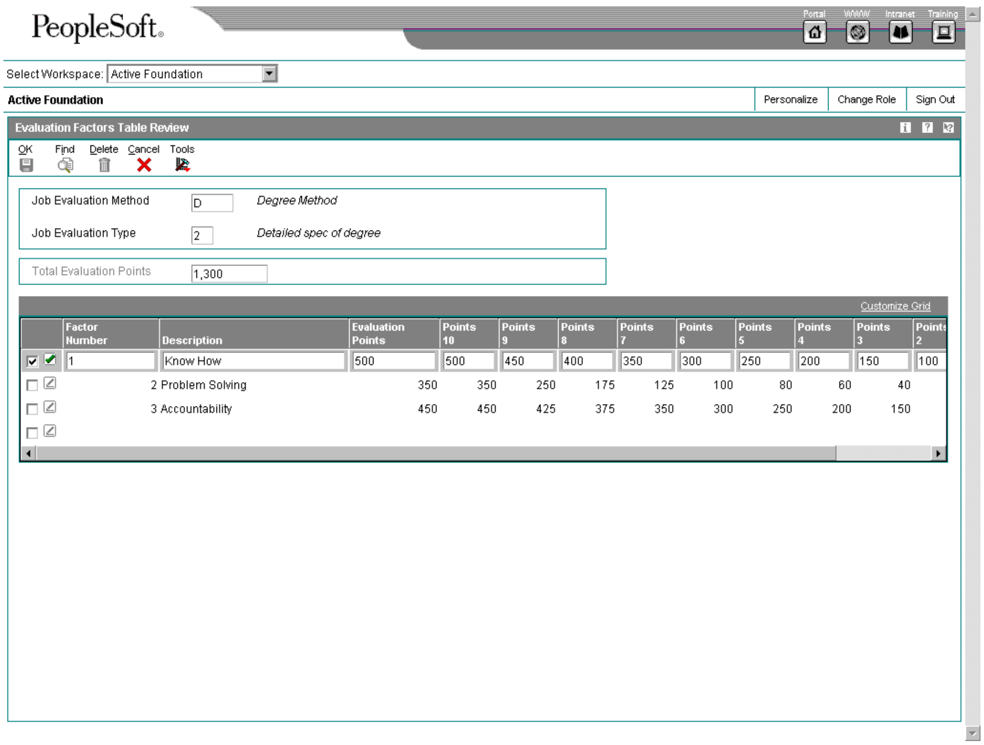
- Accountability

To enable you to rate and compare jobs, you assign points or degrees to each evaluation factor.

▶ To define job evaluation factors

From the Job Specifications Setup menu (G05BJ4), choose Evaluation Factors Table.

1. On Work With Evaluation Factors Table, click Add.



2. On Evaluation Factors Table Review, complete the following fields and click OK:
    - Job Evaluation Method
    - Job Evaluation Type
    - Factor Number
    - Evaluation Points
    - Description
    - Points 1 through
    - Points 10

Entering Job Evaluation Information

Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company.

Evaluating jobs is also helpful for comparing how salaries in your company compare with other salaries for the same positions within the industry.

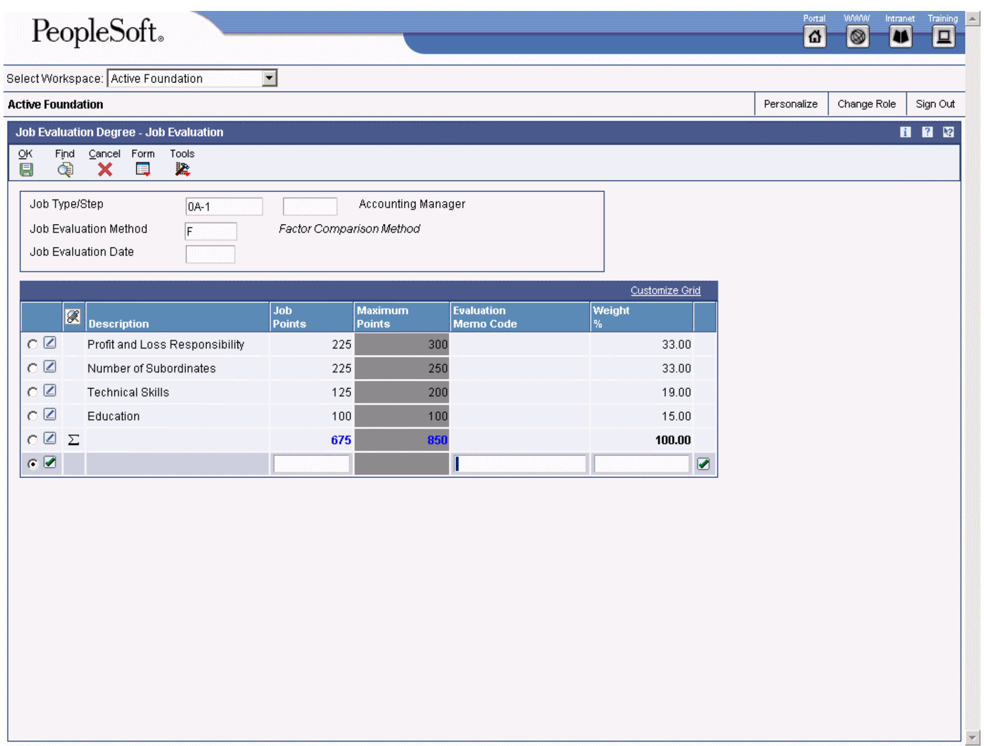
To evaluate jobs, you need to choose a method of evaluation and then define evaluation factors for rating the job. You can choose an industry method like the Hay method, or you can define your own method of evaluation.

Before You Begin

- ❑ Use the Evaluation Factors Table program (P05011) to define a table for each evaluation method that you want to use. See *Defining Job Evaluation Factors* in the *Human Resources Guide.*

▶ To enter job evaluation information

Depending on how the processing options for the Job Entry and Evaluation program (P08001) are set, the Job Evaluation form might automatically appear after you enter job information. If the Job Evaluation form does not appear automatically, from the Job Specifications menu (G05BJ1), choose Job Evaluation Degree.



1. On Job Evaluation, complete the following fields and click Find:
   - Job Type/Step

- Job Evaluation Method
- Job Evaluation Date

2. Complete the following fields that apply to the evaluation method that you entered:
   - Degree
   - Job Points
3. Complete any of the following optional fields:
   - Evaluation Memo Code
   - Weight %

- Click OK.

Processing Options for Job Evaluation Degree (P050011)

Edits

1. Enter a '1' to clear the Evaluation Points and Degrees when the Evaluation Method is changed. Enter a '2' to clear the Evaluation Points, Degrees, Memo and Weight when the Evaluation Method is changed. Blank will not clear any of the Evaluation Data.

Reviewing Job Comparisons by Factor

You evaluate jobs to determine an equitable salary range for each job within your organization. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Typical evaluation methods include the following:

- Degree method
- Hay method
- Factor comparison method

After you define and evaluate jobs, you can review evaluation information for all the jobs that use a specific evaluation method. You can use this information to verify that you evaluated each job equitably.

► To review job comparisons by factor

From the Job Specifications menu (G05BJ1), choose Job Comparisons by Factor.

1. On Work With Job Comparison by Factor complete the following field and click Find:
   - Job Evaluation Method
2. Review the information in the following fields:
   - Job Type

- Job Step
- Degree
- Points

Reviewing and Ranking Jobs by Factor

In addition to reviewing jobs by method, you can also review and rank jobs using additional criteria to ensure the accuracy of data entry and equitable salary ranges in your organization. Although you can print a report to produce similar results, reviewing and ranking jobs by factor provides a greater range of options for sorting and reviewing. A sample group of criteria might include:

- Job Group
- Job Type/Step
- Job Evaluation Method

  Use the search button to display the five options that you can use to rank the jobs that you select. The ranking method that you choose provides criteria that weight different aspects of a job to apply in your selection process.

- Pay Grade/Step
- Job Effective Date

You rank jobs when you apply one of the job evaluation methods. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Evaluation options include the following:

- Degree method
- Evalucomp method
- Factor comparison method
- Hay method
- Point factor method

You can also use any of the fields in the Query By Example row to sort, rank, and compare job data. You can use the job effective date on each of the forms to limit your search to a desired time period.

See Also

- ❑ *Running the Job Evaluation Factor Data Report* in the *Workforce Management Foundation Guide* for information about evaluating jobs by printing reports

► To review and rank jobs by factor

From the Job Specifications menu (G05BJ1), choose Review and Rank Jobs by Factor.

1. On Work With Jobs By Factor, complete any of the following fields and click Find:

- Job Group
- Job Type/Step
- Job Evaluation Method

  The various methods offer different types of weighting and value considerations that can be used for ranking in your job evaluation.

- Pay Grade/Step
- Job Effective Date

2. Review the information in all fields, based on the selection criteria that you have specified.

Reviewing Pay Ranges for Jobs

After you define and evaluate the jobs for your organization, the system automatically creates a pay range (minimum, midpoint, and maximum rate) for each job, based on the job evaluation points and the pay range formulas. To verify that the pay ranges for your jobs are equitable and appropriate for the job duties and the geographic location where each job is performed, you can review pay ranges for jobs.

Before You Begin

- ❑ Evaluate the job and verify that it is not associated with a pay grade step. See *Entering Job Evaluation Information* in the *Human Resources Guide.*
- ❑ Verify that the job has a pay class. (The pay class defines the way in which an employee who works in the job is paid. Valid pay classes include salary, hourly, and piecework.) See *Entering Job Information* in the *Workforce Management Foundation Guide.*
- ❑ Set up the formulas that the system uses to calculate pay ranges. See *Setting Up Pay-Range Formulas* in the *Human Resources Guide*.

► To review pay ranges for jobs

From the Job Specifications menu (G05BJ1), choose Pay Ranges by Job.

1. On Work With Pay Ranges by Job, complete the following field:
   - Job Type/Step
2. To limit the pay ranges that appear, complete the following optional field and click Find:
   - Effective Date
3. To review additional information about a pay range, choose a record and click Select.
4. On Pay Range Formulas, review the information.
5. Click Cancel and then click Close.

See Also

- *Reviewing Pay Ranges for Jobs* in the *Human Resources Guide* for information about reviewing pay ranges for jobs that are associated with pay grades

Revising Pay Rate Tables

You can use the Union Rates Master Revisions program (P059121) to revise pay rate tables. You can revise pay rate tables one at a time or in groups. To revise a single pay rate table, you need to locate a record on the Work with Union Rates form, and then choose Single Revision from the Row menu.

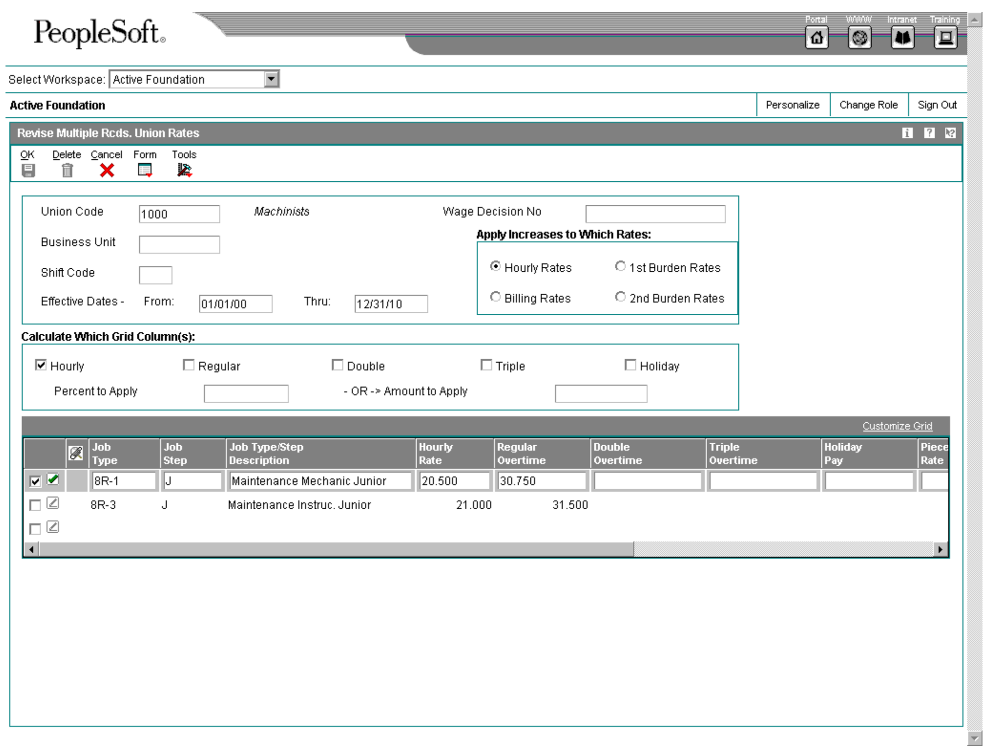
You can revise pay rate tables in groups either manually or by calculation.

Revising pay rate tables updates the Employee Master Information table (F060116) and the Union Rates File table (F069126).

► To revise pay rate tables manually

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find.
2. Choose a record in the detail area, and then choose Revise Multiple from the Row menu.



3. On Revise Multiple Rcds, Union Rates, review the following fields and change them, as necessary:

- Thru:
- Job Type
- Job Step

4. Change the value in the following optional field, if needed:
   - Wage Decision No
5. Select a group of rates to revise by clicking one of the following options:
   - Hourly Rates
   - Billing Rates
   - 1st Burden Rates
   - 2nd Burden Rates

   The fields that appear in the detail area vary depending on the option that you choose.
6. To revise hourly rates, change one or more of the following fields:
   - Hourly Rate
   - Regular Overtime
   - Double Overtime
   - Triple Overtime
   - Holiday Pay
7. To revise billing rates, change one or more of the following fields:
   - Billing Rate
   - Billing Regular
   - Billing Double
   - Billing Triple
   - Billing Holiday
8. To enter the first group of recharge burden rates, change the value in one or more of the following fields:
   - Rchg Burden Rate
   - Burden-1 Regular
   - Burden-1 Double

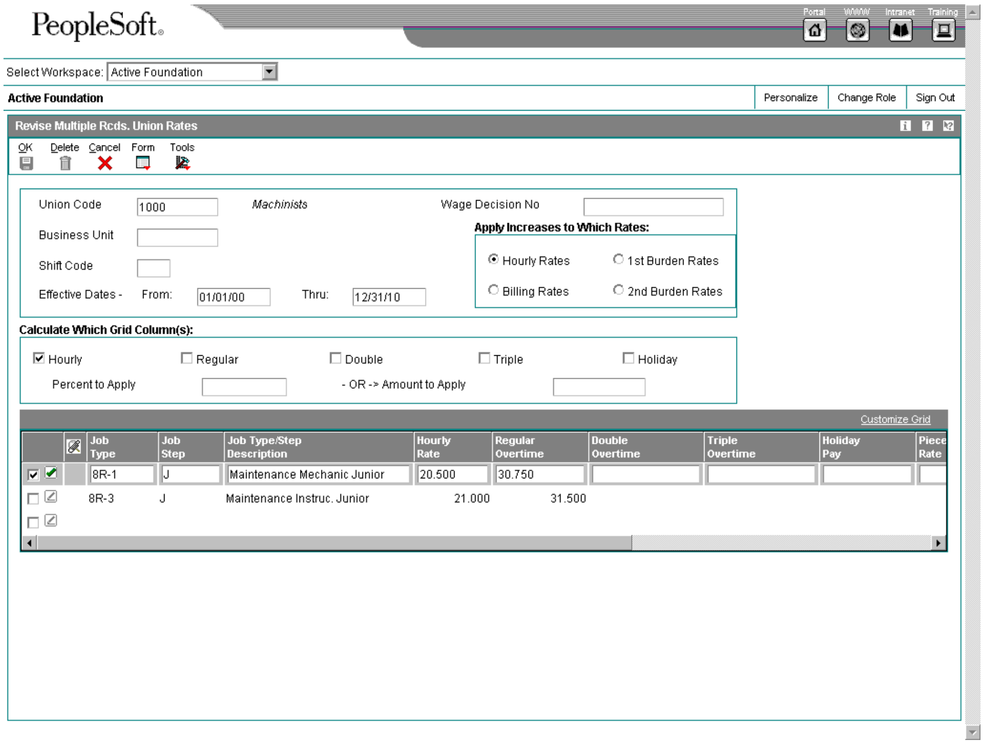
- Burden-1 Triple
- Burden-1 Holiday

9. To enter the second group of recharge burden rates, change the value in one or more of the following fields:
   - Burden-2 Regular
   - Burden-2 Double
   - Burden-2 Triple
   - Burden-2 Holiday
10. Complete the following optional fields:
    - Piecework Rate
    - Wrk Comp Code
    - Wrk Comp SubClass
    - Labor Dist. Multiplier
    - Labor Dist. Method
11. To save the revisions, click OK.
12. To revise records for the next union code, choose Next and repeat steps 2-9 for each record that you want to revise.

► To revise pay rate tables by calculation

From the Rate Derivation Setup menu (G05BRD4), choose Union Rates Master Revisions.

1. On Work with Union Rates, click Find.
2. Choose a record in the detail area, and then choose Revise Multiple from the Row menu.



3. On Revise Multiple Rcds. Union Rates, review the following fields and change information, as necessary:
   - Thru:
   - Job Type
   - Job Step
4. Revise the following optional field, if needed:
   - Wage Decision No
5. Choose a group of rates to which to apply the calculation by clicking one of the following options:
   - Hourly Rates
   - Billing Rates
   - 1st Burden Rates
   - 2nd Burden Rates
6. Choose one or more records in the detail area for which you want to revise pay rate information.
7. Complete one of the following fields and then choose Calculate from the Form menu:
   - Percent to Apply

- - OR -> Amount to Apply

8. Complete the following optional fields:
   - Piecework Rate
   - Wrk Comp Code
   - Wrk Comp SubClass
   - Labor Dist. Multiplier
   - Labor Dist. Method
9. To save the revisions, click OK.
10. To revise records for the next union code, repeat steps 2-9 for each record that you want to revise.

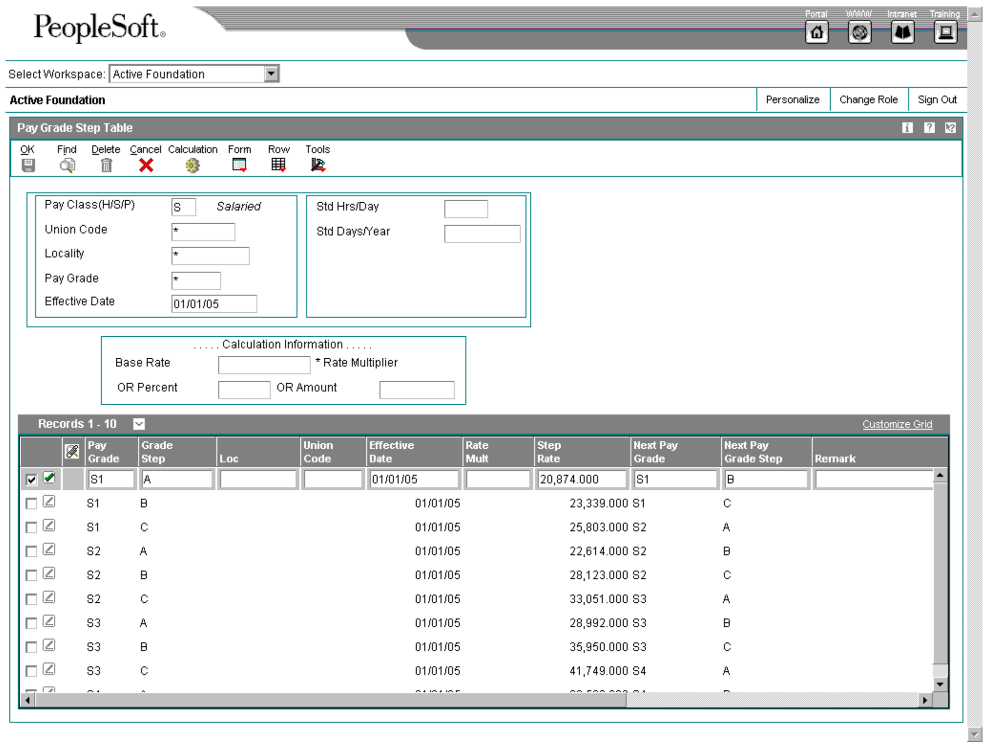
Updating Pay Rates for Pay-Grade Steps

Periodically you might need to adjust the pay rates for your pay grade steps. For example, you might need to enter a cost-of-living increase for certain pay grade steps. Updating the pay grade step table automatically applies a cost-of-living increase to one or multiple pay grade steps. Therefore, employees in these pay grade steps receive the specified increase.

You can enter a new amount or a percentage change once, and the system automatically applies the change to the specified pay grade steps.

► To update pay rates for pay-grade steps

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.



1. On Pay Grade Step Table, to locate the pay grade steps that you need to update, complete any of the following fields and click Find:
   - Pay Class(H/S/P)
   - Union Code
   - Locality
   - Pay Grade
   - Effective Date
2. Complete either of the following fields:
   - Percent to Apply
   - OR Amount
3. To cause the system to calculate the new pay rate for each pay grade step, choose Calculation from the Form menu.
4. Click OK.

Updating the Compa-Ratio for an Employee

From the Employee Adv & Technical Operations menu (G05BE3), choose Compa-Ratio Batch Calculation.

A company can use a compa-ratio to assess how it pays employees in relation to the midpoint of the employee's pay range. Compa-ratios can be used to compare employee salaries to a company's intended pay policy. Generally, a compa-ratio of 1.0 means that the employee's current salary falls within close parameters of the company's pay policy.

The compa-ratio is an employee's salary divided by the midpoint amount of the employee's pay grade. For example, if an employee in pay grade X has a salary of 35,000, and the midpoint of pay grade X is 38,000, the employee's compa-ratio is .921. This means that the employee is making 92.1 percent of the midpoint of his or her pay grade. Compa-ratios might be above or below 1.0 for a number of reasons. For example, a new hire typically has a compa-ratio under 1.0. A compa-ratio over 1.0 could mean that the employee has high seniority or performs well.

When calculating the new compa-ratio, the system uses the midpoint of the pay grades that you defined in the Pay Grade/Salary Range table (F082001). The system also uses the midpoint amount that is effective for the effective date.

When any of the information that the system uses to calculate compa-ratio changes, you must run a batch program to update employees' compa-ratios. For example, when you change the mid-point amount for a pay grade, you must update the compa-ratio for all of the employees who are assigned to those salary ranges. You can update compa-ratio for one employee or all employees.

You must update employee compa-ratios when you have run the global mass update program for pay grades, rates, or jobs and their salary ranges. You can run this program in either proof or update mode. You can also have the system print a report that lists the updated information.

If the new compa-ratio differs from the existing compa-ratio, and your system is set up to track employee history, the program creates a history record.

Processing Options for Compa-Ratio Batch Calculation (R082501)

Report

1. Should the file be updated? (1-Yes, 0-No). Default is '0'

2. Would you like a report? (1-Yes, 0-No). Default is '1'

Employee

1. Enter a valid change reason code for all new records.

2. Enter the effective date. Blank will default to the system date.

Pay Range

1. Enter the effective date for the Pay Range. Blank will default to the system date.

Changing Employee Salaries

You might need to change salaries for an employee or a group of employees. For example, you might give an employee a raise to complement a promotion, or you might increase all salaries because of inflation.

Workflow is an electronic message delivery system that you can use to process salary changes automatically. The Workflow process includes obtaining approval for salary increases that exceed a specified limit and updating the Employee Master Information table (F060116). Workflow is designed to save time and reduce errors to salary changes.

Changing salaries using salary planning is helpful when you want to calculate salary changes for employees using a third-party source, such as a spreadsheet. You can export employee information to a spreadsheet, calculate salary changes, and reimport the information into the Human Resources and Payroll systems. Using salary planning allows you to calculate salary change scenarios before you update the Employee Master Information table (F060116).

You can also change an employee's salary using pay rate information. This method is preferable when you are changing an employee's hourly, billing, or piecework rate, but you can also change the employee's salary. You can specify the change as a monetary amount or as a percentage of the employee's current pay rate, and you can enter a change that takes effect on a future date. You use pay rate information to update only one employee record at a time. Information entered in the Pay Rate Information program (P060131) updates the Employee Master Information table (F060116).

Alternatively, you can use one of the following methods to change employee salaries:

Individual employee changes	You can manually change the value in the Salary field using the Basic Compensation program (P0801CMP).
Future date changes	If a salary change will not take effect until a future date, you can enter information using the Future Data EE Master Revisions program (P06042).
High-volume changes	You can reduce data entry time by changing salaries for groups of employees using the Employee Master Mass Changes program (P06045).

See Also

- *Correcting Employee Information* in the *Workforce Management Foundation Guide* for information about how to change an employee's salary manually
- *Processing Future Changes* in the *Workforce Management Foundation Guide* for more information about changing salaries for a future date
- *Processing Mass Changes* in the *Workforce Management Foundation Guide* for more information about changing salaries for groups of employees

Changing an Employee's Salary Using Workflow

The Enterprise Workflow Management system automates the process of changing an employee's salary by notifying the appropriate supervisors for salary approval and updating the database with the salary change.

The process of using Enterprise Workflow Management to change a salary usually involves more than one supervisor or manager. For example, the employee's supervisor might originally enter the salary change information. After the supervisor enters this request, the supervisor's manager must approve the change before it becomes effective. You can set a salary threshold in the processing options for the Basic Compensation program (P0801CMP) so that Enterprise Workflow Management obtains approval for a certain percentage or flat-monetary salary increase.

Initiating a salary change is completed by a manager. Approving a salary change is a procedure that a manager performs after receiving a message about a salary change. Please note which tasks apply to you.

You can review the salary change in the Salary field on the Basic Compensation form.

Before You Begin

- ❑ Create a congratulatory letter, if needed. See *Mailmerge Workbench* in the *Foundation Guide.*
- ❑ Choose a version and set up your processing options for the Basic Compensation program (P0801CMP).
- ❑ Verify that the Workflow process EEMAST1 is activated in the Process Master program (P98800). See *Activating a Workflow Process* in the *JD Edwards Workflow Tools Guide* for more information.

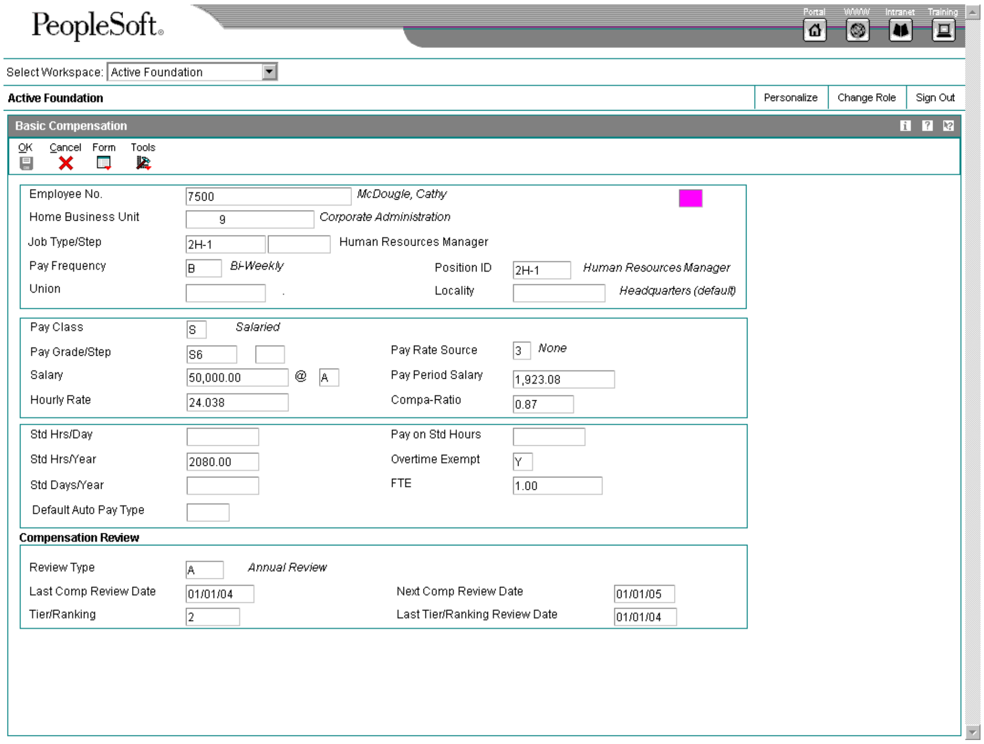
► To initiate a salary change

If you are a supervisor or manager who is responsible for initiating a salary change, you can send a message to the person who is responsible for approving the change.

After you initiate a salary change, the pending salary change remains in the supervisor's queue until the supervisor approves or rejects the change. When the supervisor approves or rejects the change, Workflow sends you a message.

From the Employee Management menu (G05BE1), choose Basic Compensation.

1. On Work With Basic Compensation, complete the following field and click Find:
   - Employee Identification
2. Choose the record in the detail area and click Select.



3. On Basic Compensation, complete the following field and click OK:

   - Salary

   A delay might occur after you click OK. The delay indicates that the workflow process has been activated. A message appears to confirm that your changes have been submitted for approval and are pending review.

Processing Options for Basic Compensation (P0801CMP)

Process Tab

These processing options allow you to specify threshold values for the salary change workflow process.

---

1. Workflow - Salary Threshold

0 = Default

If the salary is increased by the amount entered, or increased by more than the amount entered then the Employee Salary Change Approval Process (EEMAST1) workflow will be started. An approval message will be sent to the workflow recipient and the salary will only be updated after tha change is approved.

---

2. Workflow - Salary Percent Change Threshold

If the salary is increased by the percent entered, or increased by more than the percent entered then the Employee Salary Change Approval Process (EEMAST1) workflow will be started. An approval message will be sent to the workflow recipient and the salary will only be updated after the change is approved.

► To approve a salary change

If you are a supervisor who is responsible for approving salary changes, you can approve a salary change after you receive a salary change message in your Workflow queue.

After an employee enters salary change information, Workflow sends the request to your queue for review. You can accept or reject the request. The salary change does not take effect until you respond to the request.

Note

If more than one approval is needed for a salary change, the change does not take effect until all supervisors respond.

From the Workflow Management menu (G02), choose Employee Queue Manager.

1. On Work With Employee Queue Manager, complete the following field:
   - Skip To Name
2. To narrow your search, complete the following field and click Find:
   - Search Type
   - Code 1
3. Choose the employee and click Select.
4. On Work Center, click the Salary Approval icon in the left queue.

   All salary requests pending approval appear in the right queue.
5. To approve or reject a salary change, click the Workflow Approval icon in the middle of the form, and then click the Workflow Approval icon in the right section of the form.
6. On Workflow Approval, click one of the following options to accept or reject the salary change request, add text if applicable, and click OK.

- Accept
- Reject

7. On Work Center, click Close.

Changing Employee Salaries Using Salary Planning

You can use salary planning to calculate salary changes for employees using a third-party program, such as a spreadsheet program. The salary planning feature imports the information to update the Salary or Hourly Rate fields on the Basic Compensation form and the Employee Master Information table (F060116).

If the Position Budget option is activated in the System Options program (P05001S), the system verifies that your salary changes are within the budgeted salaries for the corresponding positions.

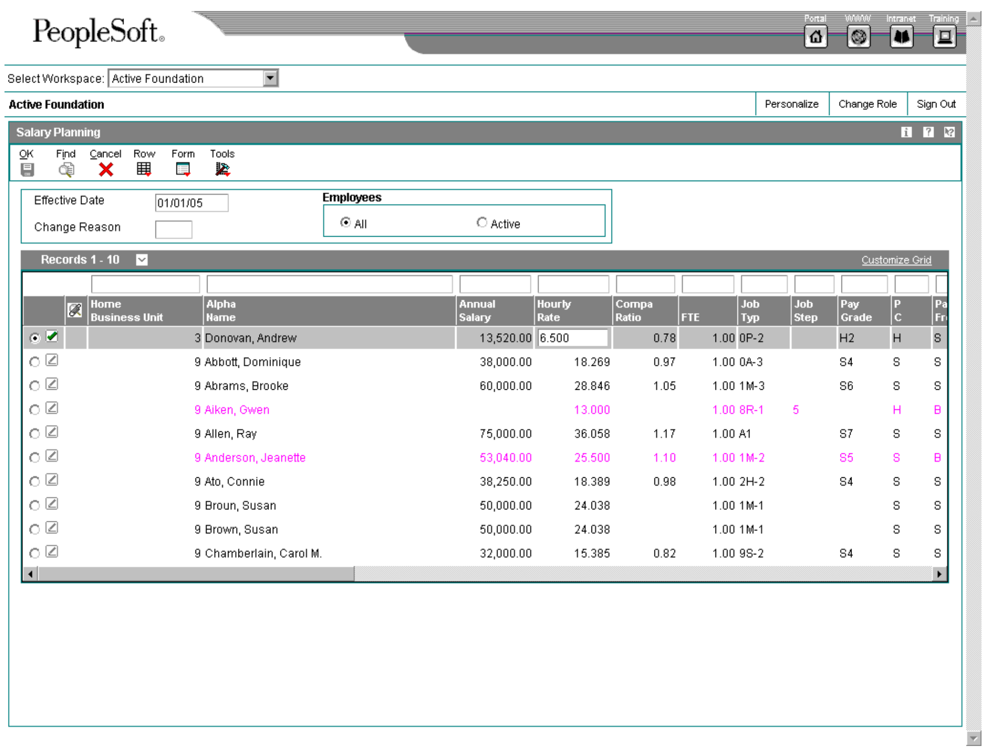
See Also

- *Setting Up System Options* in the *Workforce Management Foundation Guide* for more information about setting up position budget editing

▶ To change employee salaries using salary planning

From the Employee Management menu (G05BE1), choose Basic Compensation.

1. On Work With Basic Compensation, choose Salary Planning from the Form menu.



2. On Salary Planning, complete the following fields and click Find:

- Effective Date
- Change Reason

3. Choose an employee or a group of employees, right-click, choose Export, and then choose the third-party document that you used to calculate the salary planning information.
4. On Export Assistant, click the following option to turn it on:
   - Establish a Hot-Link
5. Choose whether to Export to an Existing workbook or to a New Workbook and specify a range of cells.
6. Click Continue.

   The third–party document appears with the information from the Salary Planning form.
7. Calculate any necessary changes and then save and close the file.
8. On Salary Planning, choose the same employee or group of employees as you did in step 3.
9. Right click, choose Import, and then the third-party source that you used for calculating salary planning information.
10. On Open, enter a range of cells and click Open.

    The system imports updated employee salary information into the Basic Compensation form.

Changing an Employee's Salary Using Pay Rate Information

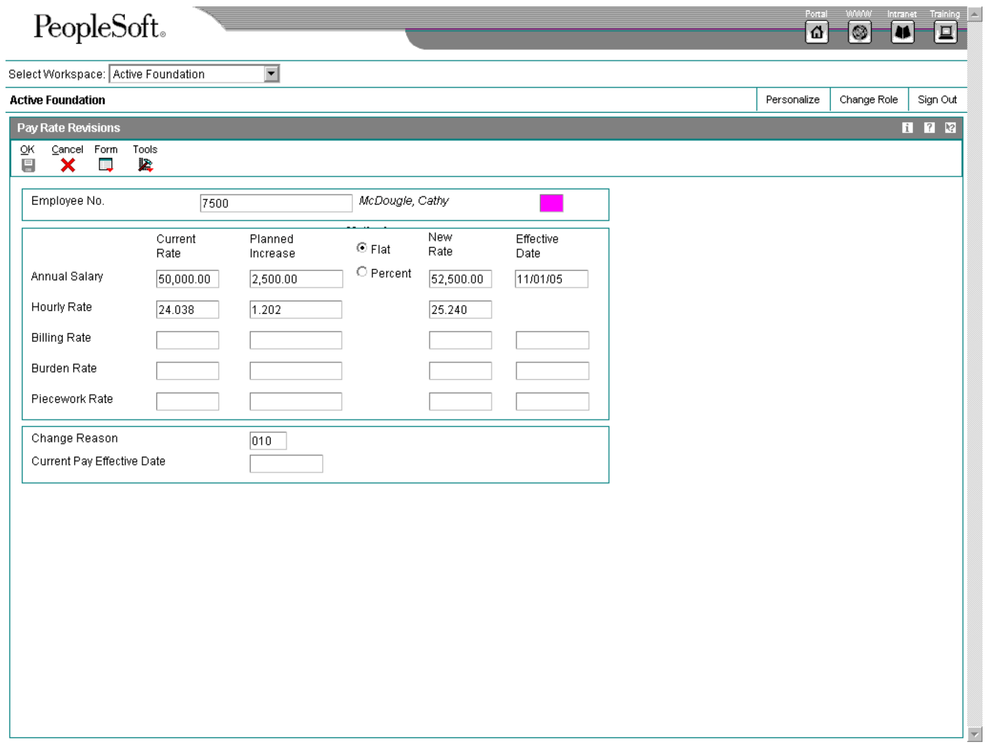
You can change an employee's salary using pay rate information. This method is preferable when you are changing an employee's hourly, billing, or piecework rate because you directly enter the change to the rate. You can specify the change as a monetary amount or as a percentage of the employee's current pay rate, and you can enter a change that takes effect on a future date. For example, suppose that you enter a future effective date after you enter a pay rate change. When the future date occurs, the system automatically updates the employee's pay rate information. If the effective date is between pay cycles, the new rate appears in the payment for the first pay period after the effective date.

You use pay rate information to update only one employee record at a time. Information entered in the Pay Rate Information program (P060131) updates the Employee Master Information table (F060116).

► To change an employee's salary using pay rate information

From the Employee Management menu (G05BE1), choose Pay Rate Information.

1. On Work With Pay Rate Information, complete the following field and click Find:
   - Employee Identification
2. Choose the employee record and click Select.



3. On Pay Rate Revisions, review the current rates in any of the following fields of the Current Rate column:
    - Annual Salary
    - Hourly Rate
    - Billing Rate
    - Burden Rate
    - Piecework Rate
4. To define a future pay change as a percent or flat amount increase, click either the Flat or the Percent option in the Method group box.
5. Complete as many of the fields as necessary in the Planned Increase column for each rate that you are changing.

    Add a monetary amount or a percentage to each field, depending on the method you chose.
6. In the Effective Date column, complete as many of the following fields as necessary for each rate that you are changing:
    - Next Raise Date
    - New Bill Rate Date

- New Burden Rate Date
- New Piece Rate Date

7. Complete the following field:
    - Chg Rsn
8. If you do not have the J.D.Edwards Payroll system, complete the following field:
    - Current Pay Effective Date
9. Review the new rates in the New Rates column and click OK.

Pay-Grade Step Progression

You use pay-grade step progression to automate pay-rate changes for groups of employees. Pay-grade step progression helps you ensure that all employees that perform the same job at the same level receive the same rate of pay, even if the pay rate for that position changes.

The following scenario illustrates how using pay-grade step progression can automate pay-rate changes for a group of employees. Company A negotiates a new contract with a union. The new contract includes a 2.00 USD per hour pay-rate increase for all union-related positions. More than 1000 union employees perform more than 100 different union-related jobs within the company. Using pay-grade step progression, you can automatically update the pay rates for all union-related positions and the employees who perform those jobs.

You can also use pay-grade step progression to establish job paths that employees can follow. Progression paths include predefined pay-grade step levels, each with its own rate of pay. You can automatically move groups of employees to the next level in their progression path and update their pay rates accordingly.

The following scenario illustrates how creating progression paths can automate pay-rate changes for a group of employees. Company B hires a group of employees, all for different positions, at the same time. The company policy states that employees are hired on a 30-day trial basis. After 30 days, the employees are either terminated or they are promoted to the next level and receive an associated pay-rate increase. Using pay-grade step progression, you can automatically move all selected employees to the next level in their progression paths and update their pay rates accordingly.

Automating the process of administering pay-rate changes for a group of employees can significantly decrease data entry time as well as the occurrence of data entry errors. Pay-grade step administration can also help eliminate the possibility of incorrectly excluding an employee from receiving a pay-rate change.

Before You Begin

- ❑ Set up pay-grade step tables and assign pay-grade step information to your employees. See *Setting Up Job Information* in the *Workforce Management Foundation Guide* for more information about setting up and assigning pay-grade step information

Working with Pay Rates for Pay-Grade Steps

Periodically, you might need to adjust the pay rates for your pay-grade steps. For example, you might need to enter a cost-of-living increase for all pay-grade steps, or you might need to make a market adjustment to a particular pay-grade step. You can manually or automatically update the pay grade step table to reflect the new rates.

You can use any of the following three methods to make automated changes to pay rates that are associated with pay-grade steps:

- Enter a flat amount by which the rate will change
- Enter a percentage rate change
- Enter a base rate and a rate multiplier

You might also need to make additional entries to your pay grade step tables. For example, you might need to enter new rates for all pay grade steps for the upcoming year. To avoid having to manually enter all of the information in the table for the upcoming year, you can copy existing records in your table and change only the fields in the new records that contain different information, such as the rate and date fields.

Before You Begin

- ❑ Set up the pay grade step table and assign pay-grade step information to your employees. See *Setting Up Pay-Grade Steps* in the *Human Resources Guide* for more information about setting up the pay grade step table.

See Also

- ❑ *Updating Pay Rates for Pay-Grade Steps* in the *Human Resources Guide* for more information about adjusting pay rates for pay-grade steps

Copying Pay-Grade Step Records

You might need to add records to your pay grade step tables that are similar to records that already exist in your tables. To avoid excessive data entry, you can copy existing records and change only the information that is different for the new records. For example, if your pay-grade step rates for the upcoming year are different from the rates for the current year, you might want to create new records, rather than update the existing records with the new rates. Copying existing records can significantly reduce the instances of data entry errors. After you have created the new records, you can modify them, as necessary.

► To copy pay-grade step records

From the Job Specifications Setup menu (G05BJ4), choose Pay Grade Step Table.

1. On Pay Grade Step Table, to locate the pay-grade steps that you want to copy, complete any of the following fields and click Find:
   - Pay Class(H/S/P)
   - Union Code
   - Locality
   - Pay Grade
   - Effective Date
2. Choose the records that you want to copy and then choose Copy from the Row menu.
3. Scroll down to the newly created records, which will appear at the bottom of the Pay Grade Step Table, and make changes to any of the following fields:
   - Pay Grade
   - Grade Step
   - Loc Desc

- Union Code
- Effective Date
- Rate Mult
- Step Rate
- Next Pay Grade
- Next Pay Grade Step
- Remark
- Hrs Day

Note
You must change information in the new records to avoid having duplicate records in the Pay Grade Step table.

4. Click OK.

Creating Progression Work Groups

After you have updated the pay grade step table with rate changes, you can create groups of employees to which you want to apply those rate changes. Creating progression work groups allows you to update all employees within a work group at the same time.

- You can also use work groups to select employees that you want to move from one pay-grade step to the next. You do not need to update the pay grade step table with rate changes in order to move employees to the next pay-grade step, as long as the next step is already included in the table.

Effective Dates for Progression Work Groups

When you create progression work groups, you assign an effectivity date or an effectivity data item to the entire work group. The effectivity data item can be any data item included in UDC 08/DT. The effectivity date is used to determine when the rate change becomes effective for the employees who are included in the work group. You should use an effectivity date or data item that you want to use for all employees who are included in the work group. However, you can change the date for individual employees after you create the work group. You can change the effectivity date for an individual in a progression group only if you are using an effectivity data item to determine the date on which the changes become effective. Otherwise, you must change the effectivity date for all employees within the progression group.

If the effectivity date is on or before the system date, the Employee Master Information table (F060116) is directly updated when you run the update process. If the effectivity date is after the system date, the pay-rate change is stored in the Future Data EE Master Revisions table (F06042). The Employee Master Information table is then updated during the final update step of the payroll cycle that the effectivity date falls within.

Note

J.D. Edwards recommends using an effectivity date that will update the Employee Master Information table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the Future Data EE Master Revisions program (P06042) to update pay-grade information during final update, you must set the Process Future Data Revisions processing option for the Pay Cycle Workbench program (P07210) to allow future data processing.

You can set up effectivity dates for pay-rate changes using the following dates:

System Date If you leave the Effectivity Date field and the Effectivity Data Item field blank, the system uses that date to determine when the pay-rate changes become effective.

Override Date If you enter a date in the Effectivity Date field, the system uses that date to determine when the pay-rate changes become effective.

User-Defined Date If you enter a data item in the Effectivity Data Item field, such as Date of Next Review or Date of Next Raise, the date associated with each employee for that particular data item is the date that the system uses to determine when the pay-rate changes become effective. You can enter any date that appears in UDC 08/DT.

Caution

The effectivity date is not always the date on which the pay-rate change becomes effective. If you enter an effectivity date that falls after the system date when you run the update process, the Future Data EE Master Revisions table is updated. Future data revisions are not updated to the Employee Master Information table until the final update step of the payroll cycle during which the effectivity date falls. This can cause your pay-rate change to become effective on a date later than the effectivity date. For example, if you use an effectivity date of 06/16/05, and that date falls after the system date, the Future Data EE Master Revisions table is updated. If the pay cycle that includes the effectivity date includes work dates of 06/15/05 through 06/30/05, the new pay rate is not updated to the Employee Master Information table until the final update step of this payroll cycle, and, therefore, is not used to calculate pay for this payroll cycle. The pay-rate change becomes effective during the next payroll cycle, making the actual effective date of the change 07/01/05.

New and Existing Pay-Grade Steps

You can base pay-rate changes on two different pay-grade step options. If you want to change the rate for an existing pay-grade step and update the records for the employees who are currently attached to that pay-grade step with the new rate, use the existing pay-grade step option as the basis for creating the work group. To move employees from one pay-grade step to the next, use the new pay-grade step option as the basis for creating the work group.

Note

To move some employees from one pay-grade step to the next and update other employees with new rates for their current pay-grade steps, you must create more than one work group. You cannot perform both types of updates for one work group.

Before You Begin

- Update the pay-grade steps with the rate changes in the pay grade step table. See *Updating Pay Rates for Pay-Grade Steps* in the *Human Resources Guide* for more information.

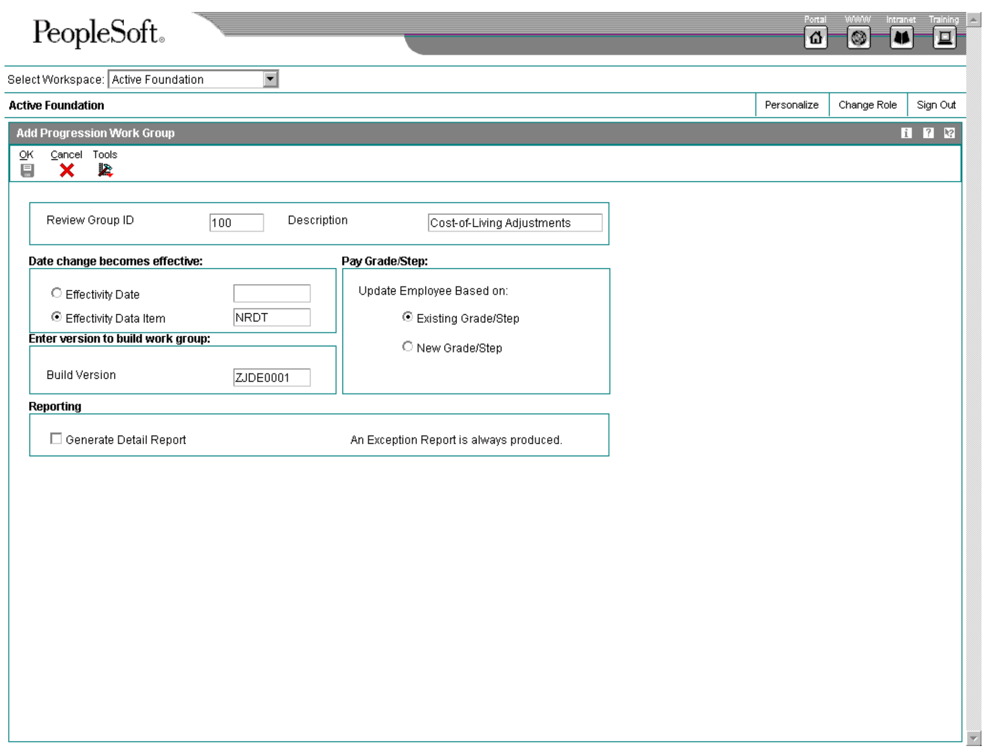
See Also

- *Processing Future Changes* in the *Workforce Management Foundation Guide* for more information about updating future data changes to the Employee Master Information table (F06011)

► To create progression work groups

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, click Add.



2. On Add Progression Work Group, complete the following fields:

- Review Group ID
- Description

3. To use the system date as the effectivity date for the rate change, click the following option and leave the Effectivity Date field blank:
   - Effectivity Date
4. To use an override date as the effectivity date for the rate change, click the Effectivity Date option and complete the following field:
   - Effectivity Date
5. To use a user-defined date as the effectivity date for the rate change, click the Effectivity Data Item option and complete the following field:
   - Effectivity Data Item
6. To choose the basis for the pay-rate change, click one of the following options:
   - Existing Grade/Step
   - New Grade/Step
7. To produce a detailed report of the employees who are included in the work group, click the following option:
   - Generate Detail Report

   An exception report is always printed, regardless of whether you generate the detail report.
8. Complete the following field and click OK:
   - Build Version

Note

You cannot create progression work groups that contain employees from more than one country. If you have employees in different countries that work in the same pay-grade step, you must create country-specific work groups to update pay grade information. Using data selection, you can specify which country you want to include when you create the work groups. Including employees from more than one country in the same progression work group can cause undesirable results.

Processing Options for Grade/Step Progression Workbench (P082005)

Versions Tab

These processing options specify the versions that are available for you to use.

1. Add new work group version.

Use this processing option to specify the version for the Work Group Build. This version will be used on the Add Progression Work Group form. The version may be changed on the Add form. The default version is ZJDE0001.

2. Proof - Apply pay grade/step changes version.

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in proof mode. The default is ZJDE0001.

3. Final - Apply pay grade/step changes version.

Use this processing option to specify the version of the Grade/Step Progression Changes program to use in Final Mode. The default is ZJDE0002.

Working with Progression Work Groups

After you create progression work groups, you can review detailed information for each employee, as well as summary information for the entire work group. You can make changes to employee information and update your work group with your changes without having to rebuild the entire progression work group. You can also delete employees from a work group. However, if you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

Note

The Build Grade/Step Progression Work Group program (R082006) must finish processing before you can review information in your work group. Until the process is complete, you will not see your work group in the Pay Grade/Step Progression Workbench program (P082005).

Reviewing Progression Work Group Information

You review work group information to verify that the pay-rate changes that you created are accurate. You can review information for each employee within the progression work group, as well as summary information for the entire work group.

► To review progression work group summary information

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
   - Review Group ID
   - Country Code
   - Group Status
2. To review summary information for the work group, choose the progression work group that you want to review and click Select.
3. On Progression Work Group Summary, review the following fields and click OK:
   - Creation Date
   - Effectivity Date
   - Effectivity Data Item
   - Country Code
   - Group Status
   - Current Salary
   - New Salary
   - Number of Employees
   - Percent Increase

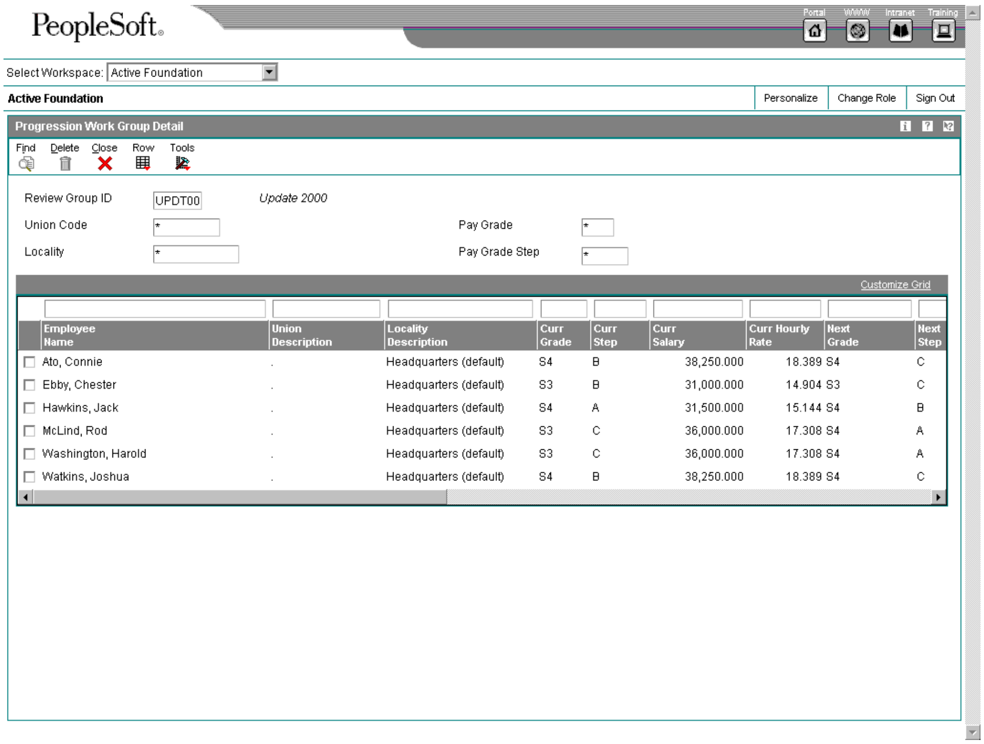
► To review progression work group detail information

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
   - Review Group ID

- Country Code
- Group Status

2. Choose the work group that you want to review and choose Detail from the Row menu.



3. On Progression Work Group Detail, review the following fields:
   - Employee Name
   - Locality
   - Curr Grade
   - Curr Step
   - Curr Salary
   - Curr Hourly Rate
   - Next Grade
   - Next Step
   - Next Salary
   - Next Hourly Rate

- Effectivity Date
- Address Number
- Home Business Unit
- Job Type
- Job Step
- FTE
- New Pay Stop Date
- New Pay Start Date
- Days Year
- Hrs Day
- Hrs/ Year

Changing Progression Work Group Information

After you review the information in your progression work group, you might need to make changes to information for the employees who are included in the work group. You might also need to change the effectivity date for an individual employee or for the entire work group.

For example, if you used effectivity data item NRDT, the date of next raise, you might find that an employee's effectivity date is blank. To correct this, you must enter a date for the employee in the Date of Next Raise field. If you leave blank the effectivity date for an employee in the work group, the system date when you run the update process will be used as the effectivity date for that employee.

Note

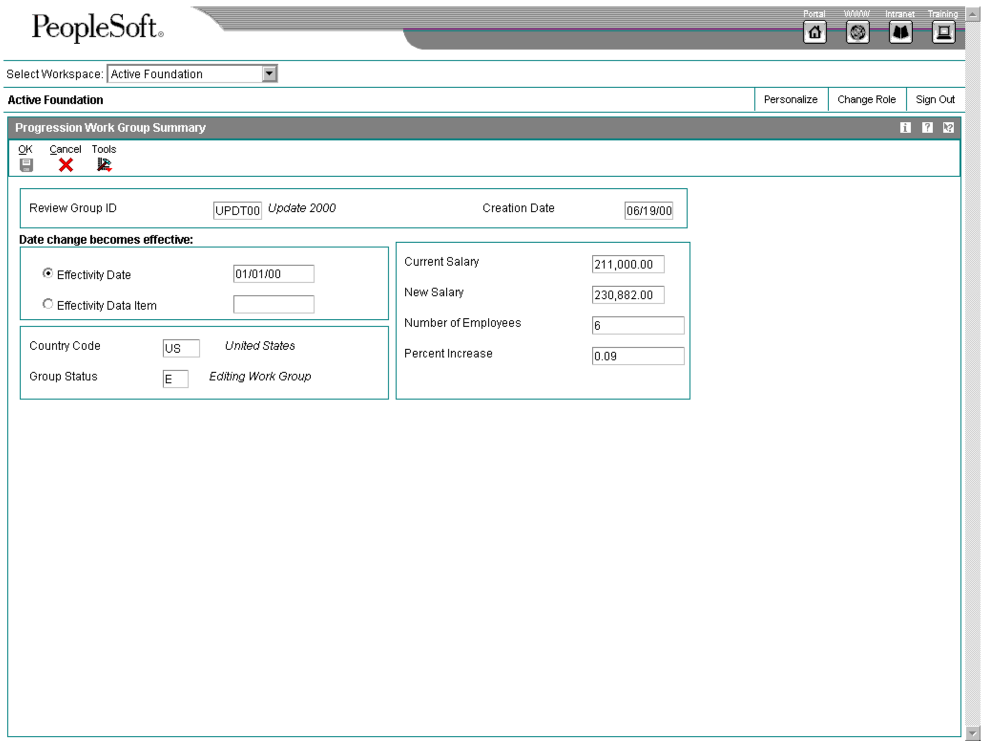
You can change the effectivity date for an individual in a progression group only if you are using an effectivity data item to determine the date on which the changes become effective. Otherwise, you must change the effectivity date for all employees within the progression group.

You might also find that information for a particular employee is incorrect. For example, an employee might be assigned to the wrong job type, business unit, or home company. Before you continue processing, you can correct this information and automatically update the work group to reflect the changes that you make to the employee's information.

► To change the effectivity date for a progression group

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:
   - Review Group ID
   - Country Code
   - Group Status
2. To change the effectivity date for the entire work group, choose the work group that you want to update and click Select.



3. On Progression Work Group Summary, click one of the following options and complete the corresponding field, if necessary:
   - Effectivity Date
   - Effectivity Data Item
4. Click OK.
5. On Grade/Step Progression Workbench, to update all effectivity date changes to the work group, choose the work group and choose Detail from the Row menu.
6. On Progression Work Group Detail, choose all records in the detail area and choose Update Work Files from the Row menu.

► To change the effectivity date for an employee

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete any of the following fields and click Find:

   - Review Group ID

   - Country Code

   - Group Status

2. Choose the work group that you want to change and choose Detail from the Row menu.
3. On Progression Work Group Detail, choose the employee record that you want to change and choose Employee Master from the Row menu.
4. On Work With Employee Information, choose the appropriate option from the Row menu, and then make any necessary changes to the employee's effectivity data item.

   Note
   The employee's effectivity data item can be any date field that is stored in the Employee Master Information table (F060116). Therefore, the option that you choose from the Row menu on the Work With Employee Information form varies depending on the field that you want to update. For additional information about changing employee information, see *Revising Employee Information* in the *Workforce Management Foundation Guide*.

5. When you have completed all changes for the employee, click Close.
6. On Progression Work Group Detail, to update all effectivity date changes to the work group, choose a record and choose Update Work Files from the Row menu.

See Also

- *Revising Employee Information* in the *Workforce Management Foundation Guide* for more information about changing employee master information

Deleting Employees from a Progression Work Group

After you review the information in your progression work group, you might notice that an employee has been incorrectly included in the work group. You can delete an employee from the work group and automatically update your work group to reflect this change.

Note

After you choose the employee and click the Delete button, the employee is deleted from the work group. You do not need to run the Update Work File process to update the work group. If you accidentally delete an employee, you must rebuild the progression work group to include that employee in the work group again.

Updating Pay-Grade Step Changes to the Employee Master Information Table (F060116)

After you have reviewed and updated information in your progression work groups, you can update the Employee Master Information table with the pay-rate changes. To ensure that the information that you are updating is accurate, you can run the process using the proof version and review the information that will be updated before you make any changes to employee information.

After you review the proof report for accuracy, you can run the final version. This process updates information to the Employee Master Information table or the Future Data EE Master Revisions table (F06042), depending on the effectivity date of the pay-rate changes. If the effectivity date is before the system date, the Employee Master Information table is updated. If the effectivity date is after the system date, the Future Data EE Master Revisions table is updated.

J.D. Edwards recommends that you use an effectivity date that will update the Employee Master Information table directly. Processing future data revisions during the final update step of the payroll cycle uses additional system resources and can cause a dramatic increase in processing time. If you use the future data revisions program to update pay grade information during final update, you must activate the Process Future Data Revisions processing option in the Pay Cycle Workbench program (P07210) to allow future data processing.

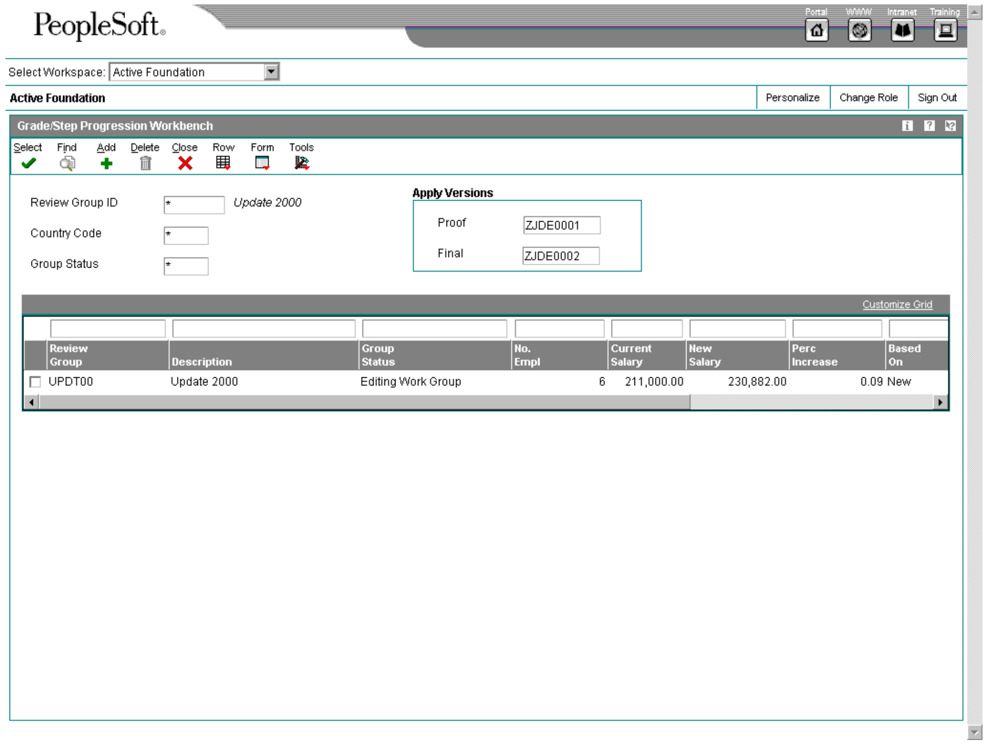
Caution

Running the final version of this process directly updates payroll tables. After you have run this process, the only way to restore your information to the way it was before you updated the tables is to make manual corrections to each employee record, or to restore the tables from a backup that you created before you updated the tables. To avoid time-consuming rework, carefully review the proof report before you run the final version.

► To update pay-grade step changes to the Employee Master Information table (F060116)

From the Pay Grade Step Administration menu (G05BJ2), choose Pay Grade/Step Progression Workbench.

1. On Grade/Step Progression Workbench, complete the following fields:
   - Proof
   - Final



2. Complete any of the following fields and click Find:
   - Review Group ID
   - Country Code
   - Group Status
3. To run the proof version, choose the progression work group that you want to update and choose Proof - Apply from the Row menu.
4. To run the final version, choose the progression work group that you want to update and choose Final - Apply from the Row menu.
5. On Confirm Apply Employee Master Changes, click OK.

Processing Options for Pay Grade to Employee Master Update (R082008)

Process Tab

These processing options specify the default values that the system uses when it updates the Employee Master Information table.

1. Generate Detail Report

Use this processing option to specify whether to create a report of updated records. An exception report will always be generated.

1 Create a report of updated records.

Blank Do not create a report of updated records.

2. Change Reason

Use this processing option to add the change reason to the employee history or future data files.

3. Automatically Delete Workgroup

Use this processing option to automatically delete the work group when the update is completed.

1 Delete the workgroup.

Blank Do not delete the workgroup.

Deleting a Progression Work Group

After you review the information in your progression work group and update the changes to the employees in the work group, you can delete the work group.

To be sure that work groups are accurate and that they reflect the latest changes in your employee database, J.D. Edwards recommends that you delete work groups after you have completed the update process, and that you create new work groups to process pay-grade step progression changes at a later date. Creating new work groups at the time that you want to process pay-grade step progression changes ensures that you include all necessary employees in the work group.

Note

You can also delete a work group during the update process by activating the processing option for the Pay Grade to Employee Master Update program (R082008).

See Also

- *Updating Pay-Grade Step Changes to the Employee Master Information Table (F060116)* in the *Human Resources Guide* for more information about deleting progression work groups using processing options

Competency Management

Competency management is a method of categorizing and tracking the qualifications that employees possess that make them competent to perform their job duties. These qualifications, such as C programming skills, CPA license, and fluency in French, are called *competencies*. You can use competency management to identify both employee competencies (the competencies that employees possess or attain) and job competencies (the competencies that are required to perform a specific job within the organization). You might want to track competencies for employees, but not for jobs. However, if you want to track competencies for jobs, you must also track competencies for employees.

The J.D. Edwards competency management features allow organizations to identify and track both individual competencies and competencies that are required to perform a specific job within the organization.

Benefits of competency management include the following:

- Competency-based job descriptions provide clear, detailed expectations for employees and can illustrate the way in which each employee fits into the whole organization
- Categorizing and quantifying competencies allow you to create a searchable database that you can use to locate employees who possess specific competencies that are required for a job
- Job requirements are consistent within organizational levels
- Competency-based performance appraisals allow you to assess the level of an employee’s performance to the job requirements, perform a gap analysis, and develop training plans and career paths
- Employees can update competency information using self-service programs

Caution

When you enter and review information for competency management, use the menu options, not the fast path, to access the forms. Accessing forms from the fast path might produce unexpected results.

Advantages of Competency Management

Employees use their competencies to help the organization achieve its goals and objectives. By linking the competencies of an organization with employee jobs, you can determine how employees can best help the organization meet its goals and objectives, thereby giving employees competency-based job descriptions that provide clear, detailed expectations and illustrate the way in which each employee fits into the whole organization.

Some types of competencies, such as education and training, are relatively simple to track and quantify, while more intangible skills, such as negotiation skills or knowledge of pricing strategies, are more difficult to quantify. Categorizing and quantifying competencies allows you to create a searchable database that you can use to locate employees who possess specific competencies, thereby giving you the ability to efficiently reallocate employees in response to market or organizational changes. Such reallocation can help your organization reduce operating costs and make employees more productive.

Effectively managing competencies can also help your organization train and retain competent employees. The organization benefits by having more productive employees and less employee turnover, which results in a lower operating cost. Employees benefit by having a set of goals and expectations to do their job and improve in their careers. The challenge for human resource representatives is to align and link the goals and objectives of the corporation with the valuable human assets within the organization.

Core Competencies

Core competencies are competencies that help employees meet the high-level goals and objectives of the organization. All of the employees in the organization should be proficient in these core competencies. You can track core competencies only if you are tracking competencies for both jobs and employees.

Inherited Competencies

To simplify the tracking of job competencies, you can attach individual competencies to each level in the organizational structure, and then attach jobs to those levels. *Inheritance* is the process of attaching job competencies to high levels in the organizational structure so that they also apply to the subordinate levels. Inheritance means that, when you attach a competency to a business unit that is at a high level in the organizational structure, that competency applies to the jobs in that business unit, as well as to all of the jobs that are in subordinate, lower-level business units. You can further take advantage of inheritance by assigning competencies at the company or job-group level. For example, you might define Commitment to Quality as a core competency and attach it to the company level of the organizational structure so that all of the jobs in the company will inherit that competency. For jobs that are at lower levels of the organizational structure, you can attach additional, more specific competencies and override the inherited competencies, if necessary.

Employees are expected to be proficient in the competencies required for their jobs, as well as in any inherited competencies. The following are advantages of inherited competencies:

- You can reduce data entry tasks by defining and attaching a competency in one place only.
- When you change a competency, you make changes in one place and all jobs that inherit that competency automatically inherit the changes.
- You can attach one competency to many jobs.

Gap Analysis

Competency management gives employees and managers a clear, quantifiable measurement of the current and future needs of the organization and the abilities of the employees. When you track both employee competencies and job competencies, you can easily identify discrepancies between the competencies that an employee possesses and the competencies that are required for the employee's current job, or for a job to which the employee aspires. The process of identifying and analyzing such discrepancies is called *gap analysis*. Employees and managers can use self-service applications to review gap analysis information. They can also use gap analysis to review career paths for employees who want to examine the possible career opportunities within the organization. Managers and human resources representatives can use gap analysis for succession planning.

Defining Organizational Structures for Job Competencies

Before you can assign jobs and job competencies to the hierarchical levels in your organizational structure, you must define the organizational structure that you will use to track competency information. Although you can use the financials organizational structure to track competency information, J.D. Edwards recommends that you create a separate structure. You can also create new business units for job competencies so that you are not using the business units that your organization uses for financial reporting purposes. By maintaining the competency organizational structure and business units separately from the financials structure, the human resources department can revise the competency structure without affecting the structure that the accounting department uses to make financial decisions. Likewise, when the accounting department needs to revise the financials organization structure, the competency structure will not be affected.

When you define a separate organizational structure for job competencies, you can either create a new structure or copy and modify an existing structure, such as the financials structure. In most cases, it is probably more efficient to copy an existing structure; however, if the existing structures are very different from the one that you intend to create, you might choose to create a new organizational structure.

To help you explore a variety of scenarios, you might create several draft versions of the organizational structure. When you have decided which draft you want to use, you can activate that draft and define it as the default organizational structure. When an organizational structure becomes obsolete, you can update date-effective information to indicate that it is no longer the current structure.

Creating New Organizational Structures for Job Competencies

From the Advanced Organization Setup menu (G094111), choose Organization Structure Inquiry/Revision.

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can base the competency organizational structure on the structure that the accounting department uses for financial reporting (the financial organizational structure). If the financial organizational structure is much different from the organizational structure that you need to create for competencies, creating a new structure is probably more efficient than copying and modifying an existing structure.

To give the human resources department more flexibility in attaching competencies, you might also create new business units for the competency organizational structure. When you create a new business unit for job competencies, enter 1 in the Subledger Inactive field so that no activity regarding the business unit will be reflected in the business units and organizational structure that your organization uses to track financial information.

To create a new organizational structure, use the Organization Structure Definition program (P0050B). To create new business units, use the Business Units by Company program (P0006). You complete the same steps to create the new organizational structure and business units for job competencies as you would to create them for financials. When you create the structure for job competencies, you do not need to run the Organization Structure Build program (R10450).

The new structure that you create is an inactive, or draft, structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

See Also

- *Creating Organization Report Structures* in the *General Accounting Guide* for step-by-step instructions for creating a new organizational structure
- *Setting Up Business Units* in the *General Accounting Guide* for step-by-step instructions for creating a new business unit
- *Updating Date-Effective Information for Organizational Structures* in the *Human Resources Guide* for more information about the Activate Job Competencies report (R080014)
- *Copying Existing Organizational Structures* in the *Human Resources Guide* for information about an alternative to creating a new organizational structure

Copying Existing Organizational Structures

To associate jobs and job competencies with the hierarchical levels in your organization, you can create an organizational structure that is specific to job competencies. In many cases, you can save time by copying the existing organizational structure for financials and then modifying it so that it is appropriate for tracking job competencies. The business units for the new organizational structure will be the same as those that are in the organizational structure that you copied; however, in the new structure, you can change the arrangement of the business units, if necessary.

When you copy an existing structure, the system creates a draft structure that contains no effective dates. You can modify the draft as many times as necessary. When you are ready to begin using this organizational structure, run the Activate Job Competencies report (R080014) to activate the draft structure and set it up as the default structure for job competencies. This program also enters an ending date for the organizational structure that was previously the default structure, if one exists.

You can also copy job competency information from an existing organizational structure to a new organizational structure that does not yet have job competency information associated with it.

The copy program includes both a form where you specify the information that you want to copy and a batch process. When you click OK on the form, the system automatically runs the batch process and prints a report that lists the information that you want to copy. You can run the batch process in proof mode, which allows you to verify the information before the system updates the database. You must run the copy program from a client workstation (NT), not from an internet or intranet site. Internet and intranet servers do not have the specific application program interfaces (APIs) that the system needs to perform the copy.

Before You Begin

- ❑ Set up the program to run on your local workstation. See *Mapping Objects* in the *Configurable Network Computing Implementation Guide*.
- ❑ Enter a code for the new organizational structure in UDC 00/TS.

► To copy an existing organizational structure

Use one of the following navigations:

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Copy Job Competency.

From the Competency Management Periodic Processing menu (G05BC2), choose either Jobs in an Organization or Job Competencies in an Organization, and then choose Create Draft from the Report menu.

1. On Copy Job Competencies, complete the following fields:
   - From Type Structure
   - To Type Structure
2. Choose one of the following options:
   - Proof Mode
   - Show Report Details
3. If the From Type Structure has job competency information associated with it, choose any of the following options:
   - Copy Job Competencies
   - Copy Job Competency Descriptions
   - All Translations
4. If you choose to copy competency descriptions, choose one or more of the options in the Copy Specific Descriptions group.
5. Click Submit.

   The system prints a report that lists the information that it will copy. If you did not turn the Proof Mode option on, the system also runs a batch process that updates the database with the copied information.

Processing Options for Copy Job Competency (P080020)

Versions Tab

Use these processing options to specify versions of the job competencies to copy.

1) Copy Job Competencies Report Version

Blank = XJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competency Report (R080015) to use when exiting to the program. Blank will use version XJDE0001.

2) Jobs Competencies in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Changing the Default Organizational Structure

As you work with job competency information, you might create several organizational structures for job competencies. Some of these structures might be draft structures that you have either decided not to use or are planning to use at some time in the future. For example, if your organization plans to acquire an additional company, you might create a draft structure that you use to incorporate jobs from the new company into your existing organizational structure. You might also have some historical organizational structures. Historical structures are those that your organization used at one time but is no longer using. A historical structure remains active, but you cannot use it as the default structure.

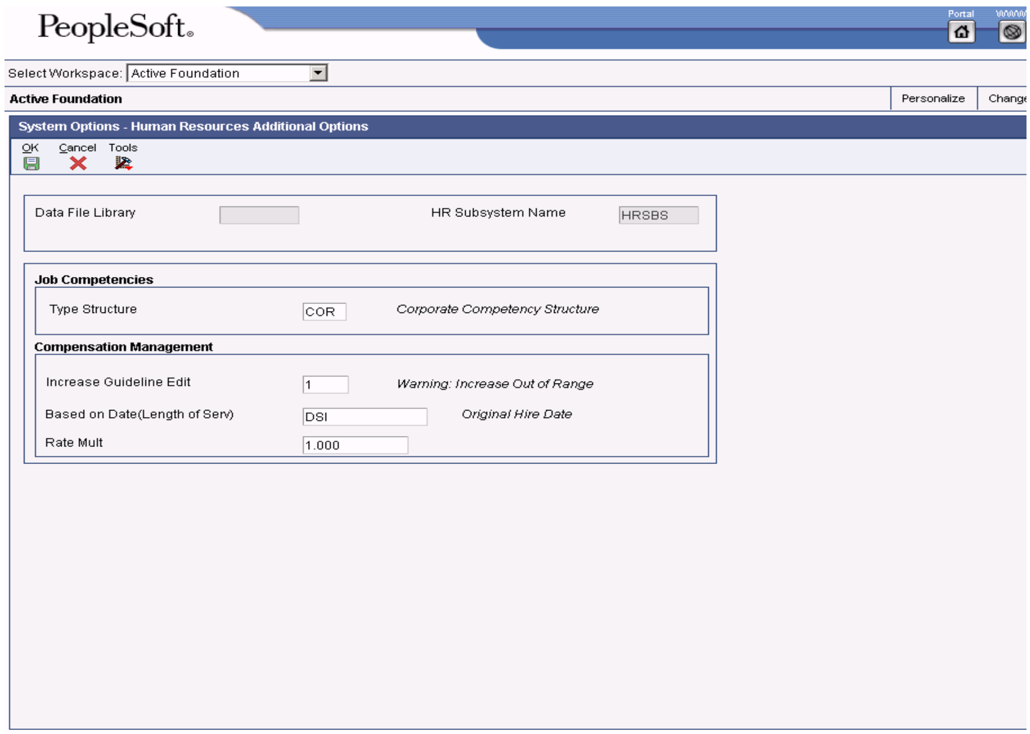
The default organizational structure is the structure that your organization currently uses to track job competency information. When managers and employees use self-service to review job competency information, they can access only the information for the default structure. For security purposes, only human resources administrators can access draft and inactive structures.

Occasionally, you might need to change the default organizational structure for job competencies. For example, you might have mistakenly activated a draft structure that should not have been activated for another month.

▶ To change the default organizational structure

From the HRM Setup menu (G05B4), choose System Options.

1. On Work with HRM Foundation System Options, choose HR Addl. Options from the Row menu.
2. On Human Resources Additional Options, complete the following field, and then click OK:
   - Type Structure



Updating Date-Effective Information for Organizational Structures

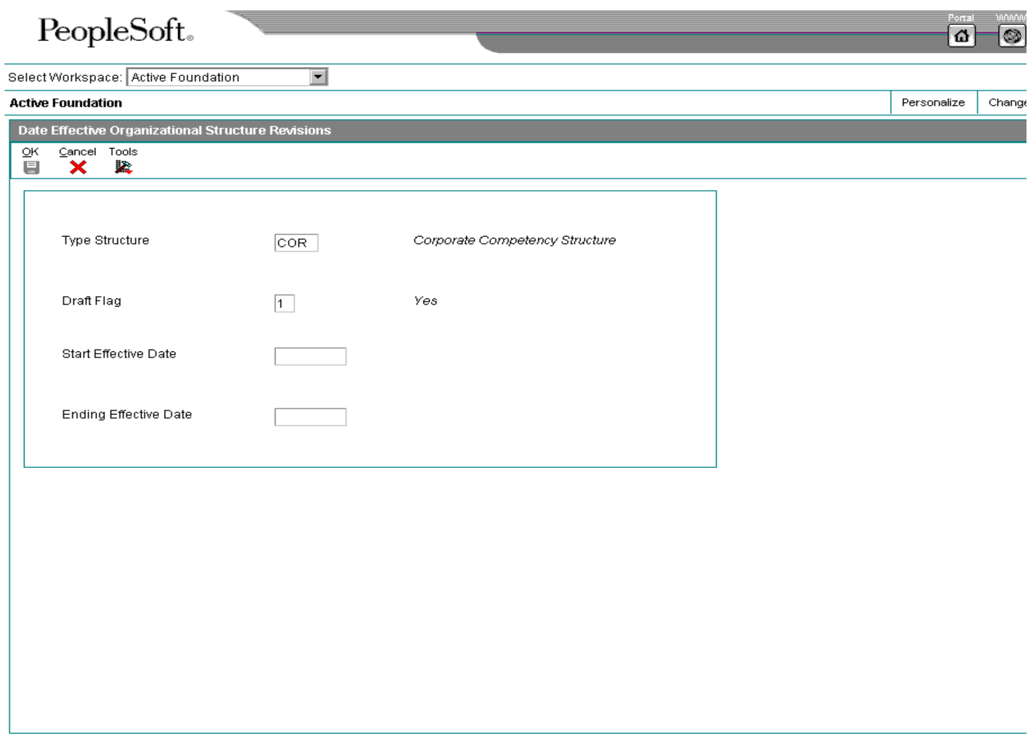
When you create a new organizational structure for job competencies using the Organizational Structures Revisions program (P0050), the system does not recognize the structure as a valid structure for job competencies. To make the structure valid for job competencies, you must update its date-effective information. You do not need to enter this information if you used the Copy Job Competencies program (P080020) to create the organizational structure for job competencies, nor do you need to enter this information if you run the Activate Job Competencies program (R080014).

This program updates the Date Effective Organizational Structure table (F0800608).

▶ To update date-effective information for an organizational structure

From the Competency Setup menu (G05BC4), choose Date Effective Organizational Structure.

1. On Work with Date Effective Organizational Structures, complete the following field and click Find:
   - Organizational Structure
2. Choose a record in the detail area and click Select.



3. On Date Effective Organizational Structure Revisions, complete the following fields:
   - Draft Flag
   - Start Effective Date
4. Complete the following optional field:
   - Ending Effective Date
5. Click OK.

   After you complete this task, you must run the Activate Job Competencies program (R080014) to complete the process of activating the draft structure.

See Also

❑ *Activating Draft Organizational Structures* in the *Human Resources Guide*

Activating Draft Organizational Structures

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Activate Job Competencies.

When you create a new organizational structure or copy and modify an existing one, the system maintains that organization structure in draft mode. You can modify the draft organizational structure and add jobs and job competencies to it without affecting the active structure. When you are ready to begin using the draft structure, you can run a program that updates the status of the structure to Active. Activating the draft structure also makes that structure the default structure for your organization (the structure that your organization currently uses to track job competency information).

After you activate a draft structure, you cannot change it back to a draft again. To help you verify that the information in the draft structure is correct before you activate it, you can set processing options to run the program in proof mode and print a verification report. When you run the program in proof mode, the system does not update the tables to indicate that the structure is the default, active structure. When you run the program in update mode, the system performs the following functions:

- Changes the status and date of the draft organizational structure to indicate that it is Active. Because you might have more than one draft structure, you must enter in the processing options the name of the structure that you want to activate.
- Enters an ending effective date for the structure that is currently the default structure for job competencies, if one exists. The system maintains a historical record of this structure's status so that you will know the dates when it was used as the default structure.
- Updates the system options to indicate that the new structure is the default structure.
- Updates the following tables:
  - HR Additional Constants (F08043)
  - Date Effective Organizational Structure (F0800608)
  - Organizational Business Unit/Job Cross-Reference (F0800601)
  - Job Group Competencies (F0800603)
  - Organizational Business Unit Competencies (F0800604)
  - Job Type/Step Competencies (F0800605)
  - Competency Options - Overrides (F0800606)
  - Organizational Competencies (F0800607)
  - Competencies in Structure and Job (F0800610)
  - Job Competency Default - Overrides (F0800611)
  - User Defined Job Competency Description Reference (F0800612)

Processing Options for Activate Job Competencies (R080014)

Display Tab

This processing option specifies the level of detail that appears on the report.

1) Show Detail

0 = No

1 = Yes

Blank = 1

A code that specifies whether the system prints a detailed report. Valid values are:

0 No, the system does not print a detailed report.

1 Yes, the system prints a detailed report.

If you leave this processing option blank, the system prints a detailed report.

Defaults Tab

These processing options specify the dates on which old organizational structure ends and the new one becomes active, as well as the new organizational structure that you want to apply.

1) Active Organizational Structure End Date

Use this processing option to specify an ending date for the organizational structure that is currently active.

Blank The end date for the active organizational structure will be the current date.

2) New Organization Structure

Use this processing option to specify a new organizational structure. The new structure name is needed for updating the Beginning/End Dates for the new structure.

3) New Organizational Structure Begin Date

Use this processing option to specify a beginning date for the new organizational structure.

4) New Organizational Structure Ending Date

Use this processing option to specify an ending date for the new organizational structure.

Process Tab

This processing option specifies whether you want to process the activation in final mode.

1) Final Mode

0 = No

1 = Yes

Blank = 1

A code that specifies in which mode the process will run.

0 No, do not run the process in final mode.

1 Yes, run the process in final mode and update the appropriate files.

If you leave this processing option blank, the system runs the report in final mode.

Reviewing the Delete Job Competency Report (R080017)

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Delete Job Competency Report.

This report deletes any attachments or overrides to a specified structure type. For example, Company A carefully evaluates its business needs and decides to include six job competencies in the company. The company creates these six job competencies in the Job Competency program (P08009) and sets up default descriptions and options for these job competencies. Next, Company A creates three draft organizational structures and tests some “what if” scenarios, in which it attaches or overrides the job competencies in different business units, jobs, and so on. When the company determines which scenario best meets its business needs, it runs the Delete Job Competency report (R080017) to delete the two draft organizational structures that it does not plan to use. The report deletes the connection of the competencies and their overrides in just the organization that is deleted. Default information about the six job competencies that the company created remains in the Job Competency program.

Processing Options for Delete Job Competency Report (R080017)

Defaults Tab

This processing option specifies the organization structure to delete.

1. Organization Structure to Delete

Enter the organizational structure to be deleted.

Process Tab

This processing option specifies the amount of detail to print on the report.

1. Print Report Detail

1 = Yes

0 = No

Blank = 1

Use this processing option to print a report of the items being deleted. Valid values are 1=print report, 0=do not print report.

Working with Employee Competencies

You use competency management to track the competencies that employees possess and to compare them with those that are required for the employees' jobs. You can track the following types of employee competencies

- Training
- Skills
- Accomplishments
- Certificates
- Degrees
- Languages

You can track a variety of competencies for each competency type. For example, for the Skills competency type, you can track programming skills, communication skills, and so on.

Before you enter competency information for employees, you must define the scales that you use to rate the levels of proficiency that employees demonstrate in each competency. You must also define the specific employee competencies that you are tracking for each competency type. You also can define training courses and specify the competencies that they fulfill.

You set up security for competency levels so that you can specify the type of user within your organization who is responsible for entering competency levels for employee competencies. This feature is particularly useful if your organization allows employees and managers to enter and update competency information using self-service. In some cases, when your organization is using employee self-service, you might also want to set up routing instructions for competency approvals. Routing instructions allow you to identify a person, other than an employee's supervisor, who is responsible for approving specific employee competencies or competency types.

When you assign competencies to an employee, you list each competency that the employee possesses, along with the level of proficiency that the employee demonstrates.

Defining Scales for Employee Competencies

A c*ompetency scale* is a method of measuring an employee's level of proficiency in a particular competency. You must associate a scale with each competency before you can begin entering competency information for employees. You can use the same scale for every competency, or you can define a separate scale for each competency. For example, for C programming ability, in the Skill competency type, you might define the following numeric scale:

1	Beginner
2	Competent
3	Accomplished
4	Expert

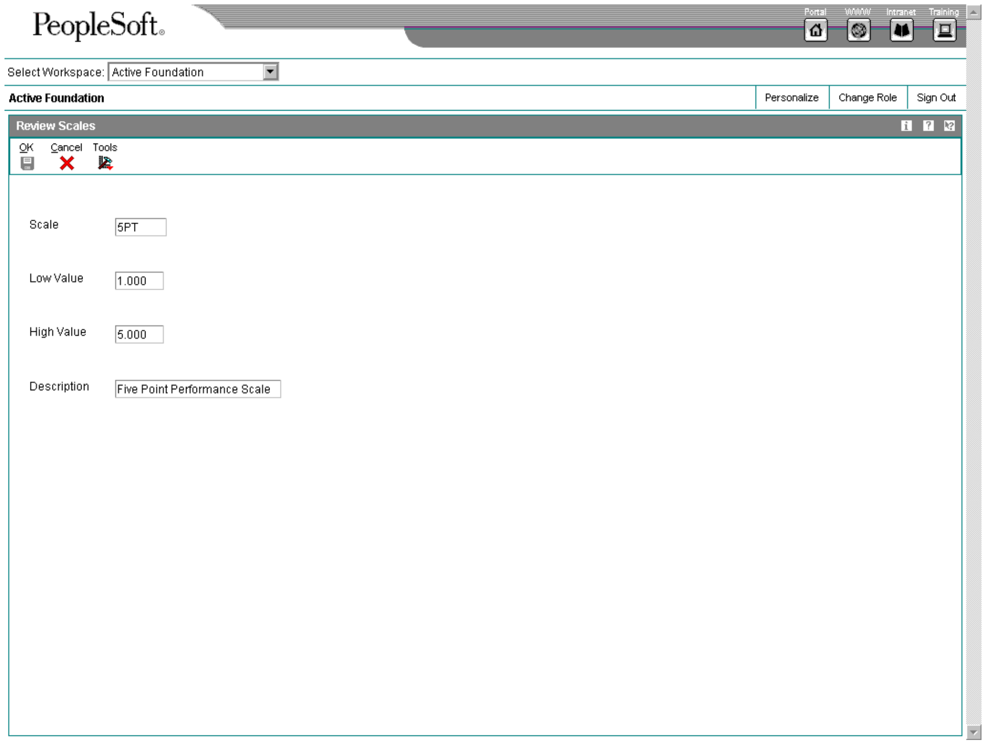
For each level on a scale, you define a low value and a high value. Scale values always increase from low to high; therefore, low values always mean less proficient and high values mean more proficient. You can either enter the scale values manually or have the system generate them automatically.

If you are also tracking job competencies, the scales that you define for employee competencies are the same scales that you use for job competencies.

► To define basic information for scales

From the Competency Setup menu (G05BC4), choose Scale Information.

1. On Work With Scales, click Add.



2. On Review Scales, complete the following fields and then click OK:

   - Scale
   - Low Value
   - High Value
   - Description

     After you create a scale, you must define the values for each level. You can enter the values manually or run a program that assigns them automatically.

► To generate values for scales automatically

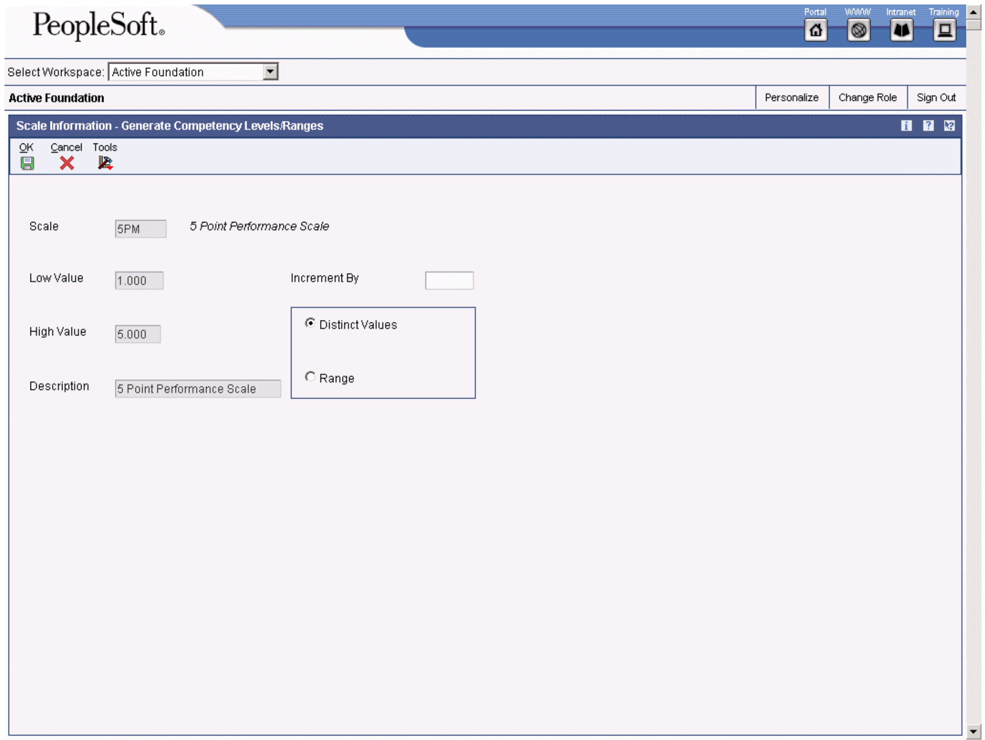
After you complete the steps to define basic information for scales, you can have the system automatically generate the values for the scales.

From the Competency Setup menu (G05BC4), choose Scale Information.

1. On Work With Scales, complete the following field and then click Find to locate the scale that you just created:

   - Scale

2. Choose the record in the detail area and then choose Generate Levels from the Row menu.



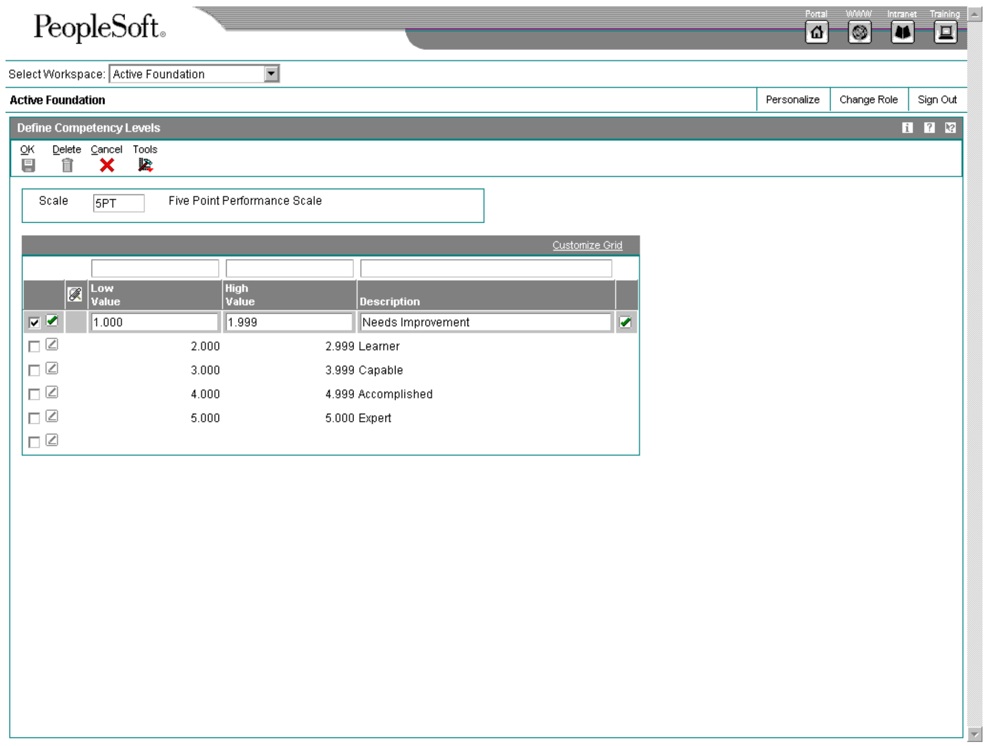
3. On Generate Competency Levels/Ranges, complete the following field:
   - Increment By
4. Choose one of the following options and then click OK:
   - Distinct Values
   - Range

▶ To enter values for scales manually

After you complete the steps to enter basic information for scales, you can enter values for scales manually.

From the Competency Setup menu (G05BC4), choose Scale Information.

1. On Work With Scales, complete the following field and then click Find to locate the scale that you just created:
   - Scale
2. Choose the record in the detail area and then choose Define Levels from the Row menu.



3. On Define Competency Levels, complete the following fields:
   - Low Value
   - High Value
   - Description
4. Repeat step 3 for as many competency levels as you need to define and then click OK.

Defining Employee Competencies

You define employee competencies to quantify the skills, training, and expertise that employees possess. You categorize competencies by competency type and then track multiple competencies for that competency type. For example, for the competency type Training you might track the following competencies:

- Employee orientation
- Foundation class
- Benefits Administration class

After you define employee competencies, you can assign these competencies to employees and indicate the levels of proficiency that employees demonstrate in each competency.

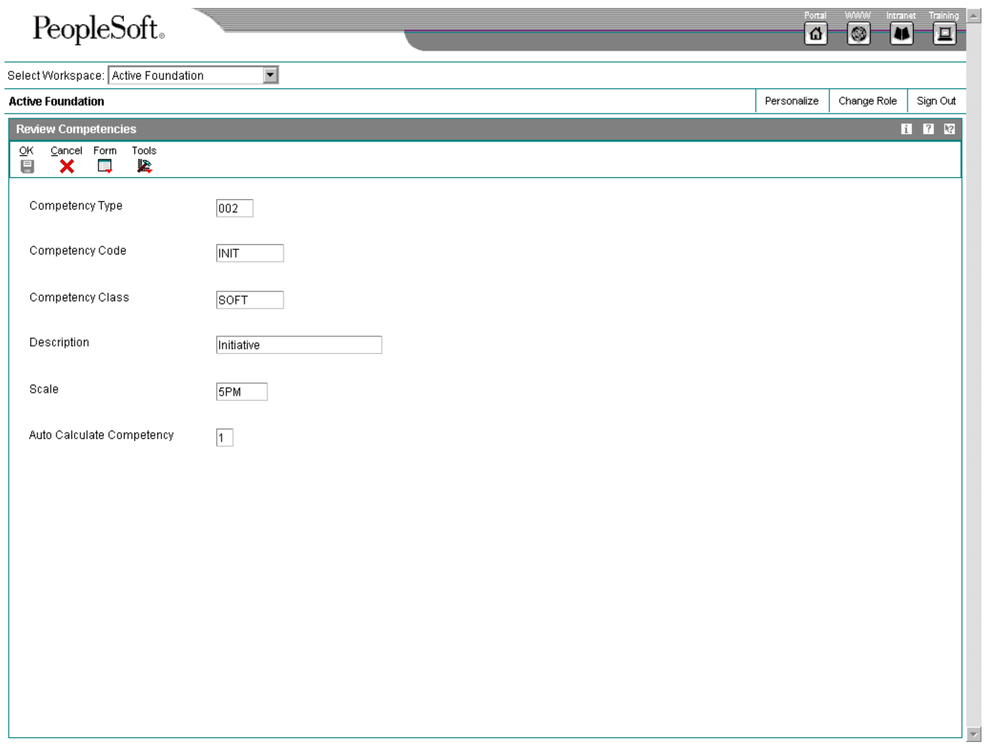
Before You Begin

- ❑ Review UDC 05/CY for a list of available competency types. Each of the values in this UDC list represents a competency table. The values in this list are hard-coded and cannot be changed. Adding additional values to this list requires that you customize the system.

▶ To define employee competencies

From the Competency Management menu (G05BC1), choose Competency Information.

1. On Work With Competency Information, click Add.



2. On Review Competencies, complete the following fields and then click OK:
   - Competency Type
   - Competency Code
   - Competency Class
   - Description
   - Scale
   - Auto Calculate Competency
3. Repeat steps 1 and 2 for as many competencies as you need to define, and then click OK.

Defining Training Courses

In some cases, a training course might help employees attain a variety of competencies in addition to a specific training competency. For example, a training course in J.D. Edwards Foundation might help employees acquire the following competencies:

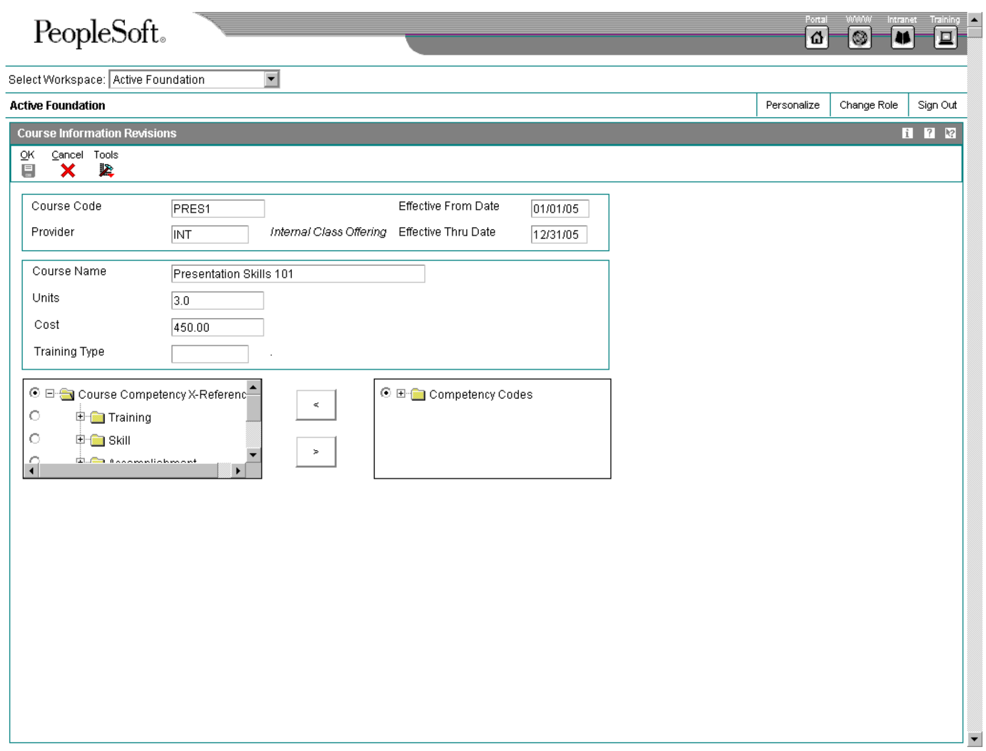
Training	Foundation training
Skills	Basic system skills
Certification	Product certification

When you define a training course, you can specify the competencies that it affects. Assigning competencies to training courses helps ensure that you consistently update the competency information for the employees who complete those training courses.

► To define training courses

From the Competency Management menu (G05BC1), choose Course Information.

1. On Work With Course Information, click Add.



2. On Course Information Revisions, complete the following fields:

   - Course Code
   - Provider

- Effective From Date
- Effective Thru Date
- Course Name
- Units
- Cost
- Training Type

3. On the lower-left portion of the form, choose the competency type that the training course affects.

   On the lower-right portion of the form, the system displays the competency codes for the competency type that you selected.

4. Choose the competency code that the training course affects and then click the left-arrow button in the lower-middle portion of the form.

   A + sign appears next to the competency type. When you click it, the system displays the competency code under the competency type.

5. Repeat steps 3 and 4 for as many competencies as the training course affects.

   You can choose multiple competency codes for each competency type.

6. Click OK.

Related Topics

Alternate method of attaching competencies to training courses	After you define a training course, you can use the Define Class/Competency X-Reference form to do any of the following: • Review the competencies that are attached to the training course • Attach additional competencies to the training course • Delete (detach) competencies from the training course To access the Define Class/Competency X-Reference form, choose Define X-Reference from the Row menu on Work with Course Information.

Working with Job Competency Information

You use competency management to track the competencies that employees possess and to compare these competencies with those that are required for the employees' jobs. You define job competencies to establish the criteria required for each job in your organization. You can make job competencies as specific or general as you choose. The competencies that you define for jobs do not need to correspond directly to the competencies that you define for employees. To ensure that job competencies apply to a variety of employees in many different jobs, you might choose to define job competencies more broadly than employee competencies.

When you define job competencies, you can enter detailed descriptions for them. These descriptions are electronic attachments to the form. Then, use competency options to indicate the employee competencies that fulfill a particular job competency. To review a written summary of all of the competency descriptions that are associated with a particular job, print the Job Profile report (R080021).

Defining Job Competencies and Descriptions

Before you assign job competencies to jobs and business units, you must define job competencies and enter descriptions of them. You can enter detailed descriptions for job competencies that explain the criteria on which each competency is based. These descriptions simplify the process of differentiating between similar job competencies. You can create multiple competency descriptions for each job competency and customize each description to a specific audience.

For example, you might define the following descriptions and audiences for the Negotiation Skills competency:

Human resources administrator	Those who possess negotiation skills are able to work with other parties to obtain mutually beneficial objectives. Negotiation requires assertiveness to achieve one's own goals while considering the concerns of the other party.
Managers	Employees who have good negotiation skills show a willingness to work with others to obtain a desired objective.
Employees	When demonstrating negotiation skills, you remain focused on the desired result and recognize when the process is moving in an appropriate direction. You are able to appreciate the needs of others and assume that the negotiation will end in a decision that is agreeable to all of the parties involved.

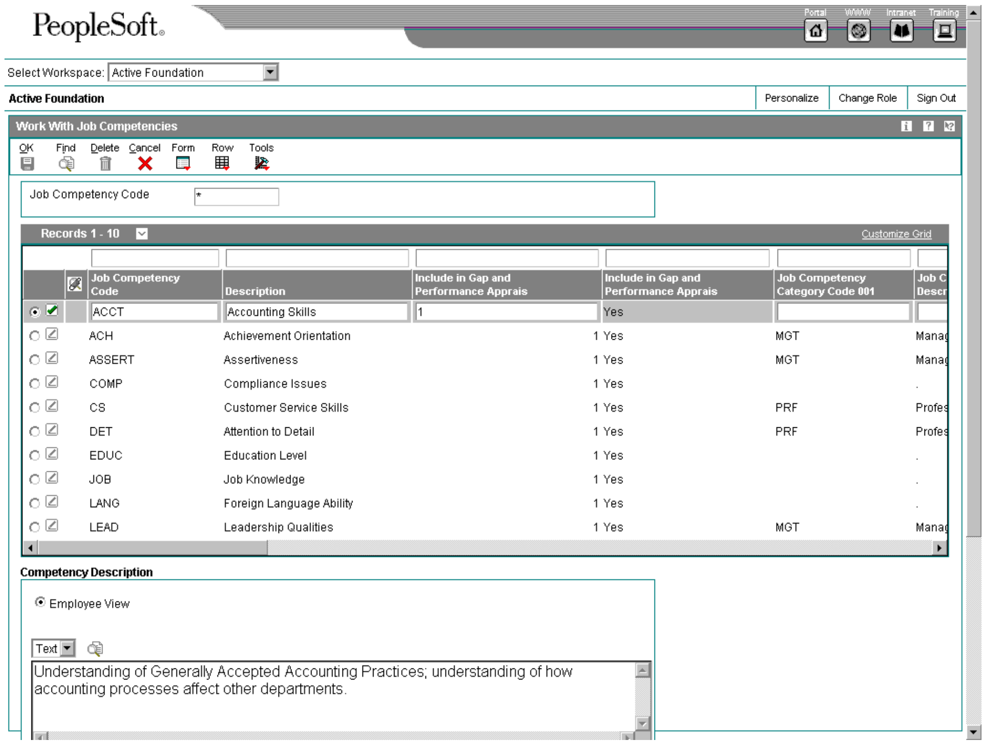
To simplify the process of locating and comparing job competencies, you can use category codes to group descriptions for similar job competencies. For example, you might set up a category code called Technical that you use to group all job competencies that apply to the technical jobs within your organization.

Before You Begin

- Set up the category codes for job competencies (UDC 08/C0 through 08/C9). See *Defining Category Codes* in the *Workforce Management Foundation Guide*.
- Set up processing options for the codes for the Job Competencies in an Organization program (P08006). These options determine the types of views for which you will be creating job competency descriptions. For example, you might have a Human Resources view and a Manager view. If you need to add or change the existing views, you can add codes to user defined code list 08/UD. See *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide*.
- If you want the system to default job competency weights when they are not already assigned, you must set data item DJCW (Default Job Competency Weights?) to Yes in the HRM Common Settings program (P05004). When this value is set to No, the default value for unassigned competency weights is zero. See *Setting Up Common Settings for Workforce Management* in the *Workforce Management Foundation Guide* for more information about common settings.

▶ To define job competencies and descriptions

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency.



1. On Work With Job Competencies, click Find to review any existing job competencies.
2. Move the cursor to the first blank record in the detail area and then complete the following fields:
   - Job Competency Code
   - Description
   - Include in Gap and Performance Apprais
3. Complete any of the following fields that apply to your organization:
   - Job Competency Category Code 001
   - Job Competency Category Code 002
   - Job Competency Category Code 003
   - Job Competency Category Code 004
   - Job Competency Category Code 005
   - Job Competency Category Code 006

- Job Competency Category Code 007
- Job Competency Category Code 008
- Job Competency Category Code 009
- Job Competency Category Code 010

4. To indicate the audience for this job competency description, click an option that corresponds to a type of view, such as one of the following:
   - Human Resource View
   - Manager Coaching View
   - Employee View

   You define these views in the processing options for the Job Competencies in an Organization program (P08006).
5. Choose Edit Description from the Row menu.
6. On Job Competency Description Maintenance, enter a text description in the media attachment area at the bottom of the form.
7. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
8. When you have finished entering attachments, click OK.
9. To enter another job competency and description, repeat steps 1 through 8.

   Repeat these steps until you have entered a description for each of the audiences.

Processing Options for Job Competency (P08009)

Version Tab

Use these processing options to specify the versions that the system uses for the Job Competency program.

---

1. Job Competencies in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competencies in an Organization program (P08006) to use. The default is ZJDE0001.

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2. Jobs in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Jobs in an Organization program (P08007) to use. The default is ZJDE0001.

3. Copy Job Competencies Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

Defining Job Competency Options

Typically, job competencies represent broad categories of knowledge or experience, while employee competencies represent measurable and observable traits and behaviors that demonstrate proficiency in one or more job competencies. While employee competencies are usually closely related to job competencies, they might not correspond exactly. In many cases, two or more employee competencies combine to satisfy a job competency, and a single employee competency can fulfill multiple job competencies. For example, the job competency Negotiation Skills might require that employees be proficient in the employee competencies Communication Skills and Conflict Management Skills. The employee competency Communication Skills might also apply to other job competencies, such as Management Skills and Team Work.

To associate employee competencies with the job competencies that they fulfill, you enter options for job competencies. A job competency option represents a group of employee competencies that can be combined to fulfill a job competency. When more than one combination of employee competencies can be used to fulfill a job competency, you can create multiple options for that job competency. For a job competency that has multiple options, you can indicate which option is the preferred option.

For example, the job of Human Resources Generalist for Company A requires the job competency of a college degree in human resources or the job competency option of five years of related experience.

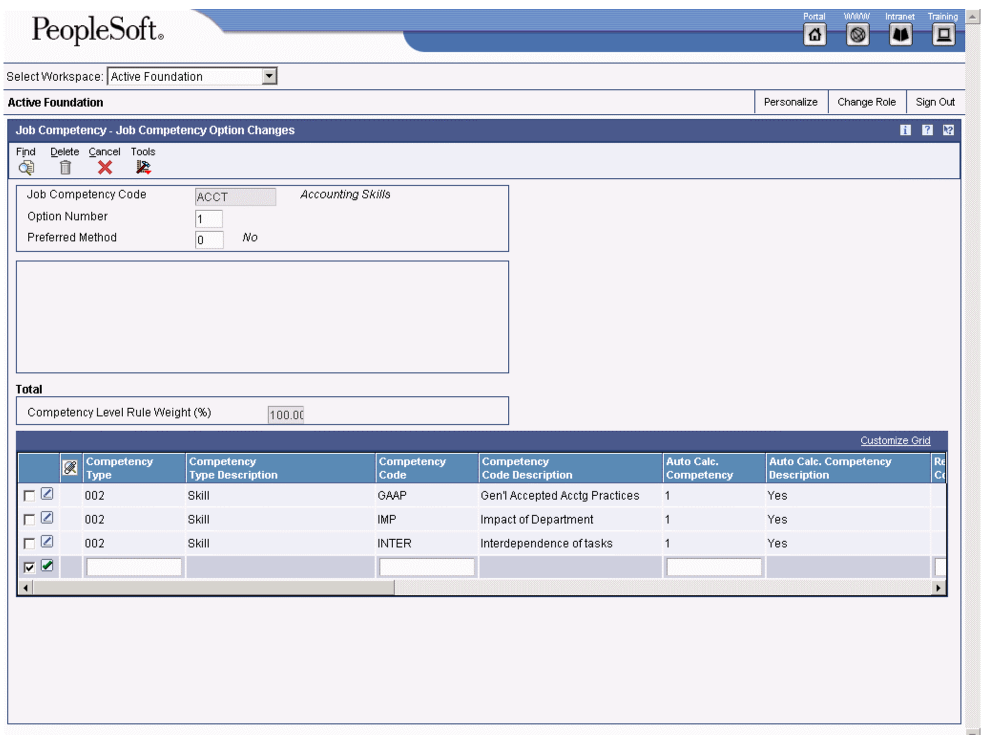
Before You Begin

- ❑ Define job competencies and descriptions. See *Defining Job Competencies and Descriptions* in the *Human Resources Guide*.
- ❑ Define employee competencies. See *Defining Employee Competencies* in the *Human Resources Guide*.

▶ To define job competency options

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency.

1. On Work With Job Competencies, click Find to review the existing job competencies.
2. Choose a record in the detail area, and then choose Competency Options from the Row menu.
3. On Work With Job Competency Options, click Add.



4. On Job Competency Option Changes, complete the following fields:
   - Option Number
   - Preferred Method
5. Complete the following fields in the detail area:

- Competency Type
- Competency Code
- Auto Calc. Competency
- Required Competency Level
- Competency Level Acceptable Low
- Competency Level Acceptable High
- Competency Level Rule Weight (%)

6. To add additional employee competencies to this job competency option, repeat step 5.
7. When you have finished adding competencies for this option, click OK.
8. To add another option for this job competency, repeat steps 3 through 6.
9. When you have finished adding job competency options, click OK.

Working with Competencies in Organizational Structures

To simplify the process of tracking job competencies within your organization, you can attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies.

When you attach a job competency to the entity that is at the top of an organizational structure, the system applies that competency to all of the jobs that are attached to the organizational structure. Likewise, when you attach a competency to a business unit within an organizational structure, the competency applies to all of the jobs within that business unit. This feature, called *inheritance,* reduces much of the administrative work that is associated with attaching job competencies and helps you ensure that competencies are attached consistently throughout your organization.

Attaching job competencies to organizational structures saves you time by reducing the number of competencies that you need to assign to each job. Attaching jobs to organizational levels allows you to take advantage of the inheritance feature, as well as to indicate the business unit in which the job resides. A job can reside in more than one business unit within the structure.

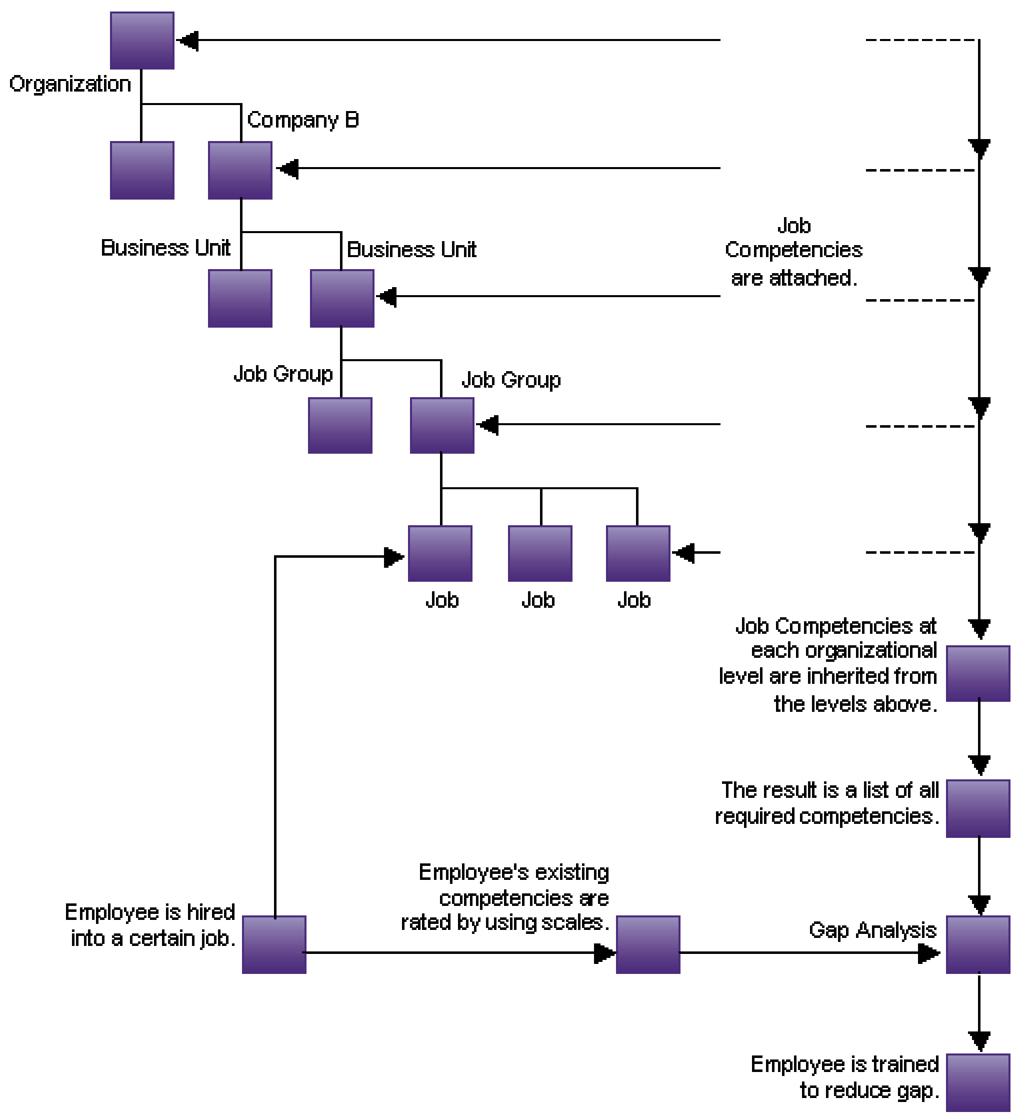
For each business unit, job group, and job, you can override certain information for inherited competencies, when necessary. To verify that inherited and overridden competencies occur where you are expecting them, you can review override information by job, job group, and business unit. If necessary, you can revise this information.

If your organization has employees in more than one country, you might want to translate the competency descriptions so that all employees can understand them. After you have reviewed job competencies and their overrides, you can enter these translated versions of the competency descriptions and attach them to the job competencies.

Typically, when you are working with competencies in organizational structures, you use a draft structure. When you have finished attaching jobs and job competencies to organizational levels and are satisfied with the results, you are ready to activate the draft organizational structure.

The following graphic illustrates how competencies can be attached to the various levels in an organization:

Competencies at Various Levels of an Organization



Attaching Job Competencies to Organizational Levels

To reduce data entry and simplify the process of updating competencies as the goals and objectives of your organization change, you can attach job competencies to the hierarchical levels in your organizational structure. You perform this task after you have created an organizational structure for job competencies and defined the job competencies that your organization uses. Each level in the organizational structure represents a business unit within the organization.

You can use the Job Competencies in an Organization program (P08006) to assign core competencies (the competencies that apply to all of the employees in your organization) to the organizational structure itself. When you assign a competency to an organizational structure, all of the jobs that are attached to the structure inherit those competencies.

For competencies that apply only to specific business units within the structure, you can also use this program to attach job competencies to those individual business units. After you attach competencies to the organizational structure and the levels (business units) within it, you can use the Jobs in an Organization program (P08007) to attach additional, more specific competencies to job groups and individual jobs. You can also override certain job competency information at these lower levels.

You can attach job competencies to the current, active organizational structure or to a draft structure. When you attach a job competency to an organizational level, all of the subordinate organizational levels inherit that job competency. Therefore, J.D. Edwards recommends that you begin attaching competencies at the organizational structure level and then work down through the business units in each subordinate level. After you attach a competency to a business unit, you cannot attach that competency to a business unit that is at a subordinate or superior level within the organizational structure.

Self-Service Considerations

Your organization might have set up the Job Competencies in an Organization program (P08006) as a self-service application that managers and employees can use to determine where competencies are assigned within the organizational structure. If you are accessing Job Competencies in an Organization from a self-service program, such as the Form menu in the Managers Workbench program (P08712), you can review the organizational structure to see the level to which each competency is attached, but you cannot attach or delete any competencies within the structure.

Before You Begin

- ❑ Define the organizational structure for job competencies. See *Defining Organizational Structures for Job Competencies* in the *Human Resources Guide*.
- ❑ Define the job competencies for your organization. See *Defining Job Competencies and Descriptions* in the *Human Resources Guide*.

► To attach a job competency to an organizational level

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

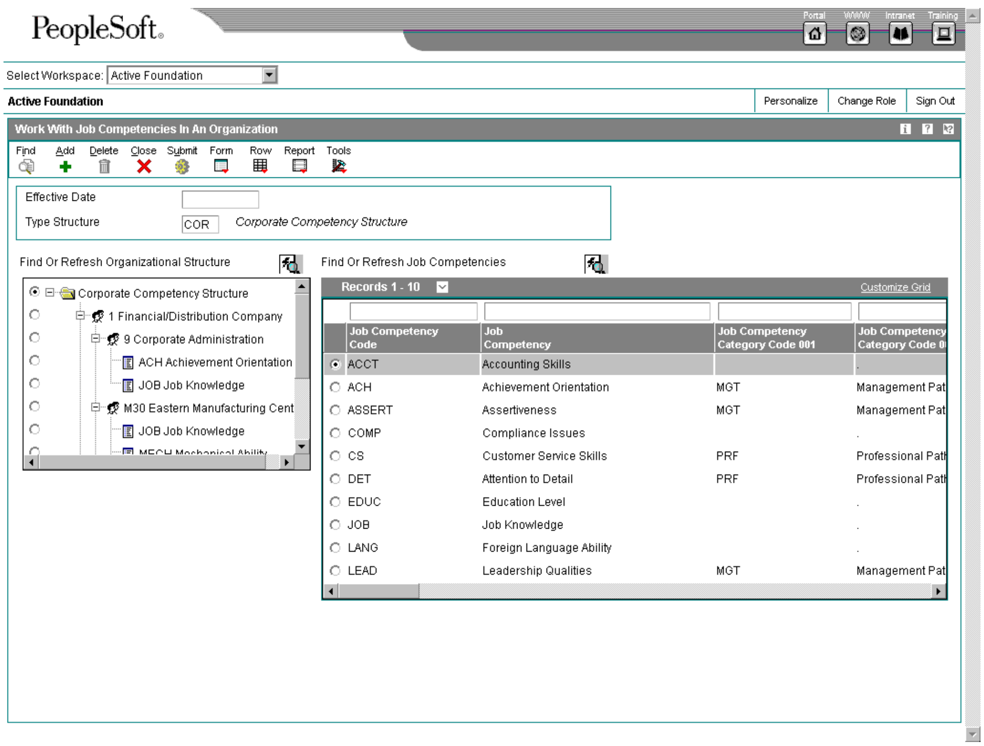
1. On Work With Job Competencies In An Organization, complete the following fields and click Find:
   - Effective Date

- Type Structure

On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job competency to a level in the structure, click once on the level to select it, click once on the competency to select it, and then click Add.

   The competency appears in the tree view under the level that you chose.



4. To remove a job competency from a level in the structure, click once on the competency in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many competencies as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

See Also

- *Overriding Inherited Job Competencies* in the *Human Resources Guide*

Processing Options for Job Competencies in an Organization (P08006)

Defaults Tab

This processing option specifies the functions that the user can access and change.

1) Audience Flag

1 = Employee

2 = Manager

3 = Human Resources

Use this processing option to specify who is going to use the application to what capacity.

Competency Descriptions Tab

These processing options specify user defined competency information.

1) User Defined Competency Description

Code 1

Blank = Do not display description 1

A valid Competency Description Code

Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected,the associated description is displayed.

2) User Defined Competency Description

Code 2

Blank = Do not display description 2

A valid Competency Description Code

Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed.

3) User Defined Competency Description

Code 3

Blank = Do not display description 3

A valid Competency Description Code

Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected,the associated description is displayed.

4) User Defined Competency Description

Code 4

Blank = Do not display description 4

A valid Competency Description Code

Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed.

5) User Defined Competency Description

Code 5

Blank = Do not display description 5

A valid Competency Description Code

Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected,the associated description is displayed.

6) User Defined Competency Description

Code 6

Blank = Do not display description 6

A valid Competency Description Code

Use this processing option to list the code for the sixth Job Competency Code description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected,the associated description is displayed.

7) View Language Specific User Defined Competency Description.

1 = Yes

0 = No

Use this processing option to indicate whether language specific descriptions should be used. If this flag is set to 1, the program will look for a description in the user's language. If this language is not found, the default language will be used. If this flag is set to 0, the default language will always be used.

Versions Tab

These processing options specify the versions of other programs that the Job Competencies in an Organization program uses.

1) Jobs in an Organization Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Jobs Workbench program (P08007) to use. The default is ZJDE0001.

2) Job Competencies Version

Blank = ZJDE0003

A valid version

Use this processing option to specify the version of the Job Competencies program (P08009) to use. The default is ZJDE0001.

3) Gap Analysis Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Gap Analysis program (P08009) to use. The default is ZJDE0001.

4) Organizational Structure Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Organizational Structure program (P0050) to use. The default is ZJDE0001.

5) Copy Job Competencies Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Copy Job Competencies program (P080020) to use. The default is ZJDE0001.

6) Job Competency Defaults and or Overrides Version

Blank = ZJDE0003

A valid version

Use this processing option to specify what version of Job Competency Defaults and or Overrides (P080018) to use when exiting to that program.

Attaching Jobs to Organizational Levels

To reduce data entry and simplify the process of attaching job competencies to the jobs within your organization, you can attach jobs to the business units that compose the hierarchical levels of an organizational structure. You perform this task after you have created an organizational structure for job competencies.

When you attach a job to a business unit, the job inherits all of the competencies that are attached to that business unit and to all of the business units above it, up to the highest level of the organizational structure. Regardless of the business unit to which the job is attached, the job also inherits the competencies that are attached to its job group. If necessary, you can attach additional competencies to the job or override certain information for the inherited competencies.

When your organization restructures, you can easily move a job from one business unit in the organizational structure to another.

Self-Service Considerations for Attaching Jobs to Organizational Levels

Your organization might have set up the Jobs in an Organization program (P08007) as a self-service application that managers and employees can use to review jobs within the organizational structure. If you are accessing Jobs in an Organization from a self-service program, such as the Form menu on Managers Workbench (P08712), you can review the organizational structure to see the level to which each job is attached, but you cannot attach or delete any jobs within the structure.

Before You Begin

- ❑ Define the jobs for your organization. See *Entering Job Information* in the *Workforce Management Foundation Guide*.
- ❑ Define the organizational structure for job competencies. See *Defining Organizational Structures for Job Competencies* in the *Human Resources Guide*.

► To attach a job to an organizational level

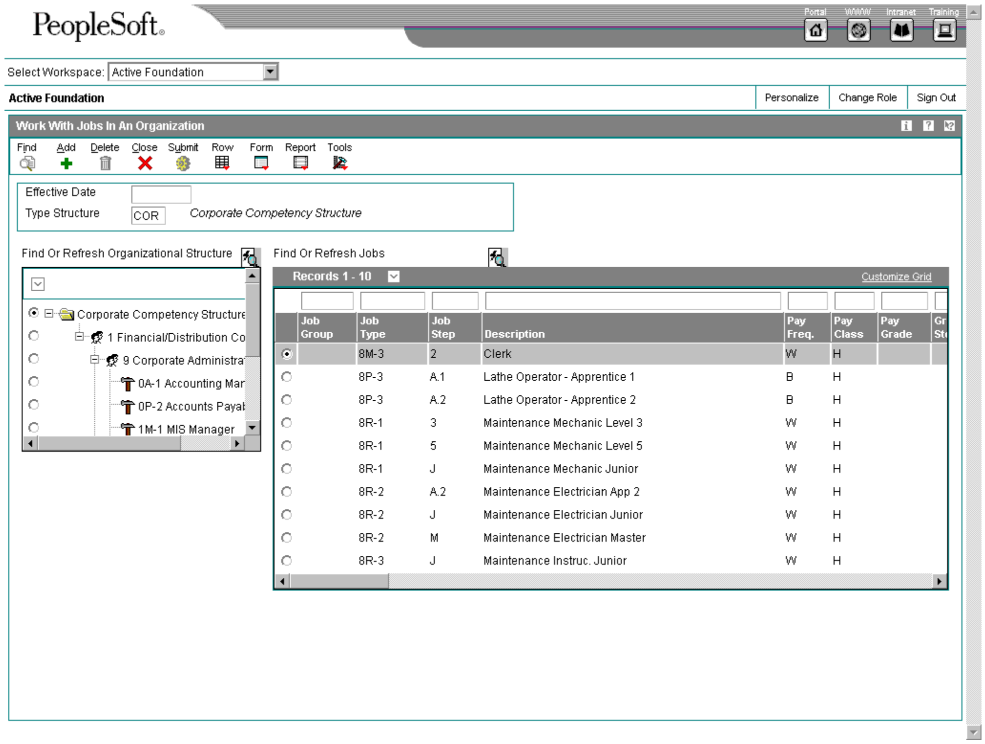
From the Competency Mgmt Periodic Processing menu (G05BC2), choose Jobs In An Organization.

1. On Work With Jobs In An Organization, complete the following fields and click Find:
   - Effective Date
   - Type Structure

   On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The hammer icon indicates a job. On the right side of the detail area, the system displays the jobs that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To attach a job to a level in the structure, click once on the level to select it, click once on the job to select it, and then click Add.

   The job appears in the tree view under the level that you chose.



4. To remove a job from a level in the structure, click once on the job in the tree view and then click Delete.
5. Complete steps 3 and 4 for as many jobs as you need to add or delete.
6. To save your work, choose Submit from the Form menu.

See Also

- *Overriding Inherited Job Competencies* in the *Human Resources Guide*
- *Attaching Additional Job Competencies* in the *Human Resources Guide* for information about entering specific competencies for job groups and individual jobs

Attaching Additional Job Competencies

After you attach competencies to the organizational structure, you can attach additional, more specific competencies to each of the following:

- Business units
- Job groups
- Jobs
- Individual jobs within a business unit

Attaching additional competencies gives you the flexibility to customize competencies to a particular job and still take advantage of the time-saving qualities of inheritance. When you attach a job competency to a business unit or job group, all of the jobs within that business unit or job group inherit the competency.

For each job, you can also attach competencies that are specific to a particular business unit. For example, the job Administrative Assistant might require different competencies when it is in the Information Technology business unit than it does when it is in the Finance business unit. You can also override certain information for inherited competencies.

In some cases, you might want to override the decision to include a competency in gap analysis. For example, a competency such as word processing skills might be essential to the job Administrative Assistant. The job Programmer might also require word processing skills, but these skills are considered minor requirements compared to the other more essential competencies, such as programming languages and analytical thinking ability. Therefore, you might choose to include that competency in the gap analysis and performance review for administrative assistants, but not in the gap analysis and performance review for programmers.

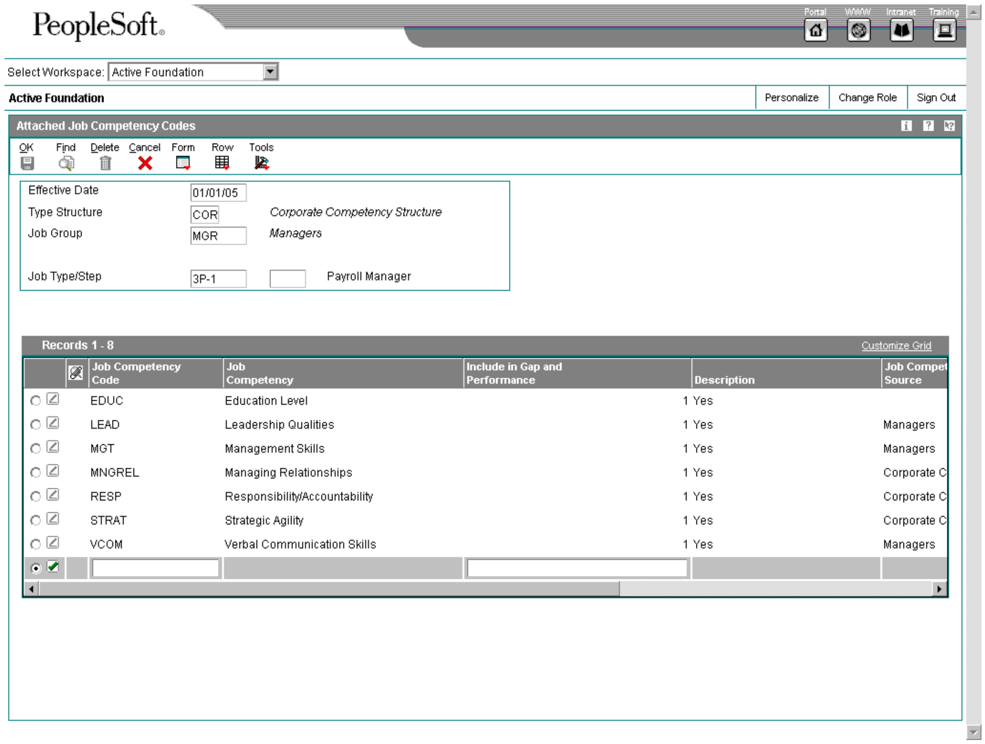
Before You Begin

- ❑ Attach jobs and job competencies to the levels in the organizational structure. See *Attaching Job Competencies to Organizational Levels* and *Attaching Jobs to Organizational Levels* in the *Human Resources Guide*.

► To attach additional job competencies

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Jobs In An Organization.

1. On Work With Jobs In An Organization, complete the following fields and click Find:
   - Effective Date
   - Type Structure
2. From the Form menu, choose Competencies For, and then choose one of the following options:
   - Organization
   - Job Group
   - Business Unit
   - Job
   - Job Within A BU



3. On Attached Job Competency Codes, complete any of the following fields in the header area that correspond to the menu option that you chose, and then click Find:

   - Type Structure
   - Job Group
   - Organizational Business Unit
   - Job Type/Step

     For example, if you chose Job Group from the menu, you would complete the Job Group field on Attached Job Competency Codes.

4. To override the decision to include an existing competency in gap analyses and performance appraisals, change the value for that competency in the following field in the detail area:

   - Include in Gap and Performance

5. To add a job competency, complete the following fields in the first blank line of the detail area.

   - Job Competency Code
   - Job Competency Source
   - Include in Gap and Performance

- Overrides Exist Flag

6. When you have finished entering information, click OK.

See Also

- *Overriding Inherited Job Competencies* in the *Human Resources Guide*

Overriding Inherited Job Competencies

When you attach a competency to an organizational structure, business unit, or job group, the jobs within that level inherit the competency. After you review the inherited competencies for a job, you might need to customize these competencies to the particular needs of an organizational structure, business unit, job group, or job. For example, a competency such as computer skills might require a different level of proficiency for computer programmers than it does for administrative assistants. When you set up the options for this job competency, you might enter a basic level of proficiency. Then, for the job computer programmer (which inherits the competency), you can override the competency options by entering a different level of proficiency.

Whenever you add, change, or delete any descriptions or options for an inherited or attached competency, you are overriding that competency. You can override any inherited or attached competency at any level in the organizational structure.

Before You Begin

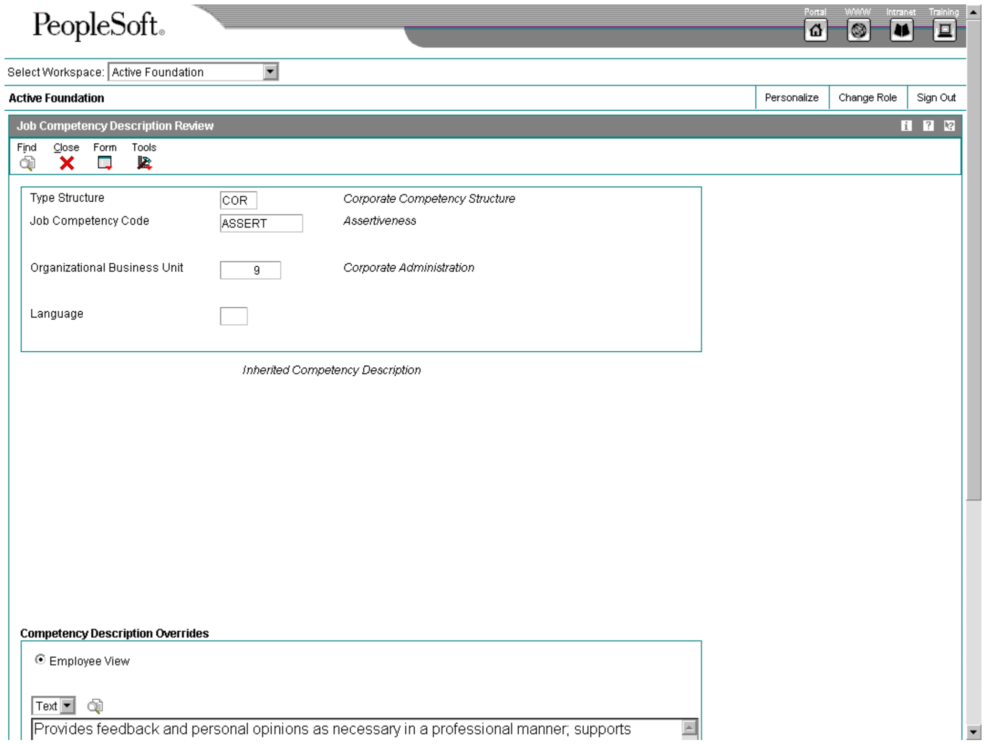
- Attach jobs and job competencies to the levels in the organizational structure. See *Attaching Job Competencies to Organizational Levels* and *Attaching Jobs to Organizational Levels* in the *Human Resources Guide*.

► To override competency descriptions

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

1. On Work With Job Competencies In An Organization, complete the following fields and click Find:
   - Effective Date
   - Type Structure

     On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.
2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review existing overrides, choose a competency in the tree structure and then choose Edit Descriptions from the Row menu.



4. On Job Competency Description Review, choose one of the following options and then review the corresponding definition:
   - Human Resource View
   - Manager Coaching View
   - Employee View
5. To override a description, choose the option for that description and then choose Add Description from the Form menu.
6. On Job Competency Description Maintenance, enter a text description and then click OK.

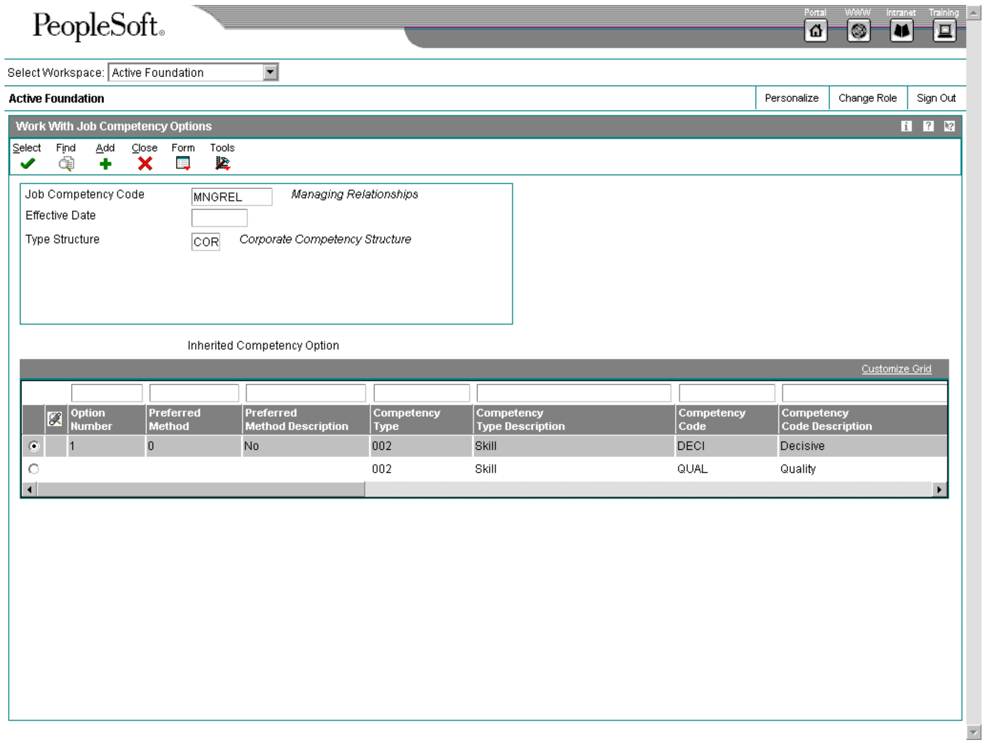
▶ To override competency options

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competencies In An Organization.

1. On Work With Job Competencies In An Organization, complete the following fields and click Find:
   - Effective Date
   - Type Structure

     On the left side of the detail area, the system displays a tree view of the organizational structure. The face icon indicates a business unit. The document icon indicates a job competency. On the right side of the detail area, the system displays the job competencies that you have defined.

2. To view a lower level of the structure, click the + icon to the left of a folder or icon.
3. To review the current options and enter overrides, choose a competency in the tree structure and then choose Override Options from the Row menu.



4. On Work With Job Competency Options, review the information in the detail area to see which competencies have been inherited or overridden.
5. To add an override for an option, click Add and then complete the steps for defining job competency options.

Note
You can also delete or modify any of the existing options.

See Also

- *Defining Job Competency Options* in the *Human Resources Guide*

Related Tasks

Reviewing default descriptions	From the Work with Job Competencies in an Organization form, you can review the default descriptions for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Description from the Row menu. The system displays the default descriptions for the competency that you choose.
Reviewing default options	From the Work with Job Competencies in an Organization form, you can review the default options for a competency by choosing a competency from the list on the right side of the detail area and then choosing Default Options from the Row menu. The system displays the default options for the competency that you choose.
Excluding a competency from gap analysis	If you want to include a competency in the gap analysis for some jobs but not all, you can enter that information when you attach an additional competency to a business unit, job group, or job.

See Also

- *Defining Job Competencies and Descriptions* and *Defining Job Competency Options* in the *Human Resources Guide* for instructions for adding options
- *Attaching Additional Job Competencies* in the *Human Resources Guide*

Reviewing Job Competency Information

After you attach jobs and job competencies to levels in the organizational structure and enter any overrides, you might need to review attached competencies and competency overrides to ensure that they have been applied consistently. You can review override information, such as effective dates and gap analysis inclusion, for any of the following:

- Jobs
- Job groups
- Business units
- Organizational structures

If you need to add or revise any job competency information, you can use the options on the Form and Row menus to access the forms for entering job competencies, competency options, and competency descriptions. You can revise override information, as well as default information.

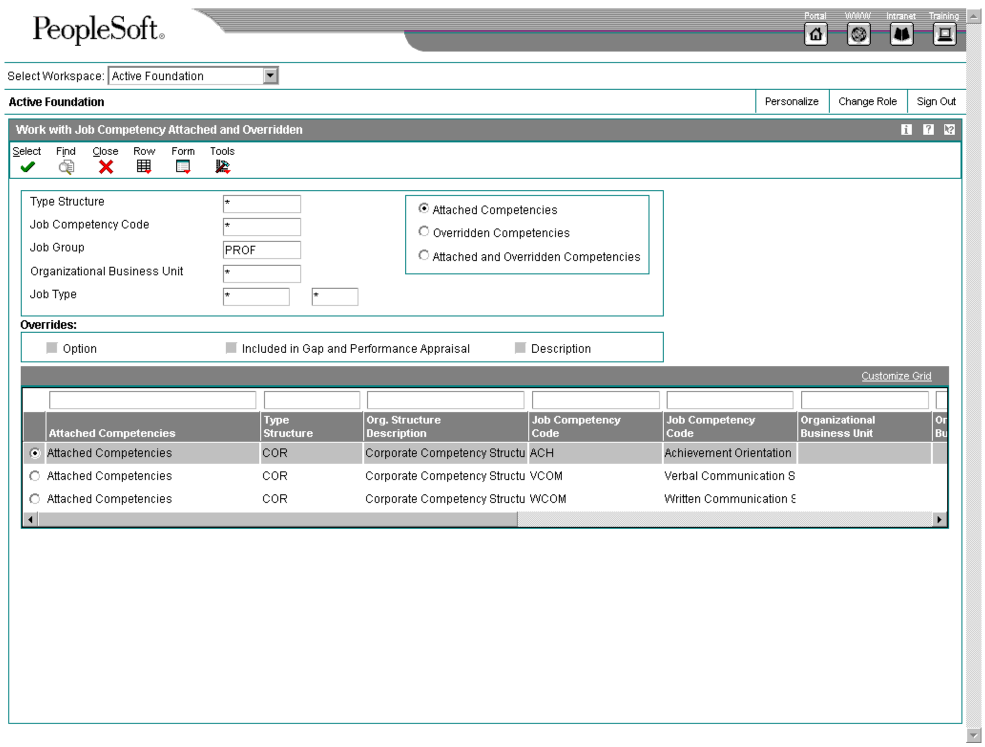
► To review job competency information

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Competency Defaults and or Overrides.

1. On Work with Job Competency Attached and Overridden, complete any of the following fields:
    - Type Structure
    - Job Competency Code

- Job Group
- Organizational Business Unit
- Job Type
- Job Step

2. Choose one of the following options:
   - Attached Competencies
   - Overridden Competencies
   - Both
3. Click Find.



4. Review the information in the detail area.

Reviewing the Job Profile Report (R080021)

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Profile Report.

When you need a formal description of a job, such as when you are advertising a job opening, you can print the Job Profile report. This report displays detailed information about the job, such as job competencies, job competency options, and job competency descriptions. It also displays the employee competencies and competency levels that are required for the job.

Processing Options for Job Profile Report (R080021)

Select Tab

Use these processing options to specify information that will be included in the report.

---

1. Organization type structure

Blank = Default organizational structure

Use this processing option to specify the organizational structure used in the Job Description report (R080021). This option will produce a report of the job descriptions for selected jobs and organizational business units.

If this field is left blank, the default organizational structure will be used.

---

2. Job type

Blank = All jobs

Use this processing option to produce a Job Description report (R080021) on a specific job type. If a value is entered, it is necessary to also specify an organizational business unit.

Blank will produce a Job Description report (R080021) of all jobs in an organizational business unit and organizational structure.

---

3. Job step

* = All job steps

Use this processing option to produce a Job Description report (R080021) on a specific job step. If a value is entered, you must also specify an organizational business unit and the job type.

A * specifies to create a Job Description report on all job steps within a job type.

4. Organizational business unit

Blank = All organizational business units

Use this processing option to create a Job Description report (R080021) based on a specific organizational business unit. If you leave this processing option blank, a Job Description report will be created for all specified jobs in all organizational business units.

5. Date - effective

Blank = Today's date

Use this processing option to produce a Job Description report (R080021) at a specific time.

Blank will produce a Job Description report (R080021) of jobs on the current date.

Versions Tab

Use this processing option to specify version information for the report.

---

1. Job Competencies in an Organization Version

Blank = ZJDE0001

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Display Tab

Use these processing options to choose competency descriptions that will appear on the report.

1. First job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the first user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the first user defined description found in the processing options for the Job Competency Workbench.

2. Second job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the second user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the second user defined description found in the processing options for the Job Competency Workbench.

3. Third job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the third user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the third user defined description found in the processing options for the Job Competency Workbench.

4. Fourth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the fourth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fourth user defined description found in the processing options for the Job Competency Workbench.

5. Fifth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the fifth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the fifth user defined description found in the processing options for the Job Competency Workbench.

6. Sixth job competency description

Blank = Yes

1 = Yes

0 = No

Use this processing option to specify whether to display the description for the sixth user defined description as specified in the Job Competency Workbench. A default of blank will display the descriptions associated with the sixth user defined description found in the processing options for the Job Competency Workbench.

Translating Job Competency Descriptions

When you enter descriptions for job competencies, the system stores those descriptions in the domestic language that is specified in your user profile. If your organization has employees in more than one country, you might need to translate these descriptions into one or more additional languages. Because the system stores job competency descriptions as media objects, they are not translated along with the rest of the software. You enter translated descriptions manually, using the Job Competencies Description Translation program (P080019).

► To translate job competency descriptions

From the Competency Mgmt Advanced & Tech Oper menu (G05BC3), choose Job Competency Description Translation.

1. On Work With Job Competencies Description Translation, complete the following fields and then click Find to locate the job competency description that you need to translate:
   - Type Structure
   - Job Competency Code
2. To narrow your search, complete any of the following fields or options, and then click Find:
   - Organizational Business Unit
   - Effective Date
   - Job Group
   - Job Type
   - Job Step
   - Language
   - Descriptions Not Translated
3. Choose one of the following options to specify the audience for the description:
   - View 1
   - View 2
   - View 3
4. Choose a record in the detail area and then click Select.
5. On Job Competency Description Review, to add a new, translated description for this view, choose Add Description from the Form Menu.
6. On Job Competency Description Maintenance, complete the following field:
   - Language
7. Enter the translated description in the media attachment area at the bottom of the form.
8. To attach other types of electronic attachments, such as pictures and links to Internet pages, right-click in the exit bar to the left of the media object, choose New from the menu, and then choose the type of object that you want to attach.
9. When you have finished entering attachments, click OK.
10. To enter a translated description for another audience, repeat steps 1 through 9.

Repeat these steps until you have entered a translated description for each of the audiences.

Related Topics

Revising descriptions	To revise an existing description for a job competency, choose the Update Description option from the Form menu of Job Competency Description Review.

Processing Options for Job Competency Description Translations (P080019)

Versions Tab

This processing option specifies the version of the Job Competencies in an Organization program (P08006) to use.

---

1) Job Competencies in an Organization

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Job Competency Workbench program (P08006) to use. The default is ZJDE0001.

Setting Up Security for Competency Levels

After an employee or an employee's supervisor enters competency information, another person in the organization, such as a member of the human resources department, might be responsible for assigning a competency level (the employee's level of proficiency) to each competency. You can choose a different person to enter competency levels for each competency type or individual competency.

You set up security for competency levels so that you can specify the type of user who has permission to update the competency levels for each competency that the employee enters. For example, you might set up the training competency type so that the training development manager is responsible for approving each employee's training competencies and entering the competency levels for each employee. In this case, the employees' supervisors could use the Managers Workbench program (P08006) to enter and review employee training competencies, but the supervisors would not be allowed to enter the competency levels for training competencies.

You use the Competency Update Events program (P05106) to set up security for competency approvals. This program works in conjunction with a processing option on the Resource Competency Information program (P05100) to control access to the Competency Level field. You enter codes in the Competency Update Events program that represent a type of user, such as supervisors. These codes correspond to the values that you enter in a processing option on Resource Competency Information. You set up different versions of Resource Competency Information for each type of user.

Before You Begin

- ❑ Set up the user defined code list for competency update codes (05/CU). The codes that you enter in this list correspond to the values that you enter in the Competency Update Event Code processing option for the Resource Competency Information program (P05100).

► To set up security for competency levels

From the Competency Setup menu (G05BC4), choose Competency Update Events.

1. On Competency Update Event Revisions, complete the following field to specify a category of user who is responsible for approving competencies:
   - Competency Update Event Code

     To give the users who are assigned to this competency update event code access to the competency levels for all employee competencies, leave the remaining fields on the form blank.
2. To limit the users who are assigned to this competency update event code to a specific competency type, complete the following field:
   - Competency Type
3. To limit the users who are assigned to this competency update event code to a specific competency within the competency type, complete the following field:
   - Competency Code

     If you enter a competency code, you must enter a competency type.
4. To limit the users who are assigned to this competency update event code to a specific competency class, complete the following field:
   - Competency Class
5. Repeat steps 1 through 4 for as many competencies, competency classes, and competency types as you need to assign to a competency update event code, and then click OK.

Setting Up Routing Instructions for Competency Approvals

Your organization might allow employees to use self-service to enter their own competency information. After the employee enters competency information, the system sends an e-mail message to the person who is responsible for approving the employee's competencies. Typically, employees' supervisors are responsible for approving the information that employees enter and for assigning a competency level (the employee's level of proficiency) to each competency. In some cases, however, you might want someone other than the employees' supervisors to assign competency levels. For example, the training development manager might be responsible for approving training competencies. Routing also occurs when another person adds competency information for an employee but is unable to update the competency levels.

You set up routing instructions for competency approvals so that you can identify a person, other than the employee's supervisor, who is responsible for approving specific employee competencies or competency types. You can choose a different person to approve each competency type or individual competency. For example, you can set up the routing instructions so that the training development manager is responsible for approving employee training competencies and the employees' supervisors are responsible for approving all other types of competencies.

When you set up routing instructions for a competency, the system sends an approval message to the person specified in the routing instructions when any other user enters information in that employee competency. For example, supervisors might be allowed to enter competency information for their employees, but they might not be responsible for approving training competency information. In this case, when a supervisor enters a training competency for an employee, the training development manager receives the approval message, just as he would if the employee entered the training competency.

If one or more competencies have no routing instructions specified, the system automatically routes approval messages for those competencies to the employee's supervisor.

► To set up routing instructions for competency approvals

From the Competency Setup menu (G05BC4), choose Competency Update Approval Routing.

1. On Competency Approval Routing Revision, to limit the approver's authority to only those employees who are in a particular organization business unit, complete the following field:
   - Organizational Business Unit
2. To enter routing instructions for a particular competency type, complete the following field:
   - Competency Type
3. To enter routing instructions for a particular competency code within a competency type, complete the following field:
   - Competency Code

     If you enter a competency code, you must enter a competency type.
4. To indicate whether the system should send an e-mail as a competency notification, complete the following field:
   - Send Msg Flag

   If you set this flag to Yes, you must complete step 5 or 6.
5. To indicate who will receive e-mail notification, complete the following field for the employee’s supervisor:
   - Address Number

6. If the employee does not have an immediate supervisor, indicate who should receive the e-mail notification by completing the following field:

   - 2nd Address Number

7. Repeat steps 1 through 6 for as many routing instructions as you need to add, and then click OK.

Assigning Competencies to Employees

After you define employee competencies, you can assign those competencies to employees and indicate the level of proficiency that employees demonstrate in each competency. By tracking competencies for employees, you can determine the competencies that they need in order to satisfy the requirements of their current jobs and any jobs that they hope to obtain in the future. You can also create clear career goals and performance objectives for employees.

Self-Service Considerations for Assigning Competencies to Employees

Because maintaining competency information for all of the employees in an organization can be a time-consuming task for human resources representatives, your organization might have set up the employee competency programs as self-service programs that managers can access from the Managers Workbench program (P08712). Managers can enter and review competency information for only those employees who report to them.

Your organization can also activate the employee self-service programs for competency management. Employees can use these programs to enter their own competency information and then request that their managers approve the information. The employee self-service programs for competency management are slightly different from the competency programs that you access from the Competency Management menu and the Managers Workbench program; however, the two sets of programs contain essentially the same information.

Before You Begin

- ❑ Enter an organizational business unit for each employee for whom you plan to assign competencies. You enter organizational business units on the Organizational Assignment form (W0801ORGA). See *Entering Organizational Assignment Information* in the *Workforce Management Foundation Guide*.

See Also

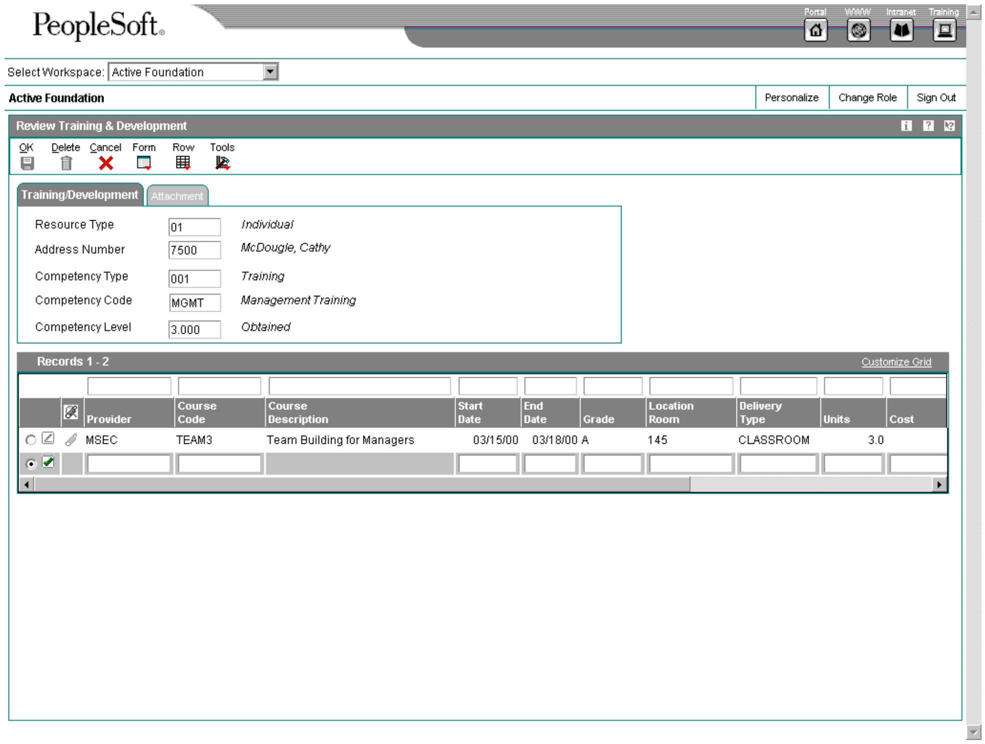
- ❑ *Entering Competency Information Using Self-Service* in the *Workforce Management Self-Service Guide* for information about how employees can use self-service to enter their own competency information

► To assign training competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 001 in the following field and then click Add:

   - Competency Type



2. On Review Training & Development, complete the following fields:
    - Address Number
    - Competency Code
    - Competency Level
3. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
4. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
5. On Review Training & Development, complete the following fields in the detail area:
    - Provider
    - Course Code
    - Start Date
    - End Date
    - Grade
    - Location Room
    - Delivery Type

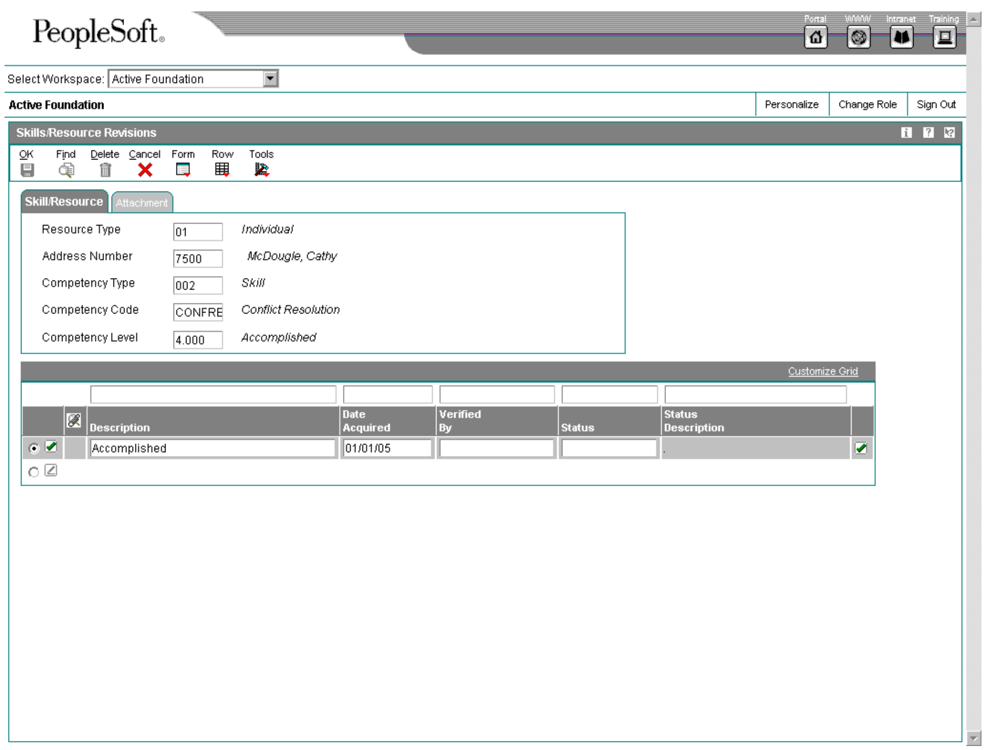
- Units
- Cost
- Training Reason

6. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
7. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
8. Repeat steps 5 through 7 for as many training courses as you need to enter for this employee and competency code, and then click OK.

► To assign skill competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 002 in the following field, and then click Add:
   - Competency Type



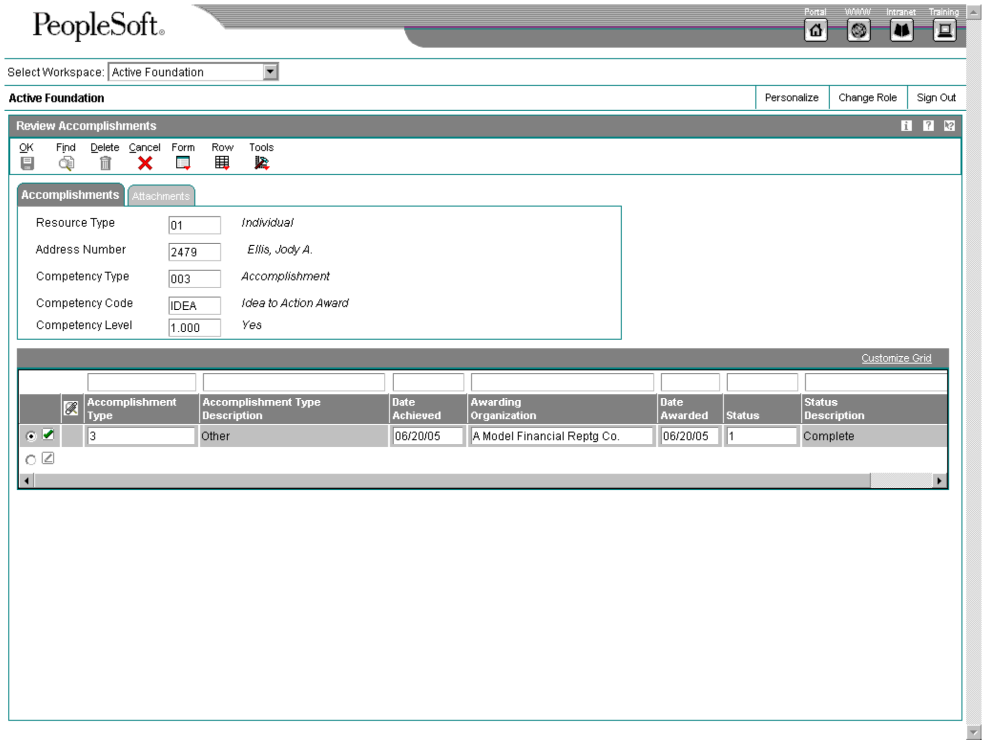
2. On Skills/Resource Revisions, complete the following fields:
   - Address Number
   - Competency Code

3. Review the following fields:
   - Competency Level
   - Resource Type
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Skills/Resource Revisions, complete the following fields in the detail area:
   - Description
   - Date Acquired
   - Verified By
   - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 6 through 8 for as many skills as you need to enter for this employee and competency code, and then click OK.

► To assign accomplishment competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 003 in the following field and click Add:
   - Competency Type



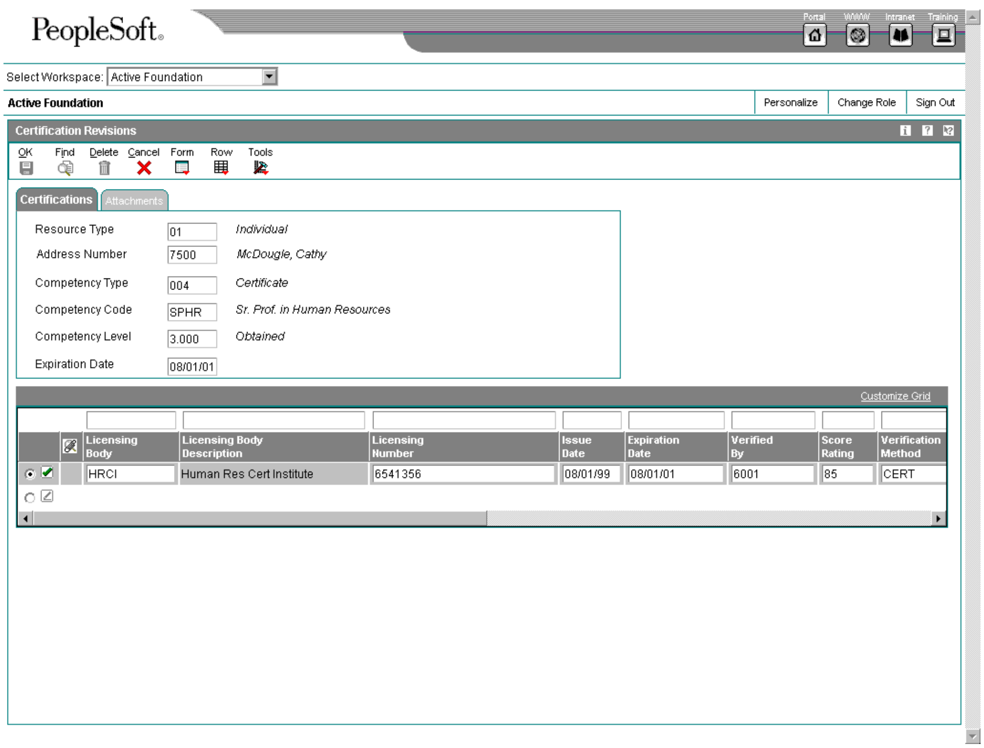
2. On Review Accomplishments, complete the following fields:
   - Address Number
   - Competency Code
3. Review the following field:
   - Competency Level
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Review Accomplishments, complete the following fields in the detail area:
   - Accomplishment Type
   - Date Achieved
   - Awarding Organization
   - Date Awarded
   - Status

7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 6 through 8 for as many accomplishments as you need to enter for this employee and competency code, and then click OK.

► To assign certification competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 004 in the following field and click Add:
   - Competency Type



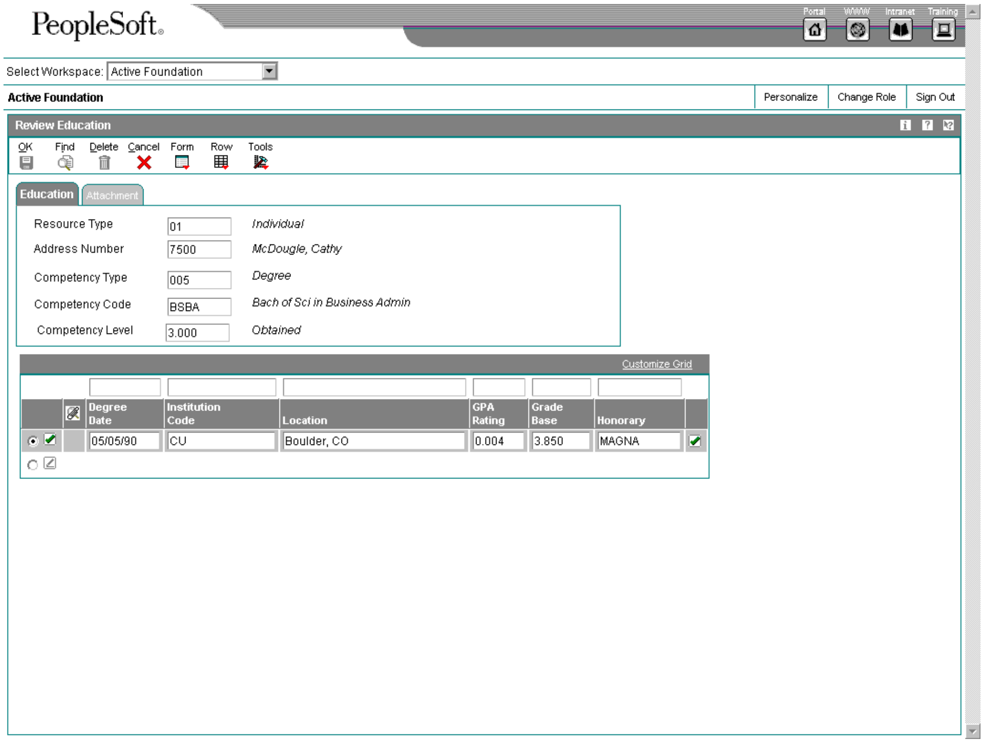
2. On Certification Revisions, complete the following fields:
   - Address Number
   - Competency Code
3. Review the following fields:
   - Resource Type
   - Competency Level

4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Certification Revisions, complete the following fields in the detail area:
   - Licensing Body
   - Licensing Number
   - Issue Date
   - Expiration Date
   - Verified By
   - Score Rating
   - Verification Method
   - Renewal Code
   - Cost
   - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 6 through 8 for as many certifications as you need to enter for this employee and competency code, and then click OK.

► To assign education competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 005 in the following field and click Add:
   - Competency Type



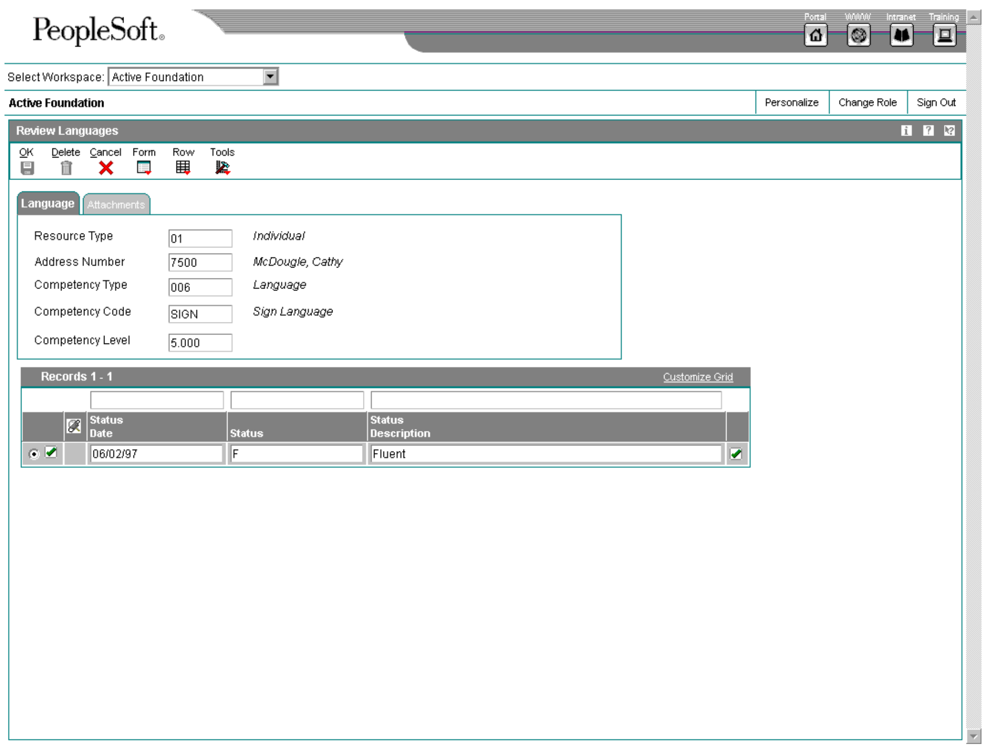
2. On Review Education, complete the following fields:
   - Address Number
   - Competency Code
3. Review the following field:
   - Competency Level
4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. On Review Education, complete the following fields in the detail area:
   - Degree Date
   - Institution Code
   - Location
   - GPA Rating
   - Grade Base
   - Honorary

7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 6 through 8 for as many educational entries as you need to make for this employee and competency code, and then click OK.

▶ To assign language competencies

From the Competency Management menu (G05BC1), choose Resource Competency Information.

1. On Work With Competencies, enter 006 in the following field and click Add:
   - Competency Type



2. On Review Languages, complete the following fields:
   - Address Number
   - Competency Code
3. Review the following fields:
   - Resource Type
   - Competency Level

4. To attach a document that provides more detailed information about the employee's level of competency, choose Header Attachment from the Form menu.
5. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
6. Complete the following fields in the detail area:
   - Status Date
   - Status
7. To attach a document that provides more detailed information about a record in the detail area, choose the record, and then choose Detail Attachment from the Row menu.
8. On Attachment Revision, enter or paste the text of the attachment into the text window, and then click OK.
9. Repeat steps 6 through 8 for as many languages as you need to enter for this employee and competency code and then click OK.

Processing Options for Resource Competency Information (P05100)

Edits Tab

This processing option specifies the Competency Update Event Code.

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1. Competency Update Event Code

Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the user defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).

You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent your organization's training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies.

You then set up a version of the Resource Competency Information program for Train.

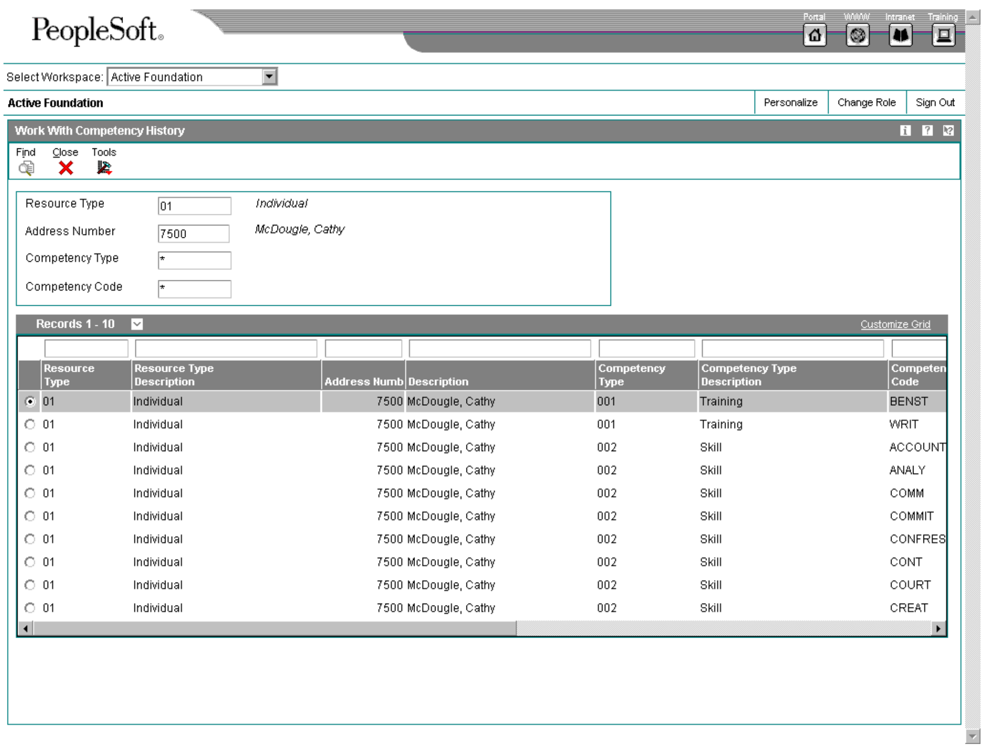
Reviewing Competency History for Employees

Each time someone enters or changes competency information for an employee, the system creates a historical record of the new information. You can review this history to determine whether an employee is becoming more proficient in a particular competency.

▶ To review competency history for employees

From the Competency Management menu (G05BC1), choose Competency History.

1. On Work With Competency History, complete any of the following fields, and then click Find:
   - Resource Type
   - Address Number
   - Competency Type
   - Competency Code



2. Review the information in the detail area.

Working with Gap Analysis

Gap analysis is the process of comparing the competencies that an employee possesses to the competencies that are required for the employee's current job, or for a job to which the employee aspires. Managers and employees can use gap analysis to develop training plans and career paths for employees who want to examine the possible career opportunities within the organization.

The system includes an online review program that you can use to review gap analysis information for individual employees. Your organization can set up this online review program for self-service so that managers and employees also can access the gap analysis information that is relevant to them.

When you need to review gap analysis information for a group of employees, you can print the Gap Analysis report (R080013). To determine which employees are qualified for a particular job, you can print the Job Match report (R080016).

To help you determine which employees are competent for a particular type of job, you can define *competency aggregates*, that is, groups of related competencies. You can use the Review Competency Aggregates report (R05100A) to determine whether an employee has competencies in a particular competency aggregate.

Before You Begin

- ❑ Enter employee and job competency information. See *Working with Job Competency Information* and *Working with Employee Competencies* in the *Human Resources Guide*.

Reviewing Gap Analysis Online

When you need to compare the competencies that an employee possesses with those that are required for a particular job, you can review gap analysis information online. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

Self-Service Considerations for Reviewing Gap Analysis Online

Your organization might have set up the Gap Analysis program (P08008) as a self-service application for managers and employees. When you access the Gap Analysis program from employee self-service, you can review information about yourself only. If you are a manager who is accessing gap analysis from the Row menu on the Managers Workbench program (P08712), you can review information only for those employees who report to you.

► To review gap analysis online

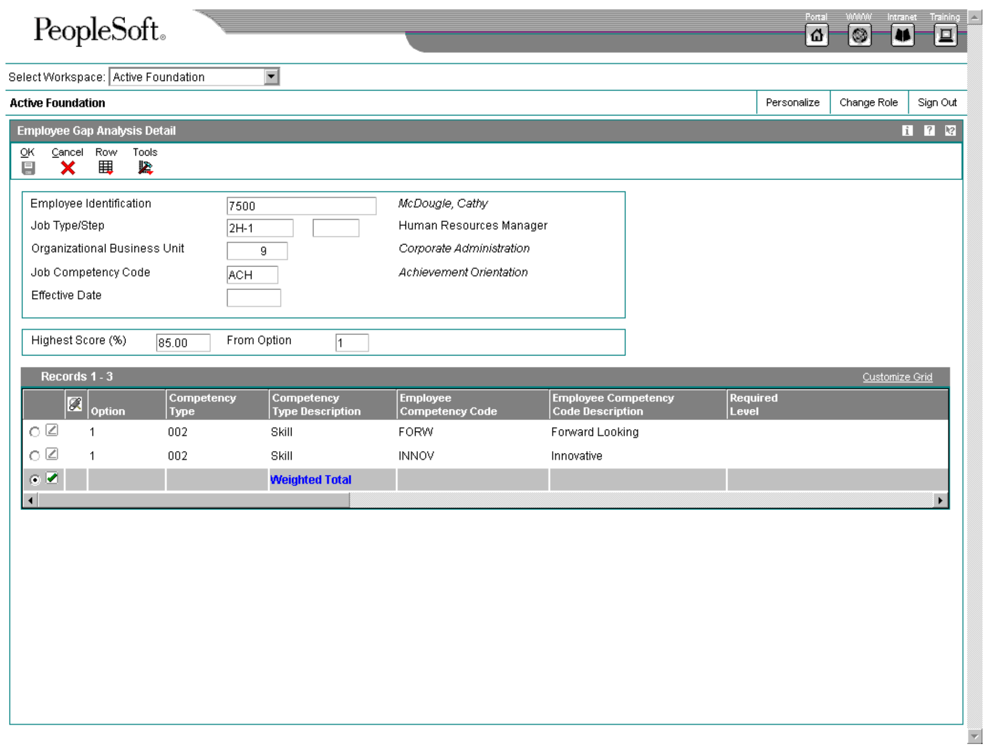
From the Competency Mgmt Periodic Processing menu (G05BC2), choose Gap Analysis.

1. On Work With Employee Competency Gap Analysis, complete the following fields and click Find:

- Individual Identification
- Job Type/Step
- Organizational Business Unit
- Effective Date
- Type Structure

  If you are accessing gap analysis from the Managers Workbench program (P08712) or employee self-service, the effective date and type structure are not available to you.

2. Choose a record in the detail area and then click Select.



3. On Employee Gap Analysis Detail, review the information in the detail area.
4. To determine whether the employee is performing at the required competency level for the job, compare the values in the following fields:
   - Required Level
   - Employee Level
5. When you have finished reviewing information, click OK.

See Also

- *Reviewing the Gap Analysis Report* in the *Human Resources Guide*

Reviewing the Gap Analysis Report

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Gap Analysis Report.

When you need to compare the competencies that employees possess with those that are required for a particular job, you can review the Gap Analysis report (R080013). This report lists detailed gap analysis information for a group of employees. You can use this information to help employees set competency goals. For each employee and job, you can determine whether the employee possesses the required competencies. You can also determine whether the employee's level of competency is sufficient to meet the competency level that is required for the job.

See Also

- *Reviewing Gap Analysis Online* in the *Human Resources Guide*

Processing Options for Gap Analysis Report (R080013)

Defaults Tab

These processing options specify the types of job-related information that appear on the report.

---

1. Organization Type Structure

   Blank = Default organizational structure

Use this processing option to specify the organizational structure to be used in the Gap Analysis report (R080013). This will report the gap analysis of employee competencies as it relates to job competencies for the specified organizational structure.

If this is left blank, the default organizational structure will be used.

---

2. Job Type

Blank = Employee's current Job Type

Use this processing option to produce a Gap Analysis report (R080013) on a specific job type. If a value is entered, it is also necessary to specify an organizational business unit.

Blank will produce a Gap Analysis report (R080013) of employees in their current job.

3. Job Step

Blank = Employee's current Job Step

Use this processing option to produce a Gap Analysis report (R080013) on a specific job step. If a value is entered, it is also necessary to specify an organizational business unit and the job type.

4. Organizational Business Unit

Blank = Employee's current
organizational business unit

Use this processing option to identify the organizational business unit for which you want to produce a Gap Analysis report (R080013). If a value is entered, it is also necessary to specify a job type and job step. The default value of Blank will produce the Gap Analysis report (R080013) of all employees in their current job type and step.

5. Date - Effective

Blank = Today's date

Use this processing option to produce a Gap Analysis report (R080013) at a specific point in time. The default value of Blank will produce a Gap Analysis report (R080013) of employees for a current date.

Display Tab

This processing option specifies whether job option details appear on the report.

---

1. Show Job Option Details

1 = Yes (Default)

0 = No

Use this processing option to indicate whether to show details about job competency options. Valid values are:

1 Yes, show the option details (employee competencies) for each job competency. This value is the default.

0 No, do not show detail information.

Reviewing the Job Match Report (R080016)

From the Competency Mgmt Periodic Processing menu (G05BC2), choose Job Match Report.

When you need to determine the employees who are qualified for a particular job, you can review the Job Match report. This report lists all of the required competencies for the job and the proficiency level that the employee has attained in each of these competencies. You can use a processing option to specify the minimum proficiency level that the job requires, and the report will include only those employees who have attained that minimum proficiency level. When you have a job opening within your organization, you can use this information to help you determine which employees are qualified to fill the opening.

Processing Options for Job Match Report (R080016)

Select Tab

These processing options specify job-related information that appears on the report.

---

1. Minimum Job Competency Percent

   Achieved

Use this processing option to indicate the minimum job competency percent achieved. The jobs that will be reported on the Job Match report (R080016) will be those where the employee's competencies are high enough that the minimum job competency percent achieved has been reached or exceeded.

---

2. Job Type

Blank = All Jobs

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match report (R080016) search through all jobs.

---

3. Job Step

* = All Job Steps

Use this processing option to search a specific job for the Job Match report (R080016). A blank value has the Job Match (R080016) report search through all jobs.

---

4. Job Group

* = All Job Groups

Use this processing option to search a specific job group for the Job Match report (R080016). An asterisk (*) has the Job Match report (R080016) search through all job groups.

5. Organizational Business Unit

Blank = All Jobs in all organizational

business units

Use this processing option to search through jobs that are in the specified organizational business unit. A blank value indicates that all jobs in all organizational business units will be searched.

6. Date - Effective

Blank = Current date

Use this processing option to select jobs and job competencies as of a specified date. A blank value will report jobs and job competencies for the current date.

Default Tab

This processing specifies the type of organizational structure that is related to this job.

1. Organization Type Structure

Blank = Default organizational structure

type

Use this processing option to specify the organizational structure. A blank value will produce the organizational structure setup in the HR Constants.

Display Tab

These processing options specify whether job option and job competency details appear on the report.

1. Show Job Option Details

Blank = Yes

1 = Yes

0 = No

Use this processing option to indicate whether to hide or show job option details. Select 1 to show the option details (employee competencies) for a job competency. Select 0 to hide these details.

2. Show Job Competency Details

Blank = Yes

1 = Yes

0 = No

Use this processing option to hide or show job competency details. A value of 1 will show the job competencies that make up a job. A value of 0 will not show the job competencies.

Defining Competency Aggregates

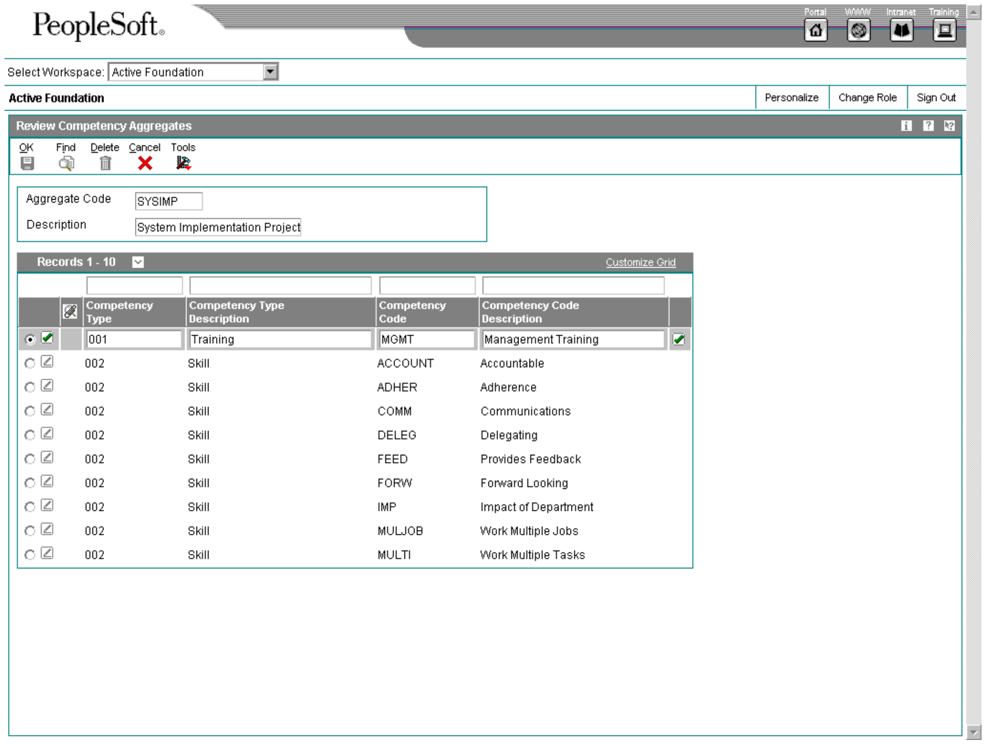
To help you determine which employees are competent for a particular project, you can define *competency aggregates*. A competency aggregate is a group of related competencies. These competencies can be from different competency types. For example, you might create a competency aggregate called System Implementation that includes all of the competencies that are needed by someone who will be doing a system implementation. The System Implementation aggregate might include the following competencies:

Skills	• Leadership ability • Organizational skills • Communication skills
Training	• Managing at XYZ company
Degree	• MBA

► To define competency aggregates

From the Competency Setup menu (G05BC4), choose Competency Aggregates.

1. On Work With Competency Aggregates, click Find to review any existing competency aggregates.
2. Click Add.



3. On Review Competency Aggregates, complete the following fields:
   - Aggregate Code
   - Description
4. To include a competency code in this competency aggregate, complete the following fields in the detail area:
   - Competency Type
   - Competency Code
5. Repeat step 4 for as many competency codes as you want to include in the aggregate, and then click OK.

Reviewing the Review Competency Aggregates Report

From the Competency Management menu (G05BC1), choose Review Competency Aggregates.

When you need to determine the employees who have competencies in a particular competency aggregate, you can review the Review Competency Aggregates report (R05100A). For a particular competency aggregate, this report lists each employee competency, including the proficiency level that the employee has attained in the competency.

Processing Options for Review Competencies (R05100A)

Default

1. Aggregate Code

Performance Management

According to a human resources study, 52 percent of workers want their supervisors to state performance goals more clearly. Nearly 40 percent of workers want their performance on the job tied closely to their development plans and compensation. The survey also found that 42 percent of workers were at least moderately dissatisfied with the employer system of performance evaluation. The authors of the study linked this dissatisfaction to the absence of a standard appraisal process and failure to define employer performance expectations clearly.

Organizations can increase productivity, competitiveness, and profitability through the effective monitoring of job performance. Automating this process by aligning appraisal criteria with organizational goals and realities increases the use, value, and employee acceptance of this performance management tool. Managers and employees can use the performance management feature of the Human Resources system to automate the tedious, labor-intensive process of performance appraisals. This feature integrates performance appraisal criteria with the core competencies of an organization, business unit, and individual job. By connecting appraisal criteria to the goals and objectives of the organization, you can provide a vital, strategic link to improved performance and employee job satisfaction. This integration also helps to reduce employee fears about performance appraisals. The performance management feature provides an approach that is fair, concise, and collaborative. Employees can see the links between their own performance criteria and each of the following:

- Goals of the organization
- Compensation increases
- Job promotions
- Focused training
- Development programs

The performance management feature uses periodic evaluations for managers and employees to plan, evaluate, and track work performance and personal goals. The system provides an automated approach for managers and employees to electronically document their perspectives, followed by an interview. The system tracks the final ratings in an employee competency database. Managers and employees can use this approach to accomplish the following:

- Identify strengths
- Identify opportunities for improvement
- Create plans to develop new skills
- Create plans to improve existing skills
- Evaluate performance issues
- Apply historical performance data for compensation considerations

A performance diary, which documents daily activity, provides a quick method for managers and employees to document performance activities. As an employee’s performance is documented, these performance diary entries can be either negative or positive. Diary entries provide a systematic method for recording incidents that might be important when the manager evaluates subsequent appraisal and reward decisions. Employees can also create and attach diary entries to their self-appraisals.

Employee Goals, a group of programs for setting and tracking job-related objectives, is integrated with the employee competency database and provides an expanded use for the performance management feature. Managers can use Employee Goals to work closely with an employee and set goals to help the employee improve in specific requirements of a job.

The system routes in-process appraisals through an appropriate approval structure, including a final approval or rejection by the employee.

Building upon the multilingual capabilities of employee and job competencies, the system also presents appraisal and competency criteria in the employee's native language.

Performance management is a valuable tool for two types of organizations: an organization that is ready to implement a competency-based approach to job descriptions, and an organization that might not be ready to implement a competency-based appraisal system, but still wants to automate standard appraisal templates.

Competency-Based Performance Appraisals

In the competency-based approach to performance appraisals, a hierarchy defines job competencies. For example, a company can define the following:

- Core organizational competencies
- Competencies specific to business units
- Competencies specific to job groups
- Competencies specific to a job

You link the competency hierarchy of a job to the employees in the job. Each job description automatically inherits the competency definitions for each applicable level.

Managers use the performance appraisal to assess the current level and consistent demonstration of each competency and to assign an applicable rating. The system weighs and averages rating factors and then calculates an inclusive performance rating for each employee. The system tracks the most current performance appraisal rating in the employee competency database. The system then tracks the overall competency or performance rating in the Employee Master Information table (F060116) for subsequent consideration in compensation analysis and focal reviews.

Traditional (Non-Competency-Based) Appraisals

For organizations that have not adopted a competency-based approach to human resource management, J.D. Edwards provides a traditional template approach for performance appraisals. These user defined templates can be specific to a particular company within an organization, a business unit, job group, or particular job. The system stores the templates as text objects.

Employees in any given job automatically inherit the performance appraisal template that is specific to their job. Employees complete a self-appraisal, and managers complete a management appraisal, each based on standard templates. The system adds the overall appraisal rating to the Employee Master Information table for subsequent consideration in compensation analysis and focal reviews. As with competency-based appraisals, employees and managers can collaborate electronically about their perspectives, followed by an interview.

The template-based appraisal system also routes in-process appraisals through the appropriate approval channels, including the final approval or contest by the employee.

Users can also create the text object templates in multiple languages. You must create a separate text media object template for each language that you support.

Setting Up Performance Management

To implement the performance management features of the Human Resources system, you must define performance appraisal methods as either competency-based or traditional. You define these methods at the system level; and you can override the settings by company, business unit, or appraisal type. Defining the performance appraisal methods at these levels allows you to implement the performance management system for either the whole organization or for parts of the organization in steps. For example, you can implement a competency-based method for a selected business unit and use the traditional method to automate text-based appraisals for other business units. You can also define a competency-based appraisal method for appraisals created by managers and a traditional appraisal method for employee self-appraisals.

The system includes a default company definition that specifies a traditional performance appraisal method. You can redefine this method description, add additional method descriptions, or change this method to a competency-based method. You cannot delete the basic company definition.

If you are planning to implement a competency-based performance appraisal method or a combination of competency-based and traditional methods, you must first define the organizational structures for job competencies and enter background competency information.

Before You Begin

- ❑ Define organizational structures for job competencies. See *Defining Organizational Structures for Job Competencies* in the *Human Resources Guide*.
- ❑ Enter job competency information. See *Working with Job Competency Information* in the *Human Resources Guide*.
- ❑ Attach jobs and job competencies to the hierarchical levels within the organizational structure that you created for job competencies. See *Working with Competencies in Organizational Structures* in the *Human Resources Guide*.
- ❑ Assign employee competency information. See *Working with Employee Competencies* in the *Human Resources Guide*.
- ❑ If you want the system to default job competency weights when they are not already assigned, you must set data item DJCW (Default Job Competency Weights?) to Yes in HRM Common Display Settings (P05004). When this value is set to No, the default value for competency weights that are not already assigned is zero. See *Setting Up Common Settings for Workforce Management* in the *Workforce Management Foundation Guide* for more information about common settings.

Defining Scales for Performance Management

A competency rating scale is a method of measuring an employee's level of proficiency in a particular skill area or job assignment. One or more competency rating scales must be associated with performance management. You might use different competency rating scales to measure different employee competencies. For example, if an employee must pass an internal certification process as a prerequisite for promotional consideration, an appropriate competency rating scale might include only pass or fail, or a scale of two. When an employee competency requires measured progress toward a goal, a competency rating scale of five or ten might be appropriate.

For performance management, you typically must enter new competency rating scales that measure employee performance progress. If only one competency rating scale exists for competency management, and that scale is applicable to all performance management situations, then you can reuse the same scale in performance management. If more than one scale exists for competency management, then you must define one or more competency rating scales for performance management.

When you define rating scales for performance management, you must specify the rating level that represents 100 percent of the organizational performance expectation. For example, if you use a rating scale of 10, you might define 100 percent as a rating level of 5. To apply this approach, a manager might rate an employee at a level of 6 for a specific competency, which indicates that the employee is performing above 100 percent of the organizational expectation.

You use the Scale Information program (P05103) to create new competency rating scales for performance management.

See Also

- ❑ *Defining Scales for Employee Competencies* in the *Human Resources Guide* for the procedure for setting up the rating scales

Before You Begin

- ❑ Review any rating scales that might exist for competency management. You use the Scale Information program (P05103) to review existing competency rating scales. See *Defining Scales for Employee Competencies* in the *Human Resources Guide*.
- ❑ Review the user defined code list for type of increase codes (06/RV). The codes that you enter in this list correspond to the values that you choose in the Create Performance Appraisals program (P087711).
- ❑ Review the user defined code list for the relation to employee codes (08/RI). The codes that you enter in this list correspond to the values that you choose in the Daily Diary program (P087715).
- ❑ Review the user defined code list for the originator type codes (05/G2). The codes that you enter in this list correspond to the values that you enter in the Audience Flag processing option for the Create Performance Appraisals and Employee Performance Appraisals (P087712) programs.
- ❑ Review the following user defined code lists for the available values that you can use when you set up performance management information:
    - Goal status (05/G3)
    - Approval type (05/AP)
    - Gap status (08/GT)
    - Appraisers role (08/AL)
    - Appraisal status (08/SA)

  The values in these lists cannot be changed. Adding additional values to this list requires that you customize the system.

Defining the Approval Hierarchy

The Human Resources system also automates the approval process for performance appraisals. When a manager completes an appraisal, the system routes it to the person or people whom the administrator designates for review. You can specify any number of management levels for review. You can also specify a highest, final level of review. All designated managers must complete their reviews before the system forwards a message to the employee indicating that the appraisal is ready for review.

You use the Define Approval Hierarchy program (P05844) to establish the approval hierarchy before creating new appraisals. You must define at least one performance appraisal UDC so that the company can include the required approval levels.

The automated approval feature, which uses a hierarchy of approving managers, depends on accurate information about the parent-child relationships in your organization. The Employee/Supervisor Relationship Build report (R05846) sets up and compiles this information for you. You typically set up this report to run daily. If this report is not set up or is not running daily, then choose the Employee/Supervisor Relationship Build report from the Performance Management Advanced and Technical menu (G08PM3) and set up the report to run daily.

See Also

- *Setting Up the Approval Hierarchy* in the *Human Resources Guide*

Setting Up Employee Goal Suggestions

You use the Goal Suggestions program (P05105A) to set up possible goals that managers and employees might use when they are creating a career development plan. You can add one or more UDC codes to create additional suggestion types. After creating a suggestion type, you can add a list of suggestions that an employee might use to accomplish a goal.

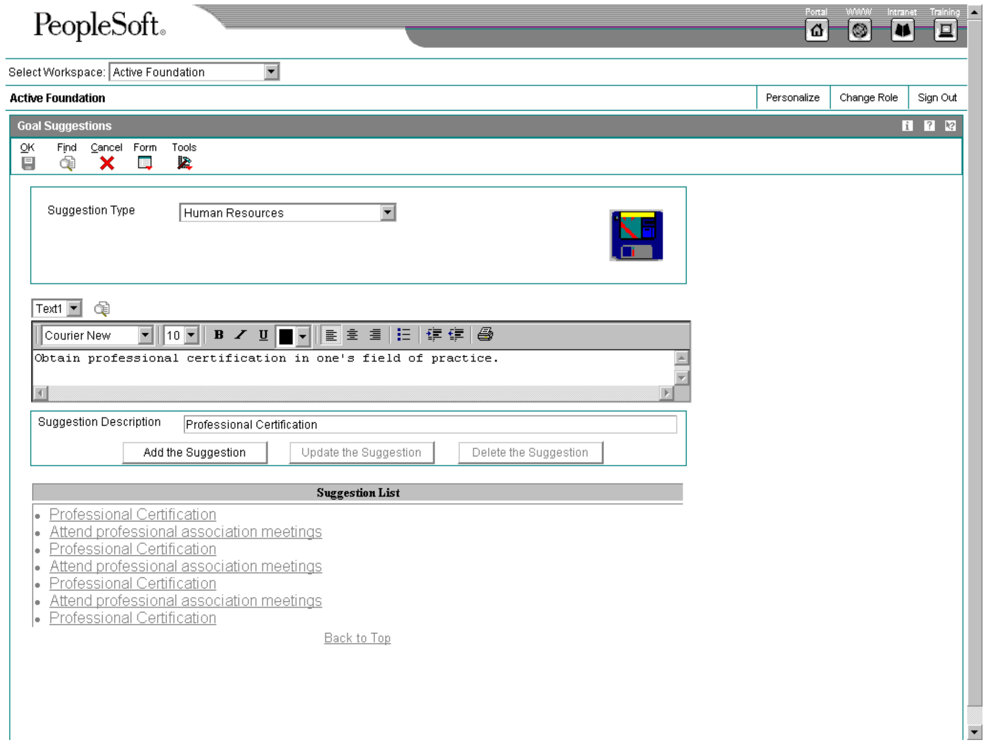
On the employee performance appraisal, managers and employees can choose an option to create a career development plan to create goal suggestions. You can create suggestion types and ideas for work-related goals, as well as for an employee's personal goals that might be beyond the scope of the company.

Before You Begin

- Review the user defined code list for goal type codes (05/GT). The codes that you enter in this list correspond to the values that you choose in the Goal Action Plans program (P05117) for competency-based or traditional appraisals.
- Review the user defined code list for suggestion type codes (05/G1). The codes that you enter in this list correspond to the values that you choose in the Goal Action Plans program for traditional appraisals.

► To set up employee goal suggestions

From the Performance Management Setup menu (G08PM4), choose Goal Suggestions.



1. On Goal Suggestions, complete the following field and then click Find:

   - Suggestion Type

     To enter suggestions for an employee competency, you must use the Employee Competency program (P05104).

2. To add a new suggestion, complete the following field, type the new suggestion into the notes field, click Add the Suggestion, and then click the Diskette icon to save the new suggestion:

   - Suggestion Description

   You can also attach a media object or URL that might support the suggestion.

3. To change an existing suggestion, click the desired entry in the Suggestion List, modify the text in the notes area, and then click Update the Suggestion.

4. To delete a suggestion, click the desired entry in the Suggestion List and then click Delete the Suggestion.

5. When you are finished adding or modifying suggestions, click OK to save the changes and exit the form.

   If you click the Diskette icon instead of clicking OK, the system saves your suggestions but does not close the form.

See Also

- *Working with Media Objects* in the *Foundation Guide* for instructions for creating and attaching a template media object or link

Setting Up Traditional Appraisal Templates

The traditional employee appraisal is similar to paper-based systems currently used by many companies. You create and store media objects, often text-based templates, in your system software. For traditional appraisals, you can also use the daily diary and automated approval features of the J.D. Edwards software.

You can also use alternate media objects with the traditional appraisal approach. For example, you can attach to the appraisal any type of file that your system supports, or you can enter a URL that connects a user to an appraisal form that is located on your company's intranet.

The system supplies the default template record for company 0000. You can customize this template or you can create a new one. You cannot delete this record. If you do not choose to create an additional template, the system uses the default template record.

► To set up a traditional appraisal template

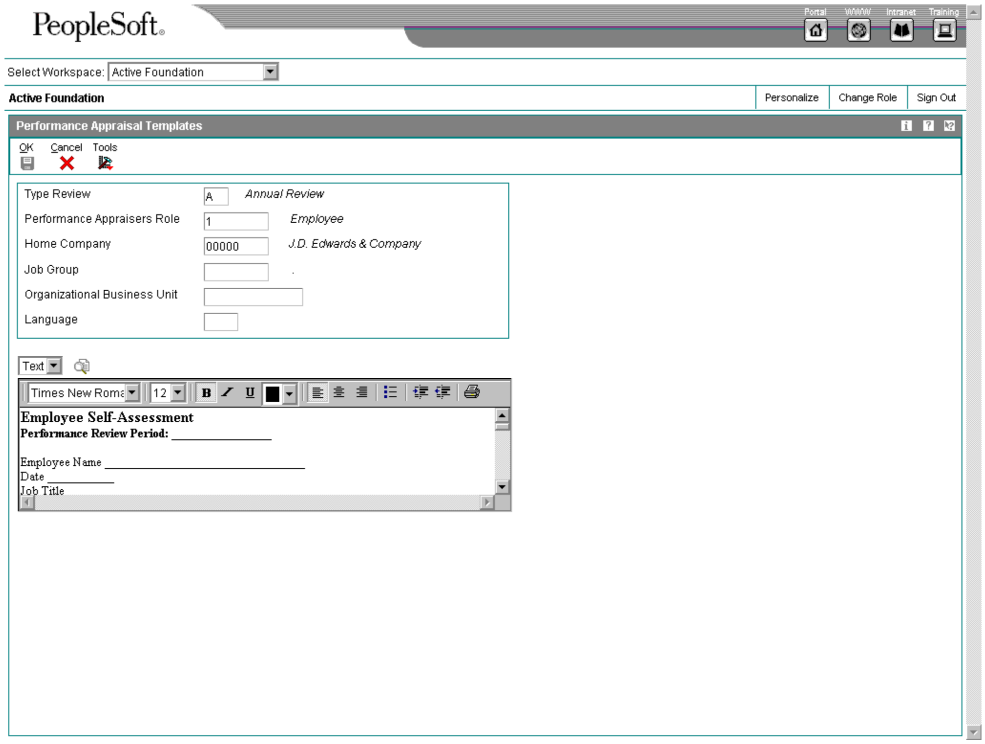
From the Performance Management Setup menu (G08PM4), choose Traditional Appraisal Template.

1. On Work With Appraisal Templates, click Find and review templates that might exist.

   You can modify existing review types to suit your company's needs or you can add new ones.

2. To create a new type of review, click Add.
3. On Performance Appraisal Templates, complete the following field:
   - Home Company
4. Complete the following optional fields:
   - Type Review
   - Performance Appraisers Role
   - Job Group
   - Organizational Business Unit
   - Language

     The system uses the language information that is based on your system signon. You can choose a different language if you are creating appraisal templates in another language.



5. Click the Media Object button to attach an appraisal media object, attach the media object, and then click OK.

See Also

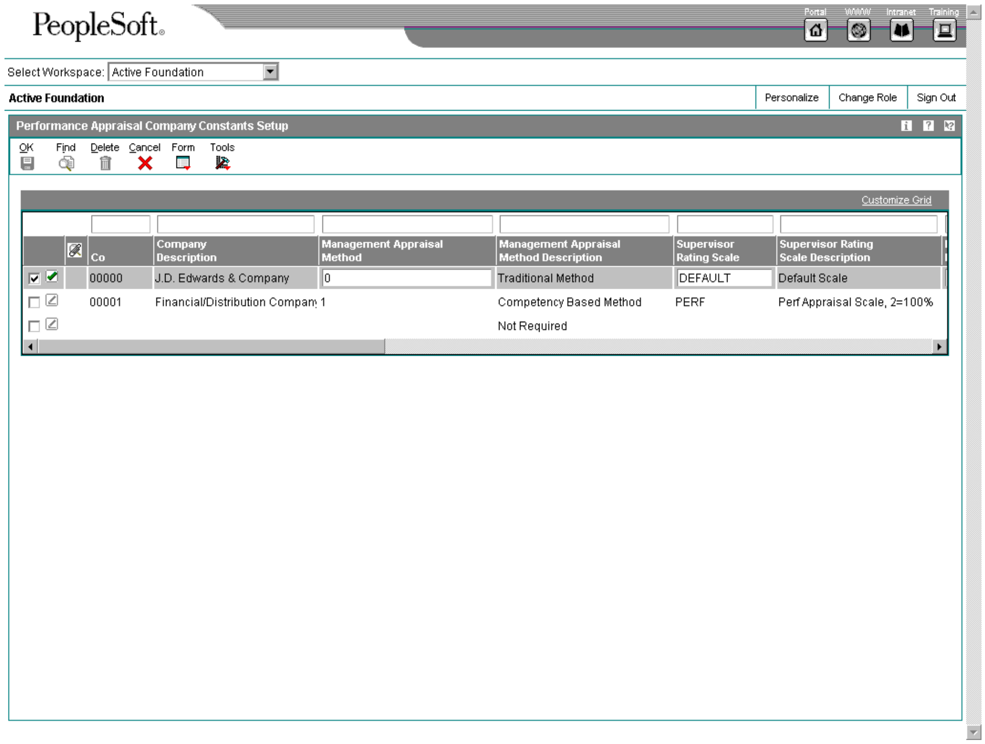
- *Working with Media Objects* in the *Foundation Guide* for instructions for creating and attaching a template media object or link

Defining Performance Management Company Constants

You can refine your performance appraisal method by defining overrides for one or more companies within your organization. You can also change the default performance appraisal method that is set up for company 0000. If you do not further refine your performance management method by creating override records for additional companies, business units, or templates, the system uses the settings for the default company 0000.

▶ To define performance management company constants

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Company Constants.



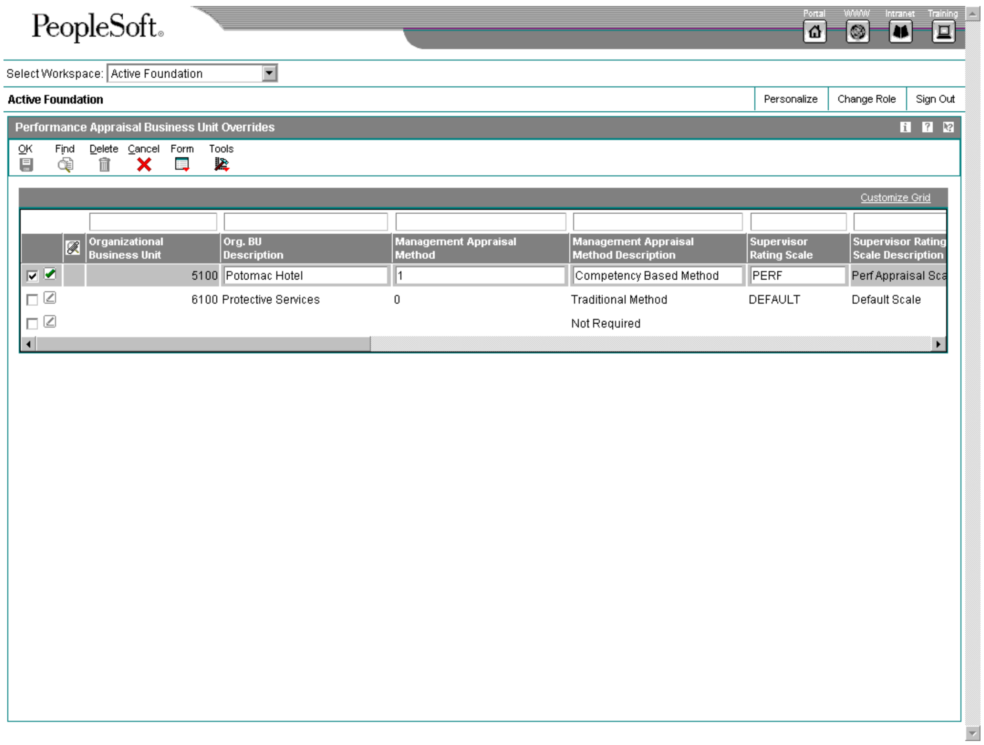
1. On Performance Appraisal Company Constants Setup, click Find, and then complete the following fields to modify an existing record:
   - Co
   - Management Appraisal Method
   - Supervisor Rating Scale
   - Required Level
   - Self Appraisal Required
   - Self Appraisal Method
   - Employee Rating Scale
   - Required Self Appraisal Level
2. Click OK.
3. To create a performance appraisal method description for another company, position the cursor in a blank record in the detail area, and then repeat steps 1 and 2.

Defining Business Unit Overrides for Performance Appraisals

You can refine your performance appraisal method by defining overrides at the business unit level. This adjustment allows your company to use one performance appraisal method in one business unit and a different method in another business unit.

► To define business unit overrides for performance appraisals

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Bus Unit Overrides.



1. On Performance Appraisal Business Unit Overrides, complete the following fields, and then click OK:
   - Organizational Business Unit
   - Management Appraisal Method
   - Supervisor Rating Scale
   - Required Level
   - Self Appraisal Required
   - Self Appraisal Method
   - Employee Rating Scale

- Required Self Appraisal Level

2. To create a performance appraisal method for another business unit, position the cursor in a blank record in the detail area and repeat steps 1 and 2.

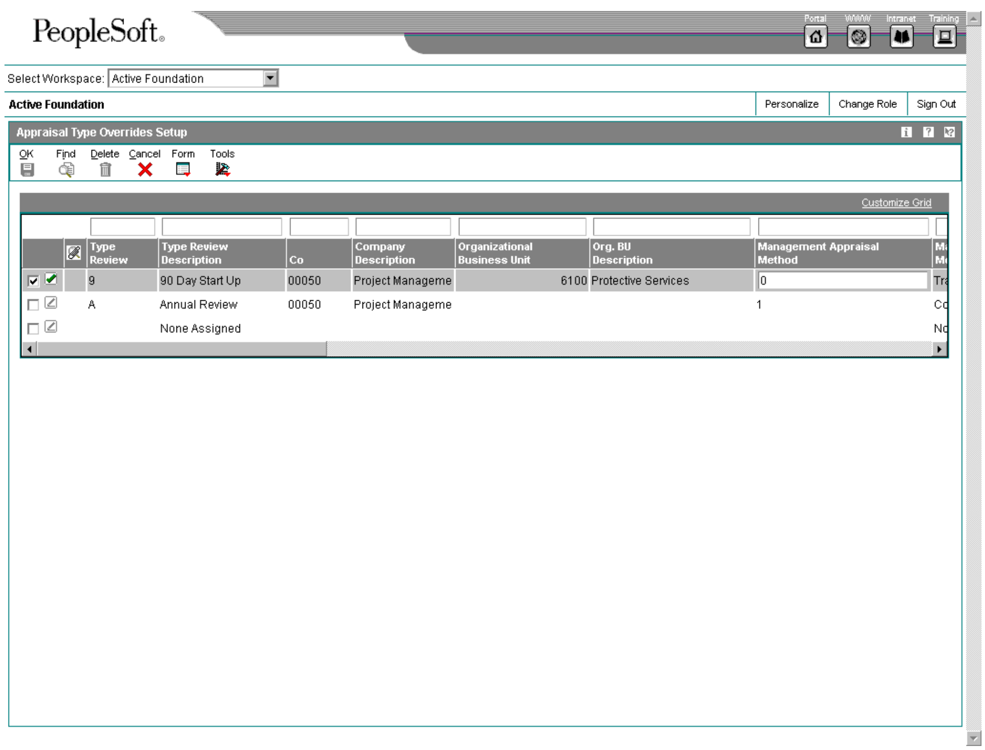
Defining Performance Management Appraisal Type Overrides

In addition to defining your performance appraisal method with business unit overrides, you can further refine your method by defining overrides at the appraisal-type level. Using this approach, your company can implement different performance appraisal methods that you can use for various types of reviews. For example, you might want to use different performance appraisal methods for the following types of reviews:

- Merit cycle
- 90-day start-up
- Annual
- Contractual

► To define performance appraisal type overrides

From the Performance Management Setup menu (G08PM4), choose Performance Mgmt Appraisal Type Override.



1. On Appraisal Type Overrides Setup, complete the following fields:
   - Type Review

- Management Appraisal Method
- Supervisor Rating Scale
- Required Level
- Self Appraisal Required
- Self Appraisal Method
- Employee Rating Scale
- Required Self Appraisal Level

2. Complete the following optional fields:
    - Co
    - Organizational Business Unit
3. To create a new performance appraisal method description for an additional performance appraisal type, position the cursor in a new record in the detail area, and repeat Steps 1 and 2.
4. Click OK.

Setting Up Security for Performance Management

When a manager creates and reviews a performance appraisal, the system automatically revises the employee's competency ratings, based on your security settings. For example, you can set up system security so that a manager can revise appropriate employee competency ratings that are related to performance issues, but you can reserve the ability to change education competencies for the human resources department. You must create and define values in the Competency Update Codes UDC (05/CU) so that managers can update appropriate competency levels.

After creating values in UDC 05/CU, you use this code in the processing options for the Employee Performance Appraisals program (P087712).

You use the Competency Update Events program (P05106) to define the authority granted under each UDC value when setting security for competency approvals.

See Also

- *Setting Up Security for Competency Levels* in the *Human Resources Guide* for more information about setting up security for the competency approvals that you use for performance management

Workforce Management Performance Appraisals

You use the same process to create either competency-based or traditional employee performance appraisals. Competency-based appraisals use an extensive system of job and employee competencies that are defined before appraisals are created. You define most of this information when you set up the competency management features of your system.

The traditional appraisal approach uses appraisal templates that are stored in your system as text files and then completed when appraisals are due. An appraisal template can be any media object and is frequently an interactive form on your company's intranet.

After you complete either a competency-based or traditional appraisal, submit it for automatic approval routing, which is based on a user-defined approval hierarchy.

In the competency management system, you define organizational, job, and employee competencies. The competency-based performance appraisal system integrates those competencies with employee performance. You track employee activities throughout the year and create employee performance appraisals that compare employee performance with the required competencies for each job.

When employee performance appraisals are due, either a human resources system administrator or managers can create the appraisals. You can create an appraisal for any employee who is your direct or indirect subordinate. After a workforce management administrator or a manager creates an employee performance appraisal, the manager reviews the appraisal, updates competency ratings as required, adds notes, and attaches pertinent diary entries.

When creating an appraisal, you can specify whether you will go directly into the review program. This option is available only when you create a single appraisal. Although managers normally revise employee performance appraisals, a system administrator can perform this function, if necessary.

After you create the appraisals, the system automatically sends a message to each manager that one or more appraisals are ready for review. If you set up the system to require employee self-appraisals, the system also automatically sends a message notifying each employee that a self-appraisal is due.

See Also

- *Maintaining a Performance Diary* in the *Human Resources Guide*

Generating Employee Performance Appraisals

You use the Create Performance Appraisals program (P087711) to choose employees and create employee performance appraisals for a group or for an individual. When creating employee performance appraisals, you can choose any of the following for appraisal:

- An individual employee
- All of the employees who report directly to you
- All of the employees who report directly or indirectly to you

See Also

- *Reviewing a Competency-Based Performance Appraisal* in the *Human Resources Guide* for instructions about how to revise employee performance appraisals using manager self-service

► To generate employee performance appraisals for a group

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Create Performance Appraisals.

1. On Create Group Performance Appraisals, complete the following field:
   - Supervisor
2. Choose one of the following options:
   - Direct Reports
   - Direct and Indirect Reports
3. From the Form menu, choose Create Direct or Create All.
4. On Confirm Group Appraisal Creation, complete the following fields and then click OK:
   - Type of Review
   - From Review Date
   - Appraisal Due Date
   - Thru Review Date
   - Self Appraisal Due Date
5. The system automatically creates employee performance appraisals for the selected employees and sends a message to each employee and manager.

Processing Options for Create Group Performance Appraisals (P087711)

Defaults Tab

These processing options specify the default values that the system applies when a human resources representative or a manager creates performance appraisals.

1) Audience Flag

Blank = 2

2 = Supervisor

3 = Human Resources

Use this processing option to specify who is going to use the application to what capacity.

2) Direct or Direct and Indirect Employees

Blank = 0

0 = Direct Only

1 = Direct and Indirect

Use this processing option to specify which group of employees should be displayed to the manager by default. Either direct reports can be displayed, or direct and indirect reports. There is an opportunity to change the displayed group when the application is running as well.

Versions Tab

This processing option specifies the version of the Create Group Performance Appraisals program (P087711) that the system uses.

Performance Appraisal Revisions

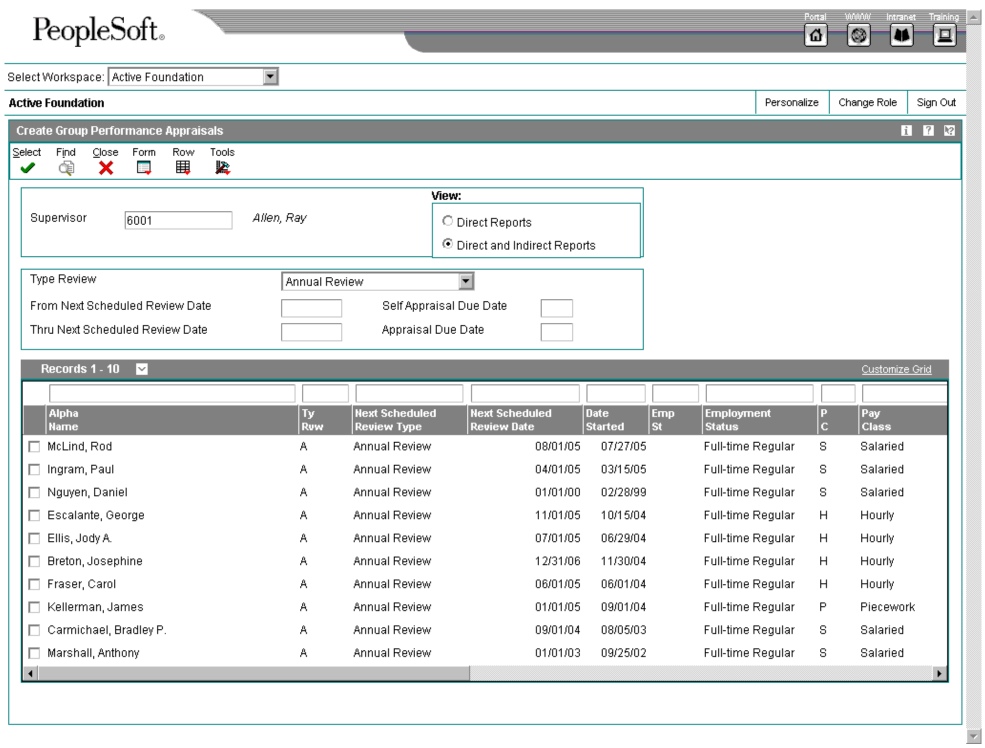
Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Performance Appraisal Revisions (P087711) to use. The default is ZJDE0001.

► To generate individual employee performance appraisals

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Create Performance Appraisals.



1. On Create Group Performance Appraisals, complete the following field:
   - Supervisor
2. Choose one of the following options, and then click Find:

- Direct Reports
- Direct and Indirect Reports

3. Choose an employee record and click Select.
4. On Create Employee Performance Appraisal, complete the following fields:
   - Type of Review
   - From Review Date
   - Appraisal Due Date
   - Thru Review Date
   - Self Appraisal Due Date
5. If you want the system to create the appraisal and automatically proceed to the appraisal review, click the following option:
   - Begin Performance Appraisal Process

     The Begin the Appraisal Process option is available only when you select one employee. When you select two or more employee records, this option is not included on the form.
6. Click OK.

   The system automatically creates an employee performance appraisal and sends a message to the employee and the manager indicating that the appraisal is ready for review.
7. On Confirmation, click OK.

   If you chose the option to begin the appraisal process, either the Competency Based Performance Appraisal Revisions form or the Traditional Performance Appraisal Revision form appears. You use this form to complete the steps for revising an employee performance appraisal.

See Also

- *Revising an Employee Performance Appraisal* in the *Human Resources Guide* for the steps on how to revise appraisals

Creating Batch Performance Appraisals (R087722)

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Batch Create Performance Appraisals.

Use this batch process to create a group of performance appraisals for the employees that you selected from the Employee Master Information table (F060116). For each selected employee, this process creates the header for the appraisal and determines the type of performance appraisal to create, either traditional or competency-based. The system notifies employees that the appraisal has been created so that they can complete their self-appraisals.

Processing Options for Batch Create Performance Appraisals

Defaults

1) Type of Increase Next Review

2) Date - From Review

3) Date - Thru Review

4) Date - Employee Self Appraisal Due

5) Date - Performance Appraisal Due

6) Bypass Warning Errors

Blank = 0
0 = Do not create appraisals with warning errors
1 = Create appraisals with warning errors

Process

1) From Date

Blank = Do Not use from date
Valid date = Select employees that have a next review date equal to or greater than the from date.

2) Thru Date

Blank = Do Not use thru date
Valid date = Select employees that have a next review date equal to or less than the thru date.

3) Days From Today

Blank = Do Not use Days From Today
Days = Select employees that the next review date is equal to or less than the system date and the number of days entered. If used the from and thru dates are ignored.

Printing Batch Performance Appraisals

From the Performance Management Daily Processing menu (G08PM1), choose Performance Appraisal Batch Print.

The Performance Appraisal Batch Print report (R087723) provides a printed copy of a competency-based employee self-appraisal or performance appraisal.

Processing Options for Performance Appraisal Batch Print (R087723)

Defaults

1) Audience Flag

Blank = 1
1 = Employee
2 = Supervisor
3 = Human Resources

2) Performance Apprasial Mode

Blank = Employee Self Appraisal
1 = Employee Self Appraisal
2 = Manager Appraisal

Running the Upcoming Reviews Report (R052202)

From the Performance Mgmt Periodic Processing menu (G08PM2), choose Upcoming Reviews.

The Upcoming Reviews report creates report versions that select groups of employees who are due to receive an employee performance appraisal as of a specific date or within a specified number of days. The report prints a list of employees based on the criteria that you specify. After you print the Upcoming Reviews report, you run the Create Performance Appraisals program (P087711) to select the employees, create appraisals, and send messages to each of the employees and managers.

You might use Upcoming Reviews report when you are generating employee performance appraisals for the whole company or a specific business unit.

Processing Options for Upcoming Reviews (R052202)

Defaults Tab

These processing options specify information about the employee and supervisor.

1. Employee Number Display

A = Address Book

S = Social Security Number

O = Other Number

Use this processing option to specify the employee number that you want to print on the report. Valid values are:

A Address book number

S Employee tax identification number

O Other number

2. URL For Supervisor Review Instructions

Use this processing option to specify the uniform resource locator for the supervisor review instructions.

Process Tab

These processing options specify the dates for which you want to review appraisals and whether the system runs the workflow reminder process.

1. Workflow Reminder Process

1 = Run workflow

0 = Don't run workflow

Use this processing option to specify whether to run the workflow reminder process. Valid values are:

1 Run the workflow process.

0 Do not run the workflow process.

2. From Date

Use this processing option to limit reviews. The review date must be greater than or equal to the from date.

3. Thru Date

Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru date.

4. Days From Today

Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option.

Maintaining a Performance Diary

A performance diary is a collection of notes and attachments that you compile throughout the year. These notes document your activities and accomplishments that affect your job performance. You can also use the performance diary to maintain notes and attachments regarding a manager's performance or another employee's performance. For example, you might track job-related tasks that you accomplish, the completion of a course of study, client recommendations regarding your assistance, or any other activity that might affect your performance appraisal. The Daily Diary program (P087715) records and classifies information by the following criteria:

- Employee
- Subject
- Subject type
- Relation to employee
- Relation to a performance appraisal

Notes that you create in the Daily Diary program are private unless you attach them to a performance appraisal. The system links your diary entries to your address book number. Human Resources representatives and managers who review your appraisal can re

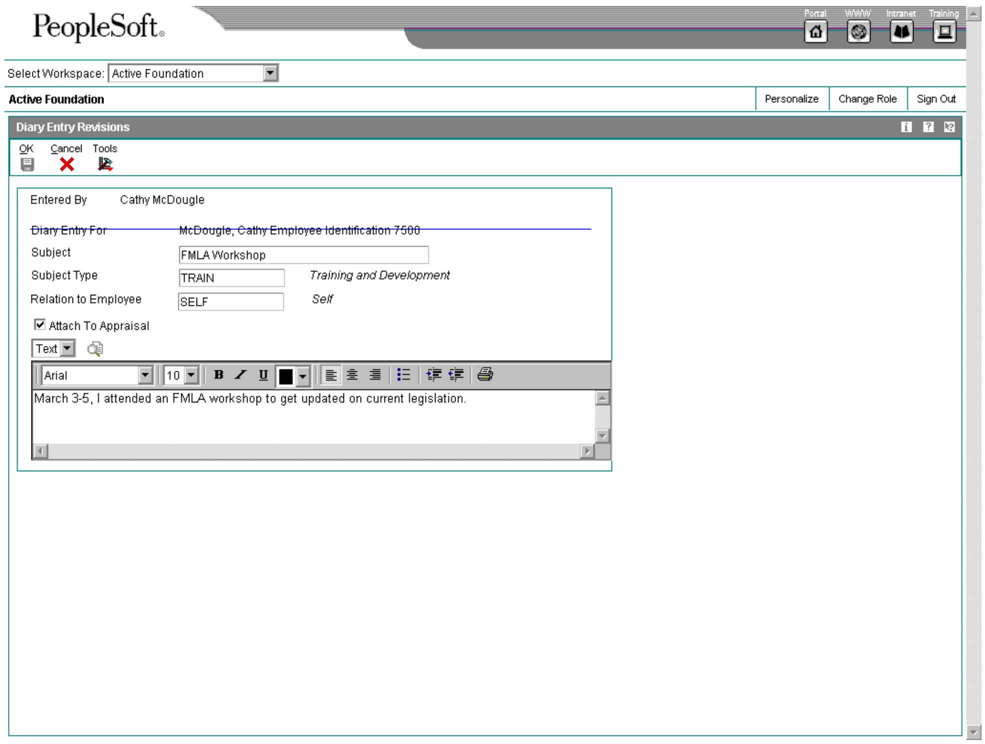
view the diary entries that you attach to a performance appraisal.

When you create your performance self-appraisal or revise your employee performance appraisal, you can attach diary entries to the appraisal to document your activities. After you attach diary entries to an appraisal, you can change the text until you approve (or contest) and submit the appraisal. After you submit the appraisal, you cannot change or delete the attached entries from the performance diary.

▶ To maintain a performance diary

From the Employee Self Service menu (G05BESS1), choose Daily Diary.

1. On Work With Diary Entries, click Add to create a new diary entry.



2. On Diary Entry Revisions, complete the following field:
   - Diary Entry For
3. Complete the following optional fields:
   - Subject
   - Subject Type
   - Relation to Employee
4. Click the following option, if appropriate.
   - Attach To Appraisal
5. Add a text note or attach a media object that documents an employee activity, and then click OK.

Processing Options for Daily Diary (P087715)

Default Tab

This processing option specifies the default value that the system uses each time that you create a new performance diary entry.

---

1) Default attach to performance appraisal value

0 = No, entry does not apply to a performance appraisal

1 = Yes, entry applies to performance appraisals

Use this processing option to specify the default value for the Attach to Performance Appraisal Flag when a new diary entry is made. The employee can also change the value.

Performance Appraisals by Managers

Either a human resources representative or managers can create employee appraisals. After you create an appraisal, you revise and approve the appraisal before scheduling a review meeting with the employee. Depending on your system settings, you can use either a competency-based or traditional approach to employee performance appraisals.

A competency-based employee performance appraisal automatically generates an appraisal that compares job competencies to demonstrated employee competencies. For each job and employee competency, you can add notes that explain or support your evaluation. You can also attach to each appraisal performance diary entries that cite specific examples of employee performance.

A traditional employee performance appraisal stores templates or links to online appraisal forms. You complete the template and rate employee performance manually. You can also attach to the appraisal performance diary entries that support your evaluation.

After you complete an appraisal, you submit it to the next manager level for approval. The system automatically routes the appraisal to each person who appears in the approval hierarchy, ending with the employee. At each level, the approving manager can approve the appraisal or return it to the previous-level manager. When the highest-level manager in the approval hierarchy approves and submits the appraisal, the system sends a message to you indicating that the performance appraisal is ready for final review. You then use the Notify Employee menu option in the Current Performance Appraisal program (P087712) to send a message to your employee that the appraisal is ready for final review. The employee approval is normally the final step in the approval process.

Employees use the Current Performance Appraisal program to review performance ratings, print the appraisal, review goals, and approve or contest the currently active employee appraisal. When the employee approves or contests the appraisal, the systems indicates that it is complete and moves it to historical status. The system also sends a message to a user defined address book number indicating whether the employee approves or contests the appraisal. The system prevents any changes to the appraisal after the employee approval.

After the employee approves or contests the appraisal, you schedule a meeting with the employee to discuss the employee competency rating results, career planning, and performance improvement plans that are in the appraisal. If you need to make further changes to the appraisal, you must create a new appraisal and submit it for approvals.

See Also

- *Maintaining a Performance Diary* in the *Human Resources Guide* for instructions for creating diary notes

Revising an Employee Performance Appraisal

From the Performance Management Daily Processing menu (G08PM1), choose Employee Performance Appraisals.

After a human resources representative generates one or more employee performance appraisals, and managers receive a message that one or more appraisals are ready for review, a manager reviews each appraisal. If the system is set up to require employee self-appraisals, the manager also reviews the employee self-appraisal and then adds or changes information and ratings, as appropriate. The manager then schedules a meeting with each employee to discuss the appraisal and obtain feedback.

The manager uses the Employee Performance Appraisals program (P087712) to choose the employees who are due for an appraisal, make changes, and adjust the ratings. If a human resources representative is responsible for locating employees whose appraisals are due and creating the appraisals, then the manager opens the current appraisal and revises the rating, if necessary. If the human resources department is not responsible for creating the appraisals, the manager can use this program to create them.

If you use the competency-based appraisals, the system automatically compares job competencies to demonstrated employee competencies. The system rates employee performance and includes this information on the appraisal. When a manager adjusts the system-generated rating, the system automatically adjusts the competency ratings accordingly. You use processing options to define the changes that a manager can make.

If you use traditional appraisals, managers use the Upcoming Reviews by Supervisor program (P052200) to determine the employees for whom a performance appraisal is due. Managers use the Employee Performance Appraisals program (P087712) to find employees for whom an appraisal is due and manually complete the appraisal from a template. A manager can attach media objects to the appraisal template. An example of a media object might be a link to a report that documents the rating that you assign. If the system requires employee self-appraisals, it sends a message to each employee that their self-appraisal is due.

After completing an appraisal, the manager submits it for review. When the originating manager submits the appraisal, the system locks it, preventing changes. This lock also prevents changes to any performance diary entries that the manager connects to the appraisal. If the second-level manager rejects the appraisal and returns it for additional changes, the system automatically unlocks the appraisal. The system routes the appraisal to each approving manager, following a user defined approval hierarchy.

When the highest-level manager in the approval hierarchy completes the review and approves the appraisal, the system sends the originating manager a message to notify the employee that the appraisal is ready for final review. The manager chooses the appraisal record and uses the Notify Employee menu option to send a message to the employee.

After the manager notifies an employee, the employee uses employee self-service to review the manager appraisal and approve or contest it. When the employee takes either action, the system locks the appraisal, preventing any additional changes. The manager then meets with the employee to discuss the ratings. If a manager needs to enter additional changes, then he or she must create a new appraisal, add the changes, and submit the new appraisal for approvals.

Although a human resources representative can review employee performance appraisals and make changes, most companies require that managers perform this function.

Reviewing a Competency-Based Performance Appraisal

If you are a manager, the system sends a message to you when an employee's appraisal is ready for you to review. You use the Current Performance Appraisals program (P087712) to locate the appraisal and perform your review.

Depending on your company policies and how your system is set up, the system might also send a message to your employee that a performance self-appraisal is due. However, you can begin your appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self-appraisal. When the employee completes the self-appraisal and submits it, you can then review the appraisal and any diary entries that might be attached to it.

Depending on how the processing options are set up, you might be able to change the system ratings for job competencies, employee competencies, and the summary rating. You can also change the summary rating for a job competency, and the system automatically rerates each of the employee competencies.

You can use the top note area on the appraisal form to record any comments that apply to your review. When you choose a specific job or employee competency for review, the notes area applies only to the appraisal that you are reviewing and the competency that you choose. You can add separate notes for each job and employee competency.

The lower note area on the appraisal form can contain a user defined competency description to help you understand and work with job competencies. The notes that the system displays are based on the user profile. For example, you can set up different notes for managers and for employees. The following options might be available:

- Human Resources view
- Manager view
- Employee view

See Also

- ❑ *Maintaining a Performance Diary* in the *Human Resources Guide*

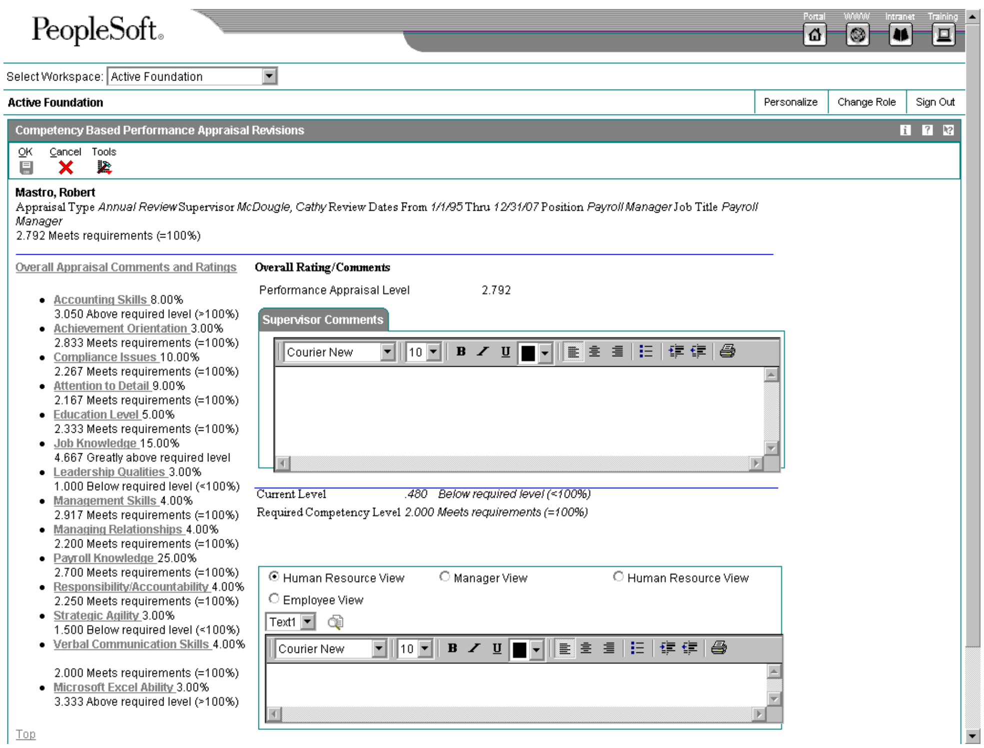
► To review competency-based performance appraisals

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, you can choose one of the following options in each group to filter the appraisal records, and then click Find:

   - Current Appraisals
   - Historical Appraisals
   - All Appraisals
   - Appraisals To Complete
   - Appraisals For Current Indirect Reports
   - Appraisals Awaiting My Approval

2. Choose an employee record and click Select.



3. On Competency Based Performance Appraisal Revisions, click the first job competency and review the rating.

   When you click a job competency, a list of related employee competencies automatically appears.

4. Click the first employee competency and review the employee competency ratings. Enter any necessary rating changes, and enter notes as appropriate.

   Depending on processing option settings, the system automatically adjusts the job competency and overall performance rating when you change an employee competency rating.

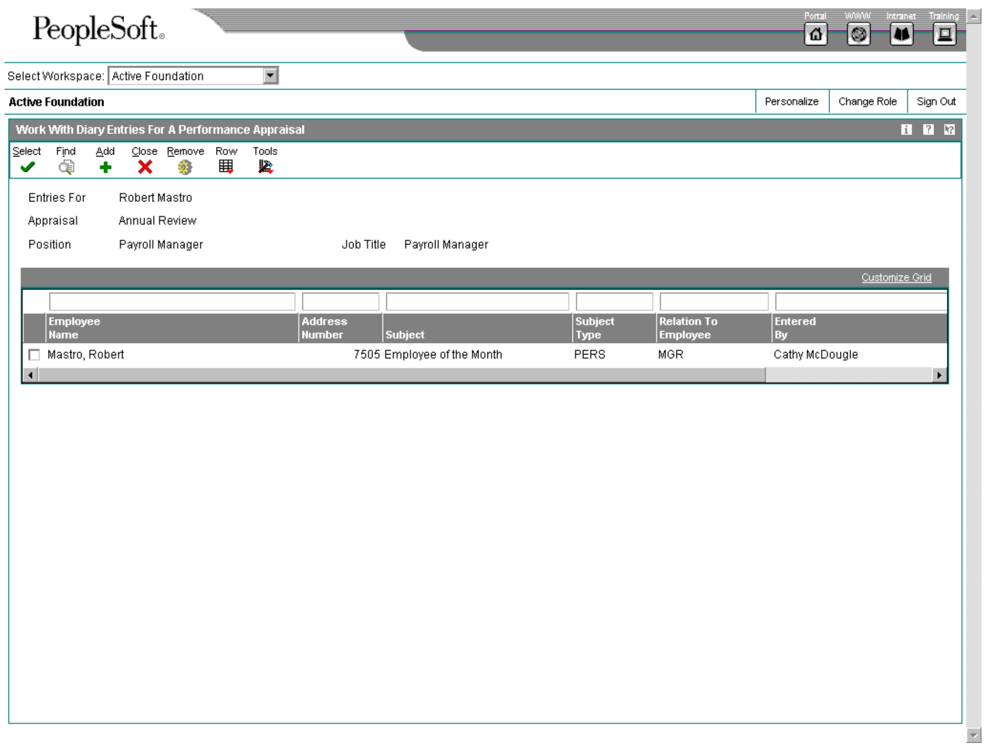
5. Alternatively, you can override the system ratings by entering a value in the following field:

   - Performance Appraisal Level

   The system automatically rates the job competencies again. If a processing option is set appropriately, you can also change the system rating for a job competency, and the system automatically rates the employee competencies again.

6. To attach a performance diary entry that might support your rating decision, click the link to Appraisal Diary Entries.

   The system displays a list of the diary records that are currently attached to the performance appraisal.



7. On Work With Diary Entries For A Performance Appraisal, choose a diary record to review and then click Select.
8. To add diary entries that are not currently attached to the appraisal, click Add.
9. Select a diary entry and then click Select.
10. To remove an attached diary records, choose a diary records and click Remove.

Note
Clicking Remove removes the diary record from the performance appraisal only. It does not delete the diary entry from the system.

11. Review all remaining job competencies and employee competencies and change ratings, as appropriate.
12. When you have completed rating all competencies, click Submit to Next Level Manager for Approval.

    The system sends a message to the next-level manager to indicate that a performance appraisal is ready for approval.

Processing Options for Current Performance Appraisals (P087712)

Defaults Tab

These processing options specify the default values that the system applies when a human resources representative or a manager creates performance appraisals.

---

1) Audience Flag

1 = Employee

2 = Manager

3 = Human Resources

Use this processing option to specify who is going to use the application to what capacity.

---

2) Performance Appraisal Status

0 = Employee Self Appraisal

1 = Current/Active Performance Appraisals

2 = Historical Performance Appraisals

Use this processing option to specify the status of performance appraisals the user displays. This will be used by the program to determine what task the employee or manager is currently completing. Valid values are:

0

Employee Self Performance Appraisal

1

Current/Active Performance Appraisals

2

Historical Performance Appraisals

Display Tab

These processing options specify the details that appear on the performance appraisal.

1) Display Job Title or Job Type/Step Description

Blank = Display Job Title if it exists, otherwise Job Type Step Description

1 = Always display Job Title

2 = Always display the description for Job Type/Step

Use this processing option to specify how the employee's job is displayed. Either the Job Title is displayed or the associated description for the employee's Job Type/Step is displayed.

---

2) Enter the URL for your performance appraisal guide.

Use this processing option to provide your organization's performance management guide. If this is provided, the employees or managers using this system will be able to click and view the guide.

---

3) Display Job Competency Level

0 = Do not display Job Competency Level (default)

1 = Display Job Competency Level

Use this processing option to specify whether the job competency level should be displayed on a competency-based performance appraisal.

4) Display Employee Competency Level

0 = Do not display Employee Competency Level (default)

1 = Display Employee Competency Level

Use this processing option to specify whether the employee competency level should be displayed on a competency-based performance appraisal.

Process Tab

These processing options specify the functions that can be performed, based upon the user.

1) Update Performance Level for Job Competencies

0 = No, can only change levels for employee competencies

1 = Yes, can change level for a job competency

Use this processing option to indicate whether the job competency level can be changed on the performance appraisal.

2) Auto Calculate Employee Competency Levels

0 = No, if job competency levels can be changed, they cannot be used to calculate employee competencies

1 = Yes, if a job competency level is changed, the level is used to calculate the employee competency levels

Use this processing option to specify whether the employee competency levels can be automatically calculated based on the job competency level entered. This only applies if the Update Performance Level for Job Competencies is allowed.

3) Competency Update Event Code

A valid Competency Update Event Code

Use this processing option to enter a code that specifies a type of user that has access to employee competency information. The code that you enter must exist in the user defined code list for competency update codes (05/CU). This code also corresponds to a code that you entered in the Competency Update Event Code field in the Competency Update Events program (P05106).

You use this processing option in conjunction with the Competency Update Events program to control access to the Competency Level field for specific types of users. You set up different versions of Resource Competency Information for each type of user. For example, you might define a Competency Update Event Code called Train that you use to represent your organization's training manager. You can use the Competency Update Events program to grant Train the ability to update competency levels for all training competencies.

You then set up a version of the Resource Competency Information program for Train.

4) Address Number of Individual who should be notified once the employee has approved his/her performance appraisal.

0 = Do not notify anyone that appraisal is complete

A valid address number

Use this processing option to indicate the person who should receive an email message once the performance appraisal is completely finished and the employee has signed-off. For example, this person may be responsible for printing the final appraisal for employee records.

5) Supervisor Can Create Development Plan

0 = No

1 = Yes

Use this processing option to indicate whether supervisors can create new development plans (goals) for employees while completing the performance appraisal.

6) Employee Can Create Development Plan

0 = No

1 = Yes

Use this processing option to indicate whether an employee can create his/her own new development plans (goals) while completing the self appraisal or reviewing the performance-appraisal.

Competency Descriptions Tab

These processing options specify the competency descriptions that appear on the performance appraisal, based on the audience.

1) User Defined Competency Description Code 1

Blank = Do not display description 1

A valid Competency Description Code

Use this processing option to list the code for the first Job Competency Code description to show. This code is associated with the first radio button on the form. When a Job Competency Code and the first radio button are selected,the associated description is displayed.

2) User Defined Competency Description Code 2

Blank = Do not display description 2

A valid Competency Description Code

Use this processing option to list the code for the second Job Competency Code description to show. This code is associated with the second radio button on the form. When a Job Competency Code and the second radio button are selected, the associated description is displayed.

3) User Defined Competency Description Code 3

Blank = Do not display description 3

A valid Competency Description Code

Use this processing option to list the code for the third Job Competency Code description to show. This code is associated with the third radio button on the form. When a Job Competency Code and the third radio button are selected, the associated description is displayed.

4) User Defined Competency Description Code 4

Blank = Do not display description 4

A valid Competency Description Code

Use this processing option to list the code for the fourth Job Competency Code description to show. This code is associated with the fourth radio button on the form. When a Job Competency Code and the fourth radio button are selected, the associated description is displayed.

5) User Defined Competency Description Code 5

Blank = Do not display description 5

A valid Competency Description Code

Use this processing option to list the code for the fifth Job Competency Code description to show. This code is associated with the fifth radio button on the form. When a Job Competency Code and the fifth radio button are selected, the associated description is displayed.

6) User Defined Competency Description Code 6

Blank = Do not display description 6

A valid Competency Description Code

Use this processing option to list the code for the sixth Job Competency Code description to show. This code is associated with the sixth radio button on the form. When a Job Competency Code and the sixth radio button are selected, the associated description is displayed.

Versions Tab

These processing options specify the version that the system uses for each program. Each version is a user defined set of specifications that control how programs and reports run. You use versions to group and save a set of user defined processing options, values, data selections, and sequencing options.

1) Delegates Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Delegates program (P08750) to use. The default is ZJDE0001.

2) Daily Diary Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Daily Diary program (P087715) to use. The default is ZJDE0001.

3) Create Goal Version

Blank = ZJDE0001

A valid version

Use this processing option to specify the version of the Goals program (P05117) to use. The default is ZJDE0001.

Defining Employee Goals for Competency-Based Appraisals

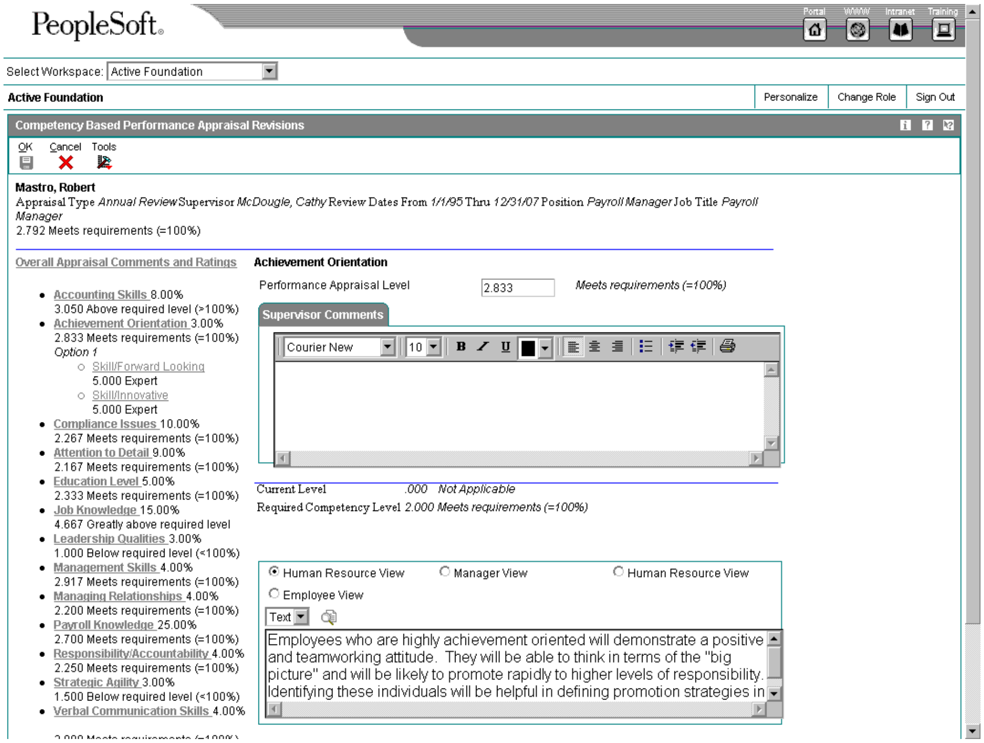
You can create employee goals and goal action suggestions that are linked to employee competencies. The purpose of this approach is to establish specific guidelines that an employee can follow to accomplish at least 100 percent of the organizational expectation for each employee competency. If an employee has additional goals that might or might not be directly related to job performance, you can also create a career development plan.

► To define employee goals for competency-based appraisals

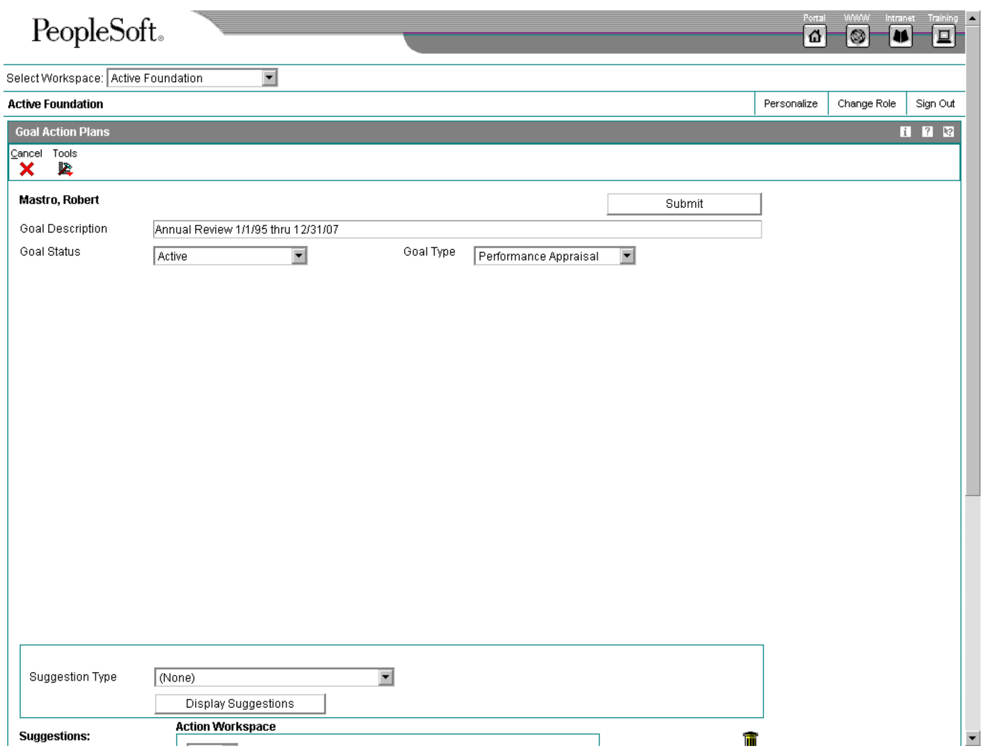
From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, choose an employee for whom a current appraisal exists, and then click Select.
2. On Competency Based Performance Appraisal Revisions, click a job competency.

   The system displays a list of the employee competencies that support the job competency.



3. Click an employee competency, review any existing Supervisor comments, and review the explanatory notes for the competency.
4. Click the link to Create a Career Development Plan for the Selected Competency.



5. On Goal Action Plans, complete the following fields to create a new employee goal:
   - Goal Status
   - Goal Type
   - Level you would like to achieve:
6. To create a new goal action suggestion, complete the following fields:
   - Action Description
   - Action Status
   - Change Reason
   - Estimate Start Date
   - Estimate End Date
7. If you are updating an existing action suggestion, complete the following fields:
   - Start Date
   - End Date
8. To move the current goal action suggestion to the Actions list, click the arrow.
9. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 6-8.
10. When your list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.

Completing Traditional Performance Appraisals

You use the Current Performance Appraisals program (P087712) to display a traditional performance appraisal template, manually complete all the categories, enter an appropriate rating, and then save it as a new appraisal. You also use the Current Performance Appraisals program to revise the appraisal and enter the rating. You can also attach performance diary entries to the appraisal to support your evaluation.

If you set up system options appropriately, when you create a performance appraisal, the system sends a message to your employee that the performance self-appraisal is due. You can begin your appraisal review immediately and then make any necessary adjustments to the appraisal when you review the employee self-appraisal. When the employee completes the self-appraisal and submits it, you can then review it and any diary entries that might be attached.

When you submit the appraisal, the system automatically sends a message to the next level manager that an appraisal is ready for review.

► To complete traditional performance appraisals

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, click on the following option to choose the type of appraisals that you want to review:
   - All Appraisals
2. Click on one of the following options to choose whether to review appraisals for your direct or indirect reports:
   - Appraisals To Complete
   - Appraisals For Current Indirect Reports

   The Appraisals to Complete option includes employees who report to you directly or indirectly. The Appraisals For Current Indirect Report includes only employees who report indirectly to you.
3. To choose an employee record, complete the following field or click an employee record and then click Select:
   - Employee Identification
4. On Traditional Performance Appraisal Revision, manually complete a performance appraisal template.

   Alternatively, if you set up another media object or URL link to an interactive appraisal form, complete the appropriate form.
5. To enter the overall performance rating, complete the following field:
   - Performance Appraisal Level
6. To attach a performance diary entry that might support your rating decision, click the Appraisal Diary Entries link at the bottom of the form.
7. On Work With Diary Entries For A Performance Appraisal, click Add.
8. On Daily Diary Search, choose a diary record and then click Select.
9. On Work With Diary Entries For A Performance Appraisal, to remove an attached diary record, choose a diary record and then click Remove.

   Note
   This action removes the diary record from the performance appraisal only. It does not delete the diary entry from the system.

10. When you are finished working with diary entries, click Close.
11. On Traditional Performance Appraisal Revision, click the link Submit to Next Level Manager.
12. On Submit Performance Appraisal, click Yes.

    The system automatically routes the appraisal and diary entries to the next-level manager in the approval hierarchy.

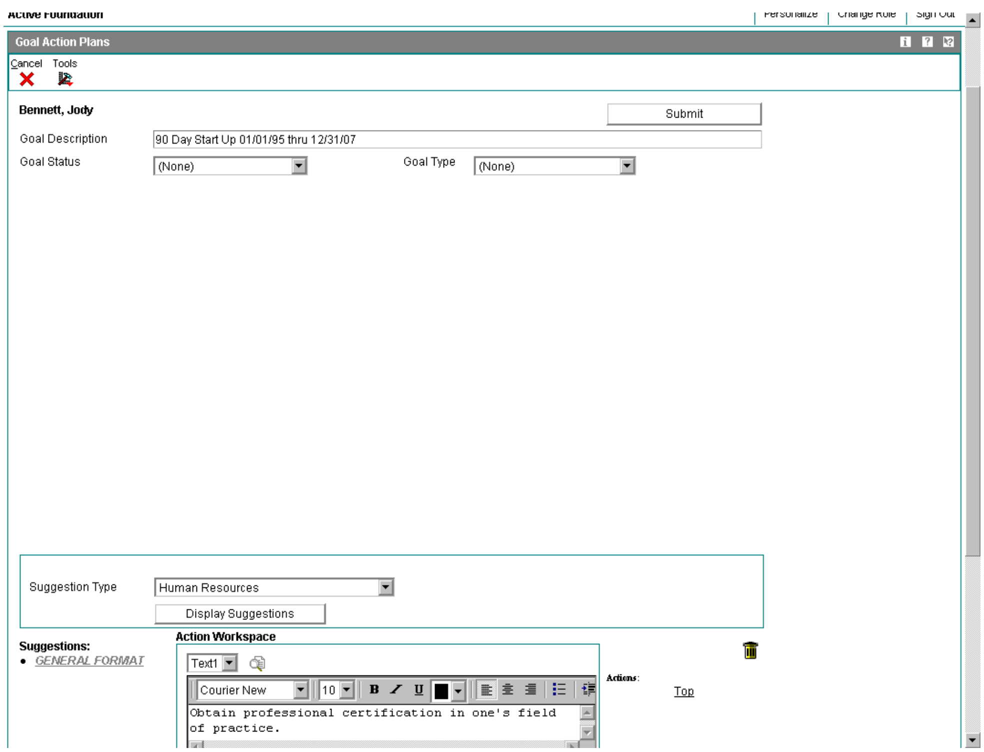
Creating an Employee Career Development Plan

You can create a career development plan when you use either competency-based or traditional performance appraisals. You use this tool to track employee goals and progress toward the goals. These goals can be linked to required job skills, or they can support goals that the employee might have that are not related to the organization.

▶ To create an employee career development plan

From the Manager Self Service menu (G05BMSS1), choose Current Performance Appraisals.

1. On Supervisor Work With Performance Appraisals, choose an employee for whom a current, traditional appraisal exists and then click Select.
2. On Traditional Performance Appraisal Revision, click the Create a Career Development Plan link at the bottom of the form.



3. On Goal Action Plans, complete the following fields:
   - Goal Status
   - Goal Type
4. Choose the Free Form option for the following field:
   - Suggestion Type
5. To create a new goal action suggestion, complete the following fields:

- Action Description
- Action Status
- Change Reason
- Estimate Start Date
- Estimate End Date

6. If you are updating an existing action suggestion, complete the following fields:
    - Start Date
    - End Date
7. To move the current goal action suggestion to the Actions list, click the arrow.
8. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 5-7.
9. When your list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.

Employee Self-Service Performance Appraisals

You can use employee self-service to manage performance appraisals. When a performance appraisal is due, either a human resources representative or a manager creates an employee performance appraisal and notifies you when it is ready for your review. If your company also uses performance self-appraisals, you receive a message indicating that you are required to prepare and submit a performance self-appraisal.

A performance self-appraisal evaluates your job performance and provides historic examples of activities that you completed. After you submit your self-appraisal, the system sends a message to your manager indicating that the appraisal is ready for review. If you need to make additional changes to the self-appraisal after you submit it, your manager can reset the appraisal status so that you can enter changes and resubmit it.

After you submit the performance self-appraisal to your manager, the manager reviews it and prepares an employee performance appraisal. The manager submits the appraisal for approval using a predefined approval hierarchy. When all approvals are complete, your manager sends a message to you indicating that the appraisal is ready for your review. You then review the appraisal, and either accept or contest it. The manager then schedules a meeting with you to review the appraisal and obtain feedback. You are normally the final step of the approval process.

Depending on your system settings, you can use one of two types of performance self-appraisals: competency-based or traditional (text-based). A competency-based performance self-appraisal generates an appraisal that compares required job competencies to your demonstrated employee competencies. To complete a traditional performance self-appraisal, you manually complete an appraisal template. You then review the performance self-appraisal and make appropriate changes. You can also attach appropriate diary entries that provide examples of performance activities.

See Also

- *Maintaining a Performance Diary* in the *Human Resources Guide* for more information about attaching appropriate diary entries that provide examples of performance activities

Reviewing a Competency-Based Performance Self-Appraisal

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

Either a human resources representative or a manager creates your competency-based performance appraisal. Your appraisal is a system-generated comparison of job competencies and demonstrated employee competencies. When you receive an e-mail message indicating that a performance self-appraisal is due, you use the Complete My Self Appraisal program (P087712) to perform the following functions:

- Choose your current self-appraisal for review
- Review your self-appraisal for accuracy
- Revise your self-appraisal based on your knowledge of your performance
- Add notes that document reasons for the changes
- Attach performance diary entries that document work or personal activities that support changes to the ratings
- Submit your self-appraisal to your manager for review

When you enter the Complete My Self Appraisal program, the system automatically recognizes your address book number and displays the currently active appraisal. When the processing options are set appropriately, you can change the system-generated ratings for each job and employee competency. You can also change the over-all performance rating and allow the system to change the ratings for each of the job and employee competencies.

See Also

- *Reviewing a Competency-based Performance Appraisal* in the *Human Resources Guide* to complete a competency-based performance appraisal

Reviewing a Traditional Performance Self-Appraisal

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

Either a human resources representative or a manager initiates your traditional performance appraisal. Your appraisal is a template that is stored as text in your JD Edwards software. When you receive an e-mail message that a performance self-appraisal is due, use the Complete My Self Appraisal program (P087712) to perform the following functions:

- Choose your current self-appraisal for review
- Manually complete all sections of the self-appraisal, including ratings, if appropriate
- Add notes that document reasons for your evaluations
- Attach performance diary entries that document work or personal activities that support changes to the ratings
- Submit your self-appraisal to your manager for review

When you enter the Complete My Self Appraisal program, the system automatically recognizes your address book number and displays the appropriate appraisal template.

See Also

- *Completing Traditional Performance Appraisals* in the *Human Resources Guide* to manually complete a traditional performance appraisal

Reviewing a Performance Appraisal From Your Manager

From the Employee Self Service menu (G05BESS1), choose Current Performance Appraisal.

When you receive a message indicating that an employee performance appraisal is ready for your review, you use the Current Performance Appraisal program (P087712) to choose your appraisal and review it.

Performance reviews can be either competency-based or traditional. You can add notes and attach performance diary entries to either type of performance appraisal to document your views of the ratings that appear in the appraisal.

See Also

- *Maintaining a Performance Diary* in the *Human Resources Guide* for more information about documenting performance appraisal ratings
- *Reviewing a Competency-Based Performance Appraisal* in the *Human Resources Guide* to review and submit a competency-based performance appraisal
- *Completing Traditional Performance Appraisals* in the *Human Resources Guide* for the steps to review and submit a traditional performance appraisal

Defining Employee Goals Using Employee Self-Service

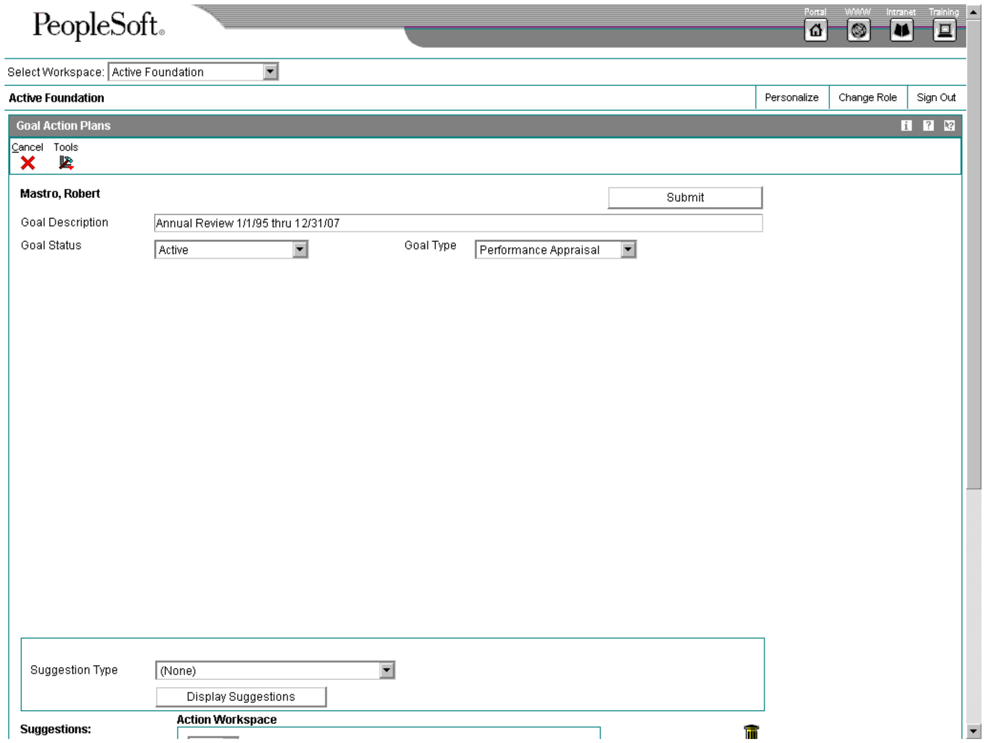
You can create and track personal goals as part of your performance appraisal process. Working closely with your manager, you use the employee goals feature to create an action plan for achieving higher levels of performance. You can also use this feature to track personal objectives that are not related to your organization. If your organization uses only a performance appraisal that your manager creates for you, you can work with your manager to create and track your goals. If you also complete a self-appraisal, you can create and track goals for yourself.

Employee goals are linked to a current appraisal. Although the system locks your appraisal after you approve the information that your manager enters, you can still create and change your goals and goal actions throughout the year.

► To define goals for competency-based appraisals

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

1. On Employee Work With Performance Appraisals, choose an appraisal record and then click Select.
2. Click an employee competency, review any existing Supervisor comments, and review the explanatory notes for the competency.
3. Select the link to Create a Development Plan for the Selected Competency.



4. On Goal Action Plans, complete the following fields to create a new employee goal:
   - Goal Status
   - Goal Type
   - Level you would like to achieve:
5. To create a new goal action suggestion, complete the following fields:
   - Action Description
   - Action Status
   - Change Reason
   - Estimate Start Date
   - Estimate End Date
6. If you are updating an existing action suggestion, complete the following fields:
   - Start Date
   - End Date
7. To move the current goal action suggestion to the Actions list, click the arrow.

8. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 6-8.
9. When your list of goal action suggestions is complete, click Submit to save, and then click Cancel to return to the appraisal form.

► **To create a career development plan**

From the Employee Self Service menu (G05BESS1), choose Complete My Self Appraisal.

1. On Employee Work With Performance Appraisals, choose an appraisal record and then click Select.
2. On Goal Action Plans, complete the following fields:
   - Goal Status
   - Goal Type
3. Choose the Free Form option for the following field:
   - Suggestion Type
4. To create a new goal action suggestion, complete the following fields:
   - Action Description
   - Action Status
   - Change Reason
   - Estimate Start Date
   - Estimate End Date
5. If you are updating an existing action suggestion, complete the following fields:
   - Start Date
   - End Date
6. To move the current goal action suggestion to the Actions list, click the arrow.
7. To add additional goal action suggestions to the Actions list for the currently selected employee competency, repeat steps 5-7.
8. When your list of goal action suggestions is complete, click Submit to save. Then click Cancel to return to the appraisal form.

Creating Employee Performance Appraisals

Human resources representatives and managers can use the performance appraisal management system to create, manage, and print performance appraisals. You use the Create Performance Appraisals program (P087711) to generate appraisals and evaluate employee job performance. These appraisals provide historic examples of activities that employees complete. Depending on your system settings, employees might be able to create performance self-appraisals. After the employee submits the performance self-appraisal to the manager, the manager reviews the self-evaluation and prepares the manager performance appraisal.

See Also

- *Generating Employee Performance Appraisals* in the *Human Resources Guide* for more information about creating appraisals

Defining Employee Goals Using Manager Self-Service

Human resources specialists know that when organizations treat employees who contribute to the success of an organization as valuable assets, the organization and the employees mutually benefit. Employees benefit from establishing specific goals that help increase their skills, perform their jobs at a higher level, and advance their careers.

The employee goals system is linked to the performance management system so that managers have a concise method of measuring employee performance and improvement. You can create employee goals for either competency-based or traditional performance appraisals. When you create a competency-based appraisal, you can create employee goals for each employee competency. You can also create a separate, personalized career development plan. Using either appraisal approach, the employee goals feature is a tool that you can use to help your employees reach personal and corporate objectives.

You use the Current Performance Appraisals program (P087712) to review an employee appraisal and add employee goals. Although you normally create goals at the same time that you are reviewing an appraisal, you can add and revise them after you finish the appraisal process. After you submit the appraisal and the system locks it to prevent changes to the appraisal, you can still review and change employee goal suggestions.

Your human resources department defines the competency information that is used in competency-based performance appraisals and employee goals. You can use existing goal suggestions that might already exist, or you can use the Work With Competency Information form (W05104A) to add new ones. You can also create additional items in the UDC tables to support employee goals.

Before You Begin

- Attach goals to competencies, as needed. See *Defining Employee Competencies* in the *Human Resources Guide*.
- Set up the category codes for employee goals (UDC 05/G1 through 05/G3, and 05/GT). See *Defining Category Codes* in the *Workforce Management Foundation Guide*.
- Create, review, and revise an employee performance appraisal. See *Creating Employee Performance Appraisals* in the *Human Resources Guide* for the steps to perform these functions.

Health Safety Management

Most employers in the United States are required by the Occupational Safety and Health Administration (OSHA) to maintain information about injuries and illnesses sustained by employees as a result of performing their job duties. OSHA requires employers to record all occupational illnesses, regardless of severity, and occupational injuries that result in death, loss of one or more workdays, restriction of work or motion, loss of consciousness, transfer to another job, or medical treatment other than first aid.

To satisfy these government reporting requirements, you can perform the following tasks when using your Human Resources system:

- Track detailed information about any injuries or illnesses suffered by employees while performing their jobs
- Enter supplemental data that includes any additional information that you want to track about injuries or illnesses, regardless of whether government reporting is required
- Use the reports provided by J.D. Edwards to satisfy all of the OSHA reporting requirements

Working with Injury and Illness Information

To satisfy many governmental health safety management requirements, you can track detailed information about any injuries or illnesses that your employees suffer during the performance of their jobs within your organization. This information includes:

- Date of incident
- Time of incident
- Description of incident
- Employee's name
- Employee's occupation
- Employee's department
- Part of body affected
- Action taken
- Lost or restricted time

You use this information to create and print health safety management reports.

You begin tracking health safety management information by opening an injury or illness case and entering the information that many governmental health safety management organizations require.

After you enter the required information for an injury or illness, you can enter supplemental data. Supplemental data includes any additional information that you want to track about injuries and illnesses, regardless of whether you need to report the case to governmental health safety management organizations.

After you have resolved an injury or illness case, you close the case. To analyze and verify injury and illness information, you can review information online.

Opening an Injury or Illness Case

When a work-related injury or illness occurs, you open a case to begin tracking information about it. You use this information to create and run the reports, which are required by the U.S. Occupational Safety and Health Administration compliance regulations.

In addition to the information that is required by the government, you can track injury and illness statistics that your organization can use to do the following:

- Identify hazards
- Increase safety awareness
- Evaluate safety procedures

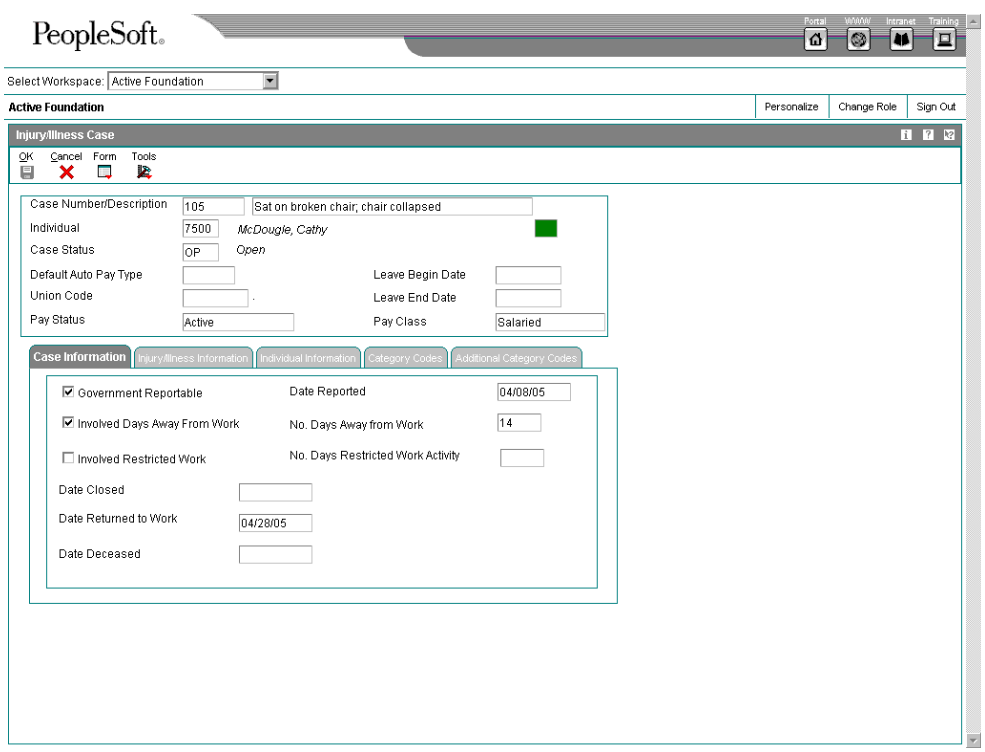
Before You Begin

- ❑ Set up the user defined code list for establishment search types (08H/ES). Establishments are the places in your organization where your employees report for work or perform their duties, or are the business units from which they are paid. See *Customizing User Defined Codes* in the *Foundation Guide* for more information.

▶ To open an injury or illness case

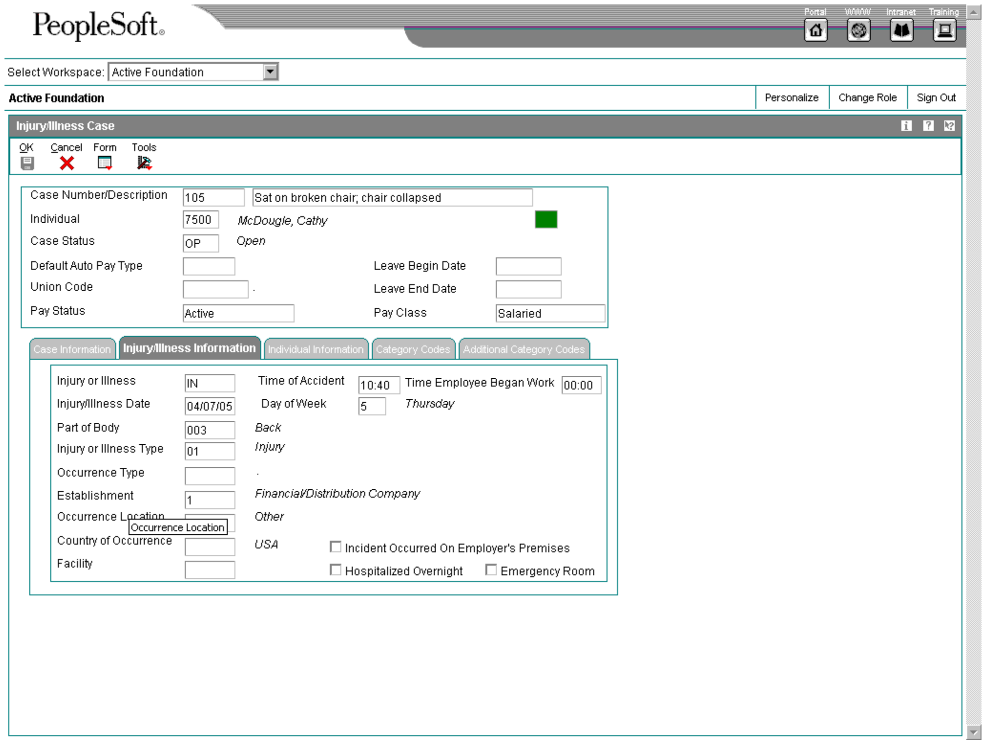
From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.

1. On Work With Injury/Illness Cases, click Add.



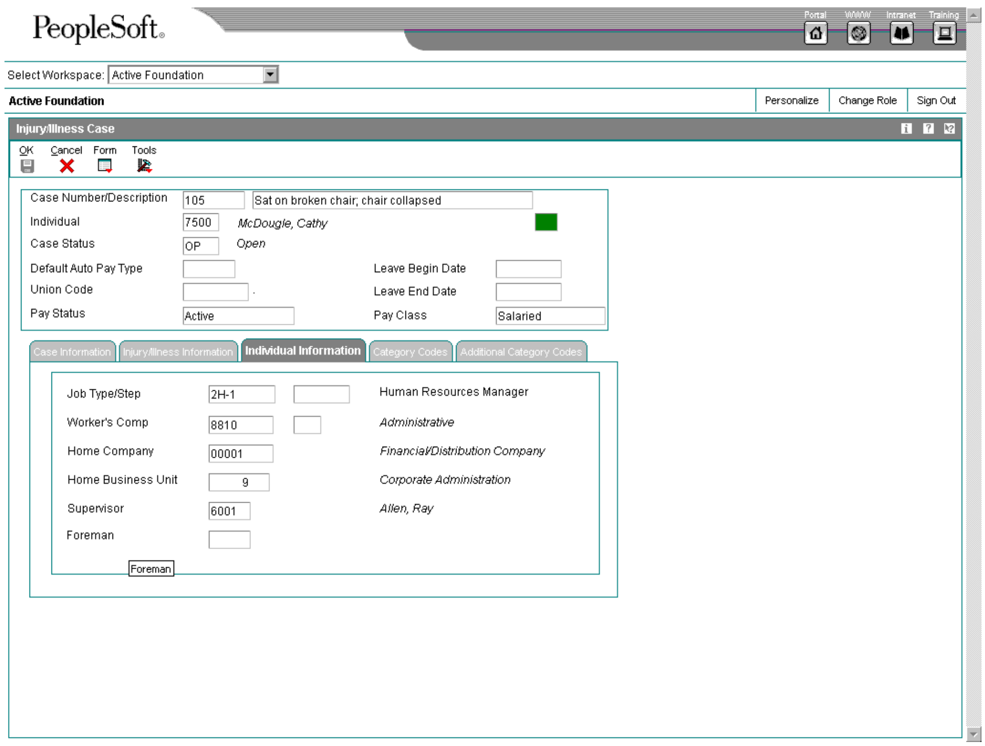
2. On Injury/Illness Case, complete the following field:
   - Case Number/Description

   If you leave this field blank, the system assigns the next available number.
3. Complete the following fields:
   - Individual
   - Case Status
4. Choose the Case Information tab and choose the following options, if necessary:
   - Government Reportable
   - Involved Days Away from Work
   - Involved Restricted Work
5. Complete the following fields, if necessary:
   - Date Closed
   - Date Returned to Work
   - Date Deceased
   - Date Reported
6. If you chose the Involved Days Away From Work option, complete the following field:
   - No. Days Away from Work
7. If you chose the Involved Restricted Work option, complete the following field:
   - No. Days Restricted Work Activity
8. Choose the Injury/Illness Information tab and complete the following fields:
   - Injury or Illness
   - Injury Date
   - Injury or Illness Type



9. Complete the following fields, if necessary:
    - Time of Accident
    - Part of Body
    - Establishment
    - Occurrence Type
    - Occurrence Location
    - Country of Occurrence
10. Click the following option, if necessary:
    - Incident Occurred on Employer's Premises
11. Complete the following fields or options to retain additional information required by legislative changes to OSHA:
    - Time Employee Began Work
    - Facility
    - Hospitalized Overnight
    - Emergency Room
12. Choose the Individual Information tab and complete the following information:

- Home Company
- Home Business Unit



13. Complete the following fields, if necessary:
    - Job Type
    - Job Step
    - Worker's Comp
    - Supervisor
    - Foreman
14. Choose the Category Codes tab and complete the optional fields.
15. Click OK.

Entering Supplemental Data for Injury and Illness Cases

Supplemental data is any type of additional information that you want to track about any of the following:

- Employees
- Applicants
- Jobs

- Dependents
- Beneficiaries
- Requisitions
- Health safety management cases

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

For health safety management cases, typical types of supplemental data might include:

- How the injury occurred
- Medical expenses
- Hazardous materials involved
- Hospital
- Attending physician

Use the same method to enter supplemental data for health safety management as you use for any type of supplemental data that you track.

See Also

- ❑ *Working with the Supplemental Database* in the *Workforce Management Foundation Guide* for information about entering, copying, reviewing, and purging supplemental data

Closing an Injury or Illness Case

After you have resolved an injury or illness case, you close the case. To close a case, you must enter a closed status and the date on which you closed the case.

► To close an injury or illness case

From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.

1. On Work With Injury/Illness Cases, complete any of the following fields to locate a specific case, or leave them blank to show all cases:
   - Establishment
   - Inj/Ill Related (IN/IL)
   - Home Company
   - Home Business Unit
   - Individual
   - Case Number
   - Case Status
2. In the detail area, choose the case that you want to close and then click Select.

3. On Injury/Illness Case, complete the following field:

   - Case Status

4. Choose the Case Information tab, complete the following field, and then click OK

   - Date Closed

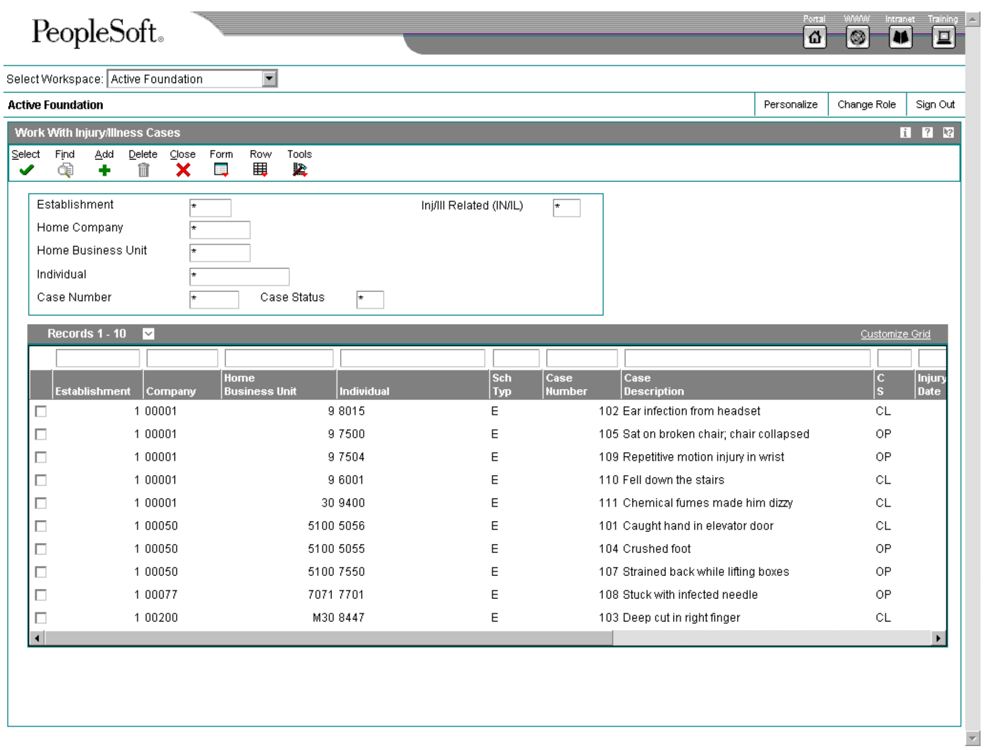
Reviewing Injury and Illness Cases by Establishment

An establishment is any single location where your organization conducts business or performs services. To determine the relative safety of each of your organization's establishments, you can review the number and types of incidents that occur at one establishment, such as a branch office. You can narrow the search to incidents that occur at a specific home business unit or to one employee.

To determine which cases are resolved and which are still open, you can also review cases by case status.

► To review injury and illness cases by establishment

From the Daily Processing menu (G08BH1), choose Injury/Illness Case Information.



Establishment	Company	Home Business Unit	Individual	Sch Typ	Case Number	Case Description	C S	Injury Date
1	00001	9	8015	E	102	Ear infection from headset	CL	
1	00001	9	7500	E	105	Sat on broken chair; chair collapsed	OP	
1	00001	9	7504	E	109	Repetitive motion injury in wrist	OP	
1	00001	9	6001	E	110	Fell down the stairs	CL	
1	00001	30	9400	E	111	Chemical fumes made him dizzy	CL	
1	00050	5100	5056	E	101	Caught hand in elevator door	CL	
1	00050	5100	5055	E	104	Crushed foot	OP	
1	00050	5100	7550	E	107	Strained back while lifting boxes	OP	
1	00077	7071	7701	E	108	Stuck with infected needle	OP	
1	00200	M30	8447	E	103	Deep cut in right finger	CL	

1. On Work With Injury/Illness Cases, complete the following field:

   - Establishment

2. To refine your search, complete one or more of the following optional fields, and then click Find:
   - Inj/Ill Related (IN/IL)
   - Home Company
   - Home Business Unit
   - Individual
   - Case Number
   - Case Status
3. Review the information in the detail area.

Reviewing Supplemental Data for Injury and Illness Cases

After you enter supplemental data for injury and illness cases, you can review that information by case or by data type. Use this information to identify unsafe conditions and develop solutions for them. You can review supplemental data for each injury or illness, including those that you do not need to report to the government.

Because you define the types of data that you want to track for injury and illness cases, the specific type of data that you can review depends on the supplemental data that you defined.

You use the same procedure to review supplemental data for injury and illness cases that you use to review supplemental data for employees.

See Also

- *To review supplemental data for a specific employee* in the *Workforce Management Foundation Guide*
- *To review supplemental data by data type* in the *Workforce Management Foundation Guide*

Reviewing Health Safety Management Reports

You can review reports that show detailed information about the injuries and illnesses that occur in your organization. Use this information to identify potential safety hazards.

Reviewing the Case Supplemental Data Report (R080413)

From the Case Supplemental Data menu (G08BSDS1), choose Case Supplemental Data Report.

To review complete information for each injury or illness case that you specify, print the Case Supplemental Data report. Use this report to identify safety hazards and to improve your organization's safety record.

The information that prints on this report is the same information that you can review online using the Case Supplemental Data Inquiry program (P08023). However, the report allows you to print information for several cases at one time.

Processing Options for Case Supplemental Data Report (R080413)

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Case Report by Data Type (R080403)

From the Case Supplemental Data menu (G08BSDS1), choose Case Report by Data Type.

To review a list of all of the injury and illness cases with information in a particular data type (such as physical object involved or medical expenses), print the Case Report by Data Type. The information that prints on this report is the same information that you can review online using Case Supplemental Data Entry (P080913).

For each case, the system lists data types in alphabetical order.

Processing Options for Case Report by Data Type (R080403)

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Occupational Illness/Injury Report (R086420)

From the Case Supplemental Data menu (G08BSDS1), choose Occupational Illness/Injury Report.

To analyze health safety management statistics for your organization, you can print a report that lists detailed information about cases. You can print one version of this report to review illness cases and another to review injury cases. Use this information to identify establishments and employees who might need additional safety reviews.

Processing Options for Occupational Illness/Injury Report (R086420)

Display Tab

These processing options specify whether to display a count of the records, the percentages for level breaks, and the percentages for all of the cases that appear on the report.

1. Display Totals

1 = Display Totals

0 = Do Not Display Totals

Use this processing option to specify whether to display a count of the records as a footer after each level break and as a grand total footer to be displayed at the end of the report. A default of blank will not display the totals.

2. Display Percentages For Level Breaks

1 = Display Percentages For Level Breaks

0 = Do Not Display For Level Breaks

Use this processing option to specify whether to display the percentages for a variety of categories after each level break. A default of blank will not display the percentages.

3. Display Percentages For Final Total

1 = Display Percentages

0 = Do No Display Percentages

Use this processing option to specify whether to display the percentages for a variety of categories for all of the cases that are examined. These percentages appear at the end of the report. The percentages do not appear with the default of blank.

You can use data selection to determine whether to include injuries or illnesses on the report.

Reviewing Government Reportable Illness/Injury Report (R086421)

From the Case Supplemental Data menu (G08BSDS1), choose Government Reportable Illness/Injury.

To analyze health safety management statistics for your organization, you can print a report that lists detailed information about cases. You can print versions of this report to review cases by establishment, supervisor, and job type. Use this information to identify establishments and employees who might need additional safety reviews.

Processing Options for the Government Reportable Illness/Injury Report (R086421)

Display Tab

These processing options are used to select the data that appears on the report.

1. Display Totals

   1 = Display Totals

   0 = Do Not Display Totals

Use this processing option to specify whether to display a count of the records as a footer after each level break and as a grand total footer to be displayed at the end of the report. A default of blank will not display the totals.

2. Display Percentages For Level Breaks

   1 = Display Percentages For Level

   Breaks

   0 = Do Not Display For Level Breaks

Use this processing option to specify whether to display the percentages for a variety of categories after each level break. A default of blank will not display the percentages.

3. Display Percentages For Final Total

1 = Display Percentages

0 = Do No Display Percentages

Use this processing option to specify whether to display the percentages for a variety of categories for all of the cases that are examined. These percentages appear at the end of the report. The percentages do not appear with the default of blank.

You can use data selection to determine whether to include injuries or illnesses on the report.

4. Display and Group Totals by

1 = Establishment Number

2 = Supervisor Number

3 = Job Type

Use this processing option to specify whether to display the total count of records by the establishment number, supervisor number, or job type. The totals are displayed as a footer after each level break. Blank or zero are not valid values for this processing option.

Partner Processes - Criterion BluePrint (PeopleClick)

The Criterion BluePrint Human Resources planning system automates processes such as training, career development, and succession planning. The name of this system has changed to PeopleClick, but you will still see it referred to as Criterion BluePrint throughout J.D. Edwards software and the accompanying documentation.

You can integrate the J.D. Edwards system with Criterion BluePrint by loading job, position, and employee information from J.D. Edwards into Criterion BluePrint.

Consult the Criterion BluePrint documentation for information about using Criterion BluePrint.

Before You Begin

- ❑ Turn on the Criterion BluePrint module in the J.D. Edwards System Control program (P99410). See *Setting Up System Controls* in the *Workforce Management Foundation Guide*.
- ❑ Verify that the codes listed under *Transaction and User Defined Codes for Criterion BluePrint* are set up in user defined code list 00/TT. All of the transaction codes should have a 1 in the Special Handling column and a Y in the Hard Coded column. See *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide*.
- ❑ Set up the conversion table that supports Unicode processing. For information about setting up this table, see *Work with Flat File Encoding* in the *System Administration Guide*.

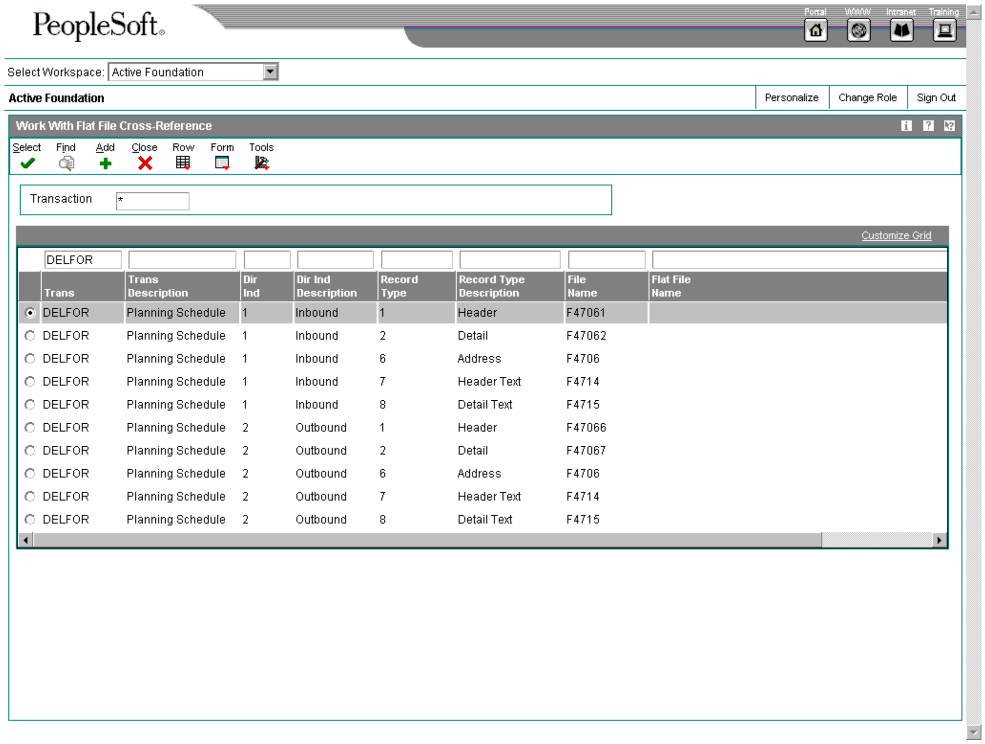
Setting Up Flat File Cross-References for Criterion BluePrint

When you export J.D. Edwards data to Criterion BluePrint, the J.D. Edwards system stores the data in flat files. Criterion BluePrint then retrieves the data from the flat files. You need to set up flat file cross-references to indicate the file in which each type of data is stored.

► To set up flat file cross-references for Criterion BluePrint

A sample of the codes that you need to set up is supplied. However, you need to delete each code and then recreate it so that you can identify the filename of the flat files.

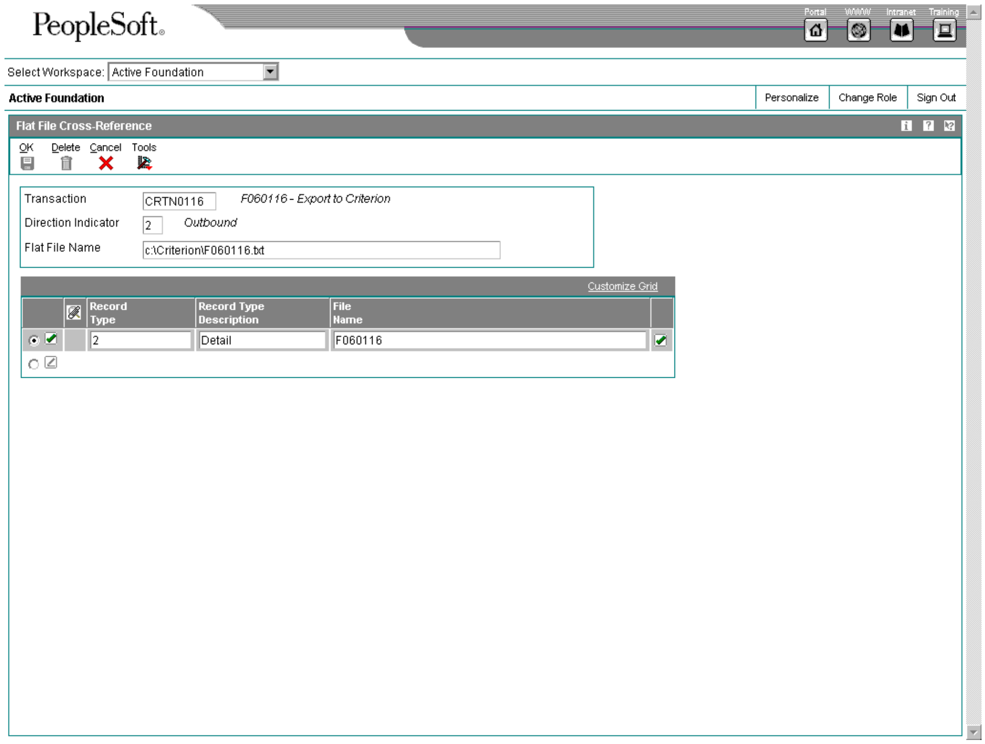
From the Criterion menu (G05BPP42), choose Flat File Cross Reference.



1. On Work With Flat File Cross-Reference choose a transaction in the detail area, and then click Select.
2. On Flat File Cross-Reference, choose a record in the detail area, and then click Delete.
3. Repeat step 2 for each record in the detail area, and then click OK.

   When all of the records in the detail area have been deleted, the transaction is also deleted.

4. On Work With Flat File Cross-Reference, click Add.



5. On Flat File Cross-Reference, type a transaction or user defined code in the following field:
   - Transaction
6. Type 2 in the following field:
   - Direction Indicator
7. Type a filename for the flat file to which the data will be exported in the following field:
   - Flat File Name

Caution
Any folders in the filename path must already exist. The J.D. Edwards system does not create the folders.

8. Type 2 in the following field in the detail area:
   - Record Type
9. Review the following field:
   - Record Type Description
10. Complete the following field and click OK:
    - File Name

11. Repeat steps 2 through 9 for each transaction code and user defined code that is listed under *Transaction and User Defined Codes for Criterion BluePrint*.

Transaction and User Defined Codes for Criterion BluePrint

The following transaction and user defined codes represent the data that is transferred from J.D. Edwards to Criterion BluePrint. Use these codes to set up flat file cross-references.

- CRTN0116 - Export Employees to Criterion
- CRTN8001 - Export Jobs to Criterion
- CRTN8101 - Export Positions to Criterion
- UDCADDS - State
- UDCAT1 - Search Type
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category
- UDCEEOM - Ethnic Code
- UDCEST - Employment Status
- UDCFLSA - Overtime Exempt
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCJGRP - Job Group
- UDCJSTA - Job Status
- UDCLNGP - Language Preference
- UDCMAIL - Check Route Code
- UDCMSTX - Marital Status
- UDCP001 - Category Code 1
- UDCP002 - Category Code 2
- UDCP003 - Category Code 3
- UDCP004 - Category Code 4
- UDCP005 - Category Code 5
- UDCP006 - Category Code 6
- UDCP007 - Category Code 7
- UDCP008 - Category Code 8
- UDCP009 - Category Code 9
- UDCP010 - Category Code 10
- UDCP011 - Category Code 11
- UDCP012 - Category Code 12
- UDCP013 - Category Code 13
- UDCP014 - Category Code 14

- UDCP015 - Category Code 15
- UDCP016 - Category Code 16
- UDCP017 - Category Code 17
- UDCP018 - Category Code 18
- UDCP019 - Category Code 19
- UDCP020 - Category Code 20
- UDCPAST - Pay Status
- UDCPRFQ - Pay Frequency
- UDCRCCD - Record Type
- UDCSALY - Pay Class
- UDCSEX - Gender
- UDCSHFT - Shift Code
- UDCLOC - Locality
- UDCTYC - Emer Contact Type
- UDCUN - Union

Exporting Data from J.D. Edwards to Criterion BluePrint

Use one of the following navigations:

From the Criterion menu (G05BPP42), choose Export UDC's to Criterion.

From the Criterion menu (G05BPP42), choose Export to Criterion all Files.

You can export the following items from the J.D. Edwards system for use in Criterion BluePrint:

- User defined codes
- Employee information
- Position information
- Job information

The J.D. Edwards system stores data in flat files, which you can import into Criterion BluePrint. When you export UDCs to Criterion, you create a separate file for each of the data items, as defined in the Flat File Cross Reference program (P47002).

You need to export this data only once, when you first start using J.D. Edwards with Criterion BluePrint. After the initial export, whenever you change or add employees, positions, or jobs in the system, the data is automatically exported to Criterion BluePrint by database triggers on the respective tables. After you export the data from the J.D. Edwards system, you need to import it to Criterion BluePrint.

See Also

- The Criterion BluePrint documentation for more information about importing data from J.D. Edwards to Criterion BluePrint.

Processing Options for Export UDCs to Criterion (R050500)

Process

1. Enter the Data Item from the OneWorld System Control table (F99410) you wish to process. Blanks not allowed.

2. Enter the Transaction Type. Blanks not allowed.

3. Enter the delimitor you wish to use.

4. Enter a '1' if you wish the code to be exported according to the code length. If left blank, the code will be exported to the length of the field.

5. Enter a '1' to export a blank value if blanks exist in the UDC you are exporting.

Processing Options for Export to Criterion all Files (R05100)

Position Cntrl

Enter '1' if you are using Position control

Partner Processes - Personic Workflow

Personic Workflow is an easy-to-use software package that automates the recruiting and hiring process. It can intelligently search scanned resumes, allowing you to narrow your applicant pool according to specific criteria. For example, if you want to review only those applicants with moderate Japanese skills, you can search for resumes that match your criteria. After you have selected several qualified applicants, Personic Workflow guides you through the process of interviewing and hiring.

You can integrate J.D. Edwards with Personic Workflow by loading requisitions and other data from J.D. Edwards into Personic Workflow. Personic Workflow then helps you find qualified applicants and guides you through the interview process. Then, when you are ready to hire an applicant, you can return the applicant's information to the records in the Employee Master Information table (F060116) in the J.D. Edwards system.

You can set a processing option to have the system automatically purge pending employees when you run the Processing Pending Employees program (R060116P).

Consult the Personic Workflow documentation for information about using Personic Workflow.

Before You Begin

- ❑ Activate the Personic Workflow module in the J.D. Edwards System Control program (P99410). See *Setting Up System Controls* in the *Workforce Management Foundation Guide*.
- ❑ Verify that the codes listed under *Transaction and User Defined Codes for Personic Workflow* are set up in user defined code list 00/TT. All of the codes, except for PRSC116Z (F060116z - Import from Personic), should have a 1 in the Special Handling column. See *Understanding User Defined Codes for Workforce Management Systems* in the *Workforce Management Foundation Guide*.
- ❑ Set up the conversion table that supports Unicode processing. For information on setting up this table, see *Work with Flat File Encoding* in the *System Administration Guide*.

See Also

- ❑ *Setting Up Flat File Cross-References for Criterion BluePrint* in the *Human Resources Guide* for more information about the flat file setup

Transaction and User Defined Codes for Personic Workflow

The following transaction and user defined codes represent the data that is transferred between J.D. Edwards and Personic Workflow. Use these codes to set up flat file cross-references.

- PRSC0006 - F006 Export
- PRSC0116 - F060116 Export
- PRSC116Z - F060116z Import from Personic
- PRSC2001 - F082001 Export
- PRSC8001 - F08001 Export
- PRSC8101 - F08101 Export

- PRSC8102 - F08102 Export
- UDCADDS - State
- UDCCTR - Country Code
- UDCEEOJ - EEO Job Category
- UDCEEOM - Ethnic Code
- UDCJBCD - Job Type
- UDCJBST - Job Step
- UDCMAIL - Check Route Code
- UDCREQS - Requisition Status
- UDCSALU - Prefix
- UDCSUFF - Suffix

Exporting Data from J.D. Edwards to Personic Workflow

Use one of the following navigations:

From the Personic menu (G05BPP41), choose Export Requisitions & Employees/Personic.

From the Personic menu (G05BPP41), choose Export Jobs to Personic.

From the Personic menu (G05BPP41), choose Export Pay Grades to Personic.

From the Personic menu (G05BPP41), choose Export Positions to Personic.

You can export the following items from the J.D. Edwards system for use in Personic Workflow:

- Managers
- Requisitions
- Cost centers
- Jobs
- Pay grades an steps
- Positions
- User defined codes

The system stores data in flat files, which you can import into Personic.

Note

To export cost centers to Personic, you must first run the Outbound Cost Center Extraction program (R0006Z1E) and then run the Export Cost Centers to Personic program (R05246).

If you choose to export UDCs to Personic, run the Export UDC's to Personic program (R050500) for each of the following codes:

- ZJDE0021 (MAIL)

- ZJDE0022 (CTR)
- ZJDE0023 (EEOJ)
- ZJDE0026 (EEOM)
- ZJDE0030 (JBST)
- ZJDE0031 (JBCD)
- ZJDE0042 (ADDS)
- ZJDE0044 (REQS)
- ZJDE0045 (SALU)
- ZJDE0046 (SUFF)

This process creates a separate flat file for each data item and user defined code, as defined in the Flat File Cross Reference program (P47002).

You might need to export this data only once, when you first start using J.D. Edwards with Personic Workflow. After the initial export, any new or changed requisitions in J.D. Edwards are sent to Personic Workflow by database triggers. However, if you add other new items, such as managers or cost centers, in J.D. Edwards, you must export those items to Personic Workflow again.

After you process all of the programs to export the data from the J.D. Edwards system, you need to import it to Personic Workflow.

See Also

- Personic Workflow documentation for more information about importing data from J.D. Edwards into Personic.

Processing Options for Export UDCs to Criterion (R050500)

Process

1. Enter the Data Item from the OneWorld System Control table (F99410) you wish to process. Blanks not allowed.

2. Enter the Transaction Type. Blanks not allowed.

3. Enter the delimitor you wish to use.

4. Enter a '1' if you wish the code to be exported according to the code length. If left blank, the code will be exported to the length of the field.

5. Enter a '1' to export a blank value if blanks exist in the UDC you are exporting.

Processing Options for Export Pay Grades to Personic (R05248)

Date
Enter effective date

1. Date - Effective On

Importing New Employee Information from Personic Workflow

When you have indicated a hire date for the successful applicant in Personic Workflow, you can import that applicant's information (such as name, address, and so on) into the J.D. Edwards system, where it is added directly to a pending employee table. From this table, the applicant's information is transferred to the Employee Master Information table (F060116).

Before You Begin

- ❑ Export the appropriate records from Personic Workflow. See the Personic Workflow documentation for more information.

► To import new employee information from Personic Workflow

From the Personic menu (G05BPP11), choose Inbound Flat File Conversion.

1. On Work With Batch Versions – Available Versions, run version XJDE0022 to load the flat file into a pending employee table.
2. Return to the Personic menu and choose Employee Work File Revisions.
3. On Work With Pending Employees, make any necessary additions, changes, and deletions in the employee records.
4. Return to the Personic menu and choose Process Pending Employees to transfer the records to the Employee Master Information table (F060116).

Processing Options for Inbound Flat File Conversion (R47002C)

Transaction

1. Enter the transaction to process.
Separators

1. Enter the field delimiter.

2. Enter the text qualifier.
Process

1. Enter the inbound processor to run after successful completion of the conversion.

2. Enter the version for the inbound processor. If left blank, XJDE0001 will be used.

Processing Options for Process Pending Employees (R060116P)

Defaults Tab

These processing options specify the default information that the system uses when you run the report.

1. Security Business Unit

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies the security business unit from the Address Book table (F0101). Valid values are:

1 Supply the security business unit.

0 Do not supply the security business unit. Blank means the same as 0.

2. Tax Areas

1 = Not Required

0 = Required

Use this processing option to specify whether the Residence Tax Area and Work Tax Area fields are required when you add or change an employee record. The J.D. Edwards Payroll system uses the tax area fields to calculate payroll taxes for employees. Valid values are:

1 Tax area fields are not required. Enter this value only if you are not using the J.D. Edwards Payroll system to process payroll for employees.

0 Tax area fields are required. Enter this value if you are using the J.D. Edwards Payroll system. Blank means the same as 0.

3. Job Information

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies the Process Pending Employee Report (R060116P) with certain job information when you complete the Job Type field. The system retrieves information in the following job information fields from the Job Information table (F08001): Pay Type, Pay Frequency, WCI Code (Workers Comp Insurance Code), SC (Sub Class-Workers Comp), Benefit Group, and Union Code. Valid values are:

1 Supply job information.

0 Do not supply job information.

4. Job Category Codes

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies values for job category codes. Valid values are:

1 Supply default job category codes.

0 Do not supply default job category codes.

5. Country Code

Enter UDC Code

Use this processing option to specify the country code.

6. Contact Type

Enter UDC Code

Use this processing option to specify the user defined code for a contact type in the Address Book Who's Who table (F0111). If you leave this processing option blank, the system uses E (emergency contact) as the default.

To see the valid codes, click the visual assist.

7. Home Phone Type

Enter UDC Code

Use this processing option to specify the user defined code for a home phone type in the Contact Phone table (F0115).

8. Work Phone Type

Enter UDC Code

Use this processing option to specify the user defined code for a work phone type in the Contact Phone table (F0115).

9. Business Unit/Job ID Cross Reference

1 = Default

0 = Do Not Default

Use this processing option to specify whether the system automatically supplies values for the business unit/job ID information for the new employee. Valid values are:

1

Use default business unit/job ID information.

0

Do not use default business unit/job ID information.

Versions Tab

These processing options specify the version of the report that will be processed.

1. Applicant Information

Use this processing option to specify the version that the system uses for transferring applicant information. If you specify a version and the applicants for whom you are adding records on the Work With Applicants form (W08401B) have supplemental data, the system transfers the supplemental data along with the applicants' information to the new employee records. If you leave this processing option blank, the system uses the default version, ZJDE0001, which does not transfer supplemental data.

Note: For the system to transfer an applicant's supplemental data, you must also set a processing option to transfer supplemental data in the processing options for the Applicant Information program (P08401).

2. Address Book MBF

Use this processing option to specify the version that the system uses for the Address Book Master Business Function (MBF). If you are using interoperability transactions, you might want to specify a version that updates the Address Book table (F0101). If you leave this processing option blank, the system uses the default version, ZJDE0001.

Note: If you specify an Address Book MBF version, you must also set a processing option to indicate the interoperability outbound transaction in the processing options for the Address Book Master Business Function (P0100041).

Action Tab

These processing options specify whether the master files will be updated and the processed records purged when you run the report.

1. Update Master Files

1 = Update

0 = Do Not Update

Use this processing option to specify whether the system updates the Employee Master (F060116), Requisition Activity (F08105), Applicant Master (F08401), and Address Book (F0101) tables. Valid values are:

1 Update the Employee Master and Address Book tables.

0 Do not update, edit only.

If the processing option is set to 1, the system updates the Human Resource History table (F08042).

If the processing option is set to 0, you can review and revise the employee information before the system updates the databases. After reviewing and revising, you need to run the Process Pending Employees program (R060116P) to update the databases.

2. Purge Processed Records

1 = Purge

0 = Do Not Purge

Use this processing option to allow the system to delete records automatically after they have been successfully updated in the master tables. If you do not have the records deleted automatically, you can delete them later by running the Purge Pending Employees program (P060116PP). Valid values are:

1 Delete successfully processed records.

0 Do not delete processed records.