PeopleSoft®

EnterpriseOne 8.10
Human Capital Management
Self-Service PeopleBook

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Human Capital Management Self-Service PeopleBook
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About These EnterpriseOne PeopleBooks Preface

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

This preface discusses:

- EnterpriseOne application prerequisites
- Obtaining documentation updates
- Typographical elements and visual cues
- Comments and suggestions

Note

EnterpriseOne PeopleBooks document only fields that require additional explanation. If a field is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use EnterpriseOne applications.

See the *Foundation Guide*.

You might also want to complete at least one EnterpriseOne introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using EnterpriseOne menus and forms. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your EnterpriseOne applications most effectively.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Note

Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, *http://www.peoplesoft.com/corp/en/login.jsp*

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in EnterpriseOne PeopleBooks:

Typographical Convention or Visual Cue	Description
Italics	Indicates emphasis, topic titles, and titles of PeopleSoft or other book-length publications. Also used in code to indicate variable values.
Key+Key	A plus sign (+) between keys means that you must hold down the first key while you press the second key. For example, Alt+W means hold down the Alt key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicates an adjective that is used in a way that might not be readily understood without the quotation marks, for example "as of" date, “as if” currency, "from" date, and "thru" date.
Cross-references	EnterpriseOne PeopleBooks provide cross-references either below the heading “See Also” or preceded by the word See. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

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

Note

Example of a note.

Cautions

Text that is preceded by *Caution* is crucial and includes information that concerns what you must do for the system to function properly.

Caution

Example of a caution.

Comments and Suggestions

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

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

Or you can send e-mail comments to *doc@peoplesoft.com*.

While we cannot guarantee an answer to every e-mail message, we will pay careful attention to your comments and suggestions.

Self-Service Overview

Employee and manager self-service are applications that you can purchase in addition to the human capital management products. To use employee or manager self-service, you must have purchased some or all of the human capital management products. Below is a list of the employee and manager applications that you can use based on the human capital management modules that you have purchased:

Human Resources

Employee Self-Service

- Enroll in benefits (open enrollment)
- Review employee personal profile information
- Request a verification-of-employment letter
- Enroll in benefits (based on life events)
- Enter or revise competency information
- Enter automatic deposit information

Manager Self-Service

- Use Managers workbench
- Create organizational charts
- Approve automatic deposit information
- Change an employee status
- Manage compensation
- Review upcoming employee reviews
- Approve bank information for automatic deposits
- Run managers reports
- Setup information for new employees
- Enter data for verification-of-employment letters
- Assign delegates
- Approve competency information

Payroll

Employee Self-Service

- Review pay stubs
- Review and request leave time
- Review and update IRS Form W-4

Time and Labor

Employee Self-Service

- Enter timecards
- Review timecard information

Manager Self-Service

- Review and approve self-service timecards

PeopleSoft EnterpriseOne Human Capital Management Self-Service features enable employees and managers to conduct business, initiate transactions, and obtain needed information with rapid, cost-effective, online access to HR, payroll, and life management functions at any time. These robust features free HR personnel from administrative details so that they can focus on strategic tasks.

Many companies have discovered the benefits of offering self-service features to employees by allowing them to complete tasks online through a company intranet site. Using self-service to streamline administrative processes such as benefits enrollment or time entry, HR departments can dramatically enhance service levels by virtually eliminating labor-intensive, error-prone tasks.

When employees enter changes to their personal information from a workstation or a remote location, they eliminate traditional document handling. Employees and the HR department share the resulting time savings. For example, when employees get married, they might need to change their name, address, tax withholding information, and benefit elections. To change personal information, many organizations currently require employees to fill out paper forms and then submit the forms to the HR department. An HR representative might then review the forms and enter the information into the system. Employees can save time and increase productivity when they use self-service features to enter changes through an intranet site. The HR department can eliminate redundant processes, lower expenses, and reduce errors when staff members process the changes electronically. When employees enter new or updated information, the system records the changes in a temporary workfile. A company representative can then review the changes before posting them to the employee database.

Employees can use self-service features to enter and review the following types of information:

- Name and address
- Emergency contacts
- Dependents and beneficiaries
- Requests for verification-of-employment letters
- Benefits enrollment
- Timecards
- Paid time off
- Leave planning and requests

The system administrator can set up a self-service site on your organization's intranet that focuses only on information that is appropriate for your employees. Managers, supervisors, and administrators can use self-service features to review and update the following information online:

- Upcoming employee reviews
- Organization charts
- Employee compensation
- Employee competencies
- Requests for verification-of-employment letters
- Leave requests, leave accruals, and leave trends
- Employee setup process

Benefits Enrollment Self-Service

You can use self-service features to manage your benefit plans online. You can reduce data entry by implementing self-service benefits enrollment. With benefits enrollment self-service, employees can enroll in or change their own benefits through a web site on your company's intranet during open enrollment, when a new employee is hired, or when an employee has a life change such as marriage.

Some tasks that you can complete using self-service benefits enrollment are:

- Enroll in plans during open enrollment
- Change benefit plans because of a life event
- Enroll dependents and enter beneficiary information
- Print benefits statements

Compensation Management Self-Service

The Compensation Management system provides salary-planning tools that empower supervisors to make salary decisions that are based on real-time information. Supervisors can use a flexible Web tool in Manager Self-Service to recommend adjustments to employee salaries using the budgets, rules, and approval requirements that are defined by Human Resources. Compensation management self-service features give HR personnel more control over the salary-planning process while freeing them from administrative tasks that are historically associated with salary planning.

Benefits for HR include the following:

- Rules engines allow HR to define the parameters under which supervisors can operate and remove HR 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 prevent lost spreadsheets, therefore saving time and preventing security risks that are associated with mailing employee information.

Benefits for supervisors include the following:

- Web 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 on their recommendations.
- Summary information tells the supervisors immediately how they and their subordinate supervisors are doing against their budgets.
- Upper management can view the progress of the staff from a budget and salary review perspective.

The Compensation Management system can improve the salary review process for the Human Resources Department and management.

Competency Management Self-Service

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. You can use competency management to identify employee competencies (competencies that employees possess) and job competencies (competencies that the organization requires to perform a specific job within the organization). Employees can use competency-management self-service features to update their competency information, such as a training class attended, through a Web site on their company's intranet site. Managers can use self-service features of the Manager's Workbench program (P08712) to review employee competencies.

Benefits for employees include the following:

- Direct access to periodically review competency requirements for a job
- Direct access to review and update personal information
- Accurate, current information in the system that can be used for performance reviews, salary adjustments, or consideration for job changes

Benefits for managers include the following:

- Accurate information for employee performance appraisals, salary reviews, and job changes
- Reduced work requirements to review changes with each employee and input changes into the system
- Current information that can be shared with and used by PeopleSoft EnterpriseOne Performance Management software

Benefits for HR include the following:

- Provides accurate, real-time information updates to employee records without labor-intensive input
- Eliminates manual tracking of employee competency information
- Improves ability to accurately and impartially evaluate employee job changes
- Provides required data to track, categorize, and analyze workforce strengths and gaps

Global Leave Administration Self-Service

Global leave administration provides a convenient approach that employees can use to plan and review leave time. Employees can use self-service features to plan for vacations and other types of leave, create "what if" scenarios, and review used leave time.

Global leave administration also provides convenient leave management and tracking tools. Managers can use self-service features to track leave history, review requested leaves, and manage leave trends.

Employee Quick Hire

You can configure the New Hire Setup Workflow process to meet the needs of your organization. For example, you can set up workflow to send a message to the appropriate manager for an approval when a manager enters an employee salary amount that exceeds a predetermined amount. To automate workplace setup tasks for a new employee, you might choose to require approval at the process level or at the task level. You might also choose to escalate certain tasks if the designated individuals do not complete the tasks in an appropriate time frame.

When adding an employee using the employee quick hire program, the system automatically sends an e-mail message to the appropriate supervisor, requesting the supervisor to identify the setup tasks necessary for the employee. The system determines which supervisor to e-mail based on predetermined position relationships.

To respond to the e-mail request, the supervisor identifies setup tasks and approves the employee setup request. The system then initiates the New Hire Setup Workflow process. Sample tasks can also be supplied automatically based on the job type. The New Hire Setup Workflow process sends e-mail messages to the individuals in your organization who are responsible for completing the necessary tasks.

System Integration for Self-Service

Workflow is an integral part of many self-service features. Workflow management is a software approach that you can use to automate tasks, such as notifying a manager that a requisition is waiting for approval, using an e-mail-based process flow across a network. Workflow can send messages and approval forms to employees as a part of the process. Workflow can also e-mail one person or a group of people, or it can escalate a message that has not been answered within a certain time frame to another employee mailbox.

Your organization can set up self-service features to automatically initiate workflow processes. The employee setup process, for example, is a workflow-based process that distributes a series of tasks, approvals, and work orders to accomplish many of the setup requirements for a new employee. Managers can use the self-service employee setup feature to authorize computer equipment, set up office space, and issue a parking permit for a new employee. After a manager initiates the employee setup process, workflow displays the progress status for each task and notifies the manager when tasks are not completed within scheduled time frames.

You can also take advantage of self-service and workflow integration when an employee address change reflects a move to a different taxing locality. You can set up a workflow process that automatically responds to the locality change and e-mails a notification message to the payroll department.

Some additional tasks that you can automate by using workflow include the following:

- Discontinuing benefits and issuing a final check when terminating an employee
- Approving a requisition
- Changing an employee salary
- Initiating new employee setup

- Reviewing upcoming employee reviews by supervisor
- Processing verification-of-employment letters
- Approving a self-service tax form
- Reviewing changes in auto-deposit information

The following changes are examples of advantages that you can enjoy with the integration of self-service features and workflow:

- Eliminating redundant data entry
- Managing current, accurate information across all business operations
- Freeing personnel from administrative details

To prevent unauthorized access to confidential information, you can set up system security to allow users to view and change only their personal information, and information that they need for their jobs.

See Also

See the following topics in the *Human Capital Management Self-Service Guide*:

- *Employee Self-Service* for more information about tasks that employees can complete on an organization's website
- *Employee Self-Service Benefits Setup* for information about how to set up employee self-service benefits features
- *Manager Self-Service* for more information about features that managers can use to change personal information and to manage employees
- *Setting Up Manager Self-Service* for information about how to set up manager self-service features
- *Self-Service Time Entry* for instructions about setting up self-service time entry and entering self-service timecards

See the following topics in the *Human Resources Guide*:

- *Compensation Management* for complete information about setting up and using Employee Compensation Management features
- *Competency Management* for complete information about setting up and using Competency Management features

See the following topics in the *Time and Labor Guide*:

- *Global Leave Administration* for complete information about setting up and using Global Leave Administration features
- *Time and Labor* for overview information about time and labor tracking and related topics
- *Time Entry* for complete information about setting up and using time and labor features

See the following topic in the *Human Capital Management Foundation Guide*:

- *Adding Employee Records Using Employee Quick Hire* for specific instructions about hiring new employees

Employee Self-Service

Self-service allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services through desktop computers. For example, employees can use self-service to review and update personal data and enroll in benefits online. When employees update information through self-service, the changes made by the employee can be posted to a temporary workfile, where a company representative can review the changes before posting them to the employee database.

Employees can use self-service to perform the following functions online:

- Change name and address
- Change emergency contact information
- Request a verification-of-employment letter
- Request paid time off
- Review benefits information and enroll for new benefits
- Review and change dependents and beneficiaries information
- Review timecards
- Enter auto-deposit information

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.

Working with Personal Information Using Self-Service

You can use Employee Self-Service to review and change personal information online. As personal circumstances change, use this approach to review or change the current status of personal information, obtain documentation regarding employment, or review your paid time off. To use Employee Self-Service, each employee must have password-protected access to your software.

Requesting a Verification-of-Employment Letter

The Review Requests for Verification of Employment program (P05003) enables employees to submit requests online to verify salary and employment information. Concurrently, they can review the salary and employment information associated with their employee records.

Using processing options, the employer controls the user level. An employee can review information at the employee user level and make changes allowed for employees. An HR person can review information at the HR user level and perform functions that are allowed only at an administrative level.

After an employee has submitted a request for employment verification, a workflow process is started. The workflow process forwards the request to a designated HR administrator. The HR administrator then reviews the employment and salary information that the system has generated, makes any necessary revisions, and then forwards the information directly to the party previously specified by the employee.

Employees can use self-service to request that a verification-of-employment letter be sent to a creditor or loan officer. After requesting the letter, employees can review the progress of the request. The HR administrator can print or e-mail the completed letter.

► To request a verification-of-employment letter

From the Employee Self Service menu (G05BESS1), choose Verification of Employment.

1. On Work With Verification Of Employment Requests, complete the following field and click Add:
   - Employee No.

2. On Verification Of Employment Data, complete the following field on the Request Information tab:

    - Contact Name

3. Complete the following optional fields:

    - Company
    - Title
    - Phone Area / Number
    - Comment

4. Choose one or more of the following contact method options:

    - E-mail
    - Facsimile
    - Mail

5. Complete the following fields that apply to the contact method option you have chosen:
    - E-Mail Address
    - Fax Prefix / Phone No.
    - Address Line 1
    - Address Line 2
    - State
    - City
    - Postal Code
    - Country
6. Click the Employment Data tab.

7. Review the following pay information fields:
    - Date Started
    - Job Type/Step Description

- Continued Employment
- Pay Frequency
- Pay Class(H/S/P)
- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise
- Pay Period Salary
- Comment

8. Review the following pay information fields for the current year, one year prior, and two years prior.
   - Base
   - Overtime
   - Commission
   - Bonus
   - Other
9. Click OK.

   The Work With Verification Of Employment Requests form appears. Your letter is pending review.
10. To review the status of your request, click Find.
11. Review the following field for the request:
    - Revd Flag

Processing Options for Review Requests for Verification of Employment (P05003)

User Level Tab

Use this processing option to specify which user level the system uses.

---

1. User Level:

   1 or blank   Employee
   2   HR Clerk
   3   HR Administrator
   (Option 3 will not send a request
   through Workflow.)

Use this processing option to specify whether this program will be used by an employee, an HR clerk, or an HR administrator. Valid values are:

Blank Employee

---

1 Employee

2 HR clerk

3 HR Administrator (This option will not send a request through Workflow.)

Note: If this program is used by an employee or an HR clerk, the approval process will be routed through workflow, where the Workflow Setup tab must be set up.

Workflow Setup Tab

Use this processing option to specify which address number the system uses.

1. Address Number of VOE request processor (HRM):

Use this processing option to specify the address number of the HR person (or a distribution list) who will process VOE requests.

Reviewing Employee Personal Profile Information

Use the Employee Profile program (P060116) to review information that currently exists in your company's records. The information that you can review is in the following categories:

- Personal
- Company (Self-Service)
- Job (Self-Service)

The information in this location is for review only; you cannot change any of the fields. If you find information that is not accurate, or if you want to add information, you can contact HR to request changes or additions.

With proper administrative authority, you can also choose an employee record and then choose one of the following menu options:

- EE Profile
- Address Book
- Benefits Enrollment
- Employee DBA Instructions

When you choose the EE Profile option, the system displays Employee Profile and Job Information (P060116). When you choose the Address Book option, the system displays Address Book Revision (P01012) and provides an opportunity to input changes. When you choose the Benefits Enrollment option, the system displays Enrollment Overrides (P08330). You can also set a processing option to choose Enrollment With Eligibility (P08334). When you choose Employee DBA Instructions, the system displays Employee DBA Instructions (P050181).

Managers can review this information from the Manager's Workbench (P08712). The HR administrator can review this information by accessing Employee Profile from the Employee Management menu (G05BE1). On Employee Profile and Job Information, your personal information is always displayed. You can click tabs for Company or Job information. Managers and HR representatives can also expedite their review of information by choosing multiple employee records on the Work With Employees form and then choosing Next on Employee Profile and Job Information to step through the employee records.

Prerequisite

- ❑ Ensure that the Human Resource field in the processing options for Employee Profile (P060116) has been se to the HR administrator's address number. The Enrollment tab of the processing options is not functional for this application. Do not enter or change the value for this tab.

► To review employee personal profile information

From the Employee Self Service menu (G05BESS1), choose Employee Personal Profile.

1. On Employee Profile and Job Information, review the data on the Personal tab.
2. Click each of the subsequent tabs and review the information.
3. If you find information that requires correction or you desire to have new information added, click Contact HR.
4. On Send Internal Work Item, complete the following fields:
   - Subject
   - Phone Number

   The system provides the default address number of the HR administrator in the Send To field, as specified by the processing option. The system provides your name as the default in the Call From field, which is not available for change.
5. Use the text area of the form to communicate detailed information that you want to provide to HR. When finished, click OK.

   Workflow sends your message to the HR administrator for action on your request.

Processing Options for Employee Profile (P060116)

Enrollment Tab

This processing option specifies the program that the system opens when the user chooses the benefits enrollment menu option.

Benefits Enrollment

E = Enroll with Eligibility
O = Enroll with Overrides (Default)

Use this processing option to specify whether to enroll an employee with eligibility for benefits or with overrides. Valid values are:

0 Enroll with overrides (default).

E Enroll with Eligibility.

Human Resource Tab

This processing option specifies the default that the system uses to send an email message to the appropriate human capital management representative.

Address Number

Use this processing option to specify the address book number that the system uses to retrieve the e-mail address from the Remark field on the Who's Who Address Book form.

Versions Tab

These processing options specify the program version that the system uses for each program.

1) Address Book Version

Blank = ZJDE0001
A valid version

Use this processing option to specify the version to use for the Address Book Search form. If you leave this processing option blank, the system uses the default version, ZJDE0001.
2) Enrollment with Eligibility Version

Blank = ZJDE0001
A valid version

Use this processing option to specify the version that the system uses for the Enrollment with Eligibility form. If you leave this processing option blank, the system uses the default version, ZJDE0001.

3) Enrollment with Overrides Version

Blank = ZJDE0001
A valid version

Use this processing option to specify the version that the system uses for the Enrollment with Overrides form. If you leave this processing option blank, the system uses the default version, ZJDE0001.

4) Employee DBA Instructions Version

Blank = ZJDE0001
A valid version

Use this processing option to specify the version that the system uses for the Employee DBA Instructions form. If you leave this processing option blank, the system uses the default version, ZJDE0001.

Reviewing Pay Stubs Using Employee Self-Service

You can use Employee Self-Service to review the accuracy of your pay stubs and ensure that they are complete. If the portal component for the Stub Information History program (P07186) exists on your organization intranet portal, you can click the link to review your personal pay stub history. An HR administrator can access the same program from a menu and enter an employee identification number to review pay stub history for various employees.

► To review pay stubs using employee self-service

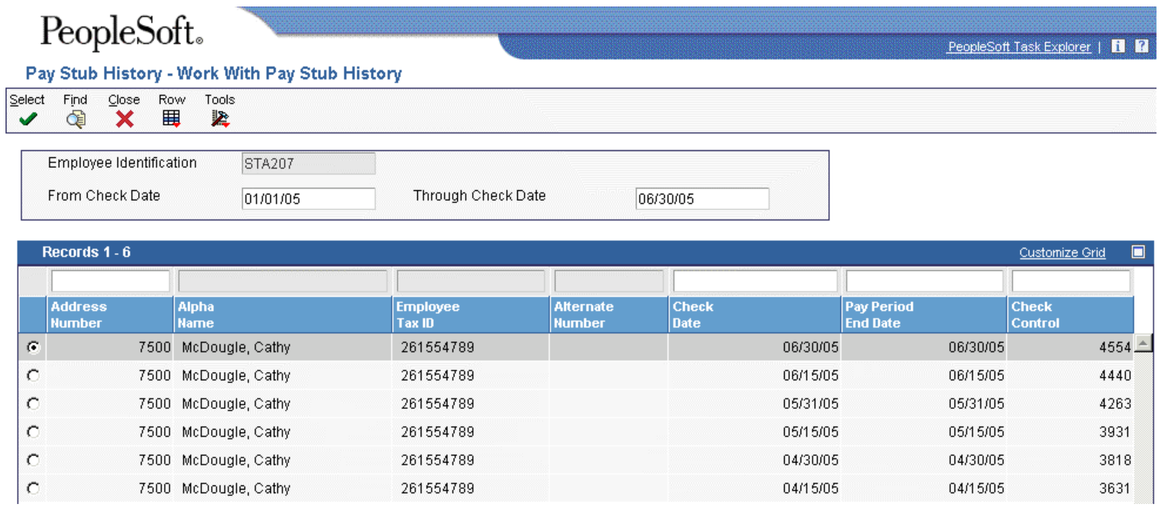
From the portal that is created by your organization, access Pay Stub History.

Alternatively, for HR access, from the U.S. History Inquiries menu (G07BUSP14), choose Pay Stub History.

1. On Work With Pay Stub History, to display entries for previous pay periods, complete the following fields and then click Find:
    - Employee Identification

When you access this program from an organization portal, the system reads the employee login identification, disables this field, and displays pay stub records for the current user.

- From Check Date
- Through Check Date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Pay Stub History - Work With Pay Stub History

Select Find Close Row Tools

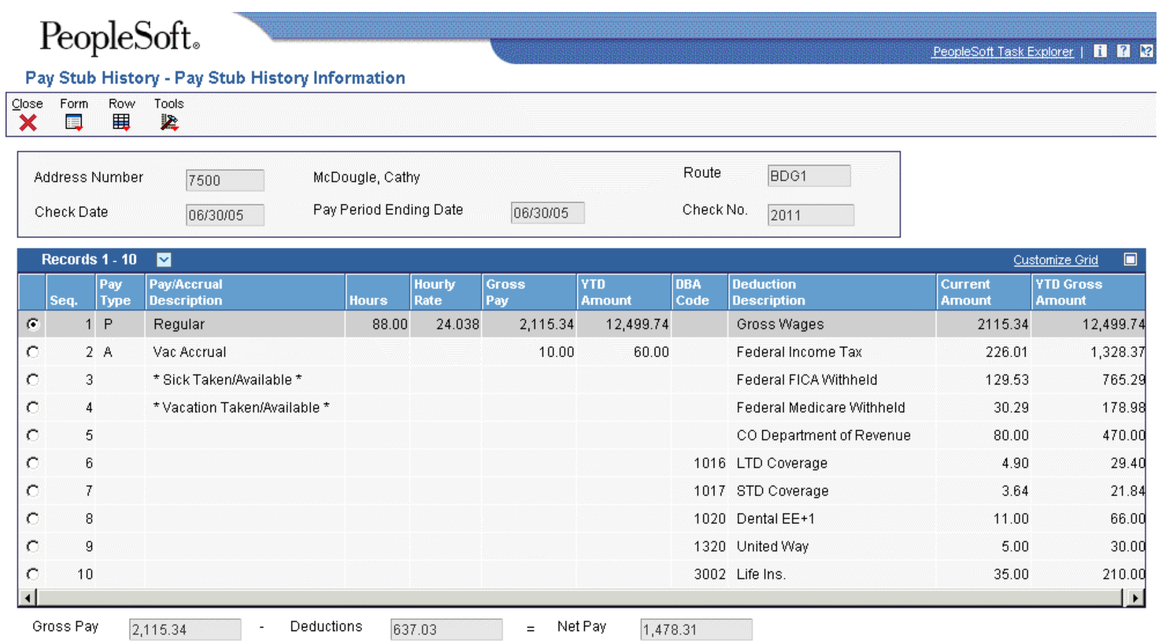
Employee Identification STA207

From Check Date 01/01/05 Through Check Date 06/30/05

Records 1 - 6 Customize Grid

	Address Number	Alpha Name	Employee Tax ID	Alternate Number	Check Date	Pay Period End Date	Check Control
◉	7500	McDougle, Cathy	261554789		06/30/05	06/30/05	4554
○	7500	McDougle, Cathy	261554789		06/15/05	06/15/05	4440
○	7500	McDougle, Cathy	261554789		05/31/05	05/31/05	4263
○	7500	McDougle, Cathy	261554789		05/15/05	05/15/05	3931
○	7500	McDougle, Cathy	261554789		04/30/05	04/30/05	3818
○	7500	McDougle, Cathy	261554789		04/15/05	04/15/05	3631

2. Choose a pay stub record and click Select.


PeopleSoft. PeopleSoft Task Explorer

Pay Stub History - Pay Stub History Information

Close Form Row Tools

Address Number 7500 McDougle, Cathy Route BDG1

Check Date 06/30/05 Pay Period Ending Date 06/30/05 Check No. 2011

Records 1 - 10 Customize Grid

	Seq.	Pay Type	Pay/Accrual Description	Hours	Hourly Rate	Gross Pay	YTD Amount	DBA Code	Deduction Description	Current Amount	YTD Gross Amount
◉	1	P	Regular	88.00	24.038	2,115.34	12,499.74		Gross Wages	2115.34	12,499.74
○	2	A	Vac Accrual			10.00	60.00		Federal Income Tax	226.01	1,328.37
○	3		* Sick Taken/Available *						Federal FICA Withheld	129.53	765.29
○	4		* Vacation Taken/Available *						Federal Medicare Withheld	30.29	178.98
○	5								CO Department of Revenue	80.00	470.00
○	6							1016	LTD Coverage	4.90	29.40
○	7							1017	STD Coverage	3.64	21.84
○	8							1020	Dental EE+1	11.00	66.00
○	9							1320	United Way	5.00	30.00
○	10							3002	Life Ins.	35.00	210.00

Gross Pay 2,115.34 - Deductions 637.03 = Net Pay 1,478.31

3. On Work With Pay Stub History, review the copy of your pay stub.

   To review detail information for piecework, you can choose Piecework Stub from the Row menu.

4. To print the information, choose Print from the Form menu.

Entering Automatic Deposit Information Using Self-Service

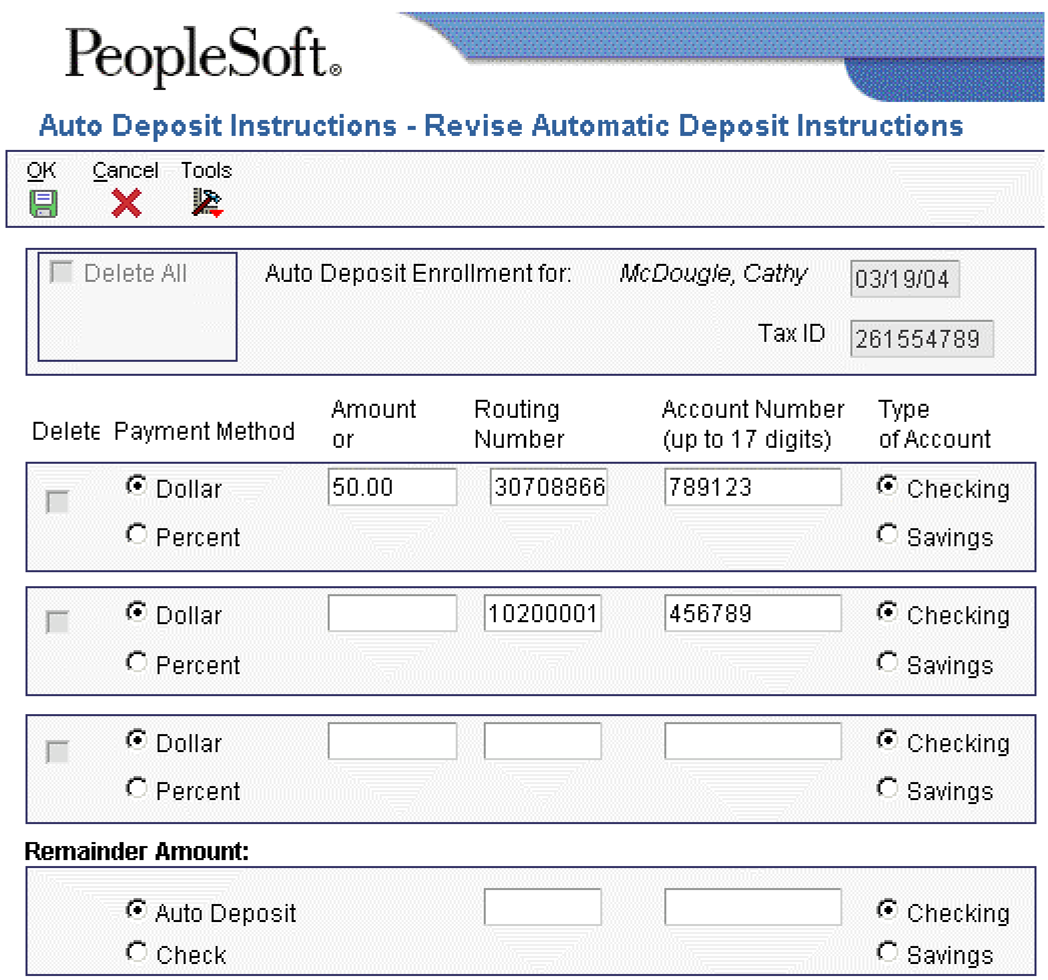
Use the Auto Deposit Instructions program (P055011) to enter automatic deposit information when you want all or part of your payment each pay period to be deposited directly into your bank account. You can choose to receive part of your payment in check form and the rest in automatic deposit form. You also can divide your payment among multiple accounts. Typically, the automatic deposit information that you enter is reviewed and approved by a payroll representative before the information takes effect. You will receive a message from the payroll representative that indicates whether the information that you entered has been approved.

You can also revise any existing automatic deposit information that you or a payroll representative entered previously.

When you use self-service to enter or update automatic deposit information, the new deposit information is processed in the next payroll cycle, and the pre-note test is eliminated.

► To enter automatic deposit information using self-service

From the Employee Self Service menu (G05BESS1), choose Auto Deposit Instructions.



1. On Revise Automatic Deposit Instructions, click one of the following options:
   - Dollar1
   - Percent1
2. Complete the following fields:
   - Amount or Percent
   - Bank Trnst No.
   - Bank Account
3. To indicate the type of account, click one of the following options:
   - Checking1
   - Savings1
4. Repeat steps 1-3 for as many accounts as you want to have a portion of your payment deposited.
5. If, after completing steps 1-4, any additional portion of your payment is unallocated, click one of the following options:
   - Remainder Auto Deposit
   - Remainder Check
6. Complete the Routing Number and the Account Number
7. Click one of the following options in the Remainder Amount group box:
   - RemChecking
   - RemSavings
8. Click OK.

   The system displays a message that indicates that the information you entered has been submitted to a payroll representative for approval.

Working with Competency Information Using Self-Service

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as C programming skills, professional license, or fluency in French, are called *competencies*.

Your organization uses competency management to track the competencies that you possess and to compare these competencies with those that are required for your job. Tracking competencies helps managers and human resources representatives determine the competencies that you need in order to satisfy the requirements of your current job, as well as a job that you hope to obtain in the future. Competency management also helps you and your manager create clear career goals and performance objectives for you.

To simplify the process of maintaining competency information for employees, you can use self-service to enter and revise your own competency information.

Entering Competency Information Using Self-Service

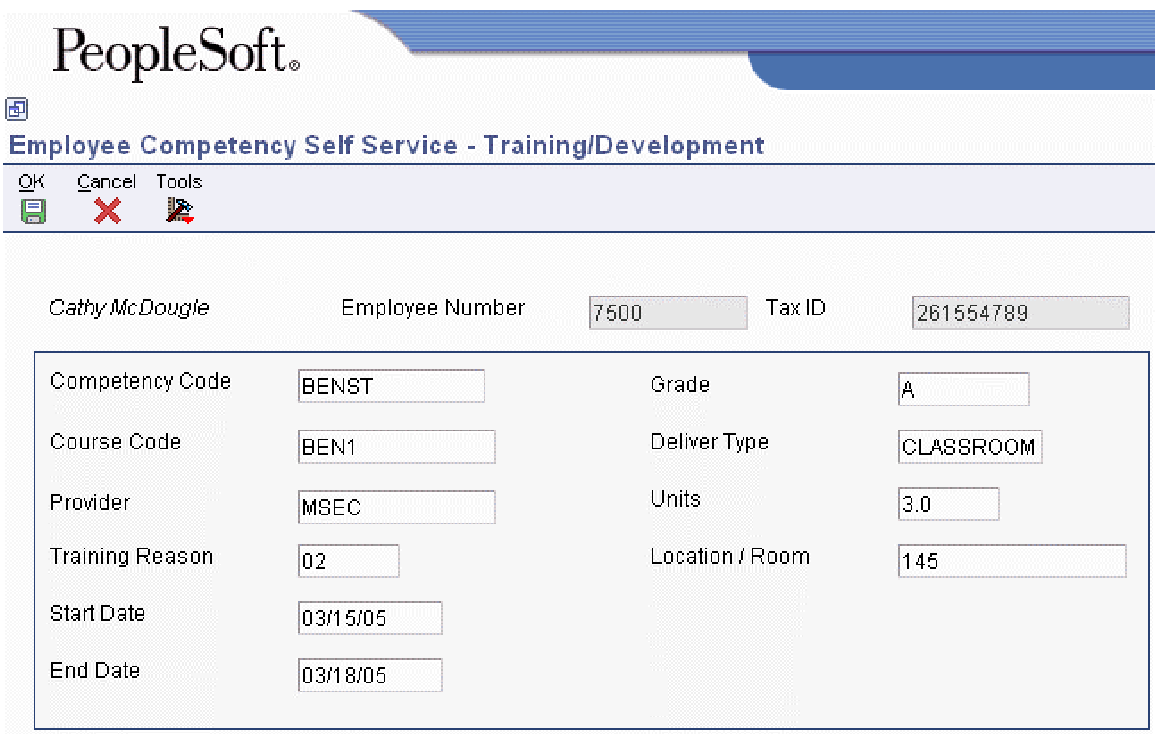
Because you typically know your professional background more thoroughly than anyone else in your organization, you can enter your own competency information, and the system submits it to someone else, such as your manager or a member of the human resources department, for approval. For example, others might not be aware that you are working on an advanced degree or a professional certification that is not directly related to your current job. Self-service allows you to update your competency information as you acquire each competency. You can also revise your existing competency information.

After you enter competency information, the appropriate person receives a Workflow message that indicates that competency information is waiting for approval. That person must then review the information and enter your level of proficiency in each competency.

► To enter a training competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
   - Training/Development



PeopleSoft.

Employee Competency Self Service - Training/Development

OK Cancel Tools

Cathy McDougle Employee Number 7500 Tax ID 261554789

Competency Code	BENST	Grade	A
Course Code	BEN1	Deliver Type	CLASSROOM
Provider	MSEC	Units	3.0
Training Reason	02	Location / Room	145
Start Date	03/15/05		
End Date	03/18/05		

2. On Training/Development, complete the following fields:
   - Competency Code
   - Course Code
   - Provider
   - Training Reason

3. Complete the following optional fields and click OK:
    - Start Date
    - End Date
    - Grade
    - Deliver Type
    - Units
    - Location / Room
4. Repeat steps 2 and 3 for each training competency you want to enter.

► To enter a skill competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
    - Skills
2. On Skills, complete the following field:
    - Competency Code
3. Complete the followings optional fields and click OK:
    - Skill Description
    - Date Acquired
    - Status
4. Repeat steps 2 and 3 for each skill competency you want to enter.

► To enter an accomplishment competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
    - Accomplishments
2. On Accomplishments, complete the following required fields:
    - Competency Code
    - Accomplishment Type
3. Complete the following optional fields and click OK:
    - Date Achieved
    - Awarding Organization
    - Date Awarded
    - Status
4. Repeat steps 2 and 3 for each accomplishment competency you want to enter.

► To enter a certification competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
    - Certification
2. On Certifications, complete the following required fields:
    - Competency Code
    - Licensing Body
    - Renewal Code
    - Expiration Date
3. Complete the following optional fields and click OK:
    - Licensing Number
    - Score Rating
    - Status
    - Issue Date
4. Repeat step 2 and 3 for each certification competency you want to enter.

► To enter an education competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
    - Education
2. On Education, complete the following required fields:
    - Competency Code
    - Institution Code
3. Complete the following optional fields and click OK:
    - Location
    - Degree Date
    - GPA Rating
    - GradeBase
    - Honorary
4. Repeat steps 2 and 3 for each education competency you want to enter.

► To enter a language competency

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose the following option and click Add:
   - Language
2. On Language, complete the following required field:
   - Competency Code
3. Complete the following optional fields and click OK:
   - Status Date
   - Status
4. Repeat steps 2 and 3 for each language competency you want to enter.

Revising Competency Information Using Self-Service

After you enter competency information for yourself, you can review it to verify that it is correct. If you find an error or omission, you can revise the information to correct it. After you revise competency information, the appropriate person, such as your manager or a member of the human resources department, receives a Workflow message that indicates that the information is waiting for approval.

The process that you use to revise competency information is similar to the process that you use to enter this information, except that you must first search for the competency that you need to revise.

► To revise competency information using self-service

From the Employee Self Service menu (G05BESS1), choose Employee Competency Self Service.

1. On Competency Self Service, choose one or more of the following options that correspond to the type of competency that you need to revise, and then click View:
   - Training/Development
   - Skills
   - Accomplishments
   - Certification
   - Education
   - Language

2. On Work With Training/Development, Work With Skills, Work With Accomplishments, Work With Certifications, Work With Education, or Work With Language, complete the following field:
   - Competency Code
3. To narrow your search, complete any of the other fields and then click Find.
4. Choose a record in the detail area, and then click Select.
5. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, make the necessary changes and then click OK.

See Also

- *Entering Competency Information Using Self-Service* in the *Human Capital Management Self-Service Guide* for more specific instructions for entering competency information

Processing Options for Competency SelfService (P05130)

Display Tab

Use this processing option to specify whether the system displays manager information on the forms.

Display Manager Information

Use this processing option to specify whether the system will display the status, verification information, and competency level on the forms. Valid values are:

Blank Do not display the information.

1 Display the information.

Manager Self-Service

Managers can accomplish many tasks with less effort and time by using self-service procedures. These procedures might be available through a company intranet site or from your software menus for employees and managers. This approach reduces document handling between employees and the human resources department by allowing employees to access information, forms, and services using desktop computers.

Managers can use self-service and Managers Workbench (P08712) programs to perform a wide range of tasks for which they are responsible. These tasks include the following:

- Requesting employee status changes
- Running managerial reports
- Assigning delegates
- Generating a graphic organizational chart and reviewing the hierarchical structure of the jobs within an organization
- Reviewing jobs and job competencies in an organization
- Performing a gap analysis of employee and job competencies
- Entering employee competency information
- Reviewing employee profiles
- Reviewing employee information, such as name and address, time entry, emergency contacts, paid time off balances, and skill competencies

Additional self-service programs are available for managers use that are not included in the Managers Workbench. These programs, accessible from the Employee and Manager Self Service menus, are:

- Upcoming Reviews by Supervisor (P052200)
- Employee Setup Workbench (P08710)
- Auto Deposit Instructions (P055011)
- Competency Self Service (P05130)

The type of information that is available on your self-service website is defined by your company. For example, your company might allow employees to make address changes but not benefits changes.

Many of the manager's self-service programs employ Workflow. Workflow is an e-mail based system that automates tasks by using e-mail to reduce the processing time that it normally takes to complete a task. For example, managers can initiate an employee's promotion using Status Change from Managers Workbench. When the process is initiated, a series of messages within Workflow are e-mailed to each manager who must be informed about the change and who must approve the change.

Only selected applications can be enabled on an intranet site. The preceding tasks are based on forms and data provided for self-service in a Windows environment. The navigations, forms, steps, and data shown in these tasks might not correspond to your customized, self-service intranet site. If you are using self-service from your self-service site, you must always log onto the site as the first step. When you log on, the system uses your employee number to retrieve your own information.

Managers Workbench

You can perform many common supervisory tasks from a centralized location using Managers Workbench (P08712). From this location, your employee information is at your fingertips, enabling you to analyze job and employee information, initiate changes, and save time when you need reports that can be processed as a list or on an individual basis. Your own personal employee information is also available from within this application.

Using the Managers Workbench, you have quick, easy access to information that you can review and use for budgeting, planning, decision-making, and approving. This application uses workflow to save time communicating changes and obtaining required authorizations.

Note

The Managers Workbench separates access to your personal information from access to your employees' information by the use of Form and Row menus. For example, when you choose options from the Form menu, you can access your own personal information and make a variety of changes. When you choose options from the Row menu, the system displays your employees' information. A manager can view an employee's information, but generally cannot make changes directly to an employee's record.

The following options are available in the Managers Workbench:

Self-Service

You can choose My Self Service Ap from the Form menu, and then perform the following tasks:

- Review or change your name and address information
- Review your time entry
- Review your paid time off
- Review or update your emergency contacts
- Review and enter your competency information

When you first choose one of your employees and then choose Self Service Apps. from the Row menu, you can perform the following tasks:

- Review employee name and address information
- Review and revise employee time entry
- Review employee paid time off
- Review employee emergency contacts
- Review and revise employee competency information

You can also review employee data, analyze employee skills, and prepare for employee coaching sessions with these self-service options.

Status Change

Status Change includes the following preset options for changing an employee's status:

- Requesting a promotion
- Changing an employee's assigned location
- Changing an employee's department or supervisor
- Changing an employee's job status
- Requesting a leave of absence

This centralized approach to managing employee changes allows you to initiate, review, and approve changes for your employees. The User Defined status change category allows your Human Capital Management department to set up an additional employee change category. For example, you might want to create a new category for compensation review.

Reports

The following reports are available from the Managers Workbench (P08712):

- Managers Reports (P08740)
- Headcount (R081021)
- Organization Chart (P08713 or P08713W)
- Turnover Reports (R080430)
- Phone List (R080115)
- Time Entry (R053001)

Managers Reports (P08740) is a preset list of reports, defined by your Human Capital Management department, that you can use to meet frequent reporting requirements. Your human capital management administrator can create one or more versions that include reports that you commonly use. Adding versions is an available option only in a Windows environment. This feature cannot be used in a Web environment.

When you are using a Web (HTML) environment, the Organization Chart report prints a diagram of the organization, using your managerial position as the top level. When you are using a Windows environment, to fully use this feature, you must have Microsoft Visio software installed on your computer. When you create organization charts from a Windows environment, you have a wide range of chart and output options.

Use these reports to help meet your needs for organizational reporting, planning, review, and management of your employees. You can generate reports for the employee group below your job level, or you can select a subordinate management level and generate reports with that level at the top of the hierarchy.

You can use the Submitted Reports option on the Form menu to review the status of reports that you have previously submitted.

Supplemental Data

Depending on what kinds of supplemental data you maintain, your human capital management administrator can set up databases for each system. You can use supplemental data to track information that is not included in the standard master tables. For example, you might want to track information such as products purchased, sales information, delivery methods, internal ratings, or work history. Supplemental database code information is stored in the Supplemental Database Setup table (F00090).

Gap Analysis

Use Gap Analysis to help you compare the skill competencies required for a job and the current competencies of an employee. Often used in conjunction with Job Competencies In An Organization, these functions are useful for organizational planning and in preparation for employee performance reviews.

Performance

Use Employee Performance to create new appraisals, review and change current appraisals, and review historical appraisal information. You can review your personal performance appraisal by choosing Performance from the Form menu.

When you are using the performance options, you can also access supplemental data from the Performance menu to record additional information that you want to track.

Employee Profile

Use Employee Profile to review employee data obtained from the Employee Master Information table (F060116). You can also use this function to contact your Human Capital Management department about updates to an employee record.

Attachments

Attachments can be added as part of the setup function to provide information for all managers who use any of the Managers Workbench applications. These can include instructions, reminders, or miscellaneous information.

You can also add attachments while using Managers Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, another manager cannot view the notes that you attach.

Jobs In An Organization

Use Jobs In An Organization to review how each job fits into the hierarchical levels of the organizational structure. You can use this information to plan for new jobs and to determine the competencies that are associated with each job. When you access this program from Managers Workbench, you can review information, but you cannot change it.

Compensation Review

Use this program to review compensation data for any of your employees. The program provides you with a workbench that provides exits for the following:

- Viewing and changing salary recommendations
- Viewing the salary budget allocation, budget spent, and budget remaining by increase types
- Submitting salary recommendations up to the next level supervisor for approval
- Returning salary recommendations down to the previous level supervisor for salary rework
- Providing access for a human capital management administrator to view or change salary recommendations of a specified supervisor with the use of a processing option

Employee Letters

When you need to send written information to employees, you can use the mailmerge features of your software to efficiently produce letters that you mail to all of your employees. For example, you can quickly generate a letter to a group of your employees who are included in a new marketing campaign. Or you can generate a mass mailing to all of your employees to explain a new benefit option.

Job Competencies In An Organization

Use Job Competencies In An Organization to see how job competencies are assigned to the hierarchical levels of the organizational structure. You can use this information to determine the competencies that apply to you and the employees who report to you.

Approvals

Use Approvals to expedite the workflow process for your employees. When an employee enters information that requires your approval, for example, you can use this Form menu option to review all requests and take appropriate action.

Delegates

Use My Delegates, on the Form menu, to set up subordinates who are authorized to use Managers Workbench in your absence or to enable others to perform managerial functions. After the initial setup, the delegates that you select can access Managers Workbench at your organizational level and then perform functions at an authority level that you specify to help you review, change, and approve employee information.

Attachments

Attachments can be added as part of the setup function to provide information for all managers who use any of the Managers Workbench applications. These can include instructions, reminders, or miscellaneous information.

You can also add attachments while using Managers Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, another manager cannot view the notes that you attach.

See Also

See the following topics in the *Human Resources Guide*:

- *Assigning Competencies to Employees* for more information about working with employee competencies
- *Reviewing Gap Analysis Online* for additional information and procedures for gap analysis
- *Attaching Jobs to Organizational Levels* for more information about managing jobs
- *Attaching Job Competencies to Organizational Levels* for more information about managing job competencies

See the following topics in the *Human Capital Management Self-Service Guide*:

- *Employee Self-Service* for more information about making self-service changes and the required procedures
- *Changing an Employee Status* for more information and procedures about managing employee status changes
- *Creating Organizational Charts* for additional information about how to create organizational charts in each environment
- *Reviewing Employee Personal Profile Information* for additional information and procedures

See the following topics in the *Human Capital Management Foundation Guide*:

- *Working with the Supplemental Database* for more information about using the supplemental database
- *Creating Employee Letters* for more information about employee letters

► To use Managers Workbench

From the Manager Self Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, choose one of the following options and then click Find to display a list of your employees:
   - Active Employees
   - All Employees

   When a processing option is set appropriately, the system reads the address book number of the manager who is logged into the system, automatically displays that information, and then displays the list of employees who report to this manager.

2. To perform a managerial function for an employee, choose an employee record and then choose an option from the Row menu.

   You can access your personal information and follow up on previous tasks that you initiate by choosing an option from the Form menu.

Compensation Management Self-Service Considerations

Your organization might have set up the Compensation Management system as a self-service application that allows you to manage the salary reviews of the employees who report to you. If you access the Compensation Management system from a self-service program, such as the Manager's Workbench (P08712), you can make salary recommendations within your own management hierarchy only. The supervisor field is disabled.

See Also

- *Setting up Manager Self-Service* in the *Human Capital Management Self-Service Guide* to specify processing options that automatically include a manager's address book number when you access Manager's Workbench (P08712) and the linked programs

Processing Options for Managers Workbench (P08712)

User Level Tab

1. User Level

Blank or 1 = Manager.
2 = HR personnel.

Use this processing option to specify whether management, employees, or HR personnel will use the application. Valid values are:

Blank Management

1 Employees and management

2 HR personnel

Version Tab

1. Compensation Review (P08810)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

2. Status Change (P08720)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

3. Status Change Review (P087201) from Form Exit
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

4. Job Competencies In An Organization (P08006)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

5. Job In An Organization (P08007)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

6. Gap Analysis (P08008)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

7. Managers Reports (P08740) from Form Exit
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

8. Managers Delegates (P08750)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

9. Resource Competency Information (P05100)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

10. Create Performance Appraisal (P087711)
Blank = ZJDE0001

Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

11. Current Performance Appraisals (P087712)
Blank = ZJDE0004

Use this processing option to specify a program version. If you leave this option blank, the system uses a default version as follows:

- If user level is set to 1, the system uses version ZJDE0004
- If user level is set to 2, the system uses version ZJDE0006

12. Historical Performance Appraisals (P087712)
Blank = ZJDE0005

Use this processing option to specify a program version. If you leave this option blank, the system uses a default version as follows:

- If user level is set to 1, the system uses version ZJDE0005
- If user level is set to 2, the system uses version ZJDE0006

Changing an Employee Status

Changing an Employee's Status, one of the applications within Manager's Workbench (P08712), provides a centralized approach to implementing common changes for employees who report to you or to one of your subordinate managers. Using this approach, you can manage some of the most common types of employee changes with a minimum of time and effort.

Using this approach, when you choose the type of change desired for a specified employee and implement a change, the system automatically notifies your HR department and any other managers who must approve the change. You will also be able to review the status of the approvals to stay current with the changes you have initiated.

You can perform any of the following, preset tasks:

- Promoting an employee
- Changing an employee's job status
- Relocating an employee
- Changing an employee department or supervisor

In addition to the five preset tasks listed above, two additional options exist that you can define in UDC 08/S4 to meet your specific requirements. For example, you might define this option to change an employee's salary. Working with your HR administrator, you can set up similar tasks or change any of the existing, pre-set tasks to use any combination of the data in the Employee Master Information table (F060116).

Requesting an Employee Status Change

To initiate an employee change, you can use the Employee Status Change program (P08720). You normally access this program through the Manager's Workbench program (P08712). The system automatically displays tabs and fields on the change request form that are required to complete the change that you request.

► To request an employee status change

From the Manager Self Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click one of the following options and click Find to display your subordinates.

    - Active Employees

      The Active option displays only employees with an active payroll status, including employees who are on a leave of absence.

    - All Employees

      The All Employees option displays all employees, including those with a terminated status.

2. Choose the desired subordinate's record from the detail area.

   The first Employee's Name column displays the organizational structure that is subordinate to your position. You can click the plus sign to the left of a manager's name to display that manager's subordinates.

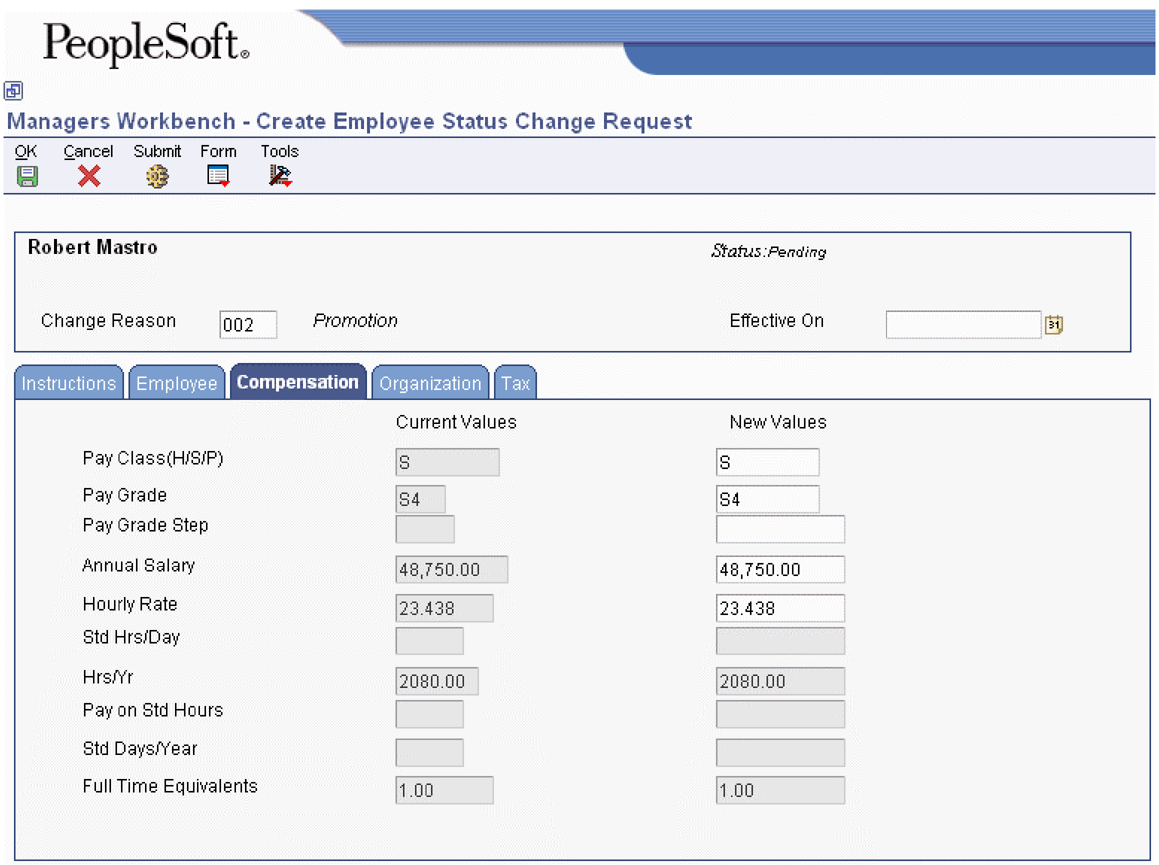
3. From the Row menu, choose Status Change Req and then Status Change.
4. On Select Employee Status Change Request, choose one of the following options:

   - Change1
   - Change2
   - Change3
   - Change4

   The system administrator can define values for the following fields to meet the needs of the organization:

   - Change5
   - User Defined

5. To display notes or instructions about the change process, click the icon next to the option.
6. Click Add.



7. On Create Employee Status Change Request, complete the following fields:
   - Change Reason
   - Effective On
8. Read the comments on the Instructions tab, and then click the next tab to enter appropriate changes to the active fields. Fields that are not applicable to the type of change selected are not available for changes.
9. Click each of the remaining tabs and enter changes as appropriate. Some change tasks might require more tabs than can fit on the form. If more tabs exist that you need to access on a subsequent form, the system activates the Next option in the menu bar.
10. After you review information for all tabs and complete the changes, perform one of the following:
    - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
    - Click Submit to save and submit the request for approval. After you submit a request, you cannot revise it except to enter a new Change Reason or to change the Effective On date.

    If you need to change a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

    The system will automatically generate workflow messages in the Employee Work Center for the appropriate managers. The Employee Master Information table (F060116) is updated when the required approvals have been completed.

Processing Options for Employee Status Change (P08720)

Process Tab

1. Mail Box Designator

Blank = 01 (Personal In Basket)

Use this processing option to specify the name of the mail box in the Employee Work Center where your workflow notifications and approval messages are sent.

To create a new mail box, add a new record to the 02/MB UDC.

2. Final Status

Use this processing option to specify the final status for the Employee Status Change records (F08720) when the process has been successfully completed.

3. Allow Delegates

0 = No

1 = Yes

Use this processing option to specify whether you want to allow the use of delegates. If a manager defines a delegate, this employee can perform certain tasks on behalf of the manager. Valid values are:

0

No

1

Yes

4. Perform Employee Master Field Edits
   0 = No
   1 = Yes

Use this processing option to specify whether you want the system to save information that you change in the Employee Status Change program (P08720) in the Employee Master Information table (F060116). Valid values are:

0

No

1

Yes

User Level Tab

---

1. User Level
   1 = Manager/Employee Level.
   2 = HR Administrator Level

Use this processing option to specify whether the application is used by a manager or by HR personnel. Valid values are:

Blank

Manager

1

Manager or a manager's delegate

2

HR personnel

1. Status Change Type 1

Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

2. Status Change Type 2

Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

3. Status Change Type 3

Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

4. Status Change Type 4

Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

5. Status Change Type 5

Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

6. Job Information Change

0 = Do not use default data

1 = Use default data

Use this processing option to specify whether the system automatically displays job information from the employee record when you change a job type for an existing employee. The system automatically includes pay frequency, union code, pay class, pay grade, overtime exempt, pay grade step, and benefit group. Valid values are:

0

Do not use default data

1

Use default data

7. Business Unit/Job ID Information Change
0 = Do not use default data
1 = Use default data

Use this processing option to determine whether the system automatically includes business unit and job cross-reference information from the employee record when you change a job type for an existing employee. The system automatically uses the union code, workers compensation, and benefit group from the Business Unit/Job Id. X-Ref table (F08005). Valid values are:

0

Do not use default data

1

Use default data

Reviewing a Status Change Request

You can use the Status Change Review program (P087201) to examine a request that you have previously submitted, review notes that relate to a request, or follow up on a request that has not been approved within a reasonable amount of time.

If a request has not been approved, you can use the escalation monitor to determine possible reasons for the delay and restart the process. Use one of the following options, depending on the apparent cause of the delay:

- Escalation monitor. Provides a report of all halted workflow processes and moves the requests to the next stage.
- Escalate. Moves a specific request to the next stage if it has been halted due to payroll lockout, effective date, or approval inactivity.
- Restart. Restarts a specific status change process, deleting any associated workflow messages.

► To review a status change request

From the Manager Self Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click one of the following options depending on whether you want to see only active employees who work for you or you want to include employees whose employment has been terminated.
   - Active Employees

     The Active Employees option includes employees who are on a leave of absence.

   - All Employees
2. Choose the desired subordinate's record from the detail area.
3. From the Row menu, choose Status Change Request and then choose Status Change Review.
4. On Work With Status Change, choose the desired employee's record and click Select.

   The system automatically displays the required tabs and fields on the form. Depending on the pending change, a different number of tabs might appear.

5. On Modify Employee Status Change Request, review the information on each of the tabs and enter required changes. Fields that are not applicable to the type of change selected will not be available for changes. If more tabs exist that you need to access on a subsequent form, the Next option in the menu bar will be available.
6. After you have reviewed the information for all tabs and completed the changes, perform one of the following actions:
   - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
   - Click Submit to save and submit the request for approval and then click OK on the Workflow Pending Review Notification.

     After you submit a request it cannot be revised except to enter a new Change Reason or to change the Effective On date.

   If you need to make additional changes to a request after you have submitted it, but before it has been approved, cancel the request and create a new one.

   The system automatically generates workflow messages in the Employee Work Center (P012501) for the appropriate managers. The Employee Master Information table (F060116) is updated when the required approvals are complete.

7. On Work With Status Change, choose Escalation Monitor from the Form menu to generate a report of and move all halted processes to the next stage.
8. To move a specific request to the next stage, choose a record and then choose Escalate from the Row menu.
9. To restart a specific status change process and delete any pending workflow messages that are linked to the process, choose a record and then choose Restart from the Row menu.

Processing Options for Status Change Review (P087201)

Processing Tab

These processing options allow you to activate potential application activities that provide managers with a broader range of control over workflow and management options.

---

1. Allow Delegates
   1 = Yes
   0 = No

Use this processing option to specify whether you want to allow the use of delegates. If a manager has defined a delegate, this employee can perform certain tasks on his or her behalf.

Valid values are:

0 No

1 Yes

2. Allow Escalating Halted Activities
   1 = Yes
   0 = No

Use this processing option to specify whether you want to allow the user to escalate halted workflow activities. The Status Change workflow stops the process during a Payroll Lockout or to wait for a specified effective date. If the process is waiting for an effective date, escalating will cause the changes to be committed to the database immediately instead of waiting for the effective date. Escalating a Payroll Lockout will re-verify the lockout status before allowing the process to continue. Valid values are:

0 No

1 Yes

3. Allow Restarting Active Processes
   1 = Yes
   0 = No

Use this processing option to specify whether you want to allow the user to restart an active Status Change process. The Status Change workflow process might stop for any of the following reasons:

o Payroll Lockout

o Effective date

o Delay of management approval

When the workflow has stopped for any of these reasons, performing a restart will complete the active workflow activity and delete all approval messages,including messages that are waiting and those already approved, from the Employee Work Center and the Approval History table. The status of the Status Change record will change to pending. The workflow process will be completed but not deleted. Valid values are:

0 No

1 Yes

4. Allow Aborting Active Processes
1 = Yes
0 = No

Use this processing option to specify whether you want to allow the user to abort an active Status Change process. When the Status Change workflow process stops for a payroll lockout, an effective date, or a management approval,aborting will update the status of the Status Change record to 07-Cancelled by User and complete the active workflow. Valid values are:

0 No

1 Yes

5. Employee Status Change Version (P08720)
Blank = ZJDE0001

Use this processing option to specify which version of the Employee Status Change application (P08720) you want to use. The version will control the workflow process, retrieving the correct processing options for mail box and the final status.

If no value is entered, version ZJDE0001 will be used.

User Level Tab

This processing option specifies the type of user who will be accessing the application.

---

1. User Level
   1 = Manager/Employee Level.
   2 = HR Adminstrator Level.

Use this processing option to specify whether the application will be used by management, employees, or HR personnel.

Valid values are:

Blank Management

1 Employees and management

2 HR personnel

Assigning Delegates

You can use the Managers Delegates program (P08750) to designate other employees as delegates. You can also define the level of authority that is assigned to each delegate so that they can assist you with tasks and projects when you are away from your office or when you just need additional assistance. When work that you assign to others requires system access with an authority level comparable to a management level, you can assign delegate status to them up to your own level. When you designate an employee as a delegate for you, that employee can assist with routine tasks or projects from a predefined set of applications that will allow the use of delegates. For example, you might want a delegate to run a list of weekly reports or conduct a job analysis project. You can also delegate an employee to perform your supervisory functions for periods of time that you will be absent from work.

Assigning delegates permits you to designate another employee to access your software with system authorization at a level that you assign. You can assign an authority level up to, and including, your own. For example, you can designate an employee to perform many of the same functions that you would ordinarily perform by assigning appropriate authorization types. The system includes five preset authorization types and allows you to add customized authorization types.

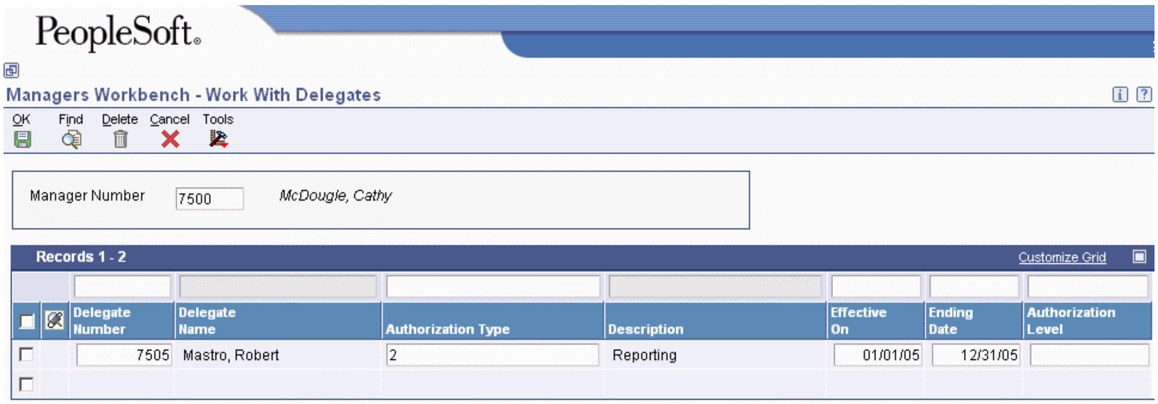
Prerequisite

- Set up additional authorization types, if needed, in UDC 08AY. See *Customizing User Defined Codes* in the *Foundation Guide* for more information.

► To assign a delegate

From the Manager Self Service menu (G05BMSS1), choose Managers Workbench.

1. On Work With Managers Employees, click Find to display your organizational hierarchy and your employees' records.
2. Choose My Delegates from the Form menu.



3. On Work With Delegates, complete the following fields:
   - Delegate Number
   - Authorization Type
   - Effective On
   - Ending Date
   - Authorization Level
4. Repeat step 3 for the same employee as many times as needed, assigning an additional authorization type for each entry.
5. When you are finished assigning delegates, click OK.

Processing Options for Managers Delegates (P08750)

Defaults Tab

Use this processing option to specify the organizational level of the user who can view managers delegates.

---

1. User Level
   1 = Manager/Employee Level
   2 = HR Administrator Level

Use this processing option to specify whether to see delegates for different managers or to see the delegates for only one manager. Valid values are:

0 Only see one manager's delegates.

1 Can change managers to see everyone's delegates.

Reviewing Upcoming Employee Reviews by Supervisor

Managers can log onto the self-service intranet site to search for all upcoming employee reviews. This process can occur in one of the following ways:

- You can log onto the self-service intranet site and search for upcoming employee reviews using the Upcoming Reviews by Supervisor program (P052200). You can search for employees based on the following fields: Business Unit, Pay Class, Type of Review, and all review dates and payroll status fields. The system automatically displays employees that report directly to you by your supervisor number.
- You can log onto the self-service intranet site and access the Upcoming Reviews By Supervisor program after receiving an electronic message about your upcoming employee reviews. Instead of having to search for specific employees, the system automatically completes the grid with the employees that you are responsible for reviewing soon.

  The electronic notification process occurs after the system administrator runs the Upcoming Reviews program (R052202). If the processing options for Upcoming Reviews are set up correctly, the program initiates Enterprise Workflow Management, which notifies all supervisors about their upcoming reviews by e-mail. The system administrator can run the program automatically on a certain date by setting a processing option appropriately and setting up the program to run in the Scheduler Workbench.

Different versions of the report can be run to report overdue reviews and reviews for all employees. In these cases, you would not receive e-mails. However, the system would still supply the Work With Upcoming Reviews by Supervisor form that displays the employees you are responsible for reviewing.

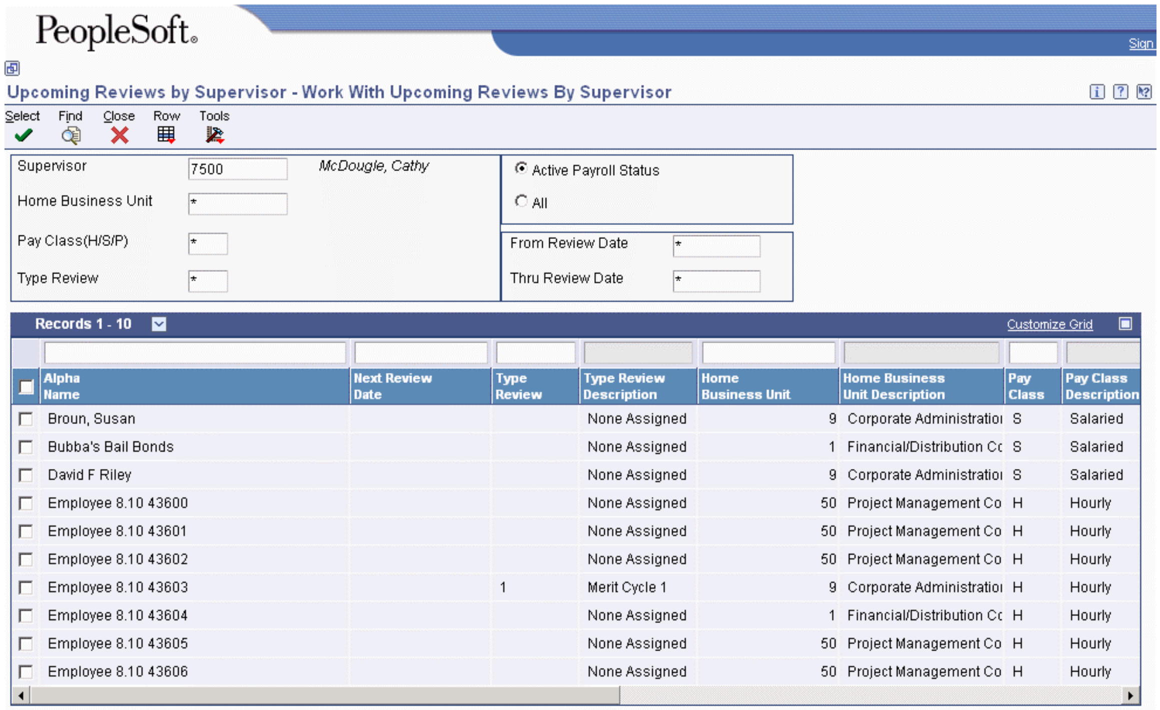
After the system displays your employees with upcoming reviews, you can choose an employee record and choose an option from the Row menu to review profile, supplemental, employment, or organizational data for the employee. You can access this information if your PeopleSoft EnterpriseOne security system is set up to allow you access.

Prerequisite

- ❑ If the Upcoming Reviews program (R052202) has been run, you need to review only the information on the report that appears when you log onto your self-service site. See *Running the Upcoming Reviews Report* in the *Human Resources Guide* to further understand the procedure.

► To review upcoming employee reviews by supervisor

From the Manager Self Service menu (G05BMSS1), choose Upcoming Reviews by Supervisor.


PeopleSoft.

Sign

Upcoming Reviews by Supervisor - Work With Upcoming Reviews By Supervisor

Select Find Close Row Tools

Supervisor 7500 McDougle, Cathy

Home Business Unit *

Pay Class(H/S/P) *

Type Review *

Active Payroll Status

All

From Review Date *

Thru Review Date *

Records 1 - 10

Customize Grid

Alpha Name	Next Review Date	Type Review	Type Review Description	Home Business Unit	Home Business Unit Description	Pay Class	Pay Class Description
Broun, Susan			None Assigned	9	Corporate Administratio	S	Salaried
Bubba's Bail Bonds			None Assigned	1	Financial/Distribution Cc	S	Salaried
David F Riley			None Assigned	9	Corporate Administratio	S	Salaried
Employee 8.10 43600			None Assigned	50	Project Management Co	H	Hourly
Employee 8.10 43601			None Assigned	50	Project Management Co	H	Hourly
Employee 8.10 43602			None Assigned	50	Project Management Co	H	Hourly
Employee 8.10 43603		1	Merit Cycle 1	9	Corporate Administratio	H	Hourly
Employee 8.10 43604			None Assigned	1	Financial/Distribution Cc	H	Hourly
Employee 8.10 43605			None Assigned	50	Project Management Co	H	Hourly
Employee 8.10 43606			None Assigned	50	Project Management Co	H	Hourly

1. On Work With Upcoming Reviews By Supervisor, complete any of the following fields:
   - Home Business Unit
   - Pay Class(H/S/P)
   - Type Review
2. Complete the following fields if you want to review employees who have upcoming reviews during a specific period of time:
   - From Review Date
   - Thru Review Date

   If you complete the From Review Date field but leave the Thru Review Date field blank, the system displays all employees with reviews on or after the from review date.

   If you complete only the Thru Review Date field, employees with no specific next review date and employees with a next review date equal to or prior to the through review date are displayed.
3. Choose one of the following options and then click Find to display your subordinates.
   - Active Payroll Status

     The Active Payroll Status option displays only employees with an active payroll status, including employees who are on a leave of absence.

   - All

     The All option displays all employees, including those with a terminated status.

The All option includes employees on a leave of absence.

4. Review the displayed information.

Entering Data for Verification-of-Employment Letters

The Review Requests for Verification of Employment program (P05003) allows only human resource administrators or system administrators to enter employment data for verification-of-employment letters.

Entering the employment data is the second part of a two-step process for processing a verification-of-employment letter. The employee must first request a letter by entering personal information on the Request Information tab of the Verification of Employment Data form. When an employee enters a request, the system copies the employee's job and compensation information from the Job Information table (F08001) to the Employment Data tab.

If Enterprise Workflow Management is enabled through your processing options, after receiving an e-mail that a verification-of-employment request is pending, you can inquire on the request, change the employee's employment data if necessary, and process the letter. You can also e-mail the completed letter to the contact person that the employee has requested.

See Also

- *Requesting a Verification-of-Employment Letter* in the *Human Capital Management Self-Service Guide* to better understand how an employee requests verification-of-employment letters
- *Setting Up Distribution Lists* in the *EnterpriseOne Workflow Tools Guide* for more information about setting up Workflow recipients and distribution lists
- *Working with Recipient Rules* in the *EnterpriseOne Workflow Tools Guide* for more information about setting up Workflow recipients and distribution lists

Prerequisite

- Have your human capital management system administrator set the processing option for Verification of Employment to 3. This processing option allows you to change the job information fields on the Verification of Employment Data form, if necessary.

► To enter employment data for verification-of-employment letters

From the Employee Self Service menu (G05BESS1), choose Verification of Employment.

1. On Work With Verification Of Employment Requests, complete the following fields and click Find to locate an employee's request:
   - Employee ID
   - Request Date
2. If you need to delete a record, choose the record and click Delete.
3. Choose the employee's record and click Select.
4. On Verification Of Employment Data, click the Employment Data tab.

5. If your processing option is set to 3, choose one or more of the following options, depending on the contact method that the employee has checked:

   - Print VOE Letter
   - Delete Document
   - E-Mail VOE Letter

   If you clicked the Save Document option, the letter will be saved to the C:\TEMP\ directory.

6. Review and change the following fields if necessary:

   - Date Started
   - Job Type/Step Description
   - Continued Employment
   - Pay Frequency
   - Pay Class(H/S/P)

- Date Of Last Raise
- Amount Of Increase
- Date of Next Raise
- Pay Period Salary
- Comment

7. Review and change the following compensation fields for the Current Year, One Year Prior, and Two Years Prior if necessary:
   - Base
   - Overtime
   - Commission
   - Bonus
   - Other
8. Click OK.

   The Verification-of-Employment letter appears.
9. Choose Print from the Form menu.
10. If you have clicked the option to e-mail the letter, click Send or Cancel on the E-Mail Confirmation form asking whether you want to e-mail the request.

Processing Options for Review Requests for Verification of Employment (P05003)

User Level Tab

Use this processing option to specify the organizational level of the user who will perform verification of employment functions.

---

1. User Level:

   1 or blank Employee

   2 HR Clerk

   3 HR Administrator

   (Option 3 will not send a request through Workflow.)

Use this processing option to specify whether this program will be used by an employee, an HR clerk, or an HR administrator. Valid values are:

Blank Employee

1 Employee

2 HR clerk

---

3 HR Administrator (This option will not send a request through Workflow.)

Note: If this program is used by an employee or an HR clerk, the approval process will be routed through workflow, where the Workflow Setup tab must be set up.

Workflow Setup Tab

Use this processing option to specify the user or users who will process verification of employment requests.

1. Address Number of VOE request processor (HRM):

Use this processing option to specify the address number of the HR person (or a distribution list) who will process VOE requests.

What You Should Know About Processing Options

The following list describes consequences and additional setup issues that you should be aware of when you choose one of the three processing options:

1-Used by Employee

Entering 1 instructs Workflow to notify the recipient of the pending request after the employee enters the request information. The recipient completes the verification-of-employment letter and can print the letter or e-mail it to the requested contact person. This value starts the process with the employee and finishes it with the Workflow recipient.

If you enter this value, you must set up your recipient in the processing option on the Workflow Setup tab.

2-Used by HRM clerk

Entering 2 instructs Workflow to notify the recipient of the completed letter after the human resource management clerk enters the request information. The recipient approves the letter and can print or e-mail the letter directly to the contact person that the employee requested. This value assumes that the process has already started with the employee. The HRM clerk does not receive a Workflow message but sends the completed letter through Workflow to a recipient for approval.

If you choose this value, you must set up your recipient in the processing option on the Workflow Setup tab.

3-Used by HRM administrator

Entering 3 deactivates Workflow in the Verification of Employment program. Because the human resources administrator starts and completes all requests, no need for Workflow exists. The HRM administrator can delete a request and also print the letter or e-mail it directly to the contact person that the employee requested.

Running Managers Reports

Managers and their delegates can use the Managers Reports program (P08740), to automate required reporting procedures and save time. Managers can select reports from a preset list to meet frequent reporting requirements. Two reporting approaches are available:

- Reports by category
- Individual reports

The Category option includes a customized list of reports that can save time. For example, if a manager needs to review a group of payroll reports at the end of each payroll cycle, the Payroll report category can be selected and the system prints all reports in the Payroll category. The reports that are included in each category are defined in the Managers Reports Setup program (P08741). Managers can also select reports within a list and specify the order in which they print to meet specific requirements. You can add to the list of categories by modifying UDC 08/RP. You can also use the Managers Reports Setup program to create Manager Reports versions that include pre-set lists of reports.

Managers can select and print any of the individual reports, such as Headcount or Phone List, by clicking the report name, reviewing the print destination on the Printer Selection form, and then clicking OK.

The Generate Graphic Org Chart program (P08713) prints a picture of the organization, starting at the requesting manager's level. This report requires Visio software installed on the manager's computer.

The supplemental data report produces information from the Supplemental Data table (F00092), linked to the Employee Master Information table (F060116). For example, you might want to print a report on skills or competencies for an employee. You can review the supplemental information that is available for this report in the Employee Master program (P0801).

When you create custom reports and want to add them to a report list in Managers Reports, you might need to alter one or more of the data items that you have included in the report's data structure to successfully run the report. To accomplish this mapping, use the Map Report Data Structure program (P08770), which is available by choosing the Map Data Structure row menu option in the Managers Report Setup program.

See Also

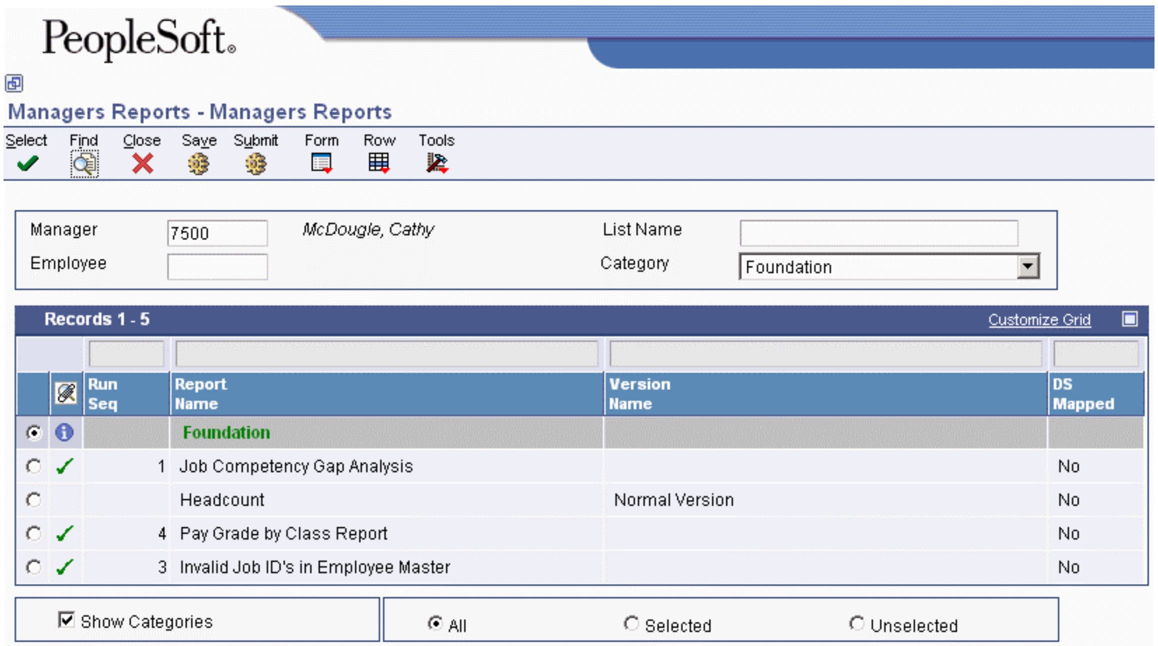
See the following topics in the *Human Capital Management Self-Service Guide*:

- *Managers Workbench* for information about implementing many tasks, including Managers Reports, from a single source
- *Setting Up Manager Reports* for procedures to set up and modify report lists for the Managers Reports program

► To run manager reports

From the Manager Self Service Menu (G05BMSS1), choose Managers Reports.

1. On Managers Reports, complete the following field and then click Find:
   - Category



2. To run the list of reports without modification, click Submit.
3. To run the list of reports in a particular order, choose Set Run Sequence from the Form menu.
4. On Manager Reports Sequence, click each row in the order in which you want the reports to run.
5. If you need to restart the sequence numbering, click Find and then click each row in the order in which you want the reports to run.
6. Click OK.
7. To run the reports in the new sequence, on Managers Reports, click Submit.
8. To run an individual report from the list, first remove the selected status from any report in the group that you do not want to run by double-clicking each report button in the first column.

   You can also change the selection status by clicking the report and then choosing Toggle Selection from the Row menu.

9. To choose the report that you want to run, double-click the button in the first column for the desired report and then click Submit.
10. To run a report for one employee, remove the selected status from all reports and then double-click the button in the first column for the desired report.
11. Complete the following field:
    - Employee

12. Click Submit.
13. To apply a name to your list of reports, enter a value in the following field and then choose Save from the Form menu.
    - List Name

Setting Up Information for New Employees

When you hire an individual, many administrative tasks must be completed before the employee starts working. The process of setting up a new employee can involve many different people, paper forms, and approvals, and equipment must be set up for the new employee. Delays in the paperwork or approvals sometimes impede preparation for the employee and contribute to lost productivity.

Managers Employee Setup automates most communication associated with preparation for a new employee's arrival. Using this automated approach, tasks can be set up and distributed, and approvals can be routed efficiently. Each process can be tracked to spot potential problems and avoid delays. Setup processes are enhanced by the Enterprise Workflow Management process. Workflow routes approval and notification messages to required people about tasks that need to be completed by a specific date. This process tracks critical dates and notifies the originator when delays occur.

Using Workflow to help complete the setup process for new employees reduces the risk of misplacing paper forms, informs appropriate personnel of tasks that should be completed by a certain date, and decreases time spent preparing for a new employee.

You can avoid lost productivity by reviewing each setup process to resolve possible delays and ensure that all preparation will be completed on time. When you need to reduce the setup interval, you don't have to wait until all the hiring processes are complete to start preparing for the new employee. As soon as the address book number has been entered into the system, you can create setup tasks to ensure that the new employee can start work on the first day of employment.

Setting up new employees consists of the following steps:

1. Add an employee record to the database.
2. Create setup tasks to prepare for the new employee in Managers Employee Setup.
3. Initiate the employee setup process. When you initiate the process, Workflow sends a series of approvals according to the setup tasks that you entered. Each setup task can do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process.

When you add an employee record using the Employee Setup Workbench program (P08710), the system automatically adds an employee record to the Address Book Master table (F0101) and an employee setup record to the Employee Setup Master table (F08710).

Alternatively, you can add a new employee record using any of the following programs:

- Employee Master (P0801)
- Applicant Entry (P08401)
- Personic or any third-party software that updates the Unedited Quick Hire Transaction File table (F060116Z)

Note

When you use one of these programs, the system does not automatically add an employee setup record to the Employee Setup Master table. To add a setup record after you add an employee record, you must access the Employee Setup Workbench program and initiate the process for employee setup.

Adding an Employee Record Using Employee Setup

You must add an employee record to the database before you can initiate the employee setup process. If you have already added an employee record, proceed to the task to initiate employee setup.

If you are adding an employee record using any of the following programs, see the referenced information for adding an employee record, and then proceed to the task to initiate employee setup.

- Employee Master (P0801)
- Applicant Entry (P08401)
- Personic or any third-party software that updates the Unedited Quick Hire Transaction File table (F060116Z)

See Also

- ❑ *Adding Employee Records One at a Time* in the *Human Capital Management Foundation Guide*
- ❑ *Entering Applicant Information* in the *Human Resources Guide*
- ❑ *Partner Processes - Personic Workflow* in the *Human Resources Guide*

Prerequisites

- ❑ Set the processing options for Employee Setup Workbench (P08710).
- ❑ Complete the setup tasks for the employee setup process. See *Setting Up the Employee Setup Process* in the *Human Capital Management Self-Service Guide*.
- ❑ Set the processing options for Employee Quick Hire (P060116Q) to activate the new hire process, which includes Employee Setup Workbench. You must also set these processing options to specify whether the system automatically updates the Employee Master Information table (F060116) or the Unedited Quick Hire Transaction File table (F060116Z) when you add a record. For more information about these processing options, see *Adding Employee Records Using Employee Quick Hire* in the *Human Capital Management Foundation Guide*.

► To add an employee record using Employee Setup

Use one of the following navigations:

From the Manager Self Service menu (G05BMSS1), choose Managers Employee Setup.

From the Employee Management menu (G05BE1), choose HRM Employee Setup.

1. On Work With Employee Setup, choose Quick Hire from the Form menu.
2. On Employee Quick Hire, add a new employee record.

   After you click OK on the Employee Quick Hire form, the system returns you to the Work With Employee Setup form and displays the employee with a Pending status.

See Also

- *Adding Employee Records for Applicants, Rehires, and New Hires* in the *Human Capital Management Foundation Guide* for more information about adding a new employee record

Processing Options for Employee Setup Workbench (P08710)

Processing Tab

These processing options specify the default values that the system will use to determine approval requirements and distribute workflow messages when managers or HR personnel perform employee setup functions.

---

1. Require Process Approval
   1 = Yes
   0 = No

Use this processing option to specify whether to require a manager's approval for the employee setup process before the system processes any of the setup tasks.

This approval is for the entire setup process. To create additional security,you can set up a requirement for the system to send an approval message for each setup task.

2. Allow Changing Process Approver
   1 = Yes
   0 = No

Use this processing option to specify whether to allow a manager the authority to change the individual who can approve the employee setup process. The default setting is the manager's supervisor. For cases in which the manager has no supervisor, and the first processing option is set to require process approval, the manager has the approval authority.

3. Work Center Mail Box
Blank = 01 (Personal In Basket)

Use this processing option to specify the mailbox number in the Employee Work Center of the individual to whom you want to send your notifications and approval messages.

To create a new mailbox number, you must add a record to UDC table 02/MB.

User Level Tab

This processing option specifies the organizational level of the user who will perform employee setup functions.

---

1. User Level
   1 = Manager/Employee Level (Default)
   2 = HR Administrator Level

Use this processing option to specify whether the application will be used by a manager (including a manager's delegate) or HR personnel. Valid values are:

Blank Manager

1 Manager or manager's delegate

2 HR Personnel

Defaults Tab

This processing option specifies the end status of the employee setup process when you successfully complete it.

---

1. Ending Setup Status
Blank = 1 (Completed)

Use this processing option to specify the status to which you want the employee setup process changed when the process completes successfully. The status codes are listed in UDC table 08/S1. Valid values are:

1 Completed

7 Archive

8 Purge

Work Orders Tab

These processing options specify the statuses the system uses to identify pending, active, and cancelled work orders, the record type to use for writing instructions for a work order, and whether the system automatically supplies the description of the employee setup task when you create a new work order.

---

1. Pending W.O. Status Code (Required)

Use this processing option to specify the status that the system will use to identify pending work orders. The system places a work order in pending status when the setup task has been initiated but is waiting for the user to enter an effective date or location information.

2. Active W.O. Status Code (Required)

Use this processing option to specify the status that the system will use to identify active work orders. The system places a work order in active status when the setup task has been initiated, the effective date has been reached,and the user has entered the location information.

3. Cancelled W.O. Status (Required)

Use this processing option to specify the status that the system will use to identify cancelled work orders. The system places a work order in cancelled status when the user ends the setup task.

4. Record Type used when creating Work Order instructions

Blank = A

Use this processing option to specify the record type that you want to use when you are writing instructions for a work order. The default value is A.

5. Copy Task Description to Work Order
1 = Yes
0 =No

Use this processing option to specify whether the system will copy the description of the employee setup task contained in the F087102 table into the description field of the work order when you create a new work order. Valid values are:

1   Copy the description from the setup task record.

0   Use the description from the work order template.

Initiating Employee Setup

After you add an employee record, you can assign setup tasks to the employee's setup record and then initiate the setup process.

Depending on how one of the processing options has been set, the entire employee setup process might require approval. Workflow will deliver an approval form for the process and wait for confirmation before it starts individual tasks that you have assigned to the employee record.

Most setup tasks are specific to the location where the employee will be working. You can choose tasks from a default task list that displays setup tasks for every employee by job type and job step. You can also choose tasks from a setup task list that includes all defined tasks. You can change tasks to customize the employee's setup. However, this could reinstate the process approval depending on the task specifications.

Each setup task can do one or more of the following activities, depending on how the tasks have been set up:

- Run a report
- Send an e-mail message
- Create a work order
- Start a Workflow process

Information that you enter in the tabbed area of the Employee Setup Entry form updates the Employee Setup Master table (F08710). Information that you enter in the detail area of the form updates the Employee Setup Tasks table (F08711).

Prerequisite

- ❑ Set the Employee Quick Hire processing options. See *Processing Options for Employee Quick Hire (P060116Q)* in the *Human Capital Management Foundation Guide*.

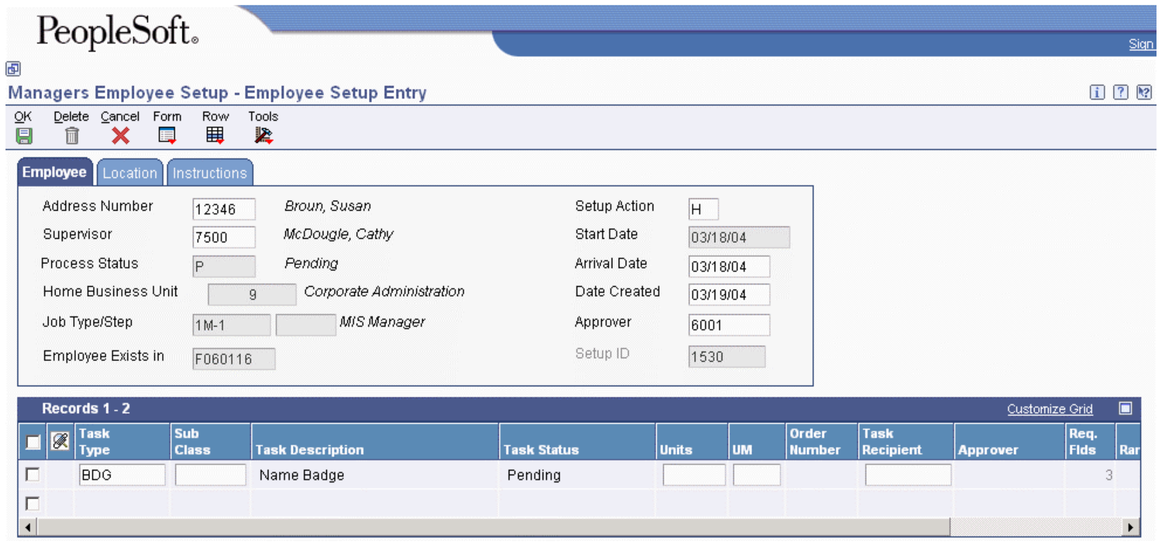
► To initiate employee setup

If you just added an employee record using the Employee Setup Workbench program (P08710), continue with the task.

If you added an employee record using a program other than the Employee Setup Workbench program, from the Manager Self Service menu (G05BMSS1), choose Managers Employee Setup.

Alternatively, from the Employee Management menu (G05BE1), choose HRM Employee Setup.

1. On Work With Employee Setup, if you used the Employee Setup Workbench program to add an employee record, go to step 3.
2. If you added an employee record with a program other than Employee Setup, complete any of the following fields and click Find:
    - Supervisor
    - Employee Number
    - Process Status
3. Choose the employee record and click Add.



4. If you added an employee record with a program other than Employee Setup Workbench, on Employee Setup Entry, complete the following fields on the Employee tab:

    - Address Number
    - Setup Action

    The system supplies the header fields.

5. To add default tasks, choose Add Default Tasks from the Form menu.

    If default tasks are set up for the new employee's job type and step, the system supplies the default tasks on the Employee Setup Entry form.

6. To add or change the subclass for a task, review the following fields:

    - Ranking
    - Lock Code

    If a value is in the Lock Code field, you can change the subclass only to a level that is equal to or less than the value in the Ranking field.

7. Complete the following field with a value that is equal to or less than the value in the Ranking field:

    - Sub Class

8. Complete the following optional field:

    - UM

9. If the task is an equipment-setup task and you need more than one unit, complete the following field:

    - Units

10. Review the system-supplied information in the following fields:

    - Order Number
    - Task Recipient

- Approved By
- Req. Flds

You cannot change these fields.

11. Click the Location tab and review the following field to determine the number of Location Code fields that you need to complete for this task:

    - Required Fields

12. Complete as many of the following Location Code fields as are required. For example, if four fields are required, then complete Location Code 001 through 004.

    - Location Code 001

13. Complete the following optional field:

    - Office Number

14. To assign an additional task, complete the following field and repeat steps 6-13:

    - Task Type

    If you complete the process approval task, you do not need to repeat steps 6-13.

15. To copy tasks from another employee, complete the following field on the Employee tab and choose Copy Employee from the Form menu.

    - Address Number

    The system supplies the detail area with tasks from the specified employee. You can copy tasks only from employees who have the same Setup Action value as the employee that you are setting up.

16. When you finish entering all tasks for the employee's setup, click OK.

    Your new employee record displays on Work With Employee Setup and shows Pending in the Process Status field in the detail area.

    The Activation Confirmation form appears asking whether you want to activate the employee setup process.

17. On Activation Confirmation, click Yes to begin the process. If you click No, the system leaves the status of the process as Pending. You will need to come back to this form to activate the process.

See Also

- *Completing Employee Setup Using Workflow* in the *Human Capital Management Self-Service Guide*

Completing Employee Setup Using Workflow

After you initiate employee setup, Workflow completes one or both of the following procedures depending on how the processing options are set:

- Obtains a process approval
- Obtains a task approval for each employee setup task that includes an approval requirement

If the system requires a process approval, Workflow will not begin each employee setup task until it obtains the process approval.

Workflow can complete any or all of the following processes for each setup task:

- Create a work order
- Create a report
- Send an e-mail
- Start an additional Workflow process

When specified in the processing option, the system will require a process approval for the entire setup process. Examples of this approval are an acknowledgment from a supervisor in the new employee's department, or a salary approval before an individual is hired. When the system requires a process approval, it sets the task status to Pending (as defined in Setup Task Status list 08/S1) until the designated manager approves the task. When the designated manager approves the task, the system resets the task status to Approved and starts each task within the process, except for tasks that include a future start date. The system starts tasks with a future Start Date on the appropriate date.

Individual tasks and changes to tasks might also require approval. For example, if the task for installing an employee telephone does not require an approval, Workflow will not send an e-mail approval form. However, you can set up this task to require an approval if a manager changes the task to install a phone with multiple features.

When a task requires approval, Workflow first verifies that the manager who entered the employee setup record also entered data in the required fields that identify the location of the new employee's workspace. If values are missing, Workflow delays the process and sends an e-mails message to the manager. When the manager enters the required data, Workflow sends an e-mail approval form to the approver who has been specified for the task. The system then sets the task status to Waiting (defined in Setup Task Status list 08/S2) until it is approved. When the designated manager approves the task, the system sets the task status to Approved and starts processing the task.

As part of each task, Workflow can send an e-mail message, run a customized report, create a work order, and start an additional Workflow process. An e-mail message can contain the employee's name and location information, the description of the task, a requested completion date, and an employee's comments about the task. You can send an e-mail message to notify a recipient that the system ran a report. You can also link a work order to the setup task.

Most setup tasks require data entry to move the status to Completed. When task recipients complete their work and enter the completion in the system, the system sets the task status to Completed.

You can review and revise the task status for the entire setup process and for individual tasks. You can delete a task if it is in the Pending status. You can cancel a task if it is in the Waiting, Approved, or Active status. If you do not activate the employee setup process when you add an employee setup record, you can activate the process after your review.

Completing the employee setup process using Workflow consists of the following procedures:

- Approving the process or task for employee setup
- Reviewing and revising the status

Managers who are responsible for approving the process for new employee setup or the individual tasks within the process should complete these procedures.

Prerequisite

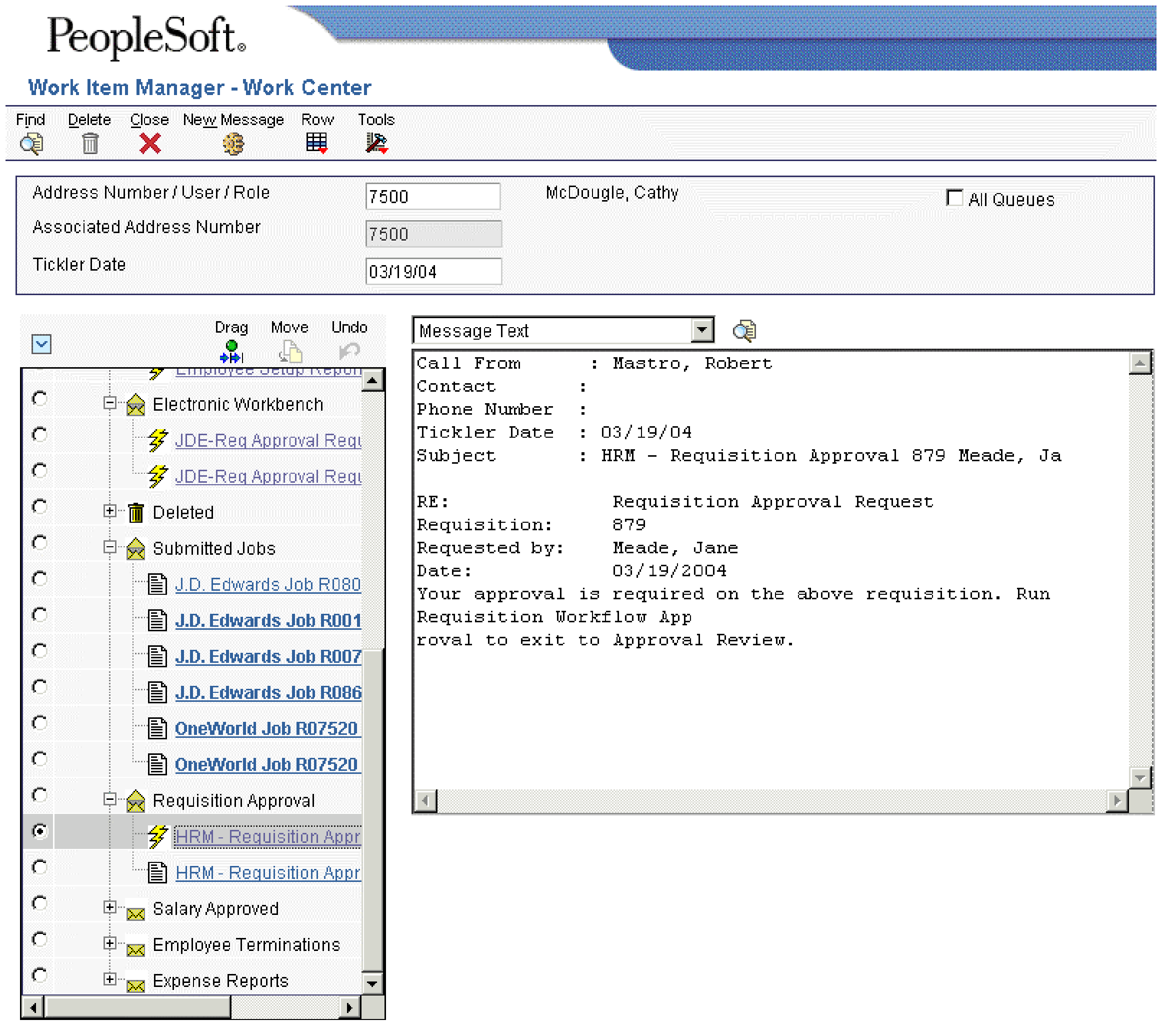
- ❑ Review the status codes from UDCs 08/S1 and 08/S2. See *User Defined Codes for Human Capital Management Foundation* in the *Human Capital Management Foundation Guide*.

► To approve the process or task for employee setup

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

1. On Work Center, verify that the information in the following fields is correct and then click Find:
   - Address Number / User / Role
   - Associated Address Number
   - Tickler Date
2. To view all Queues, click the following option:
   - All Queues
3. Review your messages in the left-hand pane.
4. Click the (+) icon adjacent to the queue that receives Employee Setup messages.

   All setup requests appear that are pending approval.



5. To view a message, click the checkbox that is adjacent to a pending approval entry and then click Drag.

   The message appears in the right-hand pane.

6. On Media Object Viewer, if the message allows you to approve a task, click the icon in the left-hand pane.

   A Workflow message might provide only change notification or change notification and approval. On Media Object Viewer, if an approval is requested, an icon exists in the left-hand pane that you can click. The system then displays a form that you can use to approve or reject the request.

7. Click the icon in the left-hand queue.
8. On To Approve or Reject a Request, choose one of the following options in the Actions area and click OK.

   - Approve
   - Reject

9. On Work Center, click Close.

▶ To review and revise the status

From the Manager Self Service menu (G05BMSS1), choose Managers Employee Setup.

Alternatively, choose HRM Employee Setup from the Employment Management menu (G05BE1).

1. On Work With Employee Setup, complete the following fields and click Find:
   - Supervisor
   - Employee Number
   - Process Status
2. If you want to cancel a process, choose a pending process record and then choose Cancel Process from the Row menu.

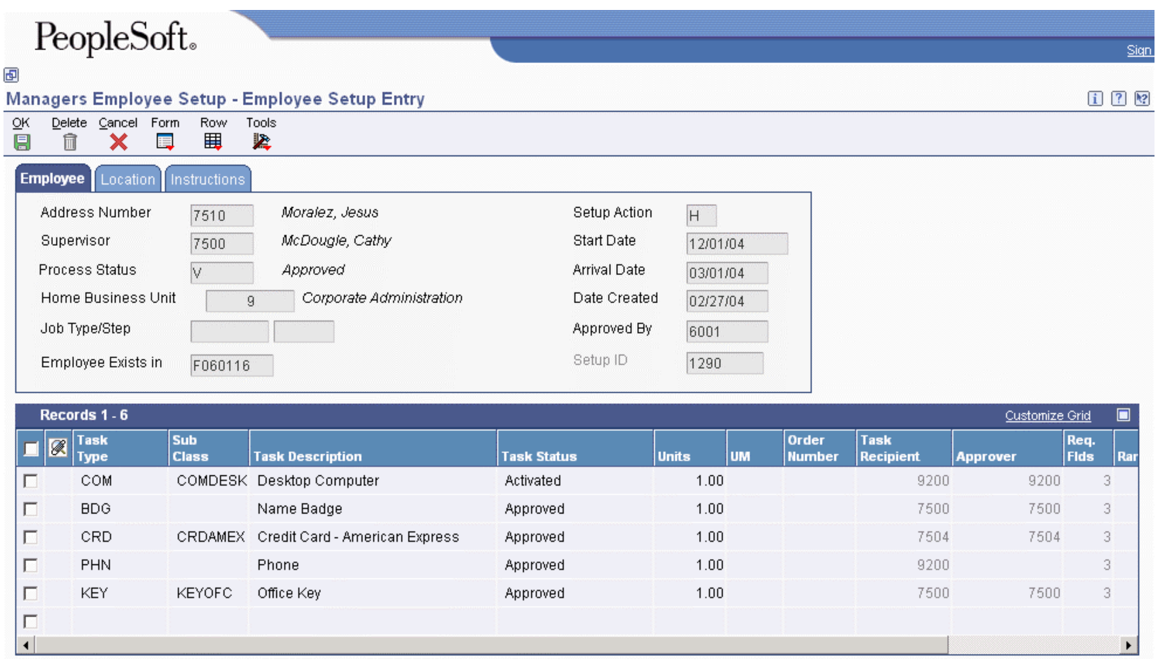
   When you cancel a process, the task record remains in the system.

3. To delete the process, choose Delete.

   You can delete a process or task record only while it is in the pending status, before you submit it. When you delete a process, the task record is removed from the system.

4. To activate the process, choose Process Tasks from the Row menu.
5. Click Select to review the status for individual setup tasks.

   Tasks with a Y in the Pending Tasks column are pending. Although you previously submitted tasks with an N, you can also review them to track their progress.



6. On Employee Setup Entry, review the Task Status field for each task in the detail area.

   The Task Status field displays the status for an individual setup task. You can delete the task if the status is Pending. A task is pending only if you have not submitted it for processing. You can abort the task if the status is Waiting, Approved, or Active.

7. To cancel a task, choose the task, choose Abort Task from the Row menu, and then click OK.

   When you cancel a task, the system sets the task status to Cancelled by User.

8. To complete a task in the system after the task recipient finishes the work, choose the task, click Complete Task, and then click OK.

   When you complete a task, the system sets the task status to the value that you specified in the Final Task Status field on the Work With Setup Task Details form.

Approving Information Using Manager Self-Service

Employees can use self-service to enter and update some of their personal information, such as name and address, emergency contact, and so on. Some types of information that employees enter, such as automatic deposit and competency, must be reviewed and approved by someone else before the database is updated.

If you are a representative of your organization's payroll department, you might be responsible for approving the automatic deposit information that employees add or change. In some cases, the routing number for an employee's bank might not exist in the user defined code list for routing numbers (06/BC). You can use self-service to approve automatic deposit information and the addition of new routing numbers.

As a manager, you can use self-service to review competency information for your subordinates. You can also enter the level of proficiency that each employee demonstrates in these competencies.

Approving Automatic Deposit Information

If you are a representative of the payroll department, you might be responsible for approving the automatic deposit information that employees enter through self-service. If Enterprise Workflow Management is enabled, you receive a message in the Employee Work Center when automatic deposit information is awaiting your approval. You must verify that the employee correctly completed all of the necessary information, and then approve or disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

► To approve automatic deposit information

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

1. On Work Item Manager, open a message queue that displays a message awaiting your review.
2. To review the message, click the checkbox next to the message that you want to review and then click Drag.
3. Review the message in the adjacent pane and, if you wish to submit an approval, click the magnifying glass icon.
4. Click Review/Validate Automatic Deposit Instructions.jde
5. Click the Review/Validate Automatic Deposit Instructions.jde link.

6. On Review/Validate Automatic Deposit Instructions, review all changes.

   If the employee entered the incorrect routing number for the bank, you can correct it.

7. To approve or disapprove, click one of the following options and then click OK.

   - Approve
   - Disapprove

See Also

- *Viewing Messages* in the *Foundation Guide*

Approving Bank Information for Automatic Deposits

Occasionally, when an employee enters automatic deposit information using self-service, the employee might discover that the routing number for the bank where the account resides is not one of the valid values in the Routing Number field. In this case, the employee can submit a request to have the bank's routing number added to the list of values. If you are a representative of the payroll department, you might be responsible for approving the employee's request before the system adds the new bank number to user defined code list 06/BC.

If Enterprise Workflow Management is enabled, you receive a message in the Employee Message Center when bank information is awaiting your approval. You must verify that the employee correctly completed all of the necessary information, and then approve or disapprove the request. If necessary, you can enter a response to the employee. Workflow includes your response in the e-mail message that notifies the employee of the status of the request.

When you approve the employee's request, the system updates user defined code list 06/BC.

► To approve bank information for automatic deposits

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

1. On Work Item Manager, choose the message that you need to view.
2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Add Bank Transit Number, review the information in the following fields and correct it, if necessary:

   - Bank Name
   - Bank Routing Number

5. Add optional information to the Payroll Clerk's Response text area
6. Choose one of the following options and click OK:

   - Bank Added
   - Bank Not Added

See Also

- *Viewing Messages* in the *Foundation Guide*

Approving Competency Information

Competency management is a method of categorizing and tracking the qualifications that employees have that make them competent to perform their job duties. These qualifications, such as knowledge, skills, and training, are called *competencies*.

Your organization uses competency management to track the competencies that each employee possesses and to compare these competencies with those that are required for the employee's job. Tracking employee competencies helps you create clear career goals and performance objectives for the employees who work for you.

To simplify the process of maintaining competency information, employees can use self-service to enter and revise their own competency information. You might be responsible for approving the information that employees enter and entering the employee's level of proficiency in certain competencies. In this case, you receive a message in the Employee Message Center after an employee enters competency information. You must then review the information and enter a level of proficiency for each competency.

► To approve competency information

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

1. On Work Item Manager, choose the message that you need to view.
2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, complete all of the following fields that apply, and then click OK:
   - Competency Level
   - Verified By
   - Verification Method

See Also

- *Viewing Messages* in the *Foundation Guide*

Creating Organizational Charts

You can use the Generate Graphic Organization Chart program (P08713 or P08713W) to create graphical organization charts that illustrate and document your organizational structure. The Generate Graphic Organization Chart program is available in Web (HTML) and Windows environments, and offer different features in each. Your system automatically detects the environment that you are using and uses the appropriate program.

Organizational Charts for Windows

You can use the Generate Graphic Organization Chart program (P08713) to create graphical organization charts that illustrate and document your organizational structure. To use the widest functionality of the software in a Windows environment, you need to have Microsoft Visio 2002 software installed on your computer. With PeopleSoft and Microsoft Visio 2002, you can produce custom charts that can be displayed as a Web page, published in documentation, or distributed for viewing in either electronic or printed format. You can even use the Visio Wizard from within your software to prompt and guide you in preparing a chart.

Organizations can also download and use the Microsoft Visio Viewer inside their Web browser to view drawings and diagrams that are created with Visio 5, 2000, or 2002. You can freely distribute drawings and diagrams to team members, partners, customers, or others, even if the recipients do not have Microsoft Visio installed on their computers.

On Organization Chart Parameters, you can choose the View Chart option on the Form menu to view charts that already exist. Employees who do not have Microsoft Visio installed on their computers can also use this menu option to display existing charts.

Note

Because the Generate Graphic Organization Chart program is designed to link with and take advantage of Microsoft Visio 2002 features, some options that are displayed might not function when used with a previous version of Microsoft Visio software.

See Also

- The Microsoft website at `http://www.office.Microsoft.com` for more information about software requirements and hardware recommendations for running Microsoft Visio 2002 or Microsoft Visio Viewer

► **To create organizational charts for Windows**

From the Manager Self Service menu (G05BMSS1), choose Generate Graphic Organization Chart.

1. On Organization Chart Parameters, complete the following field:
   - Employee Identification
2. Turn on any of the following options:

- Use Previous Values

  Each time that you turn on or off one of the options, the system updates the value in the Command String field to reflect the change. The system passes the command string directly to the Microsoft Visio wizard. The Command String specifies parameters for creating the chart. When users are familiar with how Microsoft Visio uses the command line parameters, they can type directly into this field. Turning on or off an option overwrites values in the Command String.

- Use Visio Wizard Prompts
- Show Terminated Employees
- Show Divider Line
- Hyperlink Across Pages
- Sync Across Pages

3. To specify the graphic shapes that you want to use in the chart, complete the following fields:
   - Executive Shape
   - Manager Shape
   - Child Shape
   - Terminated Shape
4. To specify the location where the system stores exported employee data, enter OLEQUE in the following field:
   - Export Queue/Path
5. Turn on the following option:
   - Export to a Network Queue
6. To specify required output, chart, and program command parameters, complete the following fields:
   - Chart Depth

     Specifies the number of reporting levels that the system displays.

   - Command String

     Edit only if necessary. The system automatically enters parameters as you choose each option on the form.
7. Turn on the following option:
   - Generate New Extract File

     To reuse an existing output file, turn off this option. You might want to use this option to regenerate a chart for an employee with different parameters.
8. To specify data items that the system displays on each organization chart shape, set the value to Yes in the following field in the detail area for each item:
   - Display Fields

Data item text that the system superimposes over a chart shape. Consider limiting the items that you choose and evaluate whether the resulting display is appropriate. The text for some data items might not fit within specific chart shapes.

Clicking in a Display or Custom Field automatically toggles between Yes and No.

9. To specify data items that the system displays as a custom property, set the value to Yes in the following field in the detail area for each item:

   - Custom Fields

     After you generate a chart, you can view a custom property in Microsoft Visio by right-clicking on a shape and choosing Properties. On a chart that is saved as a Web page, you can hover over a shape with your cursor, and the system displays the data item in a list on the left side of the screen.

Note

When you choose from only the fields listed below, the system does not process any of the other field options and requires only minimal processing time:

- EmpID
- AlphaName
- Name
- Reports_To
- SupervisorName

When you choose other display or custom options, the required processing time is considerably longer.

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10. To create a new chart, choose Display Chart.

    If you chose the option to generate new extract file, the system also creates a new extract file. You enter the file name and directory location for the extract file in a processing option. Microsoft Visio imports this file and creates the chart.

    If you prefer for the wizard to prompt you through the process, turn on the Use Visio Wizard Prompts option.

Processing Options for Generate Graphic Organization Chart (P08713)

Default Tab

Use these processing options to specify file information that your software uses to create and view a Microsoft Visio organization chart.

---

1. Fully qualified path and file name of the Visio organization chart wizard.
   Default if blank is "_Organization Chart Wizard.exe"

Use this processing option to specify the program file that the system uses to generate the organization chart. If you leave this processing option blank, the system uses _Organization Chart Wizard.exe, which is the default program that is supplied with Visio 2002.

If the wizard does not start, ensure that you have a path statement set up that specifies the correct directory location of this file, or enter a fully qualified path and file name. Although this location might vary because of installation variables and software version, the default installation location for Visio 2002 is as follows:

C:\Program Files\Microsoft Office\Visio10\1033\Solutions\Organization Chart_Organization Chart Wizard.exe

2. Export path.
   Default if blank is OLEQUE

Use this processing option to specify the name of the network queue where the system saves organization charts.

If you leave this processing option blank, the system uses OLEQUE. This default value also appears in the Export Queue/Path field on Organization Chart Parameters (W08713C) and specifies the location where the system saves the Visio export file. If you want to store the export files locally, deselect the Export to a Network Queue option on Organization Chart Parameters and enter a directory path and folder name in the Export Queue/Path field.

3. Name of the application to use to view the Visio export text file.
   Default if blank is "Notepad.exe"

Use this processing option to define the program that the system uses to view the exported text file.

When you generate an organization chart, the system extracts employee data from EnterpriseOne and saves it in a text file on your computer system. You specify the name and location of this text file in processing option 2 on the Default tab. The View Menu option on the Form menu of Organization Chart Parameters uses the program that you specify in this processing option to view the contents of this extracted file. If you leave this processing option blank, the system uses the default, Notepad.exe.

Shape Tab

Use these options to define values that the system uses to create chart shapes.

---

1. Visio Shape to use for the Executive shapes

Default if blank = "Executive"

Use this processing option to select the shape (UDC 08/GS) that the system uses for executive or top level nodes. You can create your own shapes in Visio, but you must add the name of the shape to the UDC table. If you leave this processing option blank, the system uses the default, Executive.

2. Visio Shape to use for Manager shapes

Default if blank = "Manager"

Use this processing option to select the shape (UDC 08/GS) that the system uses for manager nodes (nodes other than the executive that have subordinates). You can create your own shapes in Visio, but you must add the name of the shape to the UDC table. If you leave this processing option blank, the system uses the default, Manager.

3. Visio Shape to use for Child shapes

Default if blank = "Position"

Use this processing option to choose the shape (UDC 08/GS) that the system uses for child nodes (nodes that do not have subordinates). You can create your own shapes in Visio, but you must add the name of the shape to the UDC table. If you leave this processing option blank, the system uses the default, Position.

4. Visio Shape to use for Terminated shapes

Default if blank = "Vacancy"

Use this processing option to select the shape (UDC 08/GS) to use for terminated employees. You can create your own shapes in Visio, but you must add the name of the shape to the UDC table. If you leave this processing option blank, the system uses the default, Vacancy.

HTML Tab

This processing option allows you to enter directory information where graphic images of employees are stored. These images must be in the JPG graphical format.

---

1. Location of Employee Images

Use this processing option to specify a fully qualified path to a directory where the employee .jpg images are stored. This path must be available over the internet. An example of a fully qualified path is:

http://ServerName:83/jde/owportal/images/

Organizational Charts for the Web

In the Windows environment, you can pair Microsoft Visio 2002 with your PeopleSoft self-service software to produce sophisticated, detailed organizational charts that include custom information when you hover your cursor over a chart shape. You can specify a range of input parameters in your PeopleSoft program and also use many of the features of Microsoft Visio 2002 to produce charts that meet a range of needs.

When you use the Generate Graphic Organization Chart program (P08713W) in a Web-enabled environment, you can enjoy the simplicity of just choosing an employee, and then clicking a single option to generate a chart that displays up to three levels of your organization.

In the Web-enabled version, you can also choose options from the Form menu to display employee profile information and to specify custom setup options for your charts. On the Org Chart Display Options form, you can choose employee information that you want to display, colors for the nodes that represent each of the organization levels, and a range of layout options.

► **To create organizational charts for the web**

From the Manager Self Service menu (G05BMSS1), choose Generate Graphic Organization Chart.

1. On Organization Chart, complete the following field and then click Display Chart.
   - Address Number
2. To change the top level of the chart to one level higher in the organization, click the left-hand arrow.
3. To display the chart in a page layout format so that you can print the chart on multiple pages, choose the Page Layout option and then click Display Chart:

   To print the chart, choose the Printable View option.

Self-Service Setup

Setting up self-service is a task that should be performed by the system administrator.

Employees access self-service through a series of web pages on your company intranet site that allow them to complete such tasks as requesting a verification-of-employment letter or changing name, address, and emergency contact information. In addition to employee functions, managers can also use the Manager's Workbench program (P08712) as a centralized location from which they can perform such tasks as changing employee status, personal self-service functions for managers, creation of delegates, and various reviews. These web pages correspond to self-service programs in your software.

PeopleSoft EnterpriseOne provides web pages for all self-service programs, as well as a logon page and a menu page. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages. For example, if you want to put your own company's logo on the web pages, you need to create customized web pages.

Setting Up Common Settings for Human Capital 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 Self-Service Applications

When you set up common settings for self-service applications, you specify whether to display employee numbers, employee tax identification numbers, and participant numbers of benefit plans in the upper left corner of most self-service web pages. You can also specify whether to limit the number of dependents that an employee can enroll, whether to display any benefits that are outside an employee's benefit group but in which the employee is enrolled, and whether to display the Personal tab for adding and viewing dependents and beneficiaries.

The following table describes the common settings for data items in the Common Settings for HR Employee Self Service Programs program (P05004). You can also use the P05004 program to activate system-level settings to activate the employee self-service software.

Display Employee Number on Self-service?	Specifies whether to display the employee number on the top left corner of all employee self-service programs, such as the Name and Address Change program (P01013).
Maximum Number of Dependents	Denotes the maximum number of dependents that may be enrolled in a benefit plan.

Display Participant Number on Self-service?
Specifies whether to display the participant number on the top left corner of all employee self-service programs, such as the Name and Address Change program.

Display Overrides Outside Benefit Group?
Indicates whether to show current enrollment overrides outside the employee benefit group in the View Current Elections program (P08530).

Display Personal Tab on Self-service?
Indicates whether to show the Personal tab in benefit enrollment.

Display Tax ID on Self-service?
Indicates whether to display the employee tax ID on the top left corner of all employee self-service applications, such as the Name and Address Change program.

Using Self-Service Recruitment?
Specifies whether the eRecruit module is activated.

► To set up common settings for human capital 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 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 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 Employee Self-Service

You can set up and customize employee self-service programs that you are running in an intranet environment so that employees can perform many functions without involving HR representatives and keep their own information current. In addition to setting up various programs so that employees can just click a link on your organization's web portal, You can also use the Employee Self Service Form Options program (P085550)You can specify many appearance options and offer employees self-service options that are tailored to meet organizational requirements.

Setting Up Verification of Employment

Employees can use the Review Requests for Verification of Employment program (P05003) to request that a verification of employment letter be sent to a specific individual or company, such as a creditor or a loan officer.

The Review Requests for Verification of Employment program uses a review form and an entry form. The review form is the entry point to Verification of Employment. The entry form has two tabs, Request Information and Employment Data. On the Employment Data tab, a Human Resources administrator or system administrator can enter information pertaining to the employee, such as the date that employment began. The system calculates and supplies the employee's earnings based on the Pay Type by Category table (F05002). Only the system administrator can change the employee earnings fields. The fields on the Employment Data tab are active only when an administrator is logged on to the self-service system.

When employees access the Review Requests for Verification of Employment program, information on the Employment Data tab is displayed. However, the employee cannot change the information.

Information entered on the Review Requests for Verification of Employment program updates the Verification of Employment Data table (F05003).

For the system to accurately report pay information on verification-of-employment letters, you must add certain pay types to the pay categories that you define in user defined code list 05/V1. For example, you might link a holiday bonus pay type and an annual bonus pay type to the bonus category.

When you set up verification of employment, you update the Pay Type By Category table.

Note

The task for requesting a verification of employment letter can include the Enterprise Workflow Management system. If your processing options are set up appropriately, Workflow notifies the individual responsible for processing the request after the request information is entered.

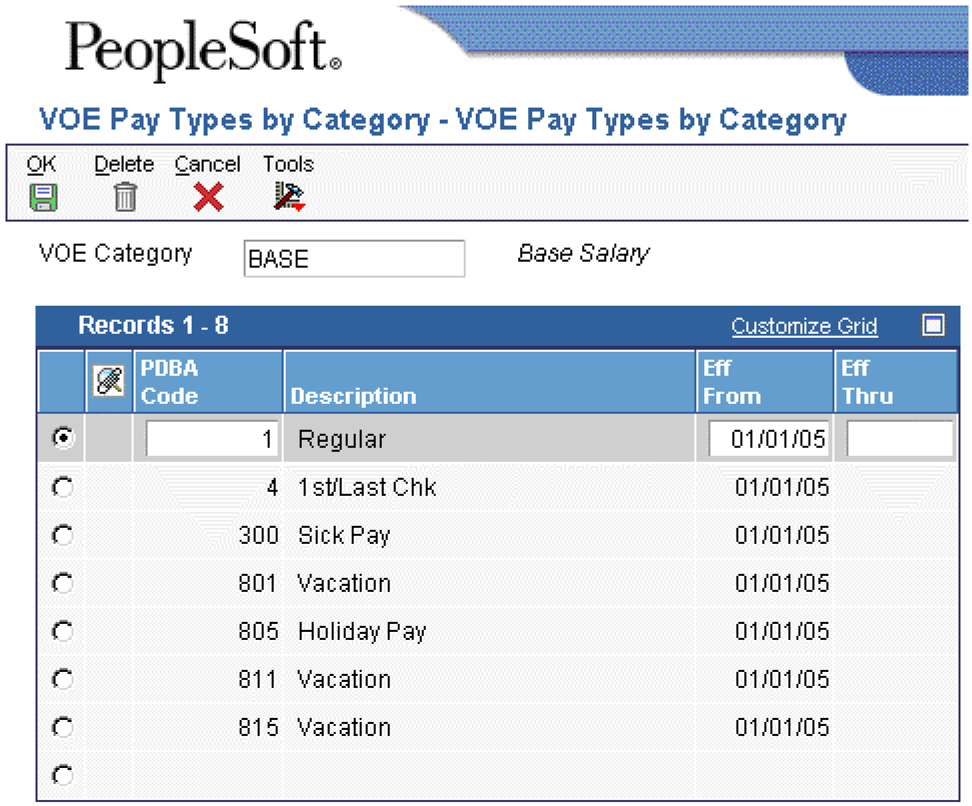
Prerequisites

- ❑ Verify that your verification-of-employment letter is complete. Select and review the VOEREQUEST in the Maintain MailMerge Documents program (P980014). You must also hard code a company signature and phone number on the letter. See *Modifying Mail-Merge Documents* in the *Foundation Guide*.
- ❑ Review information about user defined codes. See *Understanding User Defined Codes for Human Capital Management Systems* in the *Human Capital Management Foundation Guide*.
- ❑ Set up verification of employment categories for pay information in user defined code list 05/V1. See *Changing a User Defined Code* in the *Foundation Guide*.
- ❑ Set up the common settings for self-service. See *Setting Up Common Settings for Human Capital Management* in the *Human Capital Management Foundation Guide*.
- ❑ Set up the processing options for verification of employment. See *Entering Data for Verification-of-Employment Letters* in the *Human Capital Management Self-Service Guide*.

► To set up verification of employment

From the Self Service Setup menu (G05BESS4), choose VOE Pay Types by Category.

1. On Work With Verification of Employment Categories, click Add.



2. On VOE Pay Types by Category, complete the following fields and click OK:
   - VOE Category
   - PDBA Code
   - Eff From

Setting Up Name and Address Change

From the Employee Self Service Director Setup menu (G08BB411), choose Employee Self Service Process Flow Setup.

The Employee Name and Address Change program (P05101) displays the employee's current name and address and allows the employee to enter a new name and address. You can attach a personal photo of the employee as a media object to the Personal tab of the Name and Address Change form.

Information entered in Employee Name and Address Change program updates the Address Book Master table (F0101), which contains name and address information for all employees. This information has a search type of E (Employee).

When the employee enters a city, state, or postal code change, Workflow can notify a human resource administrator about the change so that payroll files can be updated manually. For example, a human resource administrator should update any employee's change of resident tax areas. Make sure you set your processing option with the address number of the employee who is to receive these notifications.

Employees access the Employee Name and Address Change program by clicking a link that you provide on your organization Web portal. To set up this access, you use the Self-Service Process Flow Setup program (P05400) to create a process flow script. You then link the Self-Service Director program (P05410) version that runs the script to the Web portal. You must set a processing option for the Self-Service Director program that specifies the correct process flow script.

See Also

- *Setting Up Self-Service Process Flows* in the *Human Capital Management Self-Service Guide* for instructions on providing access to employee self-service programs on a Web portal
- *Portal Design* in the *Portal Guide* for instructions on how to link self-service programs to a Web portal

Prerequisite

- To attach personal photos to the Personal tabs on Name and Address forms, see *Attaching Media Objects* in the *Foundation Guide*.

Setting Up Emergency Contacts and Phones

From the portal on your company website, choose an option that links to Changing Emergency Contacts and Phone Numbers.

The Emergency Contacts and Phones program (P053010) lets employees enter the names and phone numbers of individuals that should be contacted in the event of an emergency. Information entered on the Emergency Contact and Phones form updates the Address Book - Contact Phone Numbers table (F0115).

Employees access the Emergency Contacts and Phones program by clicking a link that you provide on your organization Web portal. To set up this access, you use the Self-Service Process Flow Setup program (P05400) to create a process flow script. You then link the Self-Service Director program (P05410) version that runs the script to the Web portal. You must set a processing option for the Self-Service Director program that specifies the correct process flow script.

See Also

- *Setting Up Self-Service Process Flows* in the *Human Capital Management Self-Service Guide* for instructions on providing access to employee self-service programs on a web portal
- *Portal Design* in the *Portal Guide* for instructions on how to line self-service programs to a Web portal

Prerequisite

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Capital Management* in the *Human Capital Management Foundation Guide*.

Setting Up Paid Time-Off Inquiry

From the portal on your company intranet, choose an option that links to Paid Time Off Inquiries.

The Paid Time Off Inquiry program (P053020) shows an employee's paid time-off accruals, deductions, and balances. Employees access this program by clicking a link on the organization web portal that displays the Employee Self-Service Leave Planning And Request program (P07620). The system lists the number of hours available at the beginning of the year, the number of hours that have since been added to the available DBA code, the number of hours taken, and the number of hours that are currently available.

The program includes four versions that allow you to specify the history table from which the system retrieves paid time off information, either the Employee Transaction History Summary table (F06146) or the Fiscal and Anniversary Year History table (F06147). You specify the version that the system uses for Paid Time-Off Inquiry for employee self-service and the version that it uses for Paid Time-Off Inquiry for manager self-service.

See Also

- *Entering Timecards Using Self-Service* in the *Human Capital Management Self-Service Guide* for information about reviewing paid time off

Prerequisite

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Capital Management* in the *Human Capital Management Foundation Guide*.

Employee Self-Service Benefits Setup

Setting up self-service benefits is a task that should be performed by the system administrator. The administrator can set up the desired features for employee self-service benefit selections. The administrator can also enable security functions to limit employees from viewing or changing other employees' confidential records.

Employees access self-service benefits through a series of web pages on your company's intranet site that allow them to complete such tasks as changing benefit options or changing name, address, and emergency contact information.

Your software provides web pages for all self-service programs, as well as a logon page and a menu page. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages. For example, if you want to put your own company's logo on the web pages, you need to create customized web pages. You can organize your web-based benefits enrollment program under a menu structure based on employment events such as new hire and rehire, and life events such as children or marriage. You might create a menu from which the employee selects the event or reason for changing enrollment. If the employee selects marriage, for example, the version of the web page that allows changes associated with marriage is used.

You can use processing options to set up different versions of the Self-Service Director program (P05410). For example, you might set up custom versions for enrollment event codes that are similar to the following versions that are included in your software:

New Hire Enrollment	NHR (New Hire)
Rehire Enrollment	RHR (Rehire)
Marriage	MAR (Marriage)
Divorce	DIV (Divorce)
Children	CHD (Children)
Open Enrollment	OPN (Open Enrollment)

Employee Self-Service Benefits Setup includes only those instructions that are required to set up employee self-service benefits. These instructions assume that the setup procedures for employee benefits are complete.

Implementing Employee Benefits Setup

You can use the ESS Setup Director program (P054100) to organize and implement the setup procedures for benefits self-service. This program introduces a director approach to the benefits setup task that simplifies and expedites setting up your software for a benefits enrollment offering. The program includes a list of links to the programs that you use, including program versions and processing options. After you complete this setup process, to activate employee access to self-service offerings, you must also implement a link to benefits enrollment on your organization's intranet Web portal.

Consider the list of setup programs in the ESS Setup Director program as the starting point for your setup process. Implementing this list results in a sample benefits enrollment that might suit your organizational requirements. When you enter the ESS Setup Director program, the system displays setup overview information in the Extended Description window. When you click on any of the program links, the program automatically displays related documentation for the topic that is selected. Before you start building a list of program links to set up benefits enrollment, it is recommended that you click each program in the list and review the linked documentation. Some topics include additional links that can help you move to another area within the current topic. As you perform this review, you can note the options that apply to your organization's requirements.

When you use the ESS Setup Director program to set up self-service benefits enrollment, you implement two processes: you specify setup program options and then you perform the setup tasks. This program includes two options, each of which displays a list of setup programs. ESS Versions/Processing Options displays a list of the setup programs for which you need to define processing option values and, where necessary, create program versions. ESS Setup Applications displays a list of programs that you subsequently use to perform each of the setup tasks.

To create a customized list, you can choose individual programs that appear in the Available Items pane and move them to the Selected Items pane. To choose the entire list, just click the right, double arrow. Many of the programs, such as Common Setting for HR ESS Programs, Self Service Process Flow Setup, and others, must be included in all benefit enrollments. Depending on your organization's benefits offerings, some setup steps might not apply. Because some of the setup programs must be used in a specific order, the ESS Setup Director program maintains the correct order even if you move links out of order from one list to the other.

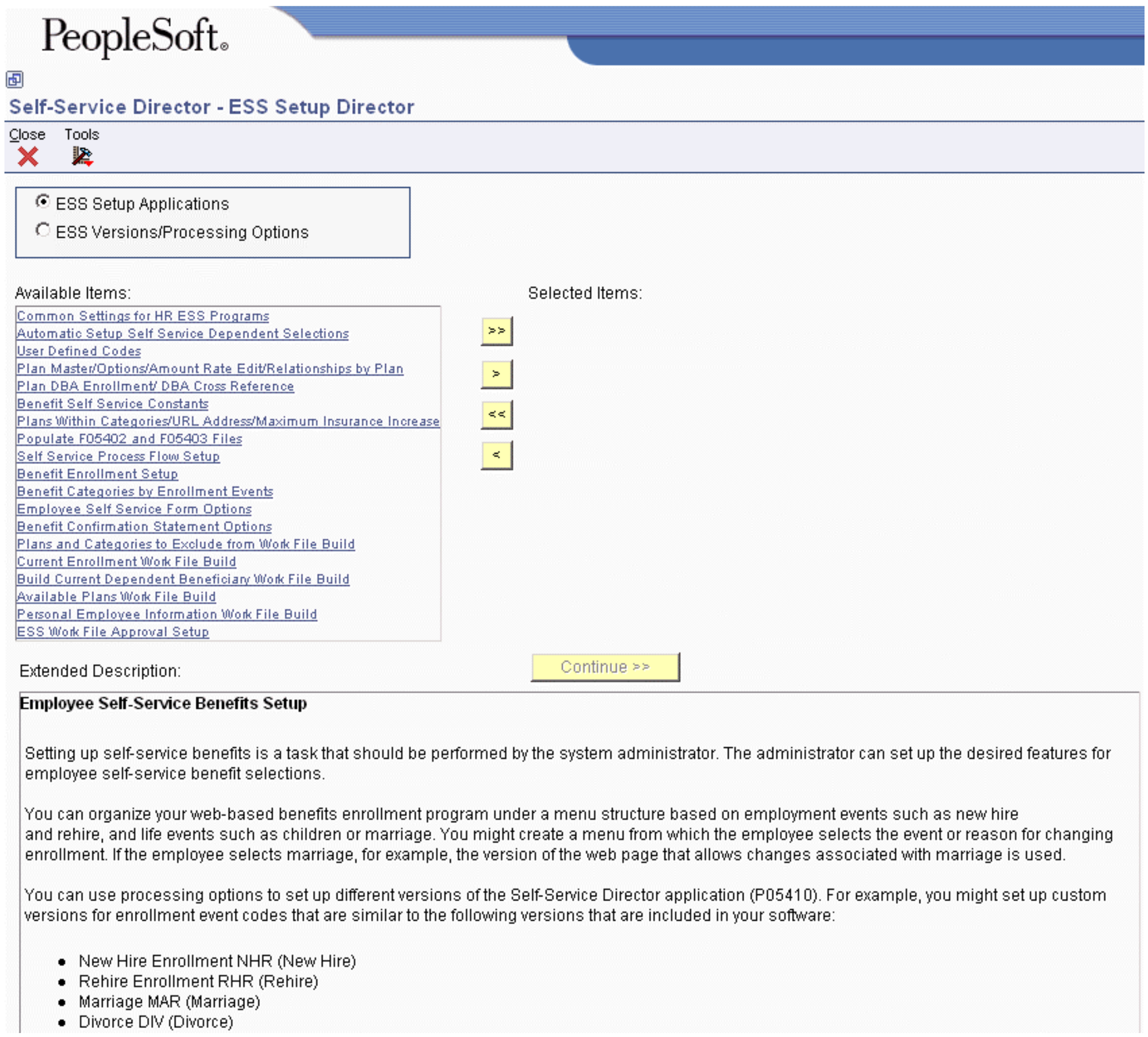
When you move one or more links to the Selected Items list and then choose Continue, the system displays a full screen of related documentation and links that you can use to start the setup program or move to the next item that is on your list of selected links.

See Also

- *Self-Service Setup* in the *Human Capital Management Self-Service Guide* to set up other self-service features
- *Benefits Administration Setup* in the *Benefits Guide* to set up employee benefits
- *Portal Design* in the *Portal Guide* for instructions on how to line self-service programs to a Web portal

► To implement employee benefits setup

From the Employee Self Service General Setup menu (G08BB413), choose Employee Self-Service Director.



1. On ESS Setup Director, click the following option and then review the resulting list of links in the Available Items pane:

   - ESS Setup Applications

2. In the Available Items pane, click each link and review the documentation that the system automatically displays.

   Note the programs that you want to include in your setup process.

   Note the programs that require a new version or processing option settings.

3. To review the programs for which you need to create a new version or set processing options, click the following option and review the list of links:

   - ESS Versions/Processing Options

4. To create a Selected Items list of links, click a version or processing option link on the Available Items list and then click the single, right-arrow between the Available and Selected Items lists.
5. Repeat the previous step for each version or processing option link that you want to move into the Selected Items list.

   To move all items on the Available Items list to the Selected Items list, click the double, right arrow.

   To move an item from the Selected Items list to the Available Items list, click the single, left arrow.
6. When the Selected Items list is complete, to begin the first task, click Continue.

   The system displays the first program on the list of selected items.
7. On ESS Instructions, review data that might exist.

   To refresh the screen, if necessary, choose Refresh from the Tools menu.
8. To access the program and add or change data, choose Edit Setup.
9. After you complete the task for the selected program, choose Cancel or Close.
10. On ESS Instructions, to move to the next selected item on your list, choose Next.
11. Repeat steps 7 through 10 until you complete all of the selected items on your list.
12. To review a previous program or documentation in the Selected Items list, click Previous.
13. When you complete the last selected item, click Next.

    This completes the process of setting up program versions and specifying appropriate processing options.

    The system automatically displays the ESS Setup Director form so that you can choose the setup programs that are required to complete the setup process.
14. On ESS Director, choose the following option:
    - ESS Setup Applications
15. Repeat steps 4 through 11 until all of the tasks on your Selected Items list is complete.

Setting Up Common Settings for Self-Service

The setup process to provide employees with the opportunity to define and control their benefit selections begins with enabling your enhanced employee self-service software. By setting this control appropriately, you can access the necessary programs to define your self-service offerings. You can also define the primary care physician setting.

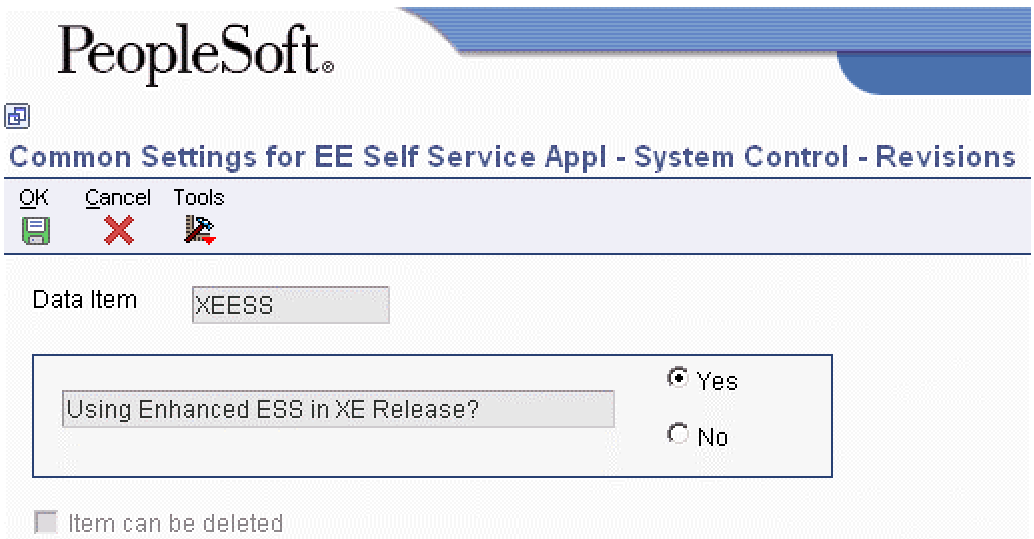
► To set up common settings for self-service benefits

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

1. On Work With HRM Common Display Settings, review the following data items:

PCPN	Determines whether the system requires a primary care physician number for self-service health and welfare benefit plans or benefit plan options that are set up to track primary care physician information.
PCPV	Determines whether the system tracks an employee visit with a primary care physician.
USEESS	Determines whether enhanced employee self-service software is being used instead of standard employee self-service software in the Xe release of PeopleSoft EnterpriseOne.

2. To change the current setting for an item, choose the data item and click Select.



3. On System Control - Revisions, choose either the Yes or No option, and then click OK.
4. On Work With HRM Common Display Settings, click Add to add data items.
5. On System Control - Revisions, complete the following field:
   - Data Item
6. Choose either the Yes or No option and click OK.
7. On Work With HRM Common Display Settings, click Find to display the new data item and verify the setting.

See Also

- *Common Settings for Benefits Enrollment* in the *Benefits Guide*

Changing Benefit Plans for Self-Service

To set up benefit plans that employees can use in self-service, you need to define the following:

- The minimum and maximum number of persons who can be included in benefit plans that cover dependents
- Whether to track the primary care physician
- Non-participating benefit plans

Prerequisites

- ❑ Set up benefit groups and categories. See *Setting up Group Information* in the *Benefits Guide*.
- ❑ Set up benefit plans and enable each plan for self-service. See *Setting Up Benefit Plans* in the *Benefits Guide*.

Adding a New Benefit Plan

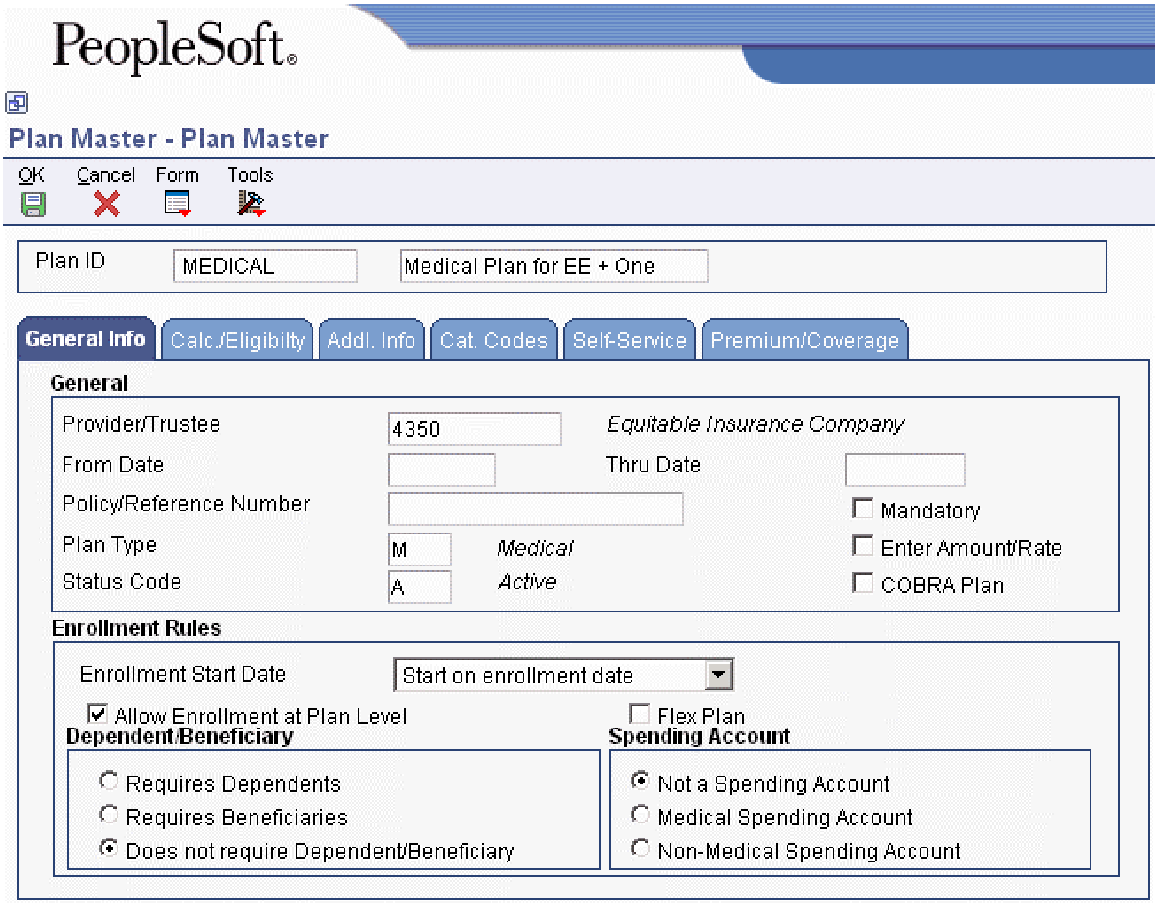
Before you can enroll employees in a benefit plan, you must set up the plan. You add a new benefit plan when you need to set up a unique plan or when you are setting up a plan for the first time. When you set up a plan, you define the following types of information:

- Effective dates
- Provider or trustee
- Enrollment rules
- Eligibility tables

► **To add a new benefit plan**

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Add.



2. On Plan Master, complete the following field:
   - Plan ID
3. In the unlabeled field to the right of the Plan ID field, type the name of the plan.
4. On the General Info tab, complete the following field:
   - Provider/Trustee
5. Complete the following optional fields or accept the default values:
   - From Date
   - Thru Date
   - Policy/Reference Number
   - Plan Type

Note

You need to assign the same benefit plan type to every plan within a benefit category. For example, all medical plans should be assigned to the medical plan type.

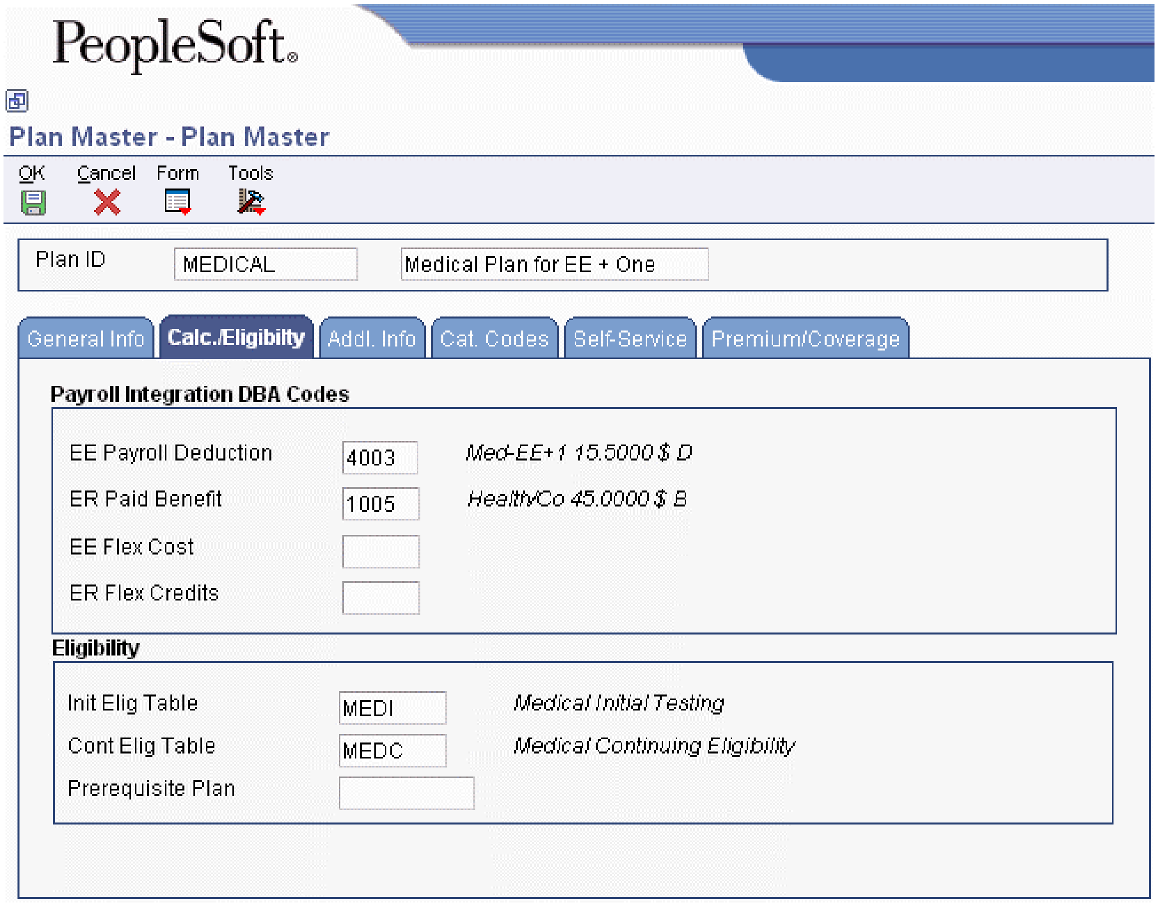
   - Status Code

6. Click any of the following options, if necessary:
    - Mandatory
    - Enter Amount/Rate
    - COBRA Plan
7. In the Enrollment Rules group box, choose an option for the Enrollment Start Date.
8. Click one or both of the following options:
    - Allow Enrollment at Plan Level
    - Flex Plan
9. Click one of the following options in the Dependent/Beneficiary group box:
    - Requires Dependent
    - Requires Beneficiary
    - Does Not Require Dependent/Beneficiary

    The Dependent/Beneficiary options define whether a plan is designated as a dependent plan or a beneficiary plan.

10. Click one of the following options in the Spending Account group box:
    - Not a Spending Account
    - Medical Spending Account
    - Non-Medical Spending Account

    You use the Spending Account options to associate the account with medical or other types of expenses.



11. Click the Calc./Eligibility tab and complete any of the following DBA fields:

    - EE Payroll Deduction
    - ER Paid Benefit
    - EE Flex Cost
    - ER Flex Credits

    If the plan is a flex plan, you should complete either the EE Flex Cost or EE Flex Credits field.

12. To enter a date-sensitive override amount or rate for the employee contribution, choose Plan Rates from the Form menu.

Note to Windows Client users

If you are using the Windows client, you must select a PDBA before you choose Plan Rates from the Form menu. The menu option is disabled until you select a PDBA. Additionally, the Plan Rates menu option displays the Plan Master Rates Window form, therefore, if you are using the Windows client, skip step 13.

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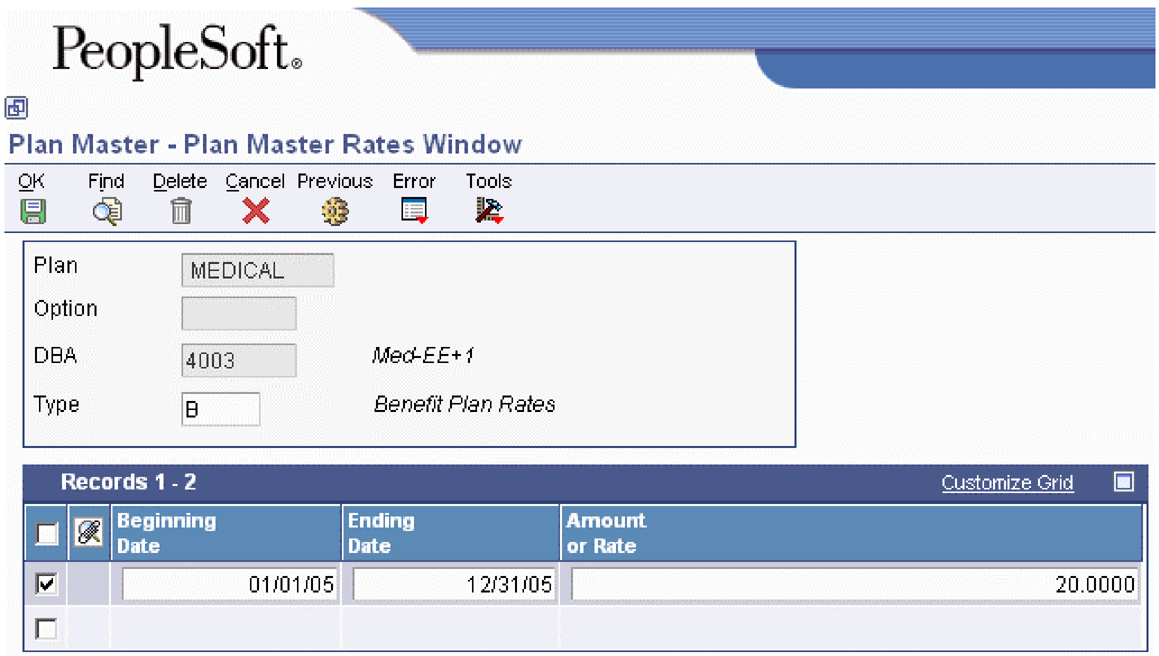
13. On PDBA Detail, choose the PDBA record for which you want to enter a rate, and then click Select.

Note

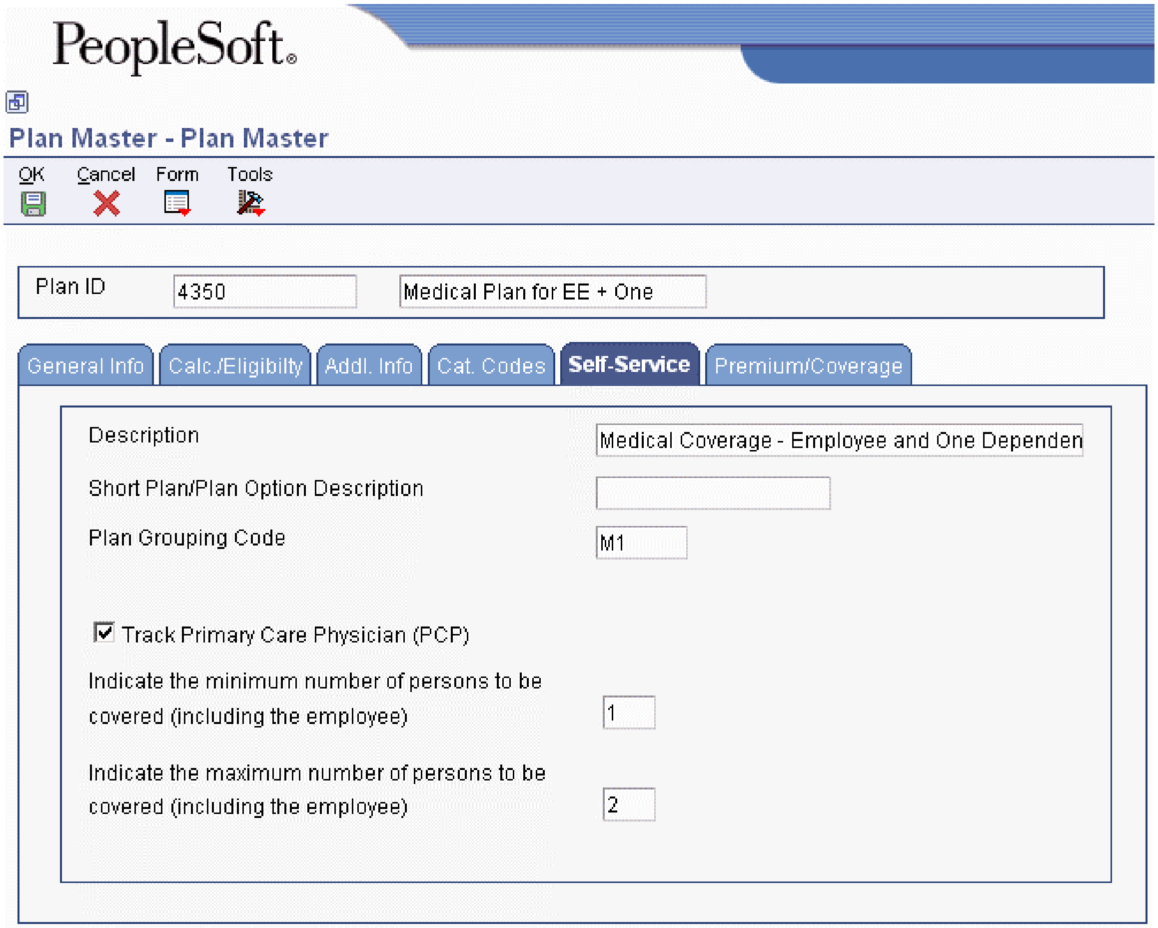
The plan rate or amount that you enter on this form is a date-sensitive override to the rate that exists in the DBA. You must complete the DBA field before you enter override amounts or rates. You cannot enter an amount or rate for a DBA field that is blank.

Entering new rates does not change existing benefit plan information for employees. To recalculate the new premium costs, the employee must re-enroll in the plan, or a human resources administrator must process batch enrollment.

14. On the Plan Master Rates Window, complete any of the following override fields, click OK, and then click Cancel:
    - Type
    - Beginning Date
    - Ending Date
    - Amount or Rate



15. On the Calc./Eligibility tab of Plan Master, complete the following fields:
    - Init Elig Table
    - Cont Elig Table
16. Complete the following optional field:
    - Prerequisite Plan
17. To enter information about the plan, click the Addl. Info tab, and then enter the information.
18. To track additional data, click the Cat. Codes tab and complete the relevant information.



19. If you use Self-Service Benefits, click the Self-Service tab and complete the following fields:

- Description

  If you do not enter a description, the plan description appears on self-service forms. This description field allows you to enter a longer representation of the benefit plan.

- Short Plan/Plan Option Description

  This description field allows only a short description that is used when benefit plans appear as column titles on self-service forms.

- Plan Grouping Code

  PeopleSoft recommends that you use the Plan Master Options program (P083202) instead of the plan grouping code.

  You can use plan grouping to associate benefit plans if you do not use benefit plan options. For example, if you create separate benefit plans for employee only, employee plus 1, employee plus family, and employee opt out, you can set up a plan grouping code in UDC 08/PG. You can then assign the plan grouping code to each plan master record.

  PeopleSoft recommends that you set up a nonparticipating plan for each benefit category so that employees can elect this plan to choose no coverage.

20. If you want to track the primary care physician number, click the following option:

    - Track Primary Care Physician (PCP)

21. If the purpose of the benefit plan is to indicate that an employee is declining coverage, click the following option:

    - Non-Participating Plan Flag

    The system displays this option only if the plan is set up as a nonparticipating plan.

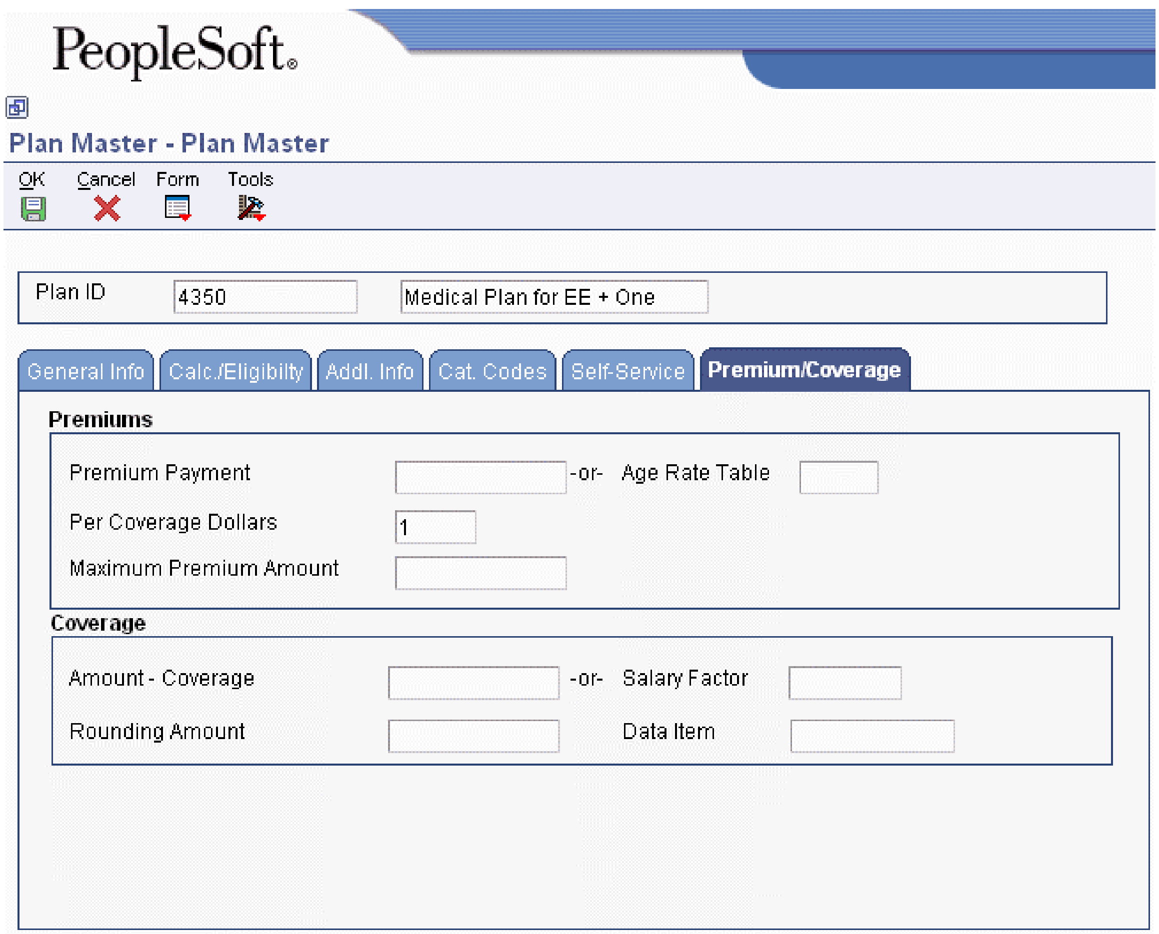
Note

PeopleSoft recommends that you set up a nonparticipating benefit plan for every benefit category.

If the benefit plan is a dependent plan, the system displays a field on the bottom of the form to allow you to enter the number of dependents who can enroll in the plan.

22. If the plan is a dependent plan, specify the number of people to be covered (including the employee) by completing the following field:

    - Maximum Dependent



23. Click the Premium/Coverage tab and complete either of the following fields to specify premium information:
    - Premium Payment
    - Age Rate Table
24. Complete the following optional fields:
    - Per Coverage Dollars
    - Maximum Premium Amount
25. To enter coverage information, complete either of the following fields:
    - Amount - Coverage
    - Salary Factor
26. Complete the following optional field:
    - Rounding Amount
27. Click OK to save the record.

Processing Options for Plan Master (P08320)

Display Tab

This processing option specifies whether certain fields appear on the Plan Master form.

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1. EE Flex Cost PDBA and the ER Flex Credits PDBA fields.

0 = Do not display these fields.

1 = Display these fields.

Use this processing option to specify whether the system should display the Employee Flex Costs field and the Employer Flex Credits DBAs field. Valid values are:

0 Do not display these fields.

1 Display these fields.

1. EE Flex Cost PDBA and the ER Flex Credits PDBA fields.

1. EE Flex Cost PDBA and the ER Flex Credits PDBA fields.

Changing Plan Options

After setting up the Plan Master (P08320), depending on your company setup, you might need to define the benefit plan options that employees can choose during each enrollment event. For employee self-service benefits, the benefit plan options might already be set up appropriately. You also need to specify the minimum and maximum number of dependents that are allowable for each health and welfare benefit plan option. You can use this procedure to set up new plan options or change existing options.

If the available options for a plan category include non-participation, you need to set up a non-participating plan option. For example, a dental benefit plan might include the following plan options:

- Dental Coverage - Employee Only
- Dental Coverage - Employee and Family
- Dental Coverage - Employee and One Dependent
- Dental Coverage - No Coverage

Setting Up Plan Options

When the coverage for a plan can vary from employee to employee, you can either set up a separate plan for each variation or set up a plan with several options. For example, your organization might offer a dental plan to employees. The cost for this plan might vary depending on whether employees elect coverage for themselves only or for themselves plus their dependents. You can set up this dental plan in either of the following ways:

- Set up Employee Only, Employee Plus One, and Employee Plus Family as separate dental plans and link each of these plans to the dental category.
- Set up a dental plan, such as DEN-01, for an employee and include options such as DEN-01 Plus One and DEN-01 Plus Family. When you link DEN-01 to the dental category, the system also links the options.

When you set up benefit plan options, you can enter different coverage costs for each option. For example, the Employee Only option might cost 20.00 USD, the Employee Plus One option 40.00 USD, and the Employee Plus Family option 80.00 USD. You can indicate the cost of an option in either of the following ways:

- Assign to the option a separate DBA that has an associated amount or rate.
- Assign to the option the DBA that is associated with the plan. You can enter an override amount or rate for the option in the Plan Master Rates Window program (P083203).
- Use the benefit plan DBA and the benefit plan options DBA. The DBAs must be separate in this case.

When the employee enrolls in a benefit plan option, the system updates the employee's DBA instructions with the amount or rate that you entered for the option.

When you set up options for a single benefit plan, use the option rule to determine how the system calculates additional coverage costs. You can include one or more of the following in the calculation:

- DBA for the benefit plan
- DBA for the option
- Additional amount

When the employee enrolls in a benefit plan option, the system uses the option rule to either add the additional cost or replace the amount in the DBA that you identified in the Plan Master program (P08320). For example, the plan DBA identifies the amount that the employee pays for coverage when enrolled in DEN-01 only. If the employee enrolls in DEN-01 Plus One, you can add an amount to deduct for the additional coverage. If the employee enrolls in the DEN-01 Plus Family option, you can set up an even greater amount to deduct for the coverage for an entire family.

You can use one of three option rules for a single plan with options. Depending on the value that you choose for the option rule, you can include additional factors that the system uses in the calculation, such as DBAs and additional amounts or rates. When you enter plan options, the system stores the information in the Plan Additional Options table (F083202).

The following table illustrates the DBA and additional amounts or rates that are allowed with each rule:

Option Rule	DBA for Plan ID	DBA for Option	Additional Amount
1	X		X
2	X	X	X
3		X	X

You use the rules for any of the DBA codes that are used for the plan, including the employee payroll deduction and the employer-paid deduction.

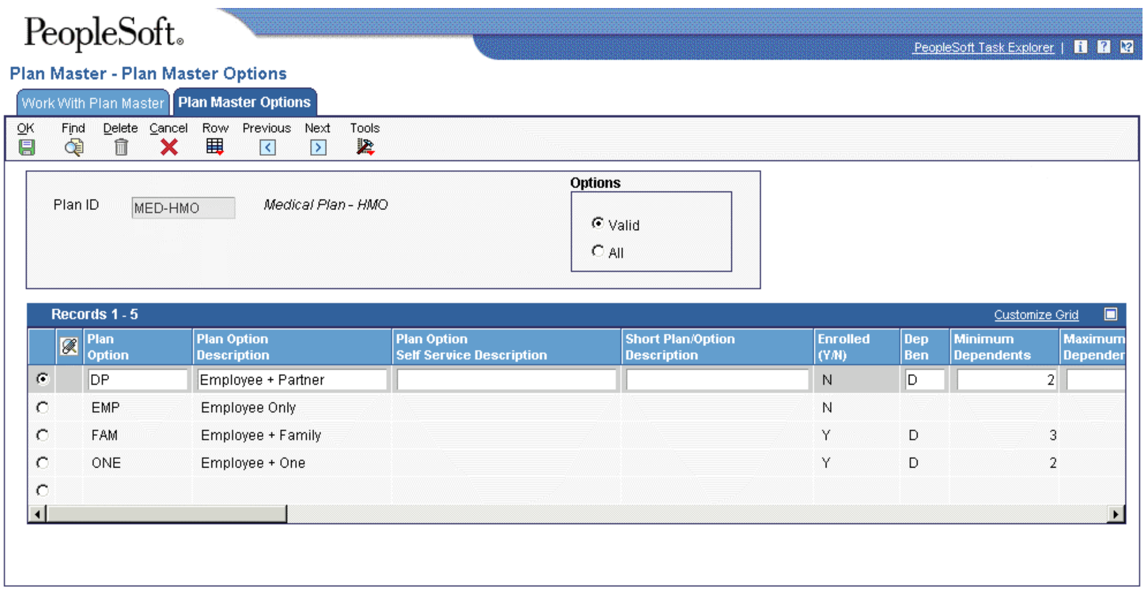
Note

You cannot delete a benefit plan or plan option when employees are enrolled in that option. Even when employees are not active, their records remain attached to the plan option. Also, you cannot change the dependent or beneficiary status of the plan option when dependents or beneficiaries are enrolled in the plan option.

▶ To set up plan options

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

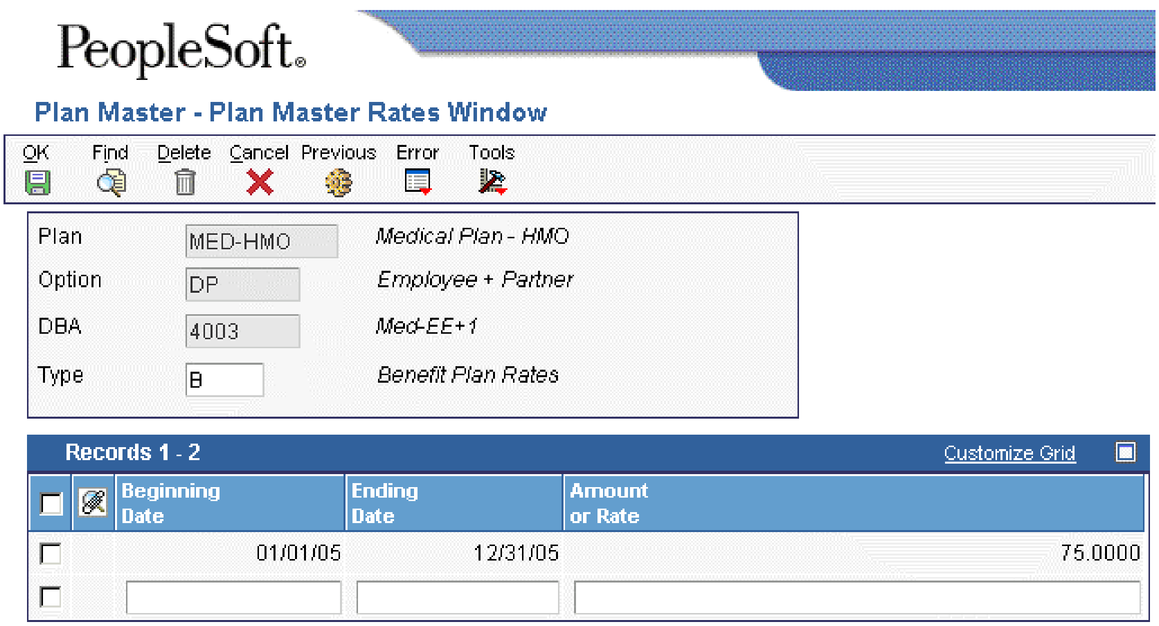
1. On Work With Plan Master, complete the following field and click Find:
    - Plan ID
2. Choose a plan.
3. Choose Plan Options from the Row menu.



4. On Plan Master Options, complete the following fields:
    - Plan Option
    - Plan Option Description
    - Dep Ben
    - Additional Premium Payment
    - V O
5. If you are using self-service benefits, complete the following fields to set up the plan option for self-service:
    - Plan Option Self Service Description
    - Short Plan/Option Description
    - Minimum Dependents
    - Maximum Dependent
    - PCP Flag
    - Non-Participating Plan

    If you do not enter a self-service description, the system uses the benefit plan option description on self-service forms.

6. To set up the employee contribution information, complete the following fields:
    - Payroll Ded -Option Rule
    - Payroll Ded DBA
    - Payroll Ded - Add'l or Override Rate
7. To set up the employer-paid information, complete the following fields:
    - Paid Benefit -Option Rule
    - Paid Benefit DBA
    - Paid Benefit - Add'l or Override Rate
8. To set up the employee flex cost information, complete the following fields:
    - Flex Cost -Option Rule
    - Flex Cost DBA
    - Flex Cost - Add'l or Override Rate
9. To set up the flex credits information, complete the following fields:
    - Flex Credit -Option Rule
    - Flex Credit DBA
    - Flex Credit - Add'l or Override Rate
10. To enter a date-effective override amount or rate for the employee contribution to the DBA item, click one of the DBA fields and choose Plan Rates from the Row menu.
11. On PDBA Detail choose a record and then click Select.



12. On Plan Master Rates Window, complete the following fields:
    - Beginning Date
    - Ending Date
    - Amount or Rate

13. Click OK to save the amount or rate record, and then click Cancel to return to Plan Master Options.
14. Click OK to save the plan record.

See Also

- *Setting Up Benefit Plans* in the *Benefits Guide* for information that can help you decide whether to set up benefit plans with options

Defining Benefit Category Rules for Self-Service

Benefit category rules and specifications need to be set up before the new benefit self-service features are available to employees. To ensure that employees make benefit selections that are consistent with your organizational and provider policies, you use the Categories by Benefit Group program (P08350) to specify a classification for each benefit category and to specify that changes in employee elections must remain within a current group of benefit plans.

Benefit categories must be defined as belonging to one of the following classifications:

- Health and Welfare
- Indemnity
- Retirement Savings
- Other

For example, medical, dental, and vision categories are in the health and welfare classification. Life insurance and tax-deferred savings categories are in the retirement savings classification. Employees might be allowed to decline inclusion in some categories, but not in others. For example, inclusion in a retirement savings plan might be optional. However, medical coverage might be required unless employees are included in spousal coverage with another employer. You can specify whether the Human Capital Management administrator is notified when employees elect to decline coverage.

Note

When setting up a benefit category as a Health and Welfare category, you should include only benefit plans that do not require a beneficiary.

A benefit category should not allow more than one benefit plan election. A benefit category should also specify whether benefit plans within the category are optional. For example, valid values for the benefit category rule are as follows:

O Optional

R Required

Most insurance providers allow employees to change their coverage when they experience a qualifying life event. For example, a married employee who gives birth to, or adopts, a child can usually change their medical insurance from employee plus spouse to employee plus family within 31 days of the birth of the child. The employee cannot ordinarily change from the current provider to an alternate provider until the commencement of an open enrollment period.

The Categories by Benefit Group program is normally used in the initial setup of benefits information. You use this program to link benefit categories to benefit groups when you set up the benefits administration software. The entire task is included as part of employee self-service benefits setup to ensure that the requirements to set up self-service are reviewed and completed.

Note

PeopleSoft does not recommend setting up a benefit category to allow the selection of multiple plans in a health and welfare benefit category. If you allow the selection of multiple plans within a category, then your benefits self-service software cannot automatically select appropriate plans for an employee based on employee dependents and beneficiaries.

Linking Categories to Benefit Groups

After you set up benefit groups and benefit categories, you can link categories to each benefit group. For example, you can link the benefit categories for medical, dental, and life to the management benefit group. When you link a category to a benefit group, all of the employees in that group are eligible for all of the benefit plans in that category.

When you link categories to groups, you can also include the following information:

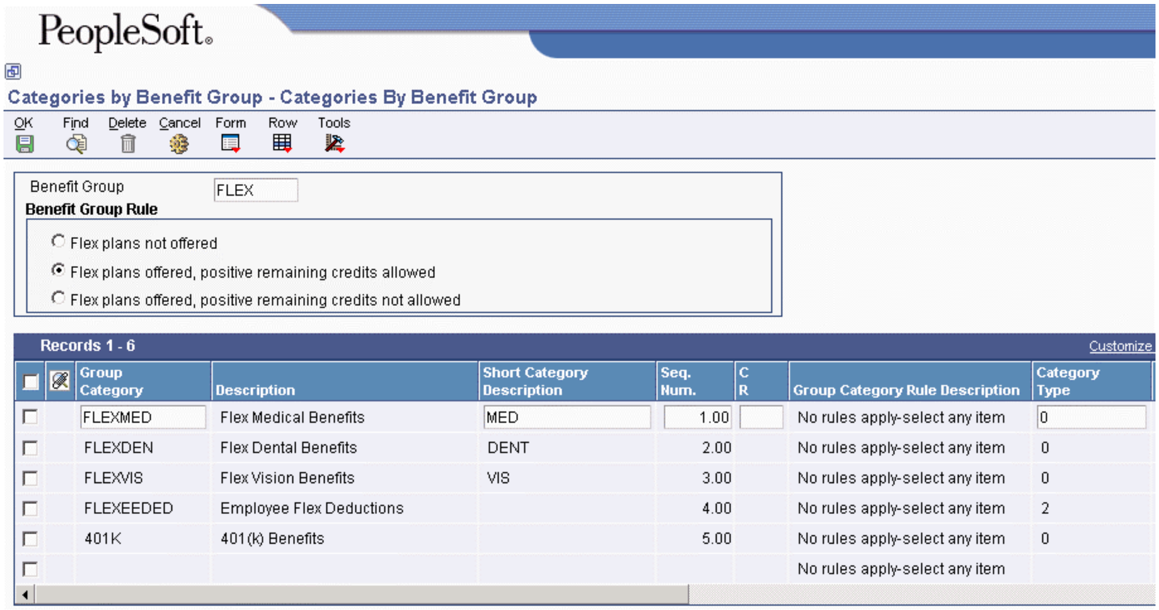
- Whether the benefit group has flex plans
- The sequence in which the benefit categories appear on the enrollment form
- The election criteria for a benefit category
- The benefit category type for special flex plans
- The benefit category classification
- An employee option to print a form for declining benefit coverage
- Whether employees must stay within the current benefit group options or within a current group of benefit plans

If a benefit group has flex plans, you must set up a benefit category for employee flex deductions (category type 2). This benefit category is the mechanism for deducting a negative flex balance from employee pay. If the employer awards members of the benefit group a lump sum of flex credits, you must set up a benefit category for those lump sum credits (category type 1).

► **To link categories to benefit groups**

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and then click Find:
   - Benefit Group
2. Choose the benefit group record and then click Select.



3. On Categories By Benefit Group, click one of the following options in the Benefit Group Rule group box to indicate whether the benefit group offers flex plans, and if so, how it treats positive remaining credits:

   - Flex plans not offered
   - Flex plans offered, positive remaining credits allowed
   - Flex plans offered, positive remaining credits not allowed

4. Complete the following fields and click OK:

   - Group Category
   - Seq. Num.
   - C R
   - Category Type

Setting Up URLs for Self-Service Benefits

Within the employee self-service benefit programs, employees can click on a link to get more information about benefits. You define uniform resource locator addresses (URLs) that link users to resources about plan options, plans, categories, and groups. Depending on the links that might be defined, employees can learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option. These resources might also include direct access to the provider so that employees can implement changes. For example, an employee might use a link to access a provider website that lists primary care physicians.

To set up all URL specifications for benefit resources from one location, you can use the Plans Within Categories program (P08351). After choosing a benefit group, category, plan, or plan option, you access the Benefits Enrollment Plan/Option URL Address program (P085540) from a Row menu option where you can record URL addresses. The URL might be a location on an organization's intranet or a provider Internet resource. The system stores the URL address information in the Benefits Enrollment Plan/Option URL Address table (F085540).

You can organize reference information by using URLs to access information for:

- All benefit plan options that are linked to a benefit plan
- All benefit plans that are linked to a benefit category
- All benefit categories that are linked to a benefit group
- All benefit groups

When employees click on links in benefit self-service programs, the system searches for the most specific resource using a hierarchal approach. For example, if an employee clicks on a link for information about a benefit plan option, the system looks first at the benefit plan option level. If no information is found, the system looks sequentially at the benefit plan, category, and group levels.

It is recommended that you set up at least one URL for every benefit group. Because all benefit plans and benefit plan options appear as links, an employee might click the link to get additional information. A URL is required for the function to work appropriately.

Prerequisites

See the following topics in the *Benefits Guide*:

- ❑ Set up benefit groups. See *Setting Up Benefit Groups*.
- ❑ Set up benefit categories. See *Setting Up Benefit Categories*.
- ❑ Link each benefit category to an appropriate benefit group. See *Linking Categories to Benefit Groups.*
- ❑ Set up benefit plans. See *Setting Up Benefit Plans.*
- ❑ Link each benefit plan to an appropriate benefit category. See *Linking Plans to Benefit Categories*.
- ❑ Set up benefit plan options. See *Setting Up Plan Options*.

Setting Up URLs for Benefit Plan Options

Within the employee self-service benefit programs, employees can click on a benefit plan option link to get information. Depending on the links that might be defined, employees might also have links to resources for benefit plans, benefit categories, and benefit groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

See Also

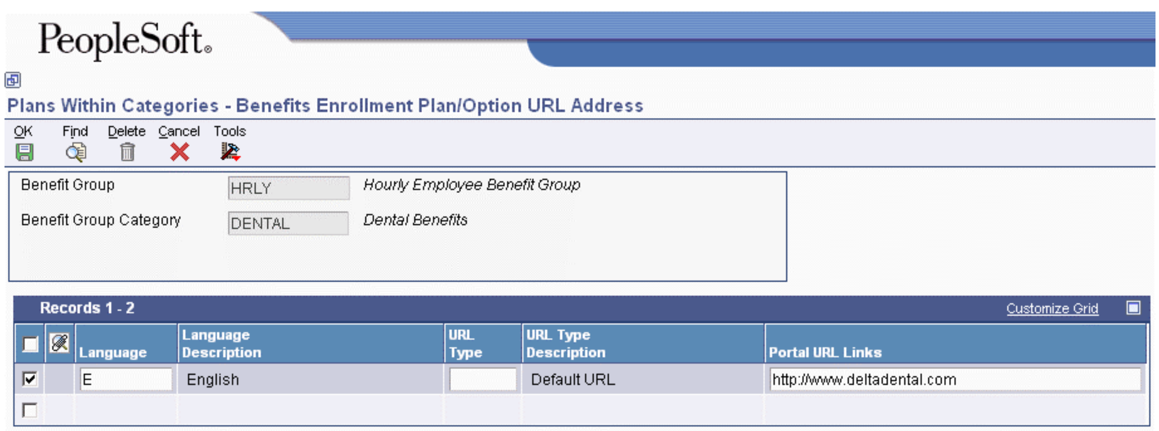
See the following topics in the *Human Capital Management Self-Service Guide*:

- *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on employee benefit plans
- *Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories
- *Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefits or benefit groups

► To set up URLs for benefit plan options

From the Benefits Administration Setup menu (G08BB4), choose Plans Within Categories.

1. On Work with Categories within Groups, complete the following field and click Find to display the benefit categories that are linked to the benefit group:
   - Benefit Group
2. Choose a benefit category and click Select to display the benefit plans that are linked to the benefit category.
3. On Plans Within Categories, choose a benefit plan and choose Associated URLs from the Row menu.



4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
   - Plan Option
   - Language
   - URL Type

   For example, the format of a sample URL might appear as follows: http://www.benefitsprovider.com.

Note

Do not change the user defined code PCP, that is defined for the URL type. Employee self-service software recognizes only PCP and Blank as valid values.

- Portal URL Links

  The system displays the Plan Option and Add Optional Description columns only when a plan option exists.

5. Click OK.

Setting Up URLs for Benefit Plans

Within the employee self-service benefit programs, employees can click on a benefit plan to get more information pertaining to the plan. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, categories and groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

See Also

See the following topics in the *Human Capital Management Self-Service Guide*:

- *Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on employee benefit plan options
- *Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories
- *Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefit groups

► To set up URLs for benefit plans

From the Benefits Administration Setup menu (G08BB4), choose Plans Within Categories.

1. On Work with Categories within Groups, complete the following field and click Find to display the benefit categories that are linked to the benefit group:
   - Benefit Group
2. Choose a benefit category and click Select to display the benefit plans that are linked to the benefit category.
3. On Plans Within Categories, choose a benefit plan and choose Associate URLs from the Row menu.
4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
   - Language
   - URL Type
   - Portal URL Links

     For example, the format of a sample URL might appear as follows: http://www.benefitsprovider.com.
5. Click OK.

Setting Up URLs for Benefit Categories

Within the employee self-service benefit programs, employees can click on a benefit category to get additional information. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, benefit plans, and benefit groups. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

See Also

See the following topics in the *Human Capital Management Self-Service Guide*:

- *Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on employee benefit plan options
- *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on employee benefit plans
- *Setting Up URLs for Benefit Groups* for the steps to add links to resource information on employee benefit groups

► **To set up URLs for benefit categories**

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and click Find:
   - Benefit Group
2. Choose the benefit group and click Select to display the benefit categories that are linked to the benefit group.
3. On Categories By Benefit Group, choose a benefit category and choose Associate URLs from the Row menu.
4. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
   - Language
   - URL Type
   - Portal URL Links
5. Click OK.

Setting Up URLs for Benefit Groups

Within the employee self-service benefit programs, employees can click on a benefit group link to get information. Depending on the links that might be defined, employees might also have links to resources for benefit plan options, benefit plans, and benefit categories. You can provide separate links for employees to learn information about the enrollment process, organizational policy, provider options, a specific benefit plan, or details about a plan option.

See Also

See the following topics in the *Human Capital Management Self-Service Guide*:

- *Setting Up URLs for Benefit Plan Options* for the steps to add links to resource information on benefit plan options
- *Setting Up URLs for Benefit Plans* for the steps to add links to resource information on benefit plans
- *Setting Up URLs for Benefit Categories* for the steps to add links to resource information on employee benefit categories

► To set up URLs for benefit groups

From the Benefits Administration Setup menu (G08BB4), choose Categories by Benefit Group.

1. On Work With Benefit Groups, complete the following field and click Find:
   - Benefit Group
2. Choose Associated URLs from the Row menu.
3. On Benefits Enrollment Plan/Option URL Address, complete the following fields:
   - Language
   - URL Type
   - Portal URL Links

     For example, the format of a sample URL might appear as follows: http://www.benefitsprovider.com.
4. Click OK.

Setting Up Benefit Enrollment Events for Self-Service

Although you normally set up benefit enrollment events when your benefits administration software is installed, you need to review these specifications when you add benefits self-service functionality to your system. When you set up benefit enrollment events, you can use the Benefits Enrollment Setup program (P08500) to define the time period during which an event is open for online changes or enrollments. If the enrollment event allows changes for a certain number of days following a specific or variable date, consider replacing Open From Date and Open Through Date values with the Open Based From Date value.

When you specify the Event Date value, the system uses the date of a qualifying event as the basis for the opening date for benefits enrollment. For example, if an employee has a new child, the open enrollment period for changing health insurance enrollment can be based on the life event of Children. Typically, an employee might have up to 31 days after the Children event date to change benefits. When you use Event Date as the basis for opening enrollment, you must also specify the number of calendar days that enrollment remains open.

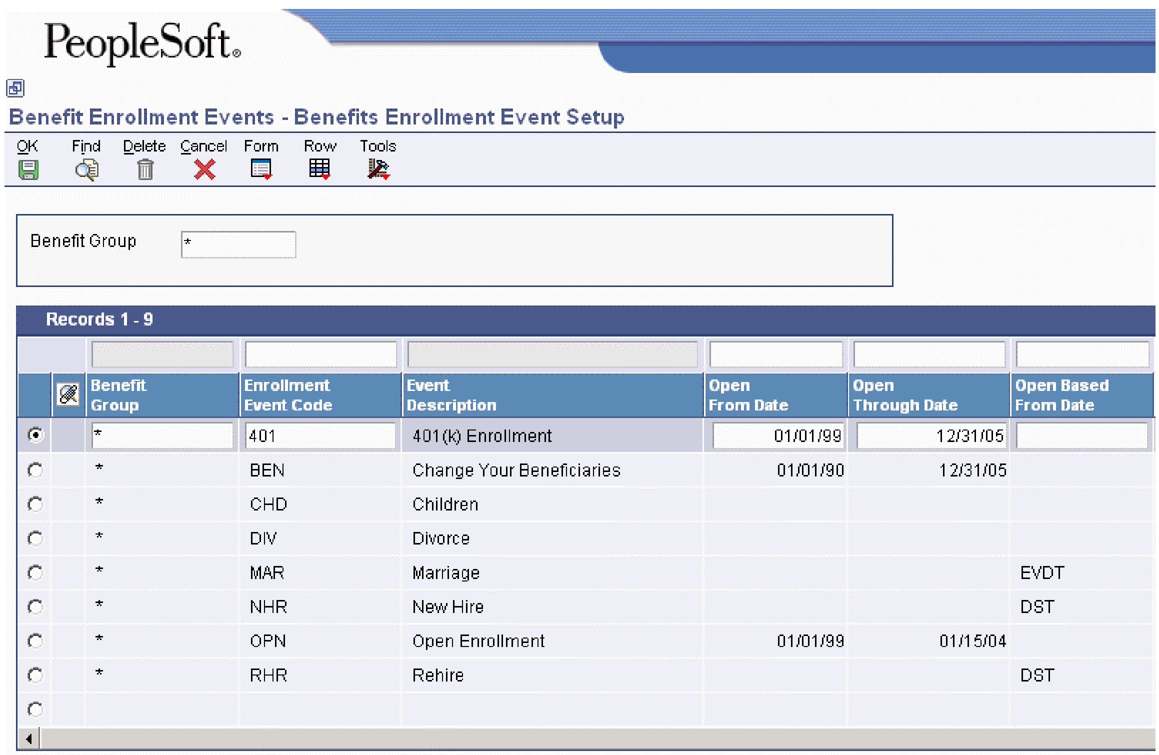
Setting Up Benefit Enrollment Events

When you use the Benefits Enrollment Setup program (P08500) to set up benefit enrollment events, you define the time period during which the event is open for online changes or enrollments. For example, open enrollment events allow changes from a specific date until another specific date. Other types of events, such as new hire enrollment events, allow changes starting on a variable date, such as the date of hire, and extending for a certain number of days following that date.

You can set up different time periods for the same enrollment event for different benefit groups. For example, open enrollment for salaried employees might be at a different time than open enrollment for executives.

► To set up benefit enrollment events

From the Self Service Setup menu (G05BESS4), choose Benefit Enrollment Events.



1. On Benefits Enrollment Event Setup, complete the following fields in the QBE row and then click Find:

   - Benefit Group
   - Enrollment Event Code

   The system first searches for an exact benefit group match and then for the generic * character. You can indicate that an event is open for all benefit groups by typing * in the Benefit Group field. For example, an employee in the EXEC benefit group is in open enrollment from 9/1/05 through 9/30/05. An employee in MGMT is in open enrollment from 11/1/05 through 11/30/05.

2. If the enrollment event will allow changes between specific dates, complete the following fields:
   - Open From Date
   - Open Through Date
3. If the enrollment event allows changes for a certain number of days following a specific or variable date, complete the following fields:
   - Open Based From Date
   - Number of Calendar Days Elapsed

   You can enter a data item, such as the employee's start date or the event date, in the Open Based From Date field.
4. Complete the following field:
   - Enrollment Effective Date

   Note

   If you do not define a time period for an enrollment event, the system assumes that the event is open all year.

   ---

5. Repeat steps 1 through 4 for every available enrollment event, and then click OK to save your changes.

Setting Up Benefit Categories by Enrollment Event

After you have set up the enrollment event codes, you need to use the Benefit Categories by Enrollment Events program (P085510) to define which benefit categories can be changed or enrolled in during each enrollment event. For example, you might allow all benefit categories (medical, dental, disability, life, and so on) to be changed during open enrollment, but only selected categories (such as medical, dental, and vision) to be changed for an event such as marriage.

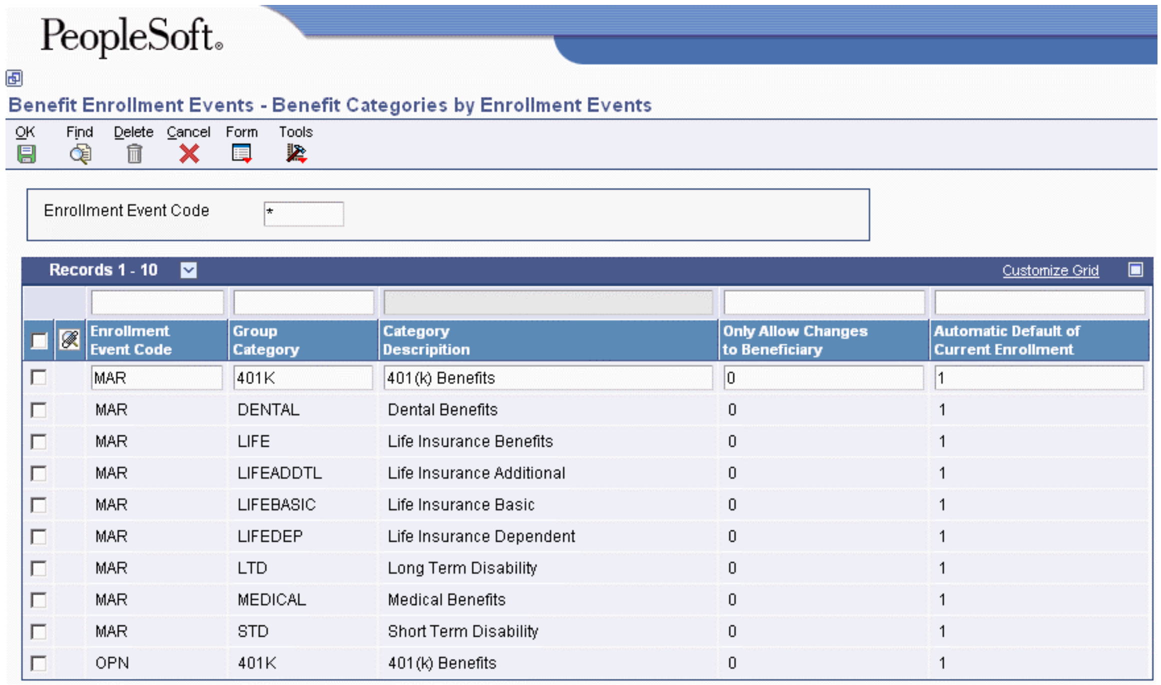
In addition to defining benefit categories, you can control whether employees can change beneficiary information only, or can also change their benefit plan enrollment.

If you do not set up categories for a specific enrollment event, the system assumes that no changes or enrollments are allowed for that event.

► To set up benefit categories by enrollment event

From the Self Service Setup menu (G05BESS4), choose Benefit Enrollment Events.

1. On Benefits Enrollment Event Setup, choose Categories By Event from the Form menu.



PeopleSoft.

Benefit Enrollment Events - Benefit Categories by Enrollment Events

OK Find Delete Cancel Form Tools

Enrollment Event Code *

Records 1 - 10 Customize Grid

Enrollment Event Code	Group Category	Category Description	Only Allow Changes to Beneficiary	Automatic Default of Current Enrollment
MAR	401K	401(k) Benefits	0	1
MAR	DENTAL	Dental Benefits	0	1
MAR	LIFE	Life Insurance Benefits	0	1
MAR	LIFEADDTL	Life Insurance Additional	0	1
MAR	LIFEBASIC	Life Insurance Basic	0	1
MAR	LIFEDEP	Life Insurance Dependent	0	1
MAR	LTD	Long Term Disability	0	1
MAR	MEDICAL	Medical Benefits	0	1
MAR	STD	Short Term Disability	0	1
OPN	401K	401(k) Benefits	0	1

2. On Benefit Categories by Enrollment Events, complete the following fields in the detail area:

   - Enrollment Event Code
   - Group Category
   - Category Description
   - Only Allow Changes to Beneficiary
   - Automatic Default of Current Enrollment

   If the benefit plans are the same, and a processing option is set appropriately in the Current Enrollment Work File Build program (R085530), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default.

3. Repeat step 1 for every available benefit category for each enrollment event, and then click OK to save your changes.

Setting Up Allowed Dependent Relationships by Plan

You can use the Allowed Dependent Relationship by Plan program (P085500) to define dependent relationship information for employee beneficiaries and dependents that can be covered under a dependent benefit plan or benefit plan option. If you add only a single record, by entering a * in the Relation field for a benefit plan, then any beneficiary or dependent relationship is valid. If only a certain subset of relationships is valid, then you must define each of those valid relationships.

If all employee benefit plans are set up, and any beneficiary or dependent relationship is valid, then you can run the Automatically Setup SS Dependent Selection program (R085505) without defining allowed dependent relationships for each plan.

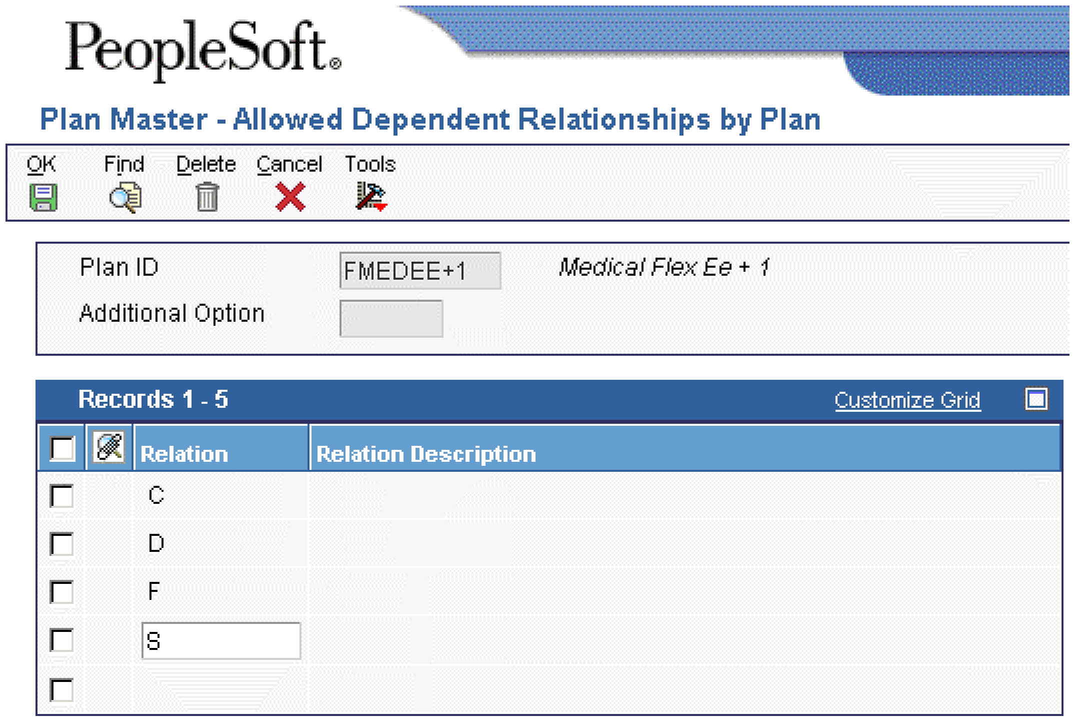
You might use this program to define allowed dependent relationships for benefit plans in an organization that covers domestic partners. Certain tax advantages that could apply to employee benefits do not apply to benefit plans that cover domestic partners. To track the DBAs for benefit plans that include a spouse and benefit plans that include a domestic partner, you might set up separate benefit plans that specify allowed dependent relationships by plan. For example, if an organization offers employee benefit plans that cover domestic partners, then the human capital management administrator might create a benefit plan with the following benefit plan options and allowed dependent relationships:

Benefit Plan Option	Valid Dependent Relationship
Employee Only (not a dependent plan)	Not applicable
Employee + Spouse	Spouse
Employee + Domestic Partner	Domestic partner
Employee + Spouse + Family	Spouse, child, step/foster child
Employee + Domestic Partner + Family	Domestic partner, child, step/foster child
No Coverage (not a dependent plan)	Not applicable

Your employee self-service software includes automatic selection of benefit plans that makes enrolling in benefits easier and faster for employees. The system automatically displays benefit plans and benefit plan options based on the number of dependents and their relationship to the employee.

► To set up allowed dependent relationships by plan

From the Employee Self Service General Setup menu (G08BB413), choose Allowed Dependent Relationships by Plan.



1. On Allowed Dependent Relationships by Plan, complete the following fields then click Find:
    - Plan ID
    - Additional Option
2. Specify the allowed dependent relationships for the plan by completing the following field:
    - Relation

      You can add values to the list of allowed relationships in UDC 08/RL. Review the entries in this table to ensure that the correct special handling codes exist. A value of *, allowing all relationships, is an allowed value, even though this character does not display in the UDC table.

      A UDC for dependent relationships must contain either a D or A in the Special Handling field. If the UDC contains a B in the Special Handling field, then the relationship is automatically excluded from being covered as a dependent.
3. When all relationships are specified for the plan, click OK.

See Also

- *Setting Up Dependent Selection Automatically* in the *Human Capital Management Self-Service Guide* to run a report that creates work files that the system uses to automatically select benefit plans and benefit plan options for employee benefit enrollment
- *User Defined Codes* in the *Foundation Guide* to set up an additional UDC code for allowed relationships and include a special handling code for self-service

Setting Up Workfiles for Benefits Self-Service

Your software uses workfiles to process employee self-service enrollments. The workfiles contain values for current enrollments and available employee benefit plans. Each of the workfiles must be set up before employees can use the benefits self-service programs.

Setting Up Dependent Selection Automatically

From the Employee Self Service General Mgmt menu (G08BESS327), choose Automatically Set Up Dependent Min/Max.

The Automatically Set Up Dependent Min/Max program (R085505) builds tables that the system uses to automatically determine the minimum number of dependents that are appropriate for each benefit plan or plan option. This program also adds a value for allowed relationships in the Allowed Dependent Relations Per Plan table (F085500). A * is added to each benefit plan or benefit plan option record that does not already contain a specified value. Self-service benefits programs use these tables to select benefit plans based on covered dependents. The system uses the following factors in determining the plans that are displayed as choices from which employees can choose:

- Minimum number of dependents
- Maximum number of dependents
- Valid relationships per plan or plan option

Before running this program, ensure that benefit plans options are defined for each benefit plan or that benefit plans are set up with plan grouping. Also review your benefit plan setup to ensure that a maximum number of dependents has been defined for all benefit plans and benefit plan options.

When you run the program, you define plans or plan options to include. You normally run this program after adding a new set of benefit plans to the software and before building the benefit workfiles that use the new plans.

Include all benefit plan options within a benefit plan when you run the Automatically Set Up Dependent Min/Max program. Do not include only one benefit plan option. If you are using benefit plan grouping, then include all benefit plans within a benefit plan group when you run the program.

The system determination of the minimum number of dependents for each benefit plan option is an estimate that is based on the maximum number of dependents listed in the prior plan option and the number of dependents that are defined for a certain plan. For example, the minimum number of dependents for the EE + 1 benefit plan in the list below is 2. The estimate of 2 is based on the maximum number of dependents defined for the previous EE Only benefit plan and the plan maximum of 2 dependents that are defined for the EE +1 benefit plan.

The system calculates the minimum number of dependents as follows:

Number of Dependents Before Running the Program			Number of Dependents After Running the Program	
Medical Plan Options	**Minimum**	**Maximum**	**Minimum**	**Maximum**
Optional - EE Only	0	0	0	0
EE + 1	0	2	2	2
EE + 3	0	4	3	4
EE + Family	0	99	5	99

Review the results to ensure that the dependent numbers reflect the needs of the organization.

See Also

- *Setting Up Allowed Dependent Relationships by Plan* in the *Human Capital Management Self-Service Guide* to define dependent relationships that the Automatically Setup SS Dependent Selection program (R085505) uses to automatically choose self-service benefit plans

Processing Options for Automatically Setup SS Dependent Selection (R085505)

Defaults

Default the number of dependants (1 = Yes default, 0 = No)

Default the relationship if one is not found (1 = Yes default, 0 = No)

Building the Current Coverage Workfile for Self-Service

From the Current Coverage Work File Mgmt menu (G08BESS321), choose Current Coverage Work File Build.

The Current Coverage Work File Build program (R085530) should be run prior to running the following reports:

- Available Plans Work File Build (R085520)
- Build Current Dependent/Beneficiary Work File (R085537)
- Personal Employee Information Workfile Build (R054101)

The Current Coverage Work File Build program creates the Employee Current/Pending Elections Work Table (F085530W) that contains current employee enrollment information. The system uses this workfile to display the benefits in which an employee is currently enrolled. When you build the Employee Current/Pending Elections Work Table, the system uses information from the following tables:

- Employee Master Information (F060116)
- Employee Enrollment (F08330)
- Categories Within Benefit Groups (F08350)
- Plans Within Benefit Categories (F08351)
- Benefits Plan Master (F08320)
- Plan Additional Options (F083202)

You should run this report at the following times:

- Before employees use the benefits self-service programs to enter changes and new information
- Before each open enrollment
- Periodically, after employees enter benefit changes

  When employees re-enter self-service after entering changes, they can view their updated information only after this report is run.

If the version number has been created for the Build Current Dependent/Beneficiary Work File program (R085537), and a processing option is set appropriately, the Current Coverage Work File Build program automatically launches the Build Current Dependent/Beneficiary Work File program.

Processing Options for Current Enrollment Work File Build (R085530)

Version Tab

Use this processing option to specify a version of the Build Current Dependent/Beneficiary Work File program (R085537) and build the Current Dep/Ben X-Reference Work Table (F085537W).

---

1. R085537 Version:

Enter the version of the Build Current
Dependent/Beneficiaries Work File
UBE (R085537) to be run. If the field is
left blank, the dependent/beneficiary
enrollment information will not be
generated. Verfy that the data selection
for R085537 is set up for the selected
version before running.
XJDE0001 is the standard version used.

Use this processing option to specify the version of the Build Current Dependent/Beneficiary Work File program (R085537) that the system uses when you run the UBE. The Build Current Dependent/Beneficiary Work File program supplies current dependent and beneficiary enrollment data for the Current Dep/Ben X-Reference Work Table (F085537W). If you want to run a specific version of the Build Current Dependent/Beneficiary Work File program that has user-defined data selection, you should specify that version. If you leave this processing option blank, the system does not run the Build Current Dependent/Beneficiary Work File program and no dependent and beneficiary information is generated.

Setting Up a Current Dependent and Beneficiary Workfile

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dependent/Beneficiary Work File Build.

When you build the Dep/Ben to Employee Plan X-Reference table (F08336), the system searches the following tables:

- Employee Master Information (F060116)
- Employee Enrollment (F08330)
- Dep/Ben to Employee Plan X-Reference (F08336)
- Current Dep/Ben X-Reference Work Table (F085537W)
- Primary Care Physician Table (F08338)
- Dep/Ben X-Reference Tag Table (F08336B)
- Plan/Plan Option Tag Table (F08320B)

The system obtains employee dependent and beneficiary records that are associated with plans, and records that are not associated with plans. The system then saves this information in the Current Dep/Ben X-Reference Work Table. When employees use self-service to change their benefits or update information, the system uses information from this file to display their current dependents and beneficiaries. You should run this program before employees use benefit self-service features.

You can build the workfile for open enrollment or for a current enrollment event type. The workfile stores the records for both types of events. The program maintains the dependent and beneficiary records separately for each event type.

Running this program checks for active and inactive dependents and beneficiaries and saves the information in the workfile. All dependent and beneficiary information is saved in the workfile even if the dependent or beneficiary is not currently covered by employee benefit plans or benefit plan options so that an employee can re-enroll an inactive dependent.

Before building the workfile, if the system finds unprocessed dependent or beneficiary records for an employee, the system prints the record on an exception report without processing the employee and proceeds to the next employee. The system does not include participants who are deceased.

Processing Options for Build Current Dependent/Beneficiary Work File (R085537)

Use this processing option to specify the type of enrollment that you are preparing to offer.

Process Tab

1. Enrollment Event Type:

1 - Open Enrollment
2 - Current Enrollment

Use this processing option to specify the records that the system examines for the Dependent/Beneficiary X-Reference Work Table (F085536W). The system processes records that match the Enrollment Event Type (EVET) you specify. The system ignores records with a different Enrollment Event Type. Values for this processing option are defined in UDC 08/EV. Valid values are:

1
Open enrollment

2
Current enrollment

Building the Available Plans Workfile for Self-Service

From the Available Plans Work File Mgmt menu (G08BESS322), choose Available Plans Work File Build.

When you use the Available Plans Work File Build program (R085520) to build the Available Plans and Plan Options by Employee Work Table (F085520W), the system searches each employee benefit group for all active benefit plans and benefit plan options that are offered. It also calculates the new cost, as of the effective date, for each plan and plan option. The system obtains age and salary from the Benefit Self Service Constant table (F08505) and uses this information as of the point-in-time date to determine the cost for applicable annuity benefit plans. If the plan requires the employee to enter an amount or rate, the system calculates the costs or credits dynamically after the employee enters the amount and requests the calculation.

If the workfile contains unprocessed records, these instances are printed to an exception report.

To determine whether the current employee enrollment elections can be reused for open enrollment, the Available Plans/Plan Options by Emp Work Table Report (R08320) tracks whether the current elections are different from the available benefit plans and benefit plan options. For the system to reuse current enrollment information, the following conditions must exist:

- All current benefit plans and benefit plan options must be valid for the upcoming enrollment year.
- All current benefit plans and benefit plan options must be set to allow reuse (defaulting).

If the benefit plans are the same, and a processing option is set appropriately in the Current Enrollment Work File Build report (R085530), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default.

You can build the Available Plans and Plan Options by Employee Work Table (F08320WF) for either open enrollment or current enrollment. In open enrollment, available plans and plan options, as well as their costs, might change. In current enrollment, which is typically associated with new hire, rehire, life event, or special enrollment, the available plans and plan options remain the same. The effective date processing option is used to obtain the active plans and plan options, with their associated costs and credits, for the event type. If you do not set up an effective date in the processing options, the system will not build the workfiles.

You can build the workfile twice; once for open enrollment and once for current enrollment. The workfile stores the records for both types of enrollment at the same time.

You can set processing options to specify the following:

- The effective date of the active benefit plans and benefit plan options
- The event type (open enrollment or current enrollment)
- Whether the system allows prior enrollment information to be automatically defaulted as the chosen benefit plans or benefit plan options

See Also

- *Setting Up Benefit Categories by Enrollment Event* in the *Human Capital Management Self-Service Guide* to review whether a benefit plan or a benefit plan option allows defaulting

Prerequisites

- Run the Current Coverage Work File Build first to determine whether the previous year plans can be used without changes for the upcoming open enrollment. See *Building the Current Coverage Workfile for Self-Service* in the *Human Capital Management Self-Service Guide*.
- If your plan rates are changing during the open enrollment period, cross-reference the current year's DBAs to new rate DBAs. See *Setting Up New DBA Plan Rates* in the *Human Capital Management Self-Service Guide*.

Processing Options for Available Plans Work File Build (R085520)

Date Tab

This processing options allow you to specify an effective date for active benefit plans and plan options.

---

1. Effective Date:

   Enter the effective date to determine the
   active plans and plan options with their
   associated costs and credits.

Use this processing option to specify the effective date that the system uses to determine active benefit plans and plan options. The system also uses this date to calculate costs and credits that are linked with benefit plans and plan options.

Event Type Tab

These processing options specify the type of enrollment event that you are setting up.

---

1. Event Type:

   1 - Build available plans/plan options for
   Open Enrollment.
   2 - Build available plans/plan options for
   Current Enrollment.

Use this processing option to specify the event type that the system uses when saving data in the Available Plans and Plan Options by Employee Work Table (F085520W). Open enrollment indicates an event that occurs during a set date range, normally only once, during the year. Current enrollment indicates life events that can happen at any time during the year. Examples of current enrollment events are marriage, divorce, or the birth of a child. Valid values are:

1
Build available plans and plan options for open enrollment.

2
Build available plans and plan options for current enrollment.

2. Process Defaulting:

   Blank - Do not process for defaulting

---

1 - Process for defaulting
(Open enrollment only)

Use this processing option to specify whether the system can automatically display benefit plans and plan options in which an employee is currently enrolled. This option is valid only when saving data in the Available Plans and Plan Options by Employee Work Table (F085520W) for an open enrollment event. Valid values are:

Blank (default)

Do not save information for automatic display. During open enrollment, employees need to elect each benefit plan or plan option.

1

Save information for automatic display. During open enrollment, the system displays the benefit plans and plan options in which each employee is currently enrolled and marks them as elected. Employees can normally change the current elections.

What You Should Know About Processing Options

Effective Date If the effective date is left blank, the system date is used.

Excluding Benefit Plans or Categories From a Work File Build

You can use the Plans/Categories to Exclude From Work File program (P085501) to choose either benefit plans or benefit group categories that you want to exclude when you are building the work files for benefits self-service. If your organization has DBAs that use special-use benefit plans or benefit group categories that are set up for purposes other than regular employee benefits, then you might want to use this approach to exclude these plans or categories when you are preparing for benefits open enrollment or a benefits enrollment that is based on a life event. If you do not exclude these special-use benefit plans or benefit group categories, then the system displays them as employee self-service benefit options.

The Plans/Categories to Exclude From Work File program allows you to choose an existing program version for either the Available Plans Work File Build (R085520) or the Current Enrollment Work File Build (R085530) and then specify a benefit plan or benefit group category identification to exclude from the work file build. To view exclusions that might exist, you can choose Exclusions from the Form menu.

► To exclude benefit plans or categories from a work file build

From the Employee Self Service General Mgmt menu (G08BESS327), choose Plans/Categories to Exclude From Work File.

1. On Excluded Benefits, choose one of the following options:
   - R085520
   - R085530
2. Enter an existing version identification in the following field:
   - Version

   To view existing versions, you can choose Version from the Form menu.
3. To exclude a benefit plan, enter a plan identification in the following field:
   - Plan ID
4. Click the adjacent Add button to add the benefit plan to the grid.
5. To exclude a benefit group category, enter a benefit group category identification in the following field:
   - Benefit Group Category

   You normally choose either a benefit plan or a benefit group category, but not both.
6. To save the exclusions to the current version, click OK.

Building the Personal Information Workfile

From the Personal Information Work File Mgmt menu (G08BESS324), choose Personal Information Work File Build.

You use the Personal Employee Information Workfile Build program (R054101) to create tables that contain employee, dependent, and beneficiary personal information. The report obtains information from the following tables:

- Employee Master Information (F060116)
- Address Book - Contact Phone Number (F0115)
- Address Book - Who's Who (F0111)

The benefits self-service programs use this information to display employee personal information. These tables provide a temporary location that the system uses to store data before writing it back to the originating tables.

The new tables that this program creates are:

- Employee Personal Profile Information Work Table (F054101W)
- Employee Phone Number Work Table (F054115W)
- Employee Emergency Contact Work Table (F054111W)

Processing Options for Personal Employee Information Workfile Build (R054101)

You can use these processing options to specify who is included in the work file build and whether the system saves IRS Form W-4 information in a work file.

Process Tab

1. Write Personal Information for Employee, Dependent/Beneficiary, or Both:

1 - Employee
2 - Dependent/Beneficiary
(R085537 MUST be run first)
3 - Both
(R085537 MUST be run first)

Use this processing option to specify information that the Personal Employee Information Workfile Build program (R054101) supplies for employee self-service work files. Valid values are:

1 or Blank (default)
Employee only

2
Dependents and beneficiaries

3
Employee, dependents, and beneficiaries

Note: To create records for dependents and beneficiaries, you must run the Build Current Dependent/Beneficiary Work File program (R085537) before you run this program.

2. Build the I.R.S. W-4 Tax Form work table (F085303W)

1 - Build the W-4 work table
Blank - Do not build the W-4 work table

Use this processing option to specify whether the system saves information in the IRS W-4 Form Work File table (F085303W). This table stores self-service information that employees can review or change. Valid values are:

0 (Blank)
Do not build the IRS W-4 Form Work File table.

1
Build the IRS W-4 Form Work File .

Setting Up Steps and Rules for Director Process Flows

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

When you run the Populate Director Form Rules/Edits program (R8985500), the system builds the following files:

- Self-Service Step/Application Cross-Reference (F05402)
- Self-Service Script Position Rules (F05403)

The system saves information about objects and applications that can be specified in a process flow in the Self-Service Step/Application Cross-Reference table. The Self-Service Process Flow Setup program (P05400) uses information from this file to define process flows.

The system saves rules and functional parameters for self-service process flows in the Self-Service Script Position Rules table.

Setting Up Self-Service Benefit Plan Guidelines

Many organizations include contribution and coverage change limits in their benefit plans and benefit plan options. For example, to participate in plans that allow for employee contributions, such as a retirement savings benefit plan, employees might have to contribute a minimum amount. In addition, organizations normally impose a maximum amount that employees can contribute. You can use the Benefit Amount Rate Edits program (P085573) to create these rules.

For other indemnity benefit plans such as life insurance, organizations often limit the amount of coverage increase that employees can choose during enrollment events. Even if employees are permitted to enroll for higher coverage when they are hired, companies often limit annual increases. For example, if an employee is enrolled in a life insurance plan that provides $10,000 of coverage, a rule might exist that the employee can elect to change to another plan that provides an increase of no more than $5,000. Thus an employee with $10,000 coverage cannot elect a life insurance benefit plan with more than $15,000 coverage. You can use the Maximum Insurance Coverage Increase program (P085574) to set this limit.

Setting Up Benefit Contribution Limits

Organizations often offer employee benefit plans or benefit plan options to which employees can voluntarily contribute an amount or percentage of their salary. For example, an organization might offer a 401(k) plan that allows employees to contribute up to eight percent of their salary. The organization might also stipulate that if employees choose to participate, they must contribute a minimum of one percent. You can use the Benefit Amount Rate Edits program (P085573) to define the minimum and maximum limits for deductions, benefits, and accruals (DBAs).

To set minimum and maximum limits for a DBA, you can use the Plan Master program (P08320) to choose a benefit plan. You need to review current DBAs that might be currently attached to the benefit plan and then use a Form menu option to choose the Benefit Rates. When you specify the minimum and maximum amounts that the organization allows for a specific DBA, you also need to specify the frequency type. The frequency type determines how the system distributes the amount deducted from salary over a period of one year.

The system stores information that you enter in the Benefit Amount Rate Edits program in the Entered Benefit Amount/Rate Edits table (F085573W).

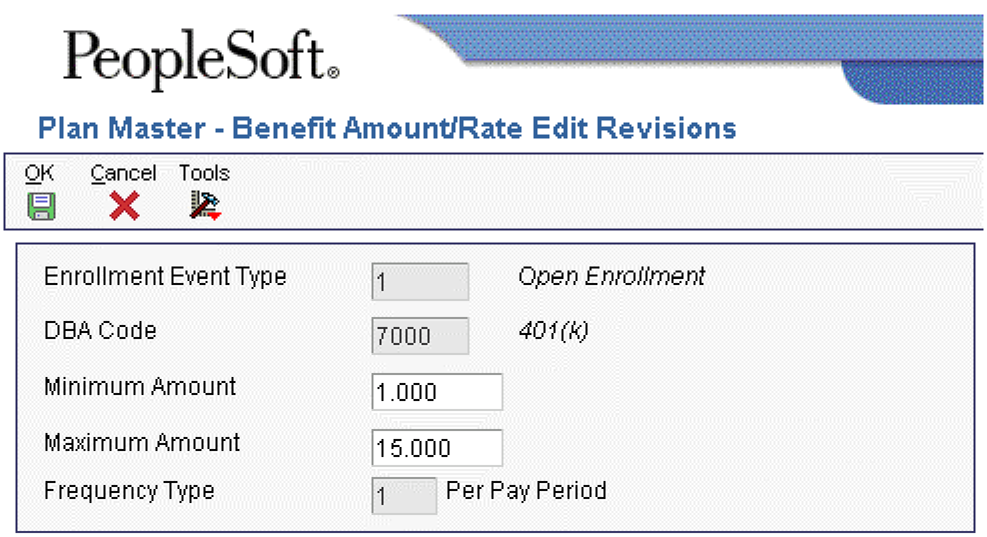
► To set up benefit contribution limits

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Find to display existing benefit plans.
2. Choose a benefit plan, and then click Select.
3. On Plan Master, click the Calc./Eligibility tab and review the following fields:
   - EE Payroll Deduction
   - EE Flex Cost

   The system uses EE Payroll Deduction or EE Flex Cost, but not both. If a value exists for EE Payroll Deduction and EE Flex Cost, the system uses EE Payroll Deduction and ignores EE Flex Cost.
4. Choose one of the following fields, and then choose Benefit Rates from the Form menu:
   - EE Payroll Deduction
   - EE Flex Cost

   The Benefit Rates menu option is available only when you first perform one of the following:
     - Choose EE Payroll Deduction
     - Choose EE Flex Cost and EE Payroll Deduction is blank
5. On Work With Benefit Amount/Rate Edits, complete the following fields and then click Find to display existing records:
   - Enrollment Event Type
   - DBA Code
6. To add minimum and maximum limits to a DBA, click Add.



7. On Benefit Amount/Rate Edit Revisions, complete the following fields:
   - DBA Code
   - Minimum Amount
   - Maximum Amount
   - Frequency Type
8. Click OK.

   You can enter minimum and maximum amounts for additional DBAs before canceling this form.

Setting Up Maximum Coverage Increase Limits

Many organizations offer life insurance benefit plans and benefit plan options to employees. Employees can normally choose to enroll in one or more of the plans or decline enrollment. Companies often allow employees to enroll in any available insurance benefit plan when they are hired, but limit annual increases after the initial enrollment. To qualify for an exception to the annual increase rule, an organization might require a physical examination.

You can use the Maximum Insurance Coverage Increase program (P085574) to create a coverage increase limit rule. You can create this rule for any of the following:

- Benefit plans
- Benefit categories
- Benefit plans within benefit categories

Before creating a new coverage increase limit rule, you need to review the premium and coverage information on the Premium/Coverage tab on the Plan Master form. After reviewing this information, you can choose a benefit plan and then use the Allowed Increment option on the Row menu of the Plan Master program (P08320) to access the Maximum Insurance Coverage Increase program. Alternatively, you can choose the Categories by Benefit Group program (P08350) and implement the same procedure.

If you create a coverage increase limit rule for a benefit plan, the rule then applies to everyone in the company who is covered by the benefit plan. If you create a rule for a benefit category, then only employees within the benefit category are affected by the rule. If you create a rule for a benefit plan within a benefit category, then only employees within the category who elect the benefit plan are affected by the rule.

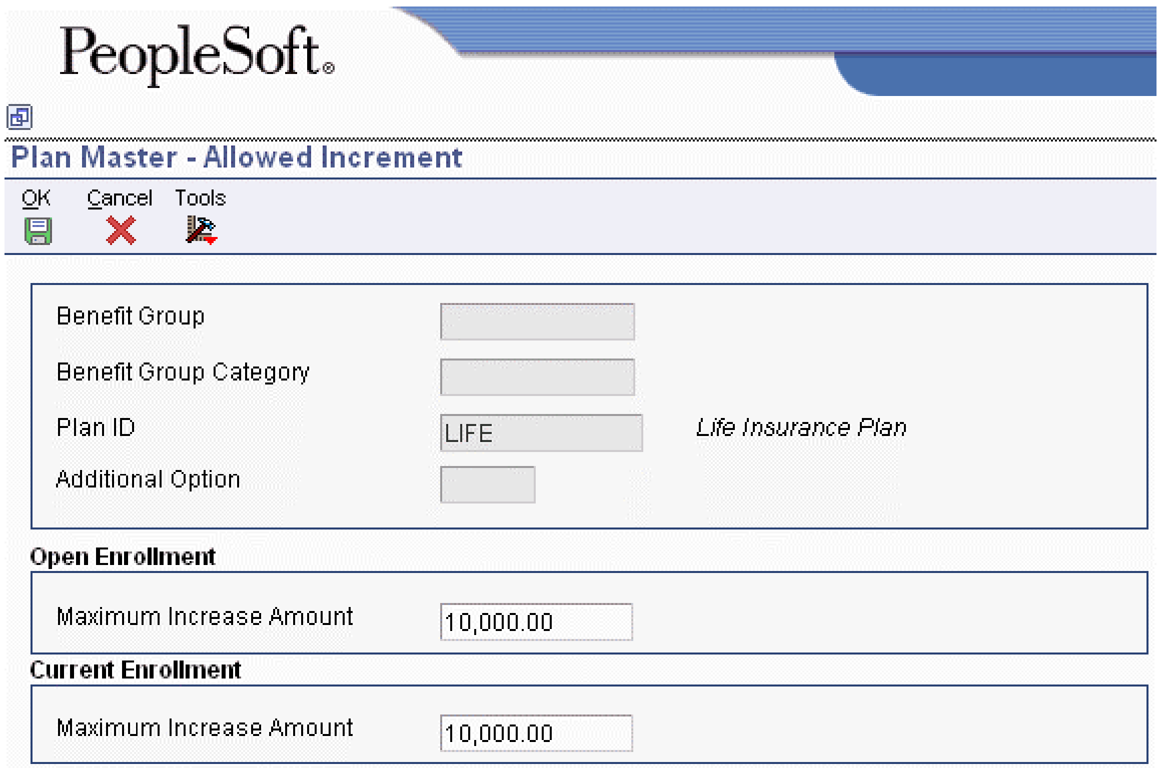
The system stores information that you enter in the Maximum Insurance Coverage Increase Amounts table (F085574).

► To set up maximum coverage increase limits

From the Benefits Administration Setup menu (G08BB4), choose Plan Master.

1. On Work With Plan Master, click Find to display current benefit plans.
2. Choose an indemnity benefit plan and click Select.

3. On Plan Master, click the Premium/Coverage tab and review the following fields:
   - Premium Payment
   - Age Rate Table
   - Per Coverage Dollars
   - Maximum Premium Amount
   - Amount - Coverage
   - Salary Factor
   - Rounding Amount
4. Click Cancel to return to Work With Plan Master.
5. Choose a benefit plan, and then choose Allowed Increment from the Row menu.



6. On Allowed Increment, complete the following field under Open Enrollment:
   - Maximum Increase Amount
7. Complete the following field under Current Enrollment:
   - Maximum Increase Amount
8. Click OK.

   If you want to create limit rules only at the benefit plan level, this step ends the procedure. If you want to create limit rules at a more specific level, then continue with the following steps.
9. Exit to the menu and choose Categories by Benefit Group.
10. On Work With Benefit Groups, click Find to display existing employee benefit groups.
11. Choose a benefit group and click Select.

12. On Categories By Benefit Group, choose an indemnity benefit plan record such as Life Insurance Benefits, and then choose Assign Plans from the Row menu.
13. On Plans Within Categories, choose an employee benefit plan and choose Allowed Increment from the Row menu.
14. On Allowed Increment, complete the following field under Open Enrollment:
    - Maximum Increase Amount
15. Complete the following field under Current Enrollment:
    - Maximum Increase Amount
16. Click OK.
17. On Plans Within Categories, click OK.

Setting Up Self-Service Process Flows

Benefits self-service software includes the opportunity for human capital management administrators to extensively tailor the enrollment process to meet organizational requirements. Accessing this software through an Internet Web portal, you can change the appearance of the interface and the processes that employees use to manage their benefits.

You need to run the Populate Director Form Rules/Edits program (R8985500) prior to creating or changing self-service process flows.

You can use the Self-Service Process Flow Setup program (P05400) to define the process flow for your self-service programs. The process flow includes the steps that are necessary to complete a full life event or open enrollment change. These steps might include a variety of interactive programs, reports, or director forms. You can create company or country-specific processes for each life or open enrollment event, including translated text to meet the needs of specific employee audiences.

Setting up process flows is required before employees, managers, or candidates can use self-service functions that require more than one program to complete.

Running the Populate Director Form Rules/Edits Report

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

The Populate Director Form Rules/Edits program (R8985500) creates and stores information that is used by the Self-Service Process Flow Setup program (P05400) to create new process flow scripts. You need to run this report before creating or changing process flow scripts. You normally need to run this report only once unless you are setting up access to additional self-service programs after your initial setup. This report creates the following tables:

- Self-Service Step/Application Cross-Reference (F05402)
- Self-Service Script Position Rules (F05403)

The Self-Service Setup/Application Cross-Reference table saves a list of all the objects, programs, and reports that you might need when you create process flow scripts.

The Self-Service Script Position Rules table saves all of the rules that govern the setup of self-service process scripts.

Defining Process Flow Scripts

A human capital management administrator can use the Self-Service Process Flow Setup program (P05400) to define the action steps for new self-service process flows, copy and edit existing process flows, or delete process flows that are no longer applicable to organizational requirements. These process flows define the procedure that an employee uses to enroll in or change benefits or personal information.

For a new process flow, the user initially defines general information about the script, including the company and country to which the process flow applies. Next, the administrator defines each action step of the process flow. If the action step requires a program, the user specifies the program, including the version number. You can select only self-service programs. If the action step specifies a director form, the system uses the Self-Service Director Text program (P05401) to provide a form where the administrator defines the director text.

When you set up a process flow for an enrollment event, you should first create a default process flow for company 00000. In the default process flow, you should leave the country value blank so that the system always finds at least one script for each event. If you experience difficulty with running a process flow, the default process flow provides a shortcut to creating a new process flow.

To plan a self-service process flow and implement the procedure with minimum effort, you need to be aware of the rules and program relationships that govern process flows. You generated these rules by running the Populate Director Form Rules/Edits program (R8985500). When you specify action steps in a process flow that violates any of the rules, the system produces an error and an explanation of the problem.

Self-Service Process Flow Rules and Program Relationships

Following are examples of the rules that govern the creation of a self-service process flow:

- A director must be included between each application in the flow. Each script must follow this order: director, program, director, program, and so on.
- The first director in a script must be enabled.
- If an action step is required in a flow, then you must also enable that step in the flow. Although a setup option exists for disabling an action step, required action steps must always be enabled.
- If you specify Self-Service Action Step 70 *Dependent List* (P085551 - ZJDE001) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568 - ZJDE0002). Step 70 must precede Step 160.
- If you specify Self-Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must place it after Step 70 (P085551 - ZJDE001).
- If you specify Self-Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P0855568 - ZJDE0002). Step 80 must precede Step 160.

- If you specify Self-Service Action Step 100 *Number of Dependents to Cover* (P085560) in the process flow, then you cannot include Step 120 *'Health & Welfare' Enrollment* (P085570). If you specify Step120 *'Health & Welfare' Enrollment* (P085570) in the process flow, then you cannot include Step 100 *Number of Dependents to Cover* (P085560). If you specify Step 100 or Step 120 in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568). Step 100 or 120 must precede Step 160.
- If you specify Self-Service Action Step 150 *COBRA Notification* (P085580) in the process flow, then this step must follow any of the following steps if they are in the process flow:

Self-Service Action Step	Program Number	Program Version (if required)
70	P08551	ZJDE0001
80	P08551	ZJDE0002
100	P085560	
120	P085570	
160	P085568	ZJDE0002
170	P085564	
180	P085568	ZJDE0003
190	P085563	ZJDE0001
200	P085563	ZJDE0002
210	P085563	ZJDE0003
220	P085563	ZJDE0004

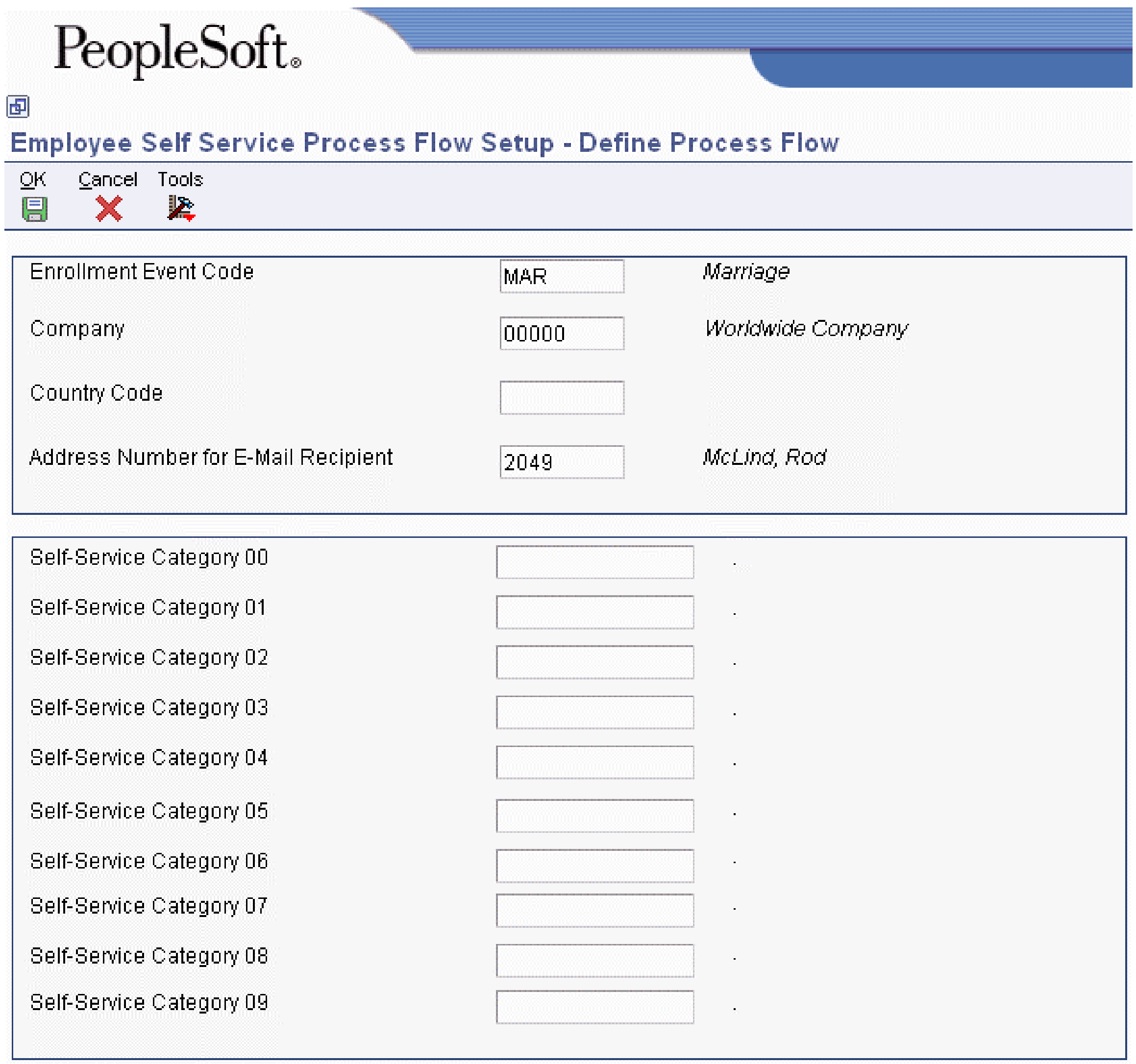
- You must specify all or none of the following Self-Service Action Steps: 160 *Preview Benefit Changes* (P085568 - ZJDE0002), 170 *Accept Benefit Changes* (P085564), and 180 *Final Benefit Confirmation Statement* (P085568 - ZJDE0003). If you specify all three steps, you must define them in sequence after Steps 60 (P085562), 70 (P085551 - ZJDE0001), 100 (P085560) and 120 (P085570).
- When you specify the following Self-Service Action Steps, you must define them in the following sequence: 160 (P085568 - ZJDE0002), 170 (P085564) and 180 (P085568 - ZJDE0003).
- If you specify any of the following Self-Service Action Steps, then you must include Step 160 (P085568 - ZJDE0002): 190 *'Indemnity' Plans to Change* (P085563 - ZJDE0001), 200 *'Retirement' Plans to Change* (P085563 - ZJDE0002), 210 *'Other' Plans to Change* (P085563 - ZJDE0003), or 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 160 must follow any of these steps in the process flow.

- If you specify Self-Service Action Steps 190 *'Indemnity' Plans to Change* (P085563 - ZJDE0001), 200 *'Retirement' Plans to Change* (P085562 - ZJDE0002), and 210 *'Other' Plans to Change* (P085563 - ZJDE0003) in the process flow, then do not include Step 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 220 causes redundancies in the script because the first three steps include the benefit plans that are defined in Step 220.

► To define a process flow script

From the Employee Self Service Director Setup menu (G08BB411), choose Employee Self Service Process Flow Setup.

1. On Work With Self-Service Process Flow Scripts, click Add.



2. On Define Process Flow, complete the following fields:

   - Enrollment Event Code

     You enter this code in a processing option for the director when running a script.

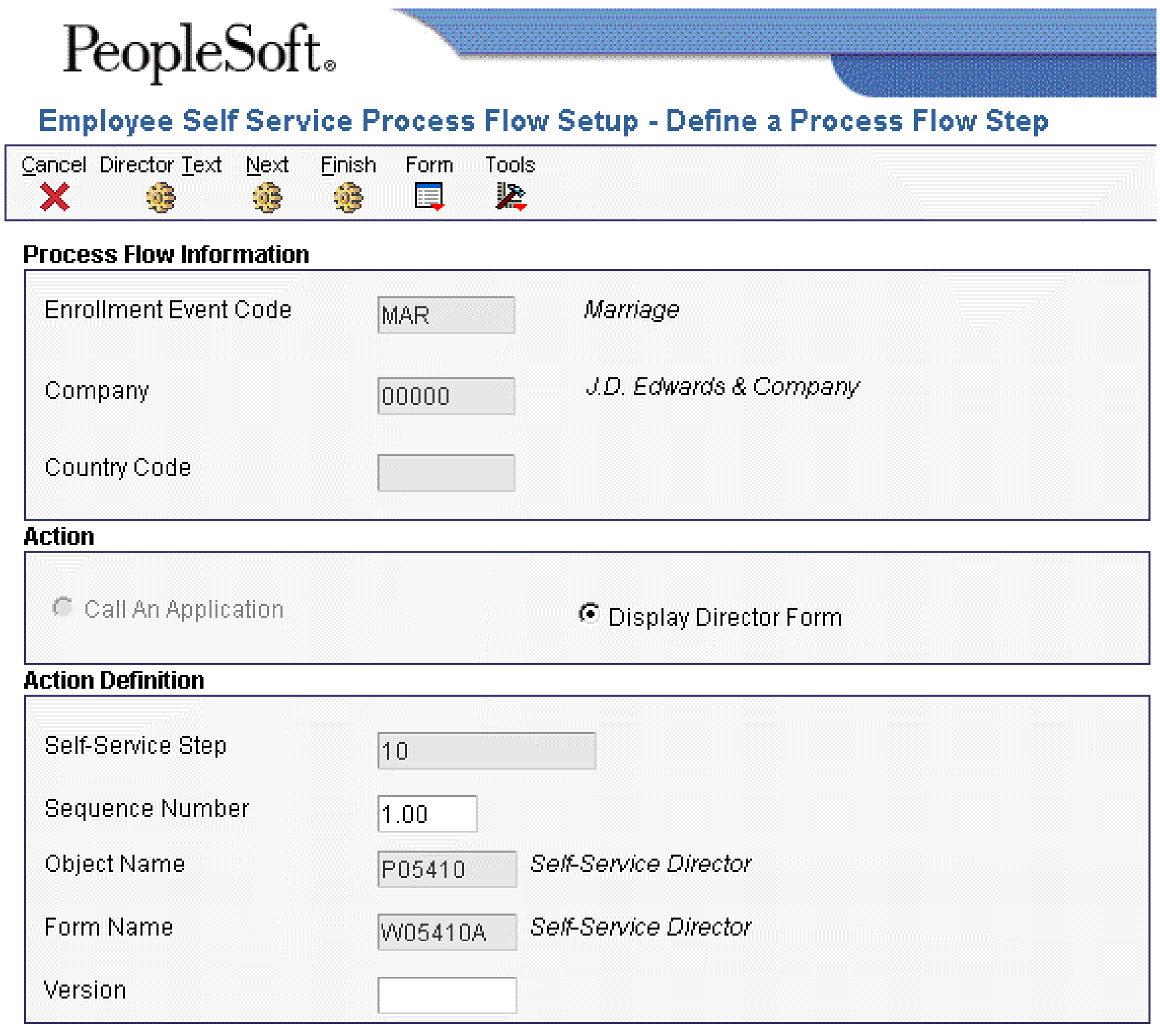
   - Company

3. Complete the following optional fields and then click OK.

    - Country Code
    - Address Number for E-Mail Recipient

    You can define any of the Self-Service Category Codes, and use them for process identification and sorting at a later time. These user defined codes are not required for the self-service process script.

    The process of creating a self-service process flow includes multiple forms that the system displays in sequence. After completing a form and choosing Next, the next form in the sequence appears without an option to return to the previous form.

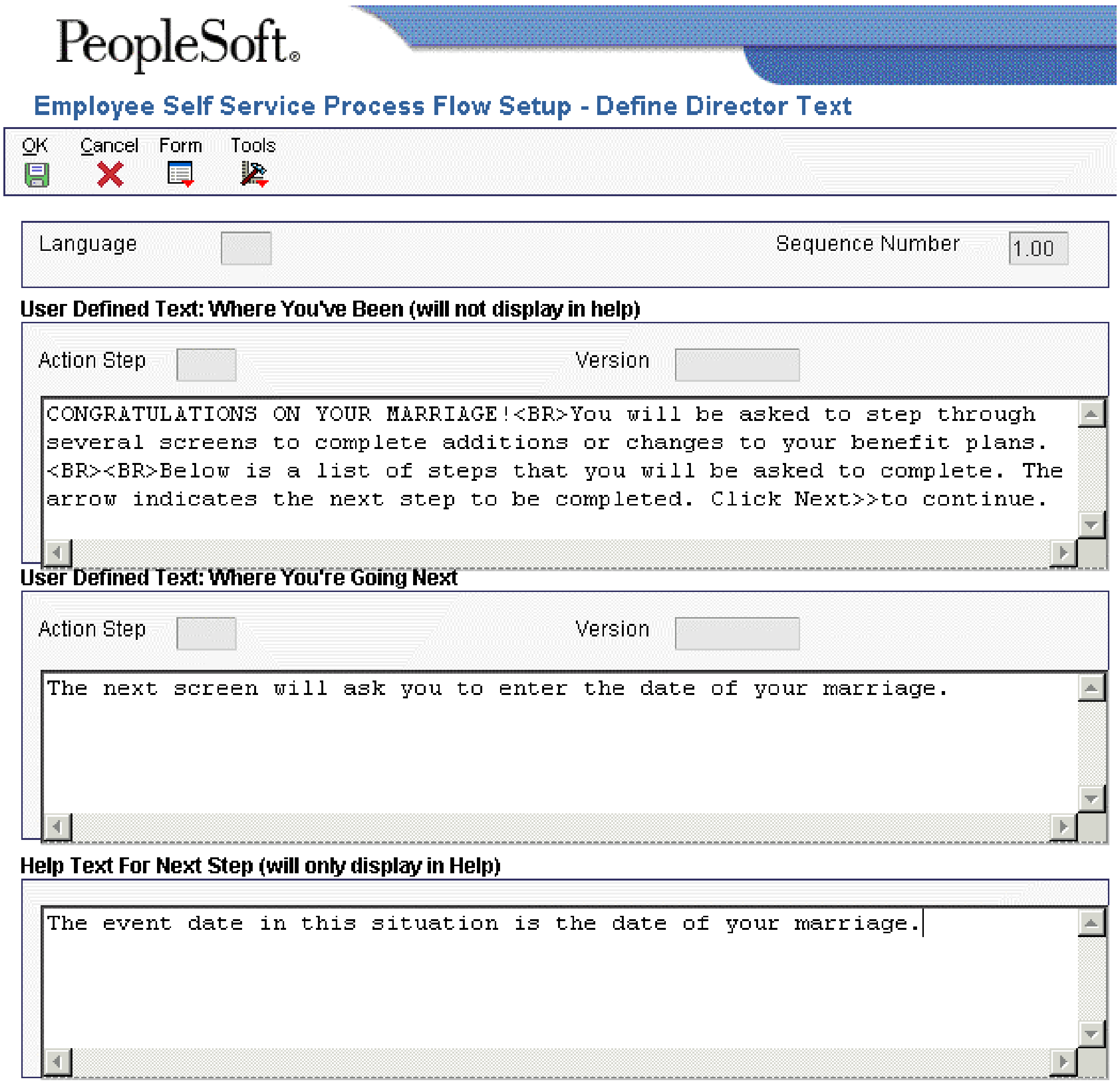


4. On Define a Process Flow Step, review the following field and click Next:

    - Sequence Number

    Because all self-service process flows must begin with a director form, the system automatically selects the Display Director Form option and disables the Call An Application option.

On subsequent steps of the process flow, use the Version field only when you need to specify a specific program version.



5. On Define Director Text, add employee instructions, comments, or feedback that assist an employee in the enrollment process step.

   Enter text in the first text field that displays a welcome message in the first director form or describes the previous step for subsequent director forms.

Note

Do not use the Enter keyboard command to begin a new line of text. To format text in these fields, use HTML tags.

Use the second text field to enter text that the system displays below the list of enrollment process steps on the director form. The system also displays this text when an employee chooses online help.

Enter information in the third text field that provides additional help for the following process step. For example, you might provide a sample of a correct entry, an explanation of possible warning messages, or what the employee needs to do if a data entry problem arises. The system displays information from the third text field only when an employee clicks Help on the following step in the process flow.

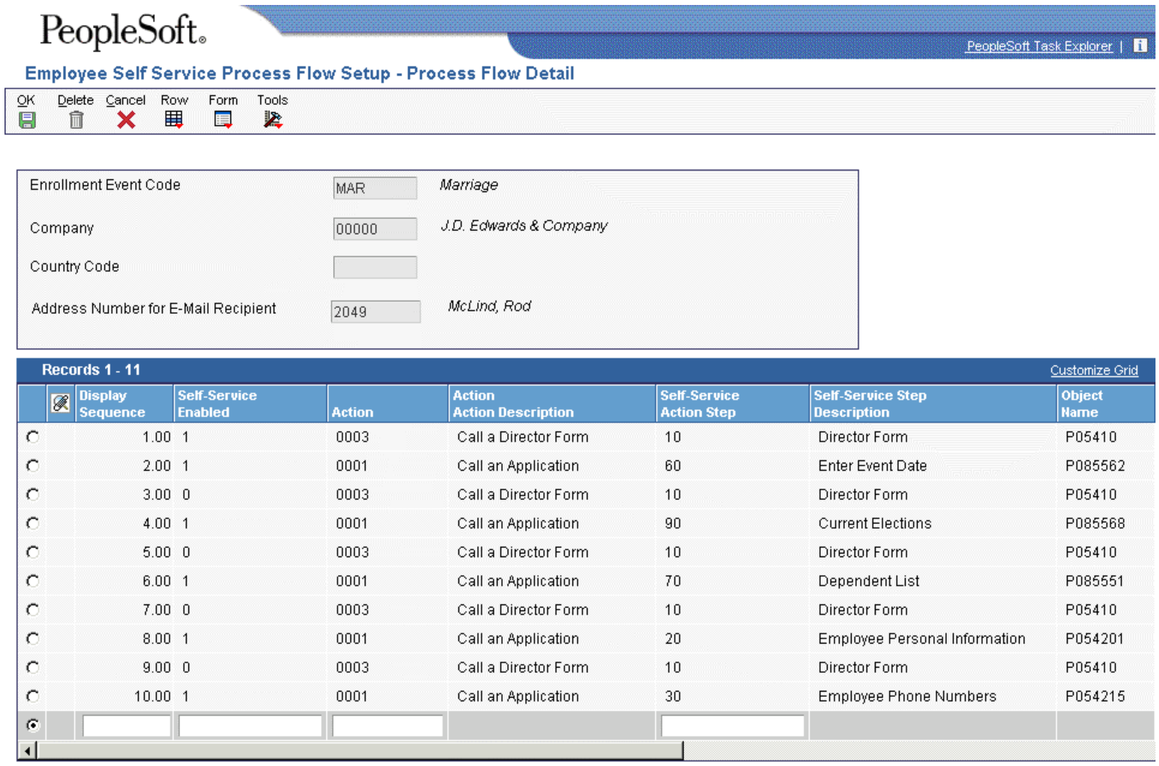
The HTML image tag for the help icon is as follows: `<IMG SRC ="/jde/owjava/images/res/QuestBook.jpg">`. Depending on your setup procedures, the path for this image might be different in your system.

In the example above, if an employee clicks Help in the Enter Event Date program (P085562), the system displays the help text that you enter into the third text field on the Define Director Text form.

6. On Define Director Text, click OK.
7. On Design a Process Flow Step, review the following options under the Action heading:
   - Call An Application
   - Display Director Form

   The system automatically selects one of these options based on the process sequence. For example, after you define a director process step, the system automatically chooses the Call An Application option.
8. Complete the following fields under the Action Definition heading and click Next:
   - Self-Service Step
   - Sequence Number

   The system automatically provides the next number in sequence. You can change this number to alter the order in which the forms are displayed to employees.
9. Repeat steps 2 - 7 until all steps of the process flow are complete.
10. When all process flow steps are defined, click Finish on the final appearance of the Design a Process Flow Step form.


PeopleSoft.

PeopleSoft Task Explorer |

Employee Self Service Process Flow Setup - Process Flow Detail

OK Delete Cancel Row Form Tools

Enrollment Event Code MAR *Marriage*

Company 00000 *J.D. Edwards & Company*

Country Code

Address Number for E-Mail Recipient 2049 *McLind, Rod*

Records 1 - 11 Customize Grid

Display Sequence	Self-Service Enabled	Action	Action Action Description	Self-Service Action Step	Self-Service Step Description	Object Name
1.00	1	0003	Call a Director Form	10	Director Form	P05410
2.00	1	0001	Call an Application	60	Enter Event Date	P085562
3.00	0	0003	Call a Director Form	10	Director Form	P05410
4.00	1	0001	Call an Application	90	Current Elections	P085568
5.00	0	0003	Call a Director Form	10	Director Form	P05410
6.00	1	0001	Call an Application	70	Dependent List	P085551
7.00	0	0003	Call a Director Form	10	Director Form	P05410
8.00	1	0001	Call an Application	20	Employee Personal Information	P054201
9.00	0	0003	Call a Director Form	10	Director Form	P05410
10.00	1	0001	Call an Application	30	Employee Phone Numbers	P054215

11. On Process Flow Detail, review the process flow, make changes or additions, and then click OK.

Setting Up Translated Director Text

Each organization defines self-service process flows that employees use to enroll in benefits. Each of the director forms within a process flow contains user defined text in the domestic language that assists employees with the task. When self-service process flows are defined for additional companies and countries, the director form text entries might require translation.

To set up translated director text, you use the Self-Service Director Text program (P05401) to enter translated text.

► To set up translated director text

From the Employee Self Service Director Setup menu (G08BB411), choose Employee Self Service Director Setup.

1. On Work With Director Text, complete the following fields and then click Find:
   - Enrollment Event Code
   - Company
   - Country Code
   - Sequence Number

2. Choose a self-service process flow record and click Select.

   The domestic text from the record appears in each of the windows.

3. On Define Director Text, choose Translate from the Form menu.
4. Complete the following field:
   - Language
5. Enter translated text into each of the windows.
6. When finished entering translated text, click OK.

Setting Up Form Options

Although self-service forms are designed to display personal information that many organizations find appropriate and useful, in the context of self-service, some human capital management administrators might need to change these choices. You can use the Employee Self-Service Form Options program (P085550) to hide certain fields on a form or to disable certain fields so that the system displays information, but employees cannot enter changes.

The system default setting for the Employee Self-Service Form Options program is to show all fields and enable input. Only overrides to this default need to be specified. Only personal information can be set up as disabled for input. If no overrides are entered, employees have full access to each of the features. The Grouping Code field is connected to UDC 08/EG. This UDC contains a record for each program that has controls that can be hidden. The predefined Grouping Codes are as follows:

CON	Employee emergency contacts
DAB	Dependent and beneficiary personal information
PER	Employee personal information

You can also set up processing options that specify display options on the following forms:

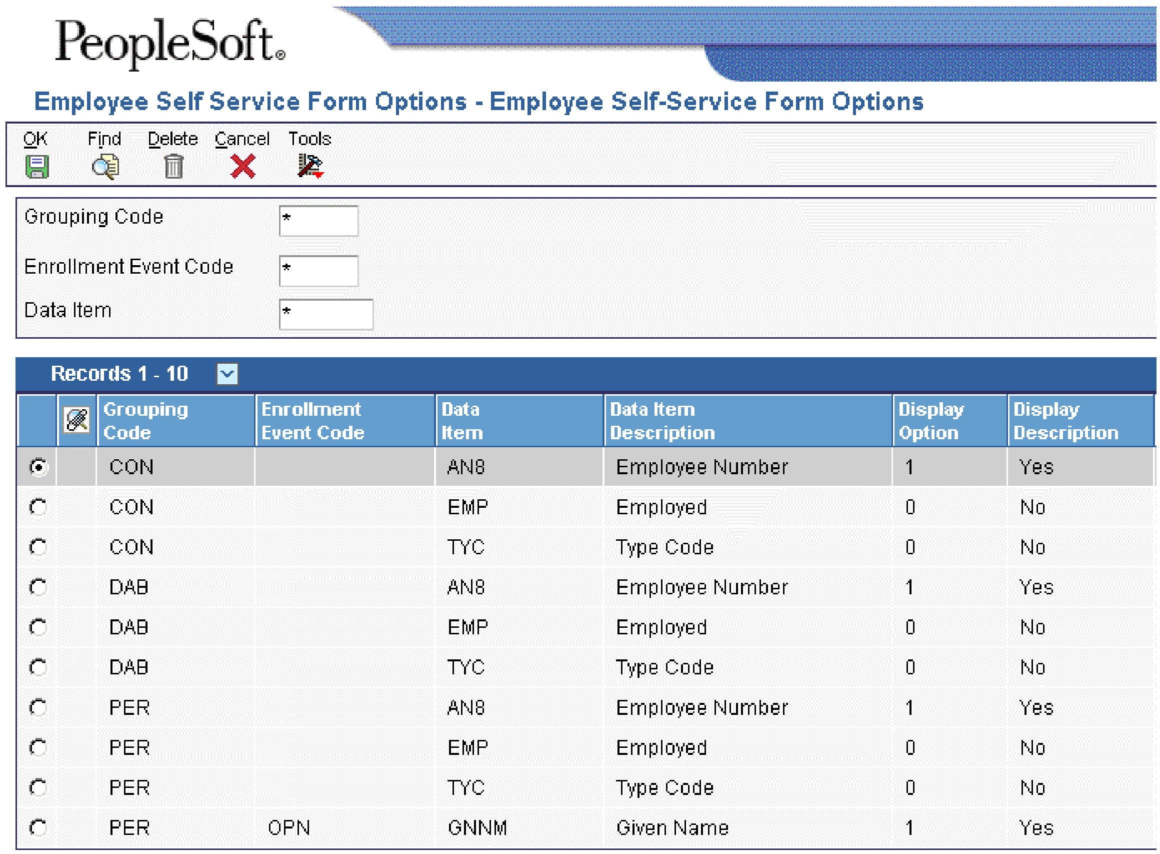
- Self-Service Director (P05410)
- Employee Information - Telephone Numbers (P054215)
- Enrollment Statement (P085568)
- Dependent Enrollment (P085570)

To set up these processing options, you use the Interactive Versions program (P983051) to find the processing options template and then choose Processing Options from the Row menu.

▶ To set up form options

From the Employee Self Service General Setup menu (G08BB413), choose Employee Self Service Form Options.

1. On Employee Self-Service Form Options, complete the following fields and click Find:
    - Grouping Code
    - Enrollment Event Code
    - Data Item



Grouping Code	Enrollment Event Code	Data Item	Data Item Description	Display Option	Display Description
CON		AN8	Employee Number	1	Yes
CON		EMP	Employed	0	No
CON		TYC	Type Code	0	No
DAB		AN8	Employee Number	1	Yes
DAB		EMP	Employed	0	No
DAB		TYC	Type Code	0	No
PER		AN8	Employee Number	1	Yes
PER		EMP	Employed	0	No
PER		TYC	Type Code	0	No
PER	OPN	GNNM	Given Name	1	Yes

2. To hide or disable the display of a data item, complete the following fields for each item:
    - Grouping Code
    - Enrollment Event Code
    - Data Item
    - Display Option
    - Disable Input

3. Click OK.

Processing Options for Self-Service Director (P05410)

Process

1. Process Flow Event

Display

1. Display Marital Status on the Director Form?
   0 = No
   1 = Yes
2. Display Salary on the Director Form?
   0 = No
   1 = Yes
3. Display Birthdate on the Director Form?
   0 = No
   1 = Yes
4. Display User Defined Text "Where You're Going Next", from P05400, on the Help Form.
   0 = No
   1 = Yes

Processing Options for Employee Information - Telephone Numbers (P054215)

Display

1) Display Phone Prefix

0 = No, do not display prefix
1 = Yes, display prefix

Processing Options for Enrollment Statement (P085568)

Options

1. Confirmation Statement Options
   C = Current Statement
   P = Pending Statement
   F = Final Statement
2. Employer Cost
   0 = Hide
   1 = Show

3. Final Statement
   0 = Show Summary Of Benefits
   1 = Show Transaction Number Only
4. Previous Employee Cost
   0 = Hide
   1 = Show
5. Categories To Display
   0 = Show All Categories
   1 = Only Categories in F085510
6. Categories In Final Statement
   0 = Show All Categories
   1 = Show Only Enrolled Categories

Default

Enter the mailing address for declined coverage statements

1. Enter The Company Name
2. Enter The Company Address
3. Enter The City
4. Enter The State
5. Enter The Postal Code
6. Enter The Persons Name For, Attention Of:

Date

1. Current Enrollment Form Date to Display
   0 = No Date Displayed
   1 = Latest Plan Enrollment Date
   2 = System Date
2. Current Enrollment Form Date to Display
   Enter a Valid Date to Override Above Options

E-mail

1. From E-mail Address
   Valid E-mail Address
   Blank = Same as To Address

Processing Options for Dependent Enrollment (P085570)

Default

Hide Benefit Calculations

   0 = Do Not Hide
   1 = Hide Calculation Button
   2 = Hide Calculation Button and Totals

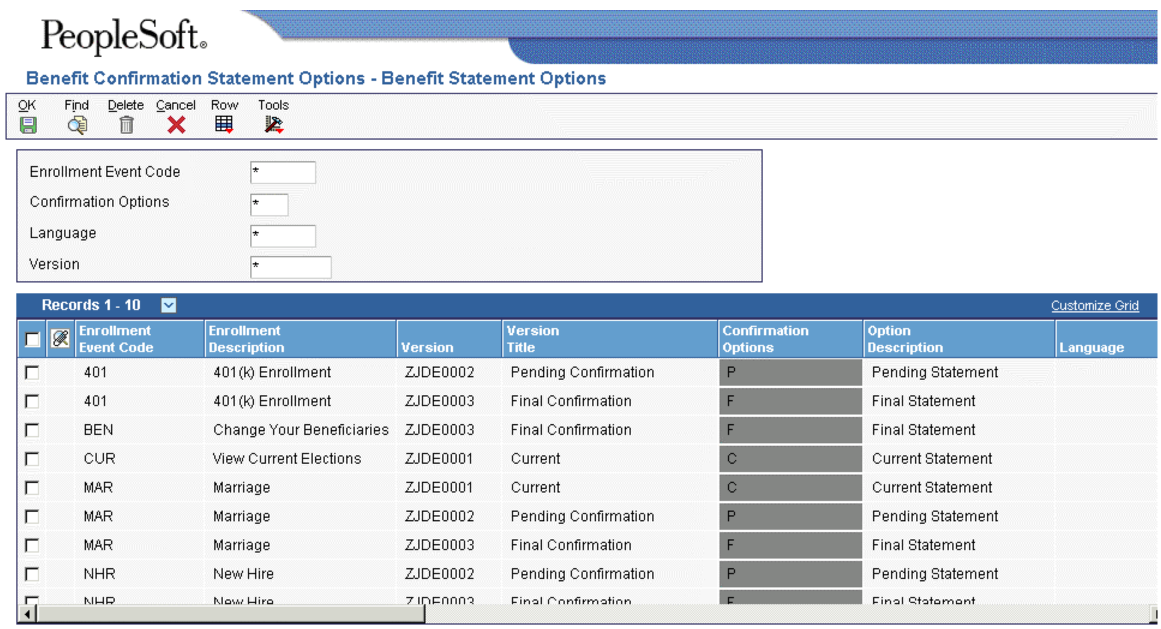
Setting Up Benefit Confirmation Statement Options

You can use the Benefit Confirmation Statement Options program (P085518) to define the text on certain buttons in benefit enrollment statements. You normally define these statement forms at various intervals of the process flows for benefits enrollment. You can change text on the buttons to suit individual events, versions, languages, countries, and organizations. You can change the text on each button or you can hide the text. If you leave the text field blank, the system uses the default text that is currently displayed in the software.

On some forms, certain buttons are always hidden, regardless of the settings that you might input in this program. For example, the Next button is valid only on the Current Statement. The Back button is valid only on the Current Statement and the Pending Statement. The Submit button exists on the Pending Statement and the Final Statement, but on the Final Statement, the default text is Final.

► To set up benefit confirmation statement options

From the Employee Self Service General Setup menu (G08BB413), choose Benefit Confirmation Statement Options.


PeopleSoft.

Benefit Confirmation Statement Options - Benefit Statement Options

OK Find Delete Cancel Row Tools

Enrollment Event Code *
Confirmation Options *
Language *
Version *

Records 1 - 10 Customize Grid

Enrollment Event Code	Enrollment Description	Version	Version Title	Confirmation Options	Option Description	Language
401	401(k) Enrollment	ZJDE0002	Pending Confirmation	P	Pending Statement	
401	401(k) Enrollment	ZJDE0003	Final Confirmation	F	Final Statement	
BEN	Change Your Beneficiaries	ZJDE0003	Final Confirmation	F	Final Statement	
CUR	View Current Elections	ZJDE0001	Current	C	Current Statement	
MAR	Marriage	ZJDE0001	Current	C	Current Statement	
MAR	Marriage	ZJDE0002	Pending Confirmation	P	Pending Statement	
MAR	Marriage	ZJDE0003	Final Confirmation	F	Final Statement	
NHR	New Hire	ZJDE0002	Pending Confirmation	P	Pending Statement	
NHR	New Hire	ZJDE0003	Final Confirmation	F	Final Statement	

1. On Benefit Statement Options, complete the following fields:
   - Enrollment Event Code
   - Confirmation Options
   - Language
   - Version Title
2. To configure the Next, Back, Print, Mail, and Submit buttons on the benefit confirmation form, complete the following fields for each event:
   - Enrollment Event Code
   - Version
   - Language

- Print Button Text
- Mail Button Text
- Send E-Mail to HR Text
- Hide Mail
- Hide Print
- Statement Text

3. When all enrollment event changes are complete, click OK.
4. To review and update only the confirmation statement text, you can choose an enrollment record and then choose Statement Text from the Row menu.
5. When changes are complete, click OK.

Processing Options for Enrollment Statement (P085568)

Options

1. Confirmation Statement Options

 C = Current Statement

 P = Pending Statement

 F = Final Statement

2. Employer Cost

 0 = Hide

 1 = Show

3. Final Statement

 0 = Show Summary Of Benefits

 1 = Show Transaction Number Only

4. Previous Employee Cost

 0 = Hide

 1 = Show

5. Categories To Display

 0 = Show All Categories

 1 = Only Categories in F085510

6. Categories In Final Statement

 0 = Show All Categories

 1 = Show Only Enrolled Categories

Default

Enter the mailing address for declined coverage statements

1. Enter The Company Name
2. Enter The Company Address
3. Enter The City
4. Enter The State
5. Enter The Postal Code
6. Enter The Persons Name For, Attention Of:

Date

1. Current Enrollment Form Date to Display
   0 = No Date Displayed
   1 = Latest Plan Enrollment Date
   2 = System Date
2. Current Enrollment Form Date to Display
   Enter a Valid Date to Override Above Options

E-mail

1. From E-mail Address
   Valid E-mail Address
   Blank = Same as To Address

Setting Up Self-Service Benefits Workflow Approval

You can design and use workflow processes to notify specific employees when an employee enters self-service changes. The system allows workflow processes to be created for the following workfiles:

- Benefits information
- Personal information
- Emergency contact information

You can use the ESS Workfile Approval Setup program (P085515) to specify workflow processes that the system starts when changes are made to certain workfiles. You need to use this program to enable or disable self-service benefits workflow processes because you cannot make these changes in the workflow Process Master program (P98800). The workflow Process Master program allows only one active version. You can disable a workflow process by choosing the Disable Version option. When disabled, the version is inactive and the workflow process does not start when employees enter benefit changes. This function is different from the activate and deactivate features on the workflow Process Master program. When you define the workflow Enabled status as Yes in the Benefits Workflow Approval program (P05420), the system runs the workflow process even if the Version Status in the workflow Process Master is not active.

Note

The system does not display the Process Master program in the HTML environment. The system administrator normally assigns this program a high level of security and it might be accessible only to users with required system security.

Employee self-service benefits software includes the BENAPPRV default process. This process sends an e-mail message and includes an acceptance form. Although the system uses only the BENAPPRV workflow process, you can create and use additional workflow processes, modified to meet organizational requirements, with each enrollment event code and work file combination. The system requirement for each workflow process is that the data structures cannot be changed.

In an open enrollment event, employee benefit changes start the workflow process. If an employee enters additional changes through self-service, the system terminates any related, active workflow processes and removes pending approvals from the e-mail system. If the workflow process cannot start, possibly because the version number is unavailable, the system sends the process recipient a notification message regarding the process failure and then accepts the benefit changes. If workflow processes are enabled in your software, you cannot update employee changes to the live tables until all workflow processes are approved.

To create a new workflow process, use the BENAPPRV version as the process ID.

You can modify a workflow process until the new process is run the first time. When you run the workflow process, the system creates an instance record and saves the record in the Process Instance table (F98860). You must delete all instance records created by running a workflow process before you can enter changes to the process.

► To set up a self-service benefits workflow approval

From the Employee Self Service Workflow Setup menu (G08BB412), choose Self Service Benefits Workflow Approval.

1. On Benefits Workflow Approval Setup, complete one or both of the following fields and click Find:
   - Enrollment Event Code
   - Work File Object Name
2. To ensure that the workflow process includes appropriate specifications, review the following fields:
   - Event Code
   - Work File Object Name
   - Workflow Process
   - Workflow Process Version
   - Workflow Process Version Status

     The value in this field indicates whether the version of the workflow process is active.

   - MB DS

     The mailbox designation is the location to which the system sends notification and approval messages.

3. To activate a workflow process version, choose a workflow process record and choose Process Master from the Form menu.

Note

The system does not provide access to the Process Master program (P98800) from the HTML environment. If access to this program is required, see the system administrator.

4. On Work With Processes, click Find to view the available workflow processes.
5. To activate a workflow process, choose a process record, and then choose Activate from the Row menu.
6. Click Close to return to Benefits Workflow Approval Setup.
7. Review the workflow process to verify that the status is changed.
8. When changes are complete, click OK.

Saving Self-Service Employee Information

When employees enter changes to their benefits, personal information, or dependent and beneficiary information, the system saves the changes in workfiles. This information needs to be periodically saved to system live files. After you set up benefits self-service, including the required workfiles, you need to schedule reports to run that periodically save this information.

Other programs such as Address Book Constants (P0000) can also cause the system to save information that can be subsequently saved in the live tables that contain self-service information. For example, when a value in Address Book Constants is set to record address information with an effective date, the Update Employee Personal Information to Live Tables program (R054104) includes the date effective address information when you save self-service changes. When you set up your system to include date effectiveness, you also need to run the Effective Address Update program (R01840) to mark the latest address as the current address.

See Also

- *Setting Up Constants for Address Book* in the *Address Book Guide* for information about activating date effective addresses

Saving Self-Service Employee Personal Information

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Personal Info to Live Tables.

You can use the Update Personal Info to Live Tables program (R054104) to save self-service changes to live system tables. This program also saves new date effective address information if the appropriate option is set in the Address Book Constants program (P0000). Processing options specify the types of changes that are saved:

- Employee personal information
- Dependent and beneficiary information
- Employee personal information and dependent and beneficiary information

You should run this program after employees use self-service to change any of their personal information. Since you might not be aware of when changes are entered, you should schedule this program to run periodically so that the system saves new information to the live tables at least once each week. You should also run this program at the conclusion of each open enrollment period. After the system updates the live tables, employees can review the new changes on self-service forms.

The Update Personal Info to Live Tables program includes a review of self-service workflow. This program verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this programs process saves information to history tables so that employees can look up changes by transaction number.

The system references the following tables for this program:

- Employee Personal Profile Information Work (F054101W)
- Employee Phone Number Work (F054115W)
- Employee Emergency Contact Work (F054111W)
- Employee Master Information (F060116)

Note

If the GeoCoder for Human Resource Management applications is active, the Update Personal Info to Live Tables program automatically updates employee tax area information if the changes that are made using self-service include a change to the employee's city, state, county, province, or postal code. If there are multiple valid GeoCodes for the employee's new address information, the system produces an exception report and does not update the employee's GeoCode. In these instances, you must select the correct GeoCode from the exception report and manually update the employee's tax area information. See *Assigning Tax Area Information Using the GeoCoder* in the *Human Capital Management Foundation Guide* for additional information.

Processing Options for Update Employee Personal Information to Live Tables (R054104)

You can use these processing options to specify the group of individuals whose records are processed and the mode in which the UBE is run.

Process Tab

1. Write Personal Information for Employee, Dependent/Beneficiary or Both:

1 - Employee (Proof mode only)
2 - Dependent/Beneficiary (Proof mode only)
3 - Both

Use this processing option to specify the group of individuals whose employee self-service records are processed. Valid values are:

1

Employee records from the employee self-service work files. When you use this value, you should run the program in proof mode.

2

Dependent and beneficiary records from the employee self-service work files. When you use this value, you should run the program in proof mode.

3

Employee, dependent, and beneficiary records from the employee self-service work files. When you use this value, you can run the program in either proof or final mode.

2. Mode:

0 - Proof
1 - Final

Use this processing option to specify the mode in which the system runs the process.

0

Run the process in proof mode. Do not update the tables.

1 (or Blank)

Run the process in final mode and update all appropriate tables.

Saving Self-Service Benefits Information

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Benefits Info to Live Tables.

You can use the Update Benefits Information to Live Tables program (R085524) to save self-service benefit changes. This program ensures that any eligibility rules are met and then saves changes from benefit workfiles to system live tables. If changes are made during open enrollment, you should run this program after the open enrollment period is closed. If changes are made because of life events, then you should run this program before each payroll is processed, so the system can save new DBA information to the appropriate files.

The Update Benefits Info to Live Tables program includes a review of self-service workflow. This program verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this programs process saves information to history tables so that employees can look up changes by transaction number.

The system references the following tables for this program:

- Employee Master Information (F060116)
- Available Plans and Plan Options by Employee Work Table (F085520W)
- Dependent/Beneficiary X-Reference Work Table (F085536W)

Processing Options for Update Benefits Information to Live Tables (R085524)

Process

1. Enrollment Event Type:

   1 - Open Enrollment
   2 - Current Enrollment

2. Mode:

   0 - Proof
   1 - Final

Defaults

1. End Enrollment Status:

   A valid code

2. End Enrollment Status based on Plan End Date(s):

   A valid code.

Reviewing Employee Self-Service History

Employees can use the Work With Employee Self Service History program (P085585) to review changes to their company benefits. When an employee enters changes to benefits, either as the result of a qualifying life event or during open enrollment, the system tracks all changes and saves them in history files. An employee might use this program to review current benefits to see if they need to be updated or to check the records for errors.

The Work With Employee Self Service History program displays historical information in the following categories:

- Personal information
- Telephone information
- Emergency contact information

- Dependent and beneficiary information
- Benefit plan and benefit plan option information

The Work With Employee Self Service History program uses the following tables:

- Employee Personal Profile Information History (F054101)
- Employee Emergency Contact History (F054111)
- Employee Phone Number History (F054115)
- Available Plans and Plan Options by Employee History (F085520)
- ESS History Table Cross Reference (F085528)

If changes to benefit information are required, and the open enrollment period is open, you can enter changes until open enrollment closes. If the open enrollment period is closed, you should contact the human capital management administrator.

If changes to benefit information are entered as the result of a qualifying life event, and the allowed period of time for entering benefit changes has not expired, you can enter changes. If the allowed period of time for entering benefit changes has expired, you should contact the human capital management administrator.

► To review employee self-service history

From your intranet portal, choose Employee Self-Service History Reference.

1. On Employee Self-Service History Reference, choose an underlined reference number.

   The underlined reference number is a link to historical information. When you click a link, the system automatically displays a form with related, historical, benefit information. Depending on the link that you choose, one of the following history forms appears:

   - Employee Personal Profile History

     When you view the Personal Profile History form, a Next button appears only if changes exist.

   - Emergency Contacts History

     When you view the Emergency Contacts History form, a Next button appears only if changes exist.

   - Dependent/Beneficiary History
   - Plan/Plan Option History

     When you view the Plan/Plan Option History form, a Next button appears only if changes exist.

2. To view the financial summary for benefit plan or benefit plan options, choose Next.

   The plan/plan option history form displays the same data that appears on the final benefits enrollment confirmation form during the open enrollment process.

   You can use the Back button to return to the previous form.

Depending on how the self-service benefits programs are set up, the following items might not appear:

- Flex cost column
- Employer cost column
- Cost per pay period row
- Send email to HR button
- The system displays two financial summary rows; one at the top of the form and one at the bottom. Because information displayed between these two rows might exceed the information that you can see on a video display, summary information is provided in both locations for user convenience.

Processing Options for Work With Employee Self Service History (P085585)

Default

1. Address Number of HR E-Mail Recipient

Display

1. Display Employer Cost column on Plan and Plan Option History Form.

   0 = No

   1 = Yes

2. Display text and buttons to resemble the Enrollment Statement.

   C = Current Enrollment Statement (Default)

   P = Pending Enrollment Statement

   F = Final Enrollment Statement

Revising Workfiles for Benefits Self-Service

A system administrator can use workfile maintenance programs to enter changes to the benefits self-service workfiles. Although entering changes directly to a workfile should be an unusual event, you can directly change the data in the workfiles to correct errors or enter changes that occur outside of normal parameters. You might use this approach for any of the following tasks:

- Review files for data errors
- Correct errors
- Enter changes to data outside of open enrollment

Caution

Access to this program should have the highest possible level of system security because when you revise self-service benefits information manually, the following occur:

- The system does not validate data entry.
- Changes entered in this program can create unintentional detrimental effects in other programs.
- Data can be removed or changed that negatively affects payroll processing and employee benefits.

Only an expert software user should enter changes to benefits self-service workfiles. The user should be aware of all of the benefits self-service tables and understand the interactions of the enhanced self-service software. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

A system administrator can remove data from the workfiles without replacing the data with valid values. For example, if an administrator mistakenly removes a benefit plan option, all employees enrolled in the benefit plan option are affected. The self-service workfiles might require rebuilding as the result of potential errors.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

Revising the Current Coverage Workfile

An expert system administrator can use the Employee Enrollment Work File Revisions program (P085530W) to enter changes to data in the Employee Current/Pending Elections Work Table (F085530W) before the system saves the temporary information from this table in the live tables. For example, if data errors are discovered in current employee coverage information, the system administrator can change, remove, and add data to the workfile.

After you build the Employee Current/Pending Elections Work Table, this table provides a picture of all the current employee enrollment information. Because enrollment changes that employees enter do not affect this file, you can use this file as a reference point when working in the Available Plans and Plan Options by Employee program (P085520W).

The system administrator should be aware that many changes that are possible in this program might include interdependent considerations in other tables. All changes to data using the benefits maintenance programs must be entered and tracked manually. The system does not review, track, or implement related changes to this or other tables.

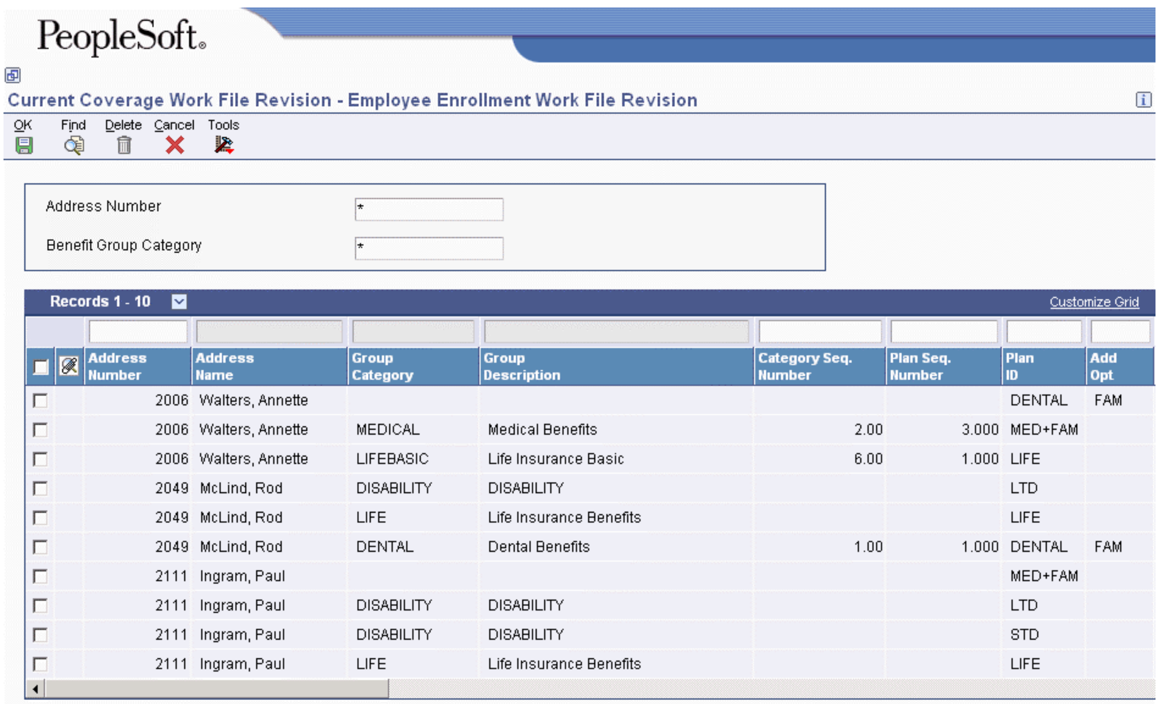
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

► To revise the current coverage workfile

From the Current Coverage Work File Mgmt menu (G08BESS321), choose Current Coverage Work File Revision.



1. On Employee Enrollment Work File Revision, complete one or both of the following fields, and then click Find:
   - Address Number
   - Benefit Group Category
2. Review the values in the following fields making changes, if appropriate:
   - Address Number
   - Group Category
   - Category Seq. Number
   - Plan ID
   - Add Opt

- Effective Date
- Benefit Category Classification
- Plan Grouping
- Plan Cost
- Plan Credit
- Flex Cost
- D B
- Additional Amount
- Amount or Rate
- Amount or Rate
- PCP Flg
- PCP Visited
- PCP Number
- Plan Seq. Number
- Category Type
- Ending Date
- Stay In Group
- Non-Participating Plan

3. Review the values in the following fields:

    - User ID
    - Program ID
    - Work Stn ID
    - Date Updated
    - Time Updated

    These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.

4. Click OK to save the changes in the workfile.

See Also

- ❑ *Saving Self-Service Employee Information* in the *Human Capital Management Self-Service Guide* for the procedure to save the temporary information in the workfile to the live tables

Revising the Available Plans Workfile

An expert system administrator can use the Available Plans and Plan Options by Employee program (P085520W) to enter changes to the data in the Available Plans and Plan Options by Employee Work Table (F085520W) before the system stores the temporary information from this table in the live tables.

After you build the Available Plans and Plan Options by Employee Work Table, this table provides a current picture of all the available benefit plans and benefit plan options from which an employee can choose. As employees enter changes, this file records the changes that are active for the upcoming benefit plan year.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, an employee is unable to update benefits choices during open enrollment and open enrollment is now closed. During open enrollment, the system automatically assigned the current benefit choices as the choices for the upcoming benefit year. The records in the Available Plans and Plan Options by Employee Work Table show that the employee is enrolled in a Preferred Provider Option benefit plan (PPO) for the upcoming benefit year. The employee wants to change medical coverage from a PPO plan to an HMO plan. The system administrator can use the Available Plans and Plan Options by Employee program to remove the employee enrollment in the PPO plan and record an enrollment in an HMO plan. The system administrator must be aware that if dependents are affected by the benefit plan change, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

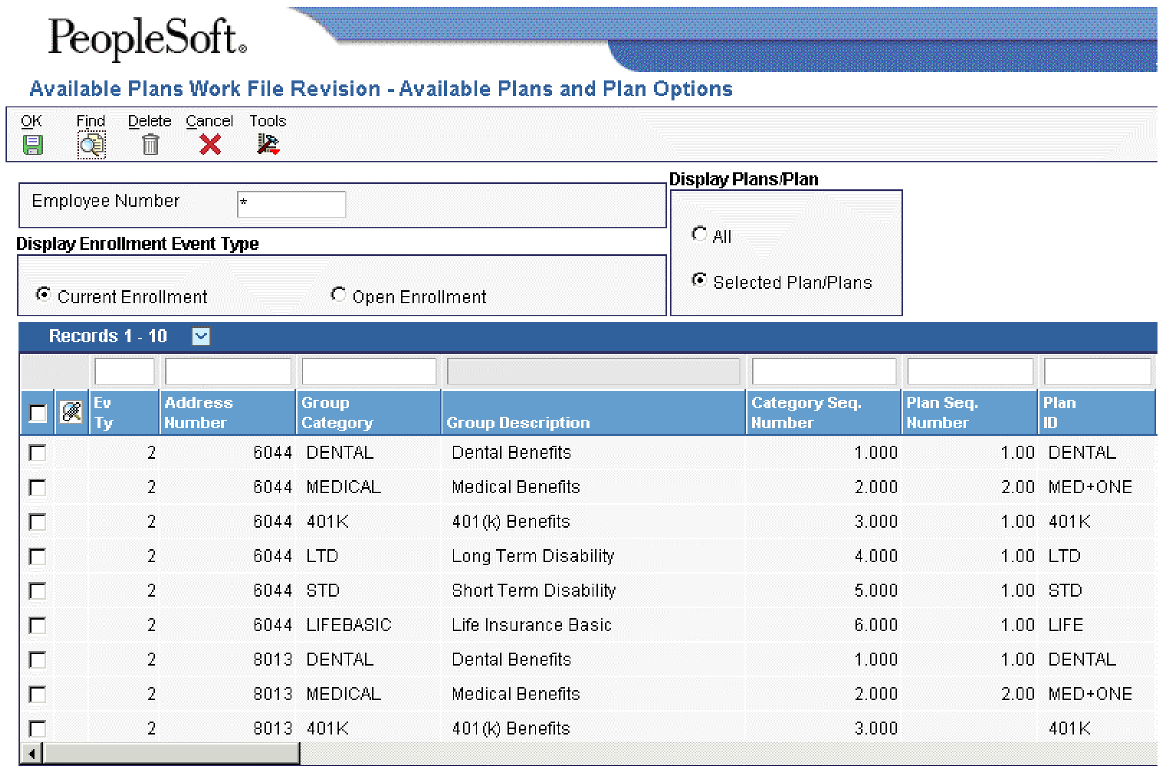
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the benefits maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, data integrity errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

▶ To revise the available plans workfile

From the Available Plans Work File Mgmt menu (G08BESS322), choose Available Plans Work File Revision.



Ev Ty	Address Number	Group Category	Group Description	Category Seq. Number	Plan Seq. Number	Plan ID
2	6044	DENTAL	Dental Benefits	1.000	1.00	DENTAL
2	6044	MEDICAL	Medical Benefits	2.000	2.00	MED+ONE
2	6044	401K	401(k) Benefits	3.000	1.00	401K
2	6044	LTD	Long Term Disability	4.000	1.00	LTD
2	6044	STD	Short Term Disability	5.000	1.00	STD
2	6044	LIFEBASIC	Life Insurance Basic	6.000	1.00	LIFE
2	8013	DENTAL	Dental Benefits	1.000	1.00	DENTAL
2	8013	MEDICAL	Medical Benefits	2.000	2.00	MED+ONE
2	8013	401K	401(k) Benefits	3.000		401K

1. On Available Plans and Plan Options, complete the following field:
   - Employee Number
2. In the Display Enrollment Event Type area, choose eithe the Current Enrollment or the Open Enrollment option.
3. In the Display Plans/Plan area, choose either the All or the Selected Plan/Plans option, and then click Find.
4. Review the values in the following fields and make changes, if appropriate:
   - Ev Ty
   - Address Number
   - Group Category
   - Sequence Number
   - Plan ID
   - Add Opt
   - D B
   - PCP Flg
   - PCP Visited
   - PCP Number
   - Amt Rte

- Employee DBA ID
- Employer DBA ID
- Additional Amount
- Non-Participating Plan
- Stay In Group
- Ded Pnts
- Cred Pnts
- Plan Cost
- Plan Credit
- Amount or Rate
- Amount or Rate
- Effective Date
- M P
- Dft Pln
- Ending Date
- Enrollment Event Code
- Selc 01
- Flex Cost
- Category Type
- Benefit Category Classification
- Decline Coverage Notification
- Defaulting Allowed
- Max DP
- Minimum Dependents
- Number Partic
- Plan Grouping
- Sequence Number
- Short Category Description
- Short Plan/Option Description

5. Review the values in the following fields:

    - Electronic Signature ID

      Electronic Signature ID and the next four data items, Date Updated, Time Updated, Updated By, and Program ID, track the last time that the employee made a change to the benefit record.

    - Date Updated
    - Time Updated
    - Updated By
    - Program ID
    - Date Updated

Date Updated and the three following data items, Update Time, and User ID, and Work Stn ID, track the last time anyone made a change to the benefit record, whether that person was the employee or another person.

- Update Time
- User ID
- Work Stn ID

These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.

6. Click OK to save the changes in the workfile.

See Also

- *Saving Self-Service Employee Information* in the *Human Capital Management Self-Service Guide* for the procedure to save the temporary information in the workfile to the live tables

Reviewing Dependent and Beneficiary Current Coverage Revisions

A Human Capital Management administrator can use the Current Dep/Ben X-Reference Work Table program (P085537W) to review current dependent and beneficiary information that is contained in the Current Dep/Ben X-Reference Work Table (F085537W). This table provides a picture of current dependent and beneficiary enrollment information that is updated each time that you build a new Employee Current/Pending Elections Work Table (F085530W).

If information in this table is incorrect, you should not enter corrections to this table. Because the system does not save information from this table in the live tables, any changes that you enter in this table are lost. An expert system administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to enter changes to the Dependent/Beneficiary X-Reference Work Table (F085536W). After you save changes to the workfile and then build new workfiles, your changes are included in the new Current Dep/Ben X-Reference Work Table.

Caution

The Dependent/Beneficiary Coverage Revisions program should not be used to enter changes to the Current Dep/Ben X-Reference Work Table. No changes should be made to this table. Changes to this table replace information that you might need for reference or troubleshooting procedures. Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs.

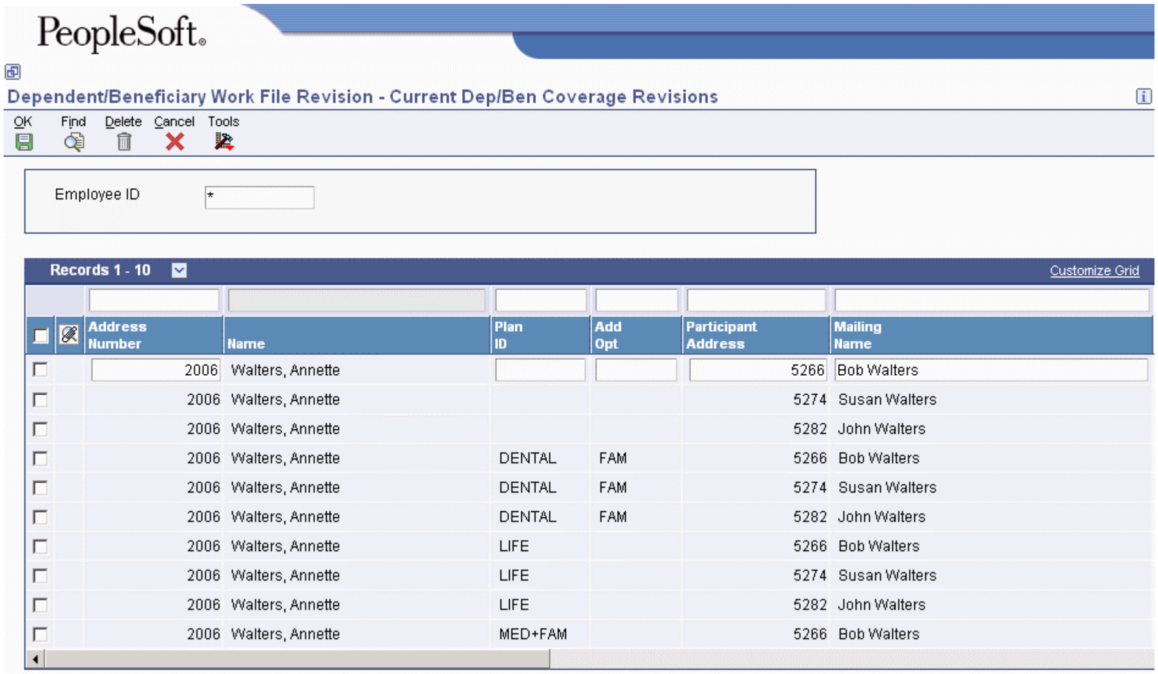
If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

See Also

- *Building the Current Coverage Workfile for Self-Service* in the *Human Capital Management Self-Service Guide* for the steps to build a new workfile

► To review dependent and beneficiary current coverage revisions

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dependent/Beneficiary Work File Revision.


PeopleSoft.

Dependent/Beneficiary Work File Revision - Current Dep/Ben Coverage Revisions

OK Find Delete Cancel Tools

Employee ID *

Records 1 - 10 Customize Grid

Address Number	Name	Plan ID	Add Opt	Participant Address	Mailing Name
2006	Walters, Annette			5266	Bob Walters
2006	Walters, Annette			5274	Susan Walters
2006	Walters, Annette			5282	John Walters
2006	Walters, Annette	DENTAL	FAM	5266	Bob Walters
2006	Walters, Annette	DENTAL	FAM	5274	Susan Walters
2006	Walters, Annette	DENTAL	FAM	5282	John Walters
2006	Walters, Annette	LIFE		5266	Bob Walters
2006	Walters, Annette	LIFE		5274	Susan Walters
2006	Walters, Annette	LIFE		5282	John Walters
2006	Walters, Annette	MED+FAM		5266	Bob Walters

1. On Current Dep/Ben Coverage Revisions, complete the following field and then click Find:
   - Employee ID
2. Review the values in the following fields, but do not enter changes:
   - Address Number
   - Plan ID
   - Add Opt
   - Participant Address
   - Mailing Name
   - D B
   - R L
   - A/I
   - Ben %
   - Secondary Ben %
   - New Ben %
   - New Second Ben %
   - Effective Date
   - Ending Date
   - PCP Number
   - PCP Visited
   - User ID

- Program ID
- Work Stn ID
- Date Updated
- Time Updated

Revising the Dependent and Beneficiary Updated Revisions Workfile

An expert Human Capital Management administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to review updated dependent and beneficiary information that is contained in the Dependent/Beneficiary X-Reference Work Table (F085536W). This table displays updated dependent and beneficiary enrollment information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, during open enrollment, an employee enters dependent or beneficiary information that contains errors. When the open enrollment period is over, errors might exist in the Dependent/Beneficiary X-Reference Work Table, but the workfile records have not been saved in the live tables. The system administrator can use the Dependent/Beneficiary Coverage Revisions program to correct the errors. The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

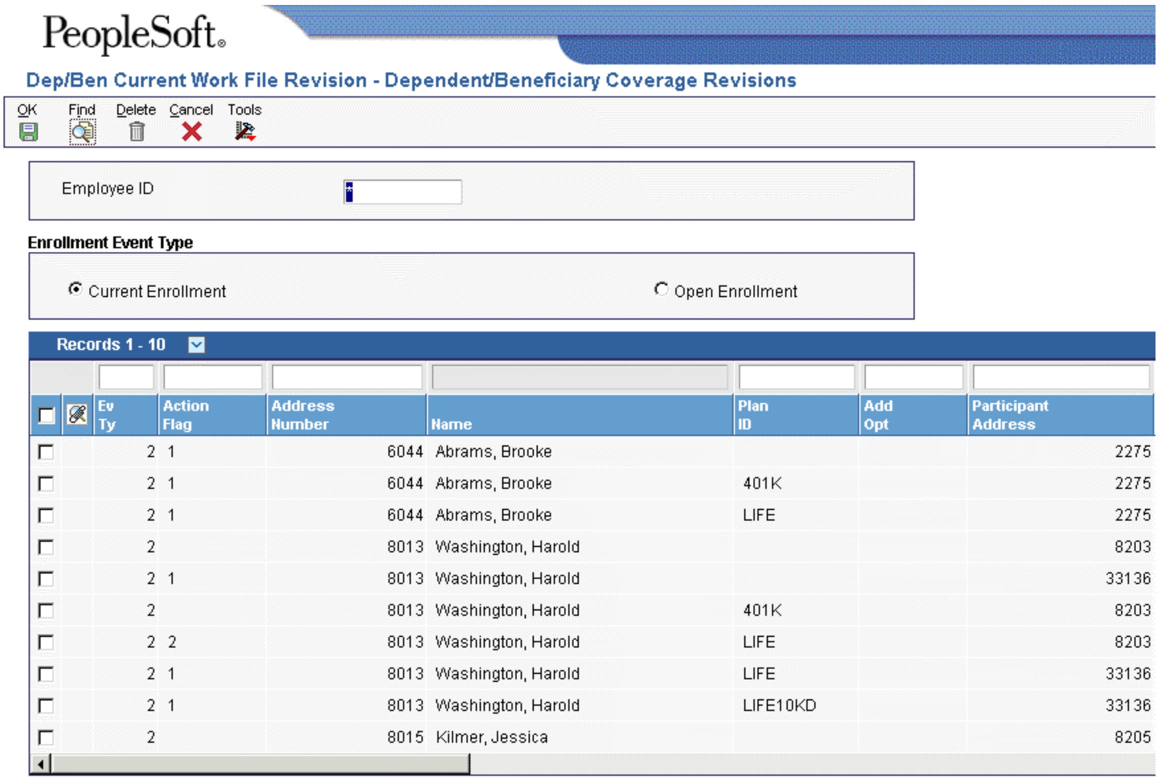
Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

► **To revise the dependent and beneficiary updated coverage revisions workfile**

From the Dependent/Beneficiary Work File Mgmt menu (G08BESS323), choose Dep/Ben Current Work File Revision.


PeopleSoft.

Dep/Ben Current Work File Revision - Dependent/Beneficiary Coverage Revisions

OK Find Delete Cancel Tools

Employee ID

Enrollment Event Type

Current Enrollment Open Enrollment

Records 1 - 10

Ev Ty	Action Flag	Address Number	Name	Plan ID	Add Opt	Participant Address
2	1	6044	Abrams, Brooke			2275
2	1	6044	Abrams, Brooke	401K		2275
2	1	6044	Abrams, Brooke	LIFE		2275
2		8013	Washington, Harold			8203
2	1	8013	Washington, Harold			33136
2		8013	Washington, Harold	401K		8203
2	2	8013	Washington, Harold	LIFE		8203
2	1	8013	Washington, Harold	LIFE		33136
2	1	8013	Washington, Harold	LIFE10KD		33136
2		8015	Kilmer, Jessica			8205

1. On Dependent/Beneficiary Coverage Revisions, complete the following field:
   - Employee ID
2. In the Enrollment Event Type area, choose one of the following options:
   - Current Enrollment
   - Open Enrollment
3. Click Find.
4. Review the values in the following fields and make changes, if appropriate:
   - Ev Ty
   - Action Flag
   - Address Number
   - Plan ID
   - Add Opt
   - Participant Address
   - Mailing Name
   - D B
   - R L
   - Ben %
   - Secondary Ben %
   - New Ben %
   - New Second Ben %
   - Effective Date

- Ending Date
- Enrollment Event Code
- Event Date
- PCP Number
- PCP Visited
- A/I

5. Review the values in the following fields:

    - Electronic Signature ID

      Electronic Signature ID and the next five data items, Date Updated, Update Time, Updated By, User ID, and Program ID, track the last time that the employee made a change to the benefit record.

    - Date Updated
    - Update Time
    - Updated By
    - User ID
    - Program ID
    - Work Stn ID

      Work Stn ID and the two following data items track the last time anyone made a change to the benefit record, whether that person was the employee or another person.

    - Date Updated
    - Time Updated

    These values cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record.

6. Click OK to save the changes in the workfile.

See Also

- *Saving Self-Service Employee Information* in the *Human Capital Management Self-Service Guide* for the procedure to save the temporary information in the workfile to the live tables

Revising the Personal Profile Workfile

An expert Human Capital Management administrator can use the Employee Personal Profile Information Table Revision program (P054101W) to review updated dependent and beneficiary information that is contained in the Employee Personal Profile Information Work Table (F054101W). This table displays current employee, dependent, and beneficiary personal profile information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator can enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, during open enrollment, an employee might enter personal profile information that contains errors. When open enrollment closes, a system administrator might need to enter corrections to the temporary workfile records before saving the new data in the live tables. The system administrator can use the Employee Personal Profile Information Table Revision program to correct the errors.

The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. This program allows changes to all data in the table except the fields that track the individuals entering changes and when changes are entered. The program even allows changes to data that is not entered by an employee. The system does not review, track, or implement related changes that might be required in other tables.

Caution

Only an expert user who is aware of all of the tables and understands the interactions of the enhanced self-service software should enter changes to benefits self-service workfiles. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes employee personal information, errors might result unless associated dependent records for the family enrollment are also changed.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

► To revise the personal profile workfile

From the Personal Information Work File Mgmt menu (G08BESS324), choose Personal Profile Work File Revision.

1. On Work With Employee Personal Profile Information Table, complete one of the following fields and click Find:
   - Address Number
   - Participant Address
2. Review the values in each field to determine whether inaccurate information exists.
3. To enter personal profile changes, choose a record and then choose Profile Revisions from the Row menu.
4. On Employee Personal Profile Information Table Revisions, review the following fields making changes, if appropriate:
   - Preferred Name
   - Middle Name
   - Participant Address
   - Mailing Name
   - Given Name
   - M I
   - Surname
   - Home Business Unit

- Job Desc
- Supervisor Name
- Business Card Title
- Tax ID
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- City
- ST
- Postal Code
- Ctry
- County
- Co
- R L
- Birth Date
- Gender
- Dep/Ben Tax ID
- H.S. Grad
- Emp
- F.T. Student
- School Attending
- D F
- Disb. Date
- Death Date
- Medicare Date
- Electronic Address
- Action Flag

5. Review the following fields that the system provides only to track changes to this table:

   - Electronic Signature ID
   - Date Updated
   - Time Update
   - Updated By
   - Program ID
   - User ID
   - Work Stn ID
   - Date Updated
   - Time Updated

6. When you are finished making changes, click OK to save the new data.

7. To change telephone number information, choose a record and then choose Phone Number from the Row menu.
8. On Employee Phone Number Table Revisions, review the following fields and make changes, if appropriate:
    - Prefix
    - Phone Number
    - Phone Type
    - Action Flag
    - Line Number
9. Review the following fields that the system provides to track changes to this table:
    - Electronic Signature ID
    - Updated Date
    - Update Time
    - Updated By
    - User ID
    - Program ID
    - Work Stn ID
    - Date Updated
    - Time Updated
10. When changes are complete, click OK.
11. To change emergency contact information, choose a record and then choose Emergency Contact from the Row menu.
12. On Employee Emergency Contact Table Revisions, review the following fields and make changes, if appropriate:
    - Salutation Name
    - Mailing Name
    - Given Name
    - M I
    - Surname
    - Address
    - City
    - ST
    - Postal Code
    - Ctry
    - Type Code
    - Professional Title
    - Line ID
    - Display Sequence
    - Remark
    - Action Flag

13. Review the following fields that the system provides to track changes to this table:
    - Electronic Signature ID
    - Updated Date
    - Update Time
    - Updated By
    - User ID
    - Program ID
    - Work Stn ID
    - Date Updated
    - Time Updated
14. When changes are complete, click OK.

    The system saves your changes in the workfile immediately. The system saves your changes in the live tables only when the next workfile build is run.

See Also

- *Building the Personal Information Workfile* in the *Human Capital Management Self-Service Guide* for the procedures to build a new personal information workfile and save information to the live tables

Setting Up New DBA Plan Rates

If any of your benefit plans are changing rates during the open enrollment period, you can cross-reference the current year's DBAs (deductions, benefits, and accruals) with the current rates to the DBAs that reference the new rates. This cross-reference lets you effectively change the rates that appear for the enrollment period without changing the rates for the current DBAs.

You need to cross-reference DBAs only for benefit calculations that are table based or if the DBA is changing radically (for example, from a flat dollar amount to a percentage). If you do not set up a cross-reference, the system retrieves new rates from the Plan Master Rates table (F083203). If you set up both the Plan Master Rates table and the DBA cross-reference, the system uses the DBA cross-reference.

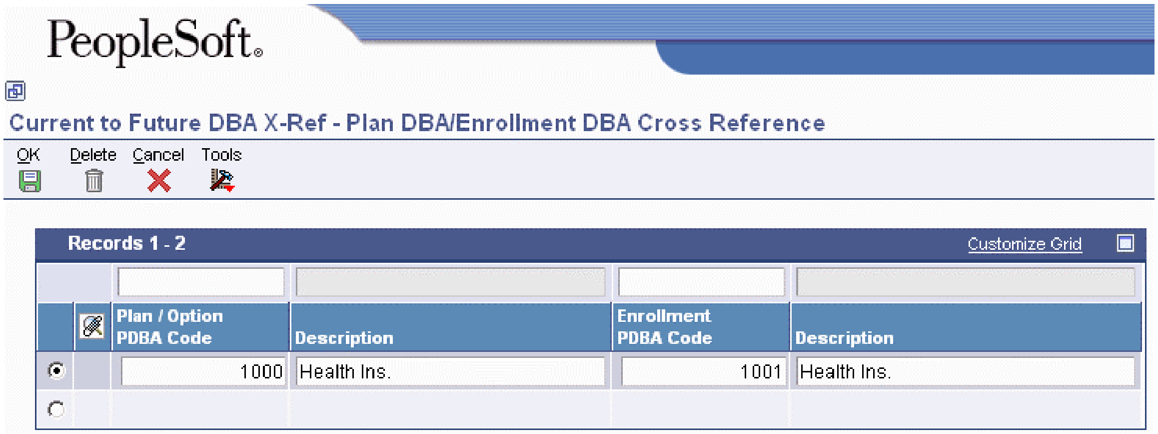
You need to set up the DBA cross-reference before you build the workfiles for open enrollment.

Prerequisite

- Set up the DBAs for the new rates. See *Setting Up Deductions, Benefits, and Accruals* in the *Human Capital Management Foundation Guide*.

▶ To cross-reference new DBA plan rates

From the Self Service Setup menu (G05BESS4), choose Current to Future DBA X-Ref.



1. On Plan DBA/Enrollment DBA Cross Reference, enter the current year's DBA in the following field:
   - Plan / Option PDBA Code
2. Enter the corresponding DBA for the new rate in the following field:
   - Enrollment PDBA Code
3. Repeat steps 1 and 2 for all the rates that are changing, and then click OK to save your changes.

You still need to change your enrollment plan's DBA amounts to the new rates prior to the period in which they will be effective.

Revising Primary Care Physician Information for Self-Service

You can use the Primary Care Physician Revision program (P08338) to add, update, or remove primary care physician information. When you enter changes, the system saves the changes in the Primary Care Physician Table (F08338) and the Primary Care Physician Tag Table (F08338B).

▶ To revise primary care physician information for self-service

Use one of the following navigations:

From the Employee Self Service General Mgmt menu (G08BESS327), choose Primary Care Physician Revision.

From the Periodic Processing menu (G08BB2), choose Primary Care Physician and Tag Table Revisions.

1. On Primary Care Physician and Tag Table Revision, complete the following fields:
    - Address Number
    - Plan ID
2. Complete the following field, if applicable, and click Find:
    - Additional Option
3. Enter changes as necessary and then click OK.
4. To remove an entire record, choose a row and then click Delete.

    The system displays a confirmation dialog.
5. To confirm the removal, click OK.

Managing Benefits Self-Service Work Files

Before each annual open benefits enrollment, you might want to remove old data from your self-service work files. By removing old data, you reduce the possibility that the system could save old data that is no longer applicable to the current work force in the live tables.

Purging the Employee Current and Pending Elections Work Table

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Employee Current/Pending Work Table.

You can use the Purge Employee Current/Pending Elections Work Table program (R085540) to remove existing data from the Employee Current/Pending Elections Work Table (F085530W). This program also uses data in the Employee Master Information table (F060116).

Purging the Dependent and Beneficiary Cross-Reference Work Table

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Dependent/Beneficiary X-Reference Table.

You can use the Purge Dependent/Beneficiary X-Reference Table program (R085542) to remove existing data from the Dependent/Beneficiary X-Reference Work Table (F085536W). This program also uses data in the Employee Master Information table (F060116).

You can set a processing option to specify whether this program deletes records that have not been saved to live files. You can also set a processing option to specify the type of enrollment.

You might want to set up an additional version of this UBE so that you can run one version prior to open enrollment and another version for benefit enrollments that are based on life events.

Processing Options for Purge Dependent/Beneficiary X-Reference Table (R085542)

These processing options allow you to specify whether the program removes data that the system has not saved in live tables. You can also designate the type of enrollment records that the system removes.

Delete Tab

1. Delete Unprocessed Records in F085536W

   Blank = No
   1 = Yes. Delete

Use this processing option to specify whether the system removes unprocessed records from the Dependent/Beneficiary X-Reference Work Table (F085536W) that have not been saved in live tables. Valid values are:

Blank
Keep (do not delete) unprocessed records.

1
Delete unprocessed records.

2. Enrollment Event Type

   1 = Open Enrollment
   2 = Current Enrollment

Use this processing option to specify the type of records that the system removes from the Dependent/Beneficiary X-Reference Work Table (F085536W). Valid values are:

1
Open Enrollment

2
Current Enrollment

Purging the Current Dependent and Beneficiary Cross-Reference Work Table

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Current Dependent/Beneficiary X-Reference.

You can use the Purge Current Dependent/Beneficiary X-Reference program (R085543) to remove existing data from the Current Dep/Ben X-Reference Work Table (F085537W). This program also uses data in the Employee Master Information table (F060116).

Purging the Employee Personal Information, Contacts, and Phone Work Tables

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Employee Personal/Contact/Phone.

You can use the Purge Employee Personal/Contact/Phone program (R054040) to remove existing data from the following tables:

- Employee Personal Profile Information Work (F054101W)
- Employee Emergency Contact Work (F054111W)
- Employee Phone Number Work (F054115W)

This program also uses data in the Employee Master Information table (F060116).

You can set processing options to specify whether you want the system to remove records that have not been previously saved in live tables.

Processing Options for Purge Employee Personal/Contact/Phone (R054040)

Use this processing option to specify whether you want the system to remove data that has not been saved in live tables.

Delete Tab

1. Delete Unprocessed Records in F054101W, F054111W and F054115W.

   Blank = No
   1 = Yes. Delete

Use this processing option to specify whether the system removes records that have not been saved in live tables. The system removes records from the following tables:

o Employee Personal Profile Information Work Table (F054101W)

o Employee Emergency Contact Work Table (F054111W) o Employee Phone Number Work Table (F054115W)

Valid values are:

Blank
The system keeps unprocessed records (does not delete).

1
The system removes unprocessed records.

Purging the Available Plans and Plan Options Work Table

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Available Plans/Plan Options.

You can use the Purge Employee Personal/Contact/Phone program (R054040) to remove existing data from the Available Plans and Plan Options by Employee Work Table (F085520W).

You can set a processing option to specify whether you want the system to remove records that have not been saved to live tables. You might also want to set up a second version of this program. You can set a processing option so that one version removes open enrollment records and the second version removes life event enrollment records.

Processing Options for Purge Available Plans/Plan Options (R085541)

These processing options allow you to specify whether you want the system to remove records that have not been saved in the live tables. You can also specify the type of enrollment event records that you want removed.

Delete Tab

1. Delete Unprocessed Records in F085520W

   Blank = No
   1 = Yes. Delete

Use this processing option to specify whether the system removes records that have not been saved in live tables. The system removes records from the Available Plans and Plan Options by Employee Work Table (F085520W). Valid values are:

Blank

The system keeps (does not remove) records that have not been saved in live tables.

1

The system removes records that have not been saved in live tables.

2. Enrollment Event Type

1 = Open Enrollment
2 = Current Enrollment

Use this processing option to specify the type of records that the system removes from the Available Plans and Plan Options by Employee Work Table (F085520W). Valid values are:

1

Open enrollment

2

Current enrollment

Setting Up Manager Self-Service

You can set up self-service programs that assist supervisors in managing the hiring and reviews of employees.

Setting Up Upcoming Reviews by Supervisor

From the Manager Self Service menu (G05BMSS1), choose Upcoming Reviews by Supervisor.

Employees in a managerial or supervisory position can use the Upcoming Reviews by Supervisor program (P052200). Supervisors can log onto the self-service site to see all employees whom they are responsible to review soon.

The Upcoming Reviews By Supervisor program can be run to report employees with upcoming reviews by supervisor and to add Enterprise Workflow Management functionality to the process. If the processing options for this report are set up correctly, the system automatically reports employees with upcoming reviews, reminds each supervisor of upcoming reviews by sending an e-mail, and automatically updates the Upcoming Reviews By Supervisor program.

When a supervisor logs into the program, the system recognizes the employee number and displays the records for employees who have upcoming reviews. You can set processing options so that supervisors can choose options from the row menu to view employee information on the following forms: Work With Organizational Assignments, Personal, and Work With Basic Compensation (Employee Master program P0801), and Supplemental Data Inquiry (Supplemental DB Inquiry program (P050200). You can choose whether you want to set up security to permit access to these forms by certain individuals only.

This program updates supervisors and eliminates the time that they would spend researching upcoming reviews for their employees.

You can also set a processing option to have the report run automatically on a certain date.

Processing options are also available to run versions that report past due reviews and reviews for all employees without specified dates. Neither of these versions include Workflow.

Upcoming Reviews By Supervisor (P052200) is an inquiry-only program. The information presented by the program is from the Employee Master Information table (F060116).

See Also

- *Running the Upcoming Employee Reviews by Supervisor Report* in the *Human Capital Management Foundation Guide*, after you set the specifications, for information about running the report
- *Working With Security Workbench* in the *System Administration Guide* to review procedures for authorizing access to functions and programs within the Managers Workbench
- *Scheduling a Recurring Job* in the *System Administration Guide* for the procedure to set up a report to run automatically

Prerequisite

- Set up the common settings for self-service. See *Setting Up Common Settings for Human Capital Management* in the *Human Capital Management Foundation Guide*.

Processing Options for Upcoming Reviews by Supervisor (P052200)

Process Tab

Use these processing options to define the defaults that will determine the options available when using this program.

---

1. Enable Select Button To Basic Compensation

1 = Yes
0 = No

Use this processing option to enable the row exit to Basic Compensation. Valid values are:

Blank Disable row exit.

1 Enable row exit.

2. Enable Organizational Assignment Row Exit

1 = Yes
0 = No

Use this processing option to enable the row exit to Organizational Assignment. Valid values are:

Blank Disable row exit.

1 Enable row exit.

3. Enable Employment Information Row Exit

1 = Yes
0 = No

Use this processing option to enable the row exit to Employee Information.

Valid values are:

Blank Disable row exit.

---

1 Enable row exit.

4. Enable Employee Profile Row Exit

1 = Yes
0 = No

Use this processing option to enable the row exit to Employee Profile. Valid values are:

Blank Disable row exit.

1 Enable row exit.

5. Enable Supplemental Data Row Exit

1 = Yes
0 = No

Use this processing option to enable the row exit to Supplemental Data. Valid values are:

Blank Disable row exit.

1 Enable row exit.

6. Enable Create Performance Appraisal

1 = Yes
0 = No

Use this processing option to enable the row exit to Create Performance Appraisal. Valid values are:

0 or Blank
Disable Row Exit

1
Enable Row Exit

Defaults Tab

Use this processing option to define whether the program will provide the opportunity to enter a supervisor data item.

---

1. Enable Supervisor Number Entry

1 = Yes
0 = No

Use this processing option to enable a supervisor data item to be entered.

Valid values are:

1 Enable supervisor data item to be entered.

0 Disable data item. The supervisor data item will be either passed to the application or supplied from the user address book number.

Version Tab

Use these processing options to define the defaults that will determine the options available when using this program.

---

1. Employee Compensation

Enter a specific version
Blank = Default version

Use this processing option to specify the version for Employee Compensation.

The default version is ZJDE0001.

2. Employee Organizational Assignment

Enter a specific version
Blank = Default version

Use this processing option to specify the version for Organizational Assignment. The default version is ZJDE0001.

3. Create Performance Appraisal

Enter a specific version

Blank = ZJDE0001

Use this processing option to specify which version of the Create Performance Appraisal program to run. If this option is left Blank, the system uses the default version, ZJDE0001.

Setting Up the Employee Setup Process

After hiring an employee, a manager can use self-service to add an employee record and initiate an employee setup process. Workflow then sends task approval messages and reminders about equipment setup to certain people.

You can define default setup tasks that can be automatically implemented each time a new employee is hired. Default tasks can be tasks that every new employee needs. For example, if your company provides a phone and a computer for most employees, you might want to set up default tasks for installing a phone, computer, and a network connection. Managers can add to or change these tasks unless you enter a lock code for tasks when you set them up. When you set up a default task, always associate it with a job type and step. Information entered as a default task updates the Default Setup Tasks table (F087101).

You also set up a task list by location. You enter every possible setup task for every location. For every task in the task list, you can specify an approver, a task recipient, and other task details. Managers can choose tasks from the task list and assign them to a new employee's setup record.

You can set up each task to do one or more of the following activities: run a report, send an e-mail message, create a work order, or start a Workflow process. You must first customize a report, set up a work order, or set up an additional Workflow process if you are planning to attach these activities to a task.

You can also require an approval for each task that you set up. If you require an approval, Workflow sends an e-mail approval form to the address book number of the person that you designated in the Approver field. You must also set your processing options to determine whether Workflow should obtain a process approval for the entire employee setup process for every new employee record.

The system determines the date to begin the approval process from the values that you enter in the following three fields on the Work With Setup Tasks Details form:

- Based On Date
- Duration
- Offset Days

To determine the date to begin each task, the system performs the following sequence of actions:

1. Retrieves the date from the Based On Date field (for instance, the arrival date of the employee)
2. Adds the number of days from the Duration field (the number of days needed to complete the task)

3. Adds the number of days from the Offset Days field (the number of days, when added to the Duration values, that determine the day by which the task must be completed)

The information that you enter in the header area of the setup forms updates the Setup Task List table (F087102). The information that you enter in the detail area of the setup forms updates the Setup Task Details table (F087103).

Prerequisites

- ❑ You must set up numerous user defined codes for the employee setup process, including location codes 08/L1 through 08/L0. See *Adding a User Defined Code* in the *Foundation Guide*.
- ❑ Set up the common settings for self-service. See *Setting Up Common Settings for Human Capital Management* in the *Human Capital Management Foundation Guide*.
- ❑ Set up your processing options to require a process approval and to specify an ending status for the process approval.
- ❑ Verify that the following workflow processes are activated in the Process Master program (P98800):

EESETUP01-Employee Setup Approval
The workflow process that e-mails an approval form for the entire employee setup process to the address book number of the approver. After workflow obtains an approval, it e-mails approval forms for each setup task that requires an approval. If you want your system to obtain an approval for this process, you must set a processing option. You must also set up this task on any task setup form.

EESUTSK03-Get Task Approval
The workflow process that e-mails an approval form to the address book number of the approver for an individual employee setup task that requires an approval. After workflow obtains an approval, it begins the task.

EESUTSK01-Employee Task Setup
The workflow process that begins the employee setup task after obtaining approval. Depending on how this task is set up, this task might include running a report, sending an additional e-mail, creating a work order, or starting an additional workflow process.

► To set up default tasks

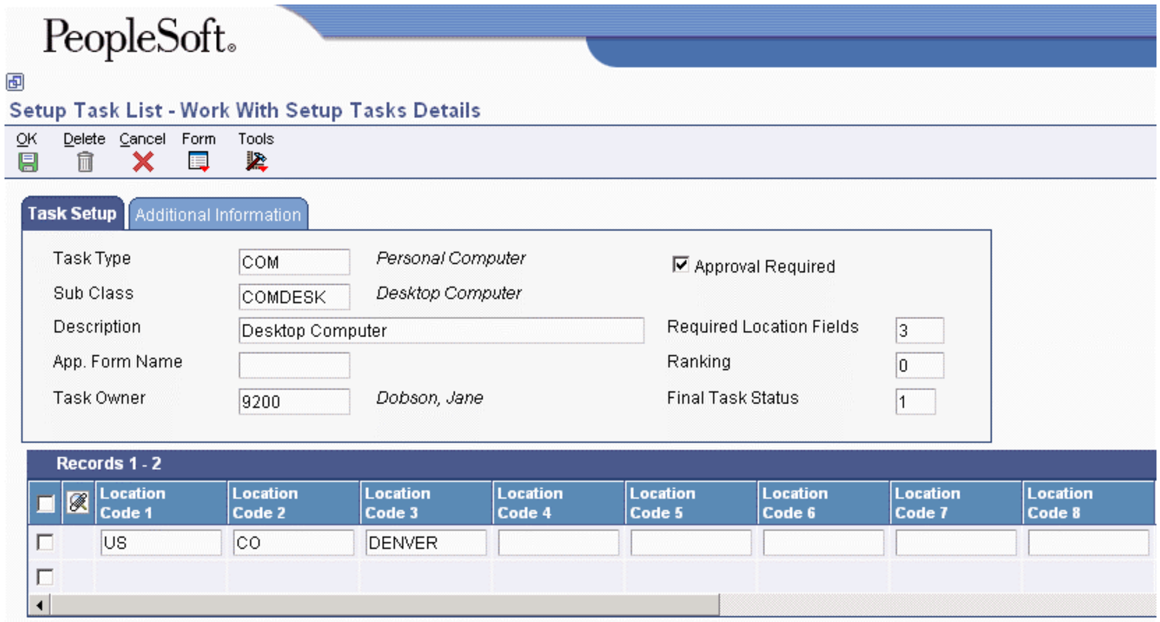
From the Manager's Employee Setup Options menu (G05BMSS4), choose Default Setup Tasks.

1. On Work With Default Setup Tasks, click Add.
2. On Edit Default Setup Tasks, complete the following fields:
   - Job Type
   - Job Step
   - Task Type
3. Complete the following optional fields and click OK:
   - Sub Class
   - Lock Code

► To set up tasks by location

From the Manager's Employee Setup Options menu (G05BMSS4), choose Setup Task List.

1. On Work With Setup Tasks, click Add.



2. On Work With Setup Tasks Details, complete the following fields in the header area:
   - Task Type
   - Sub Class
   - Description
   - Required Location Fields
   - Ranking
   - Final Task Status
3. Choose the following option in the header area, if applicable:
   - Approval Required
4. Enter your address book number or the address book number of the person responsible for monitoring this task in the following field:
   - Task Owner
5. Complete the following optional field if you have an additional form set up to enter additional task information:
   - App. Form Name
6. Complete the following field in the detail area:
   - Task Recipient

   The task recipient receives any e-mail, work order, or report that you attach to this task.

7. To identify the employee workspace, complete as many of the following type of fields that are required.

    - Location Code 1

8. To define the number of required fields, you can set the required value in the following field:

    - Required Location Fields

    The system displays an error if fewer than the required number of fields are completed.

9. If you chose the Approval Required option, complete the following field:

    - Approver

10. If you set up a customized report for this task, complete the following fields:

    - Report Name
    - Version

11. If you set up an additional workflow process for this task, complete the following field:

    - Process ID

    If you set up the process approval task, enter EESETUP01 in the Process ID field.

12. To send an e-mail message to the task recipient, complete the following field:

    - Send E-Mail

    If your organizational procedures are set up for work orders, you might want to create a work order for this task.

13. If you create a work order, complete the following field:

    - Order Number

14. Complete the following fields so that the system can determine the start date of the task:

    - Offset Days
    - Duration
    - Based on Date

    If you are setting up the process approval task, you must enter the creation date as the value in the Based on Date field. The Completion Offset Days and Duration fields must be set to 0.

15. Repeat these steps to enter different locations for the task.
16. When you are finished, click OK.

See Also

- *Creating Work Orders* in the *Work Orders Guide*

Setting Up Employee Status Change

Employee Status Change Setup (P08730) is one of the suite of programs that a manager can use from Manager's Workbench (P08712). Managers can use Employee Status Change Setup to perform any of the following changes:

- Promotion
- Job status
- Location
- Leave of absence
- Department or supervisor

Managers can save time and effort by using the five default tasks above to perform the most frequent types of employee changes. For example, when an employee changes jobs, the supervisor can initiate the change using the Manager's Workbench. Workflow can route the status change to human resources for the appropriate approvals. Once the change request has been approved, the change will automatically be updated in the system.

Your software has been supplied with a default version that contains options, approval requirements, and data items that are common to a large cross-section of organizations. As a result, little or no change might be required for this application to meet your needs. If you want to add data items to any of the existing change forms, you will find that the majority of the fields from the Employee Master Information table (F060116) are currently available.

If you want to change the default settings, the best approach is to make a copy of the existing version, rename the new version appropriately, and make changes only to the new version. Because any new version must maintain the same data structure (input parameters), this approach will result in less effort and fewer errors. You use the Employee Status Change Setup program to customize the setup of the Employee Status Change program (P08720).

An additional setup option exists, within the Employee Status Change Setup program, to define a sixth change type that can be either a combination of existing change types or a selection of any of the fields in the Employee Master Information table. You can accomplish this addition in Employee Status Change Setup. To add additional change types, you need to add each item to UDC 08/S4.

Normally, you will use the existing processing option settings for Employee Status Change Setup. These settings are:

- Report Name
- Report Version

The default report name and version include the options, approval requirements, and data items mentioned above. You should alter these settings only when you have created a new version and want managers to use your customized change options.

Prerequisite

- ❑ Verify that workflow process EESTSCHG-Employee Status Change is activated in the Process Master program (P98800). See *Activating a Workflow Process Version* in the *EnterpriseOne Workflow Tools Guide*.

► **To set up employee status change**

From the Self Service Setup menu (G05BESS4), choose Status Change Setup.

1. On Employee Status Change Setup, complete the following field and click Find:

   - Change Type

   The system automatically displays the data items that are currently selected. A check mark in the row header indicates that the data item is selected and appears as an available choice in the Employee Status Change program (P08720). If a lightening bolt symbol appears in the row header, the field is a required field and is marked with an asterisk in Employee Status Change.

2. To change the status of a selected field to a required field, double-click the row-header (the field with the check mark) so that the lightening bolt symbol appears.
3. To completely deselect a field, double-click the row-header again so that no symbol appears.
4. To add a new field, click the following display option:

   - All

     This option displays all of the enabled data items from the Employee Master Information table (F060116) from which you can select.

5. Double-click the row-header of the data item that you want to add and click OK.

Processing Options for Employee Status Change Setup (P08730)

Defaults Tab

These processing options specify the defaults that the system will apply when you initiate the status change process.

1. Business Function Name

Default Business Function used to initiate the status change process.

Use this processing option to specify the business function you want to use to initiate the status change workflow process. This business function must also handle the other workflow processes such as aborting, escalating, restarting,and approving.

The default function is Initiate Status Change. The source module is N0800206.

2. Hide Status Change Initialization Businsess Function
1 = Yes
0 = No

Use this processing option to specify whether you want to allow the user to see the Status Change business function driver used to initiate the Status Change process. It is recommended that you set this value to 1. Valid values are:

0	No
1	Yes

Setting Up Manager Reports

Managers and their delegates can use the Managers Reports program (P08740), to automate required reporting procedures and save time. System administrators use the Managers Reports Setup program (P08741) to set up the reports that are run in the Managers Reports program. Two setup approaches are available:

- Preset lists of reports
- Program versions

The Managers Reports Setup program includes a list of categories that are defined in UDC 08/RP. You can modify this list to meet organizational needs and then attach reports to each category as desired. To automatically run a category of reports from the Managers Reports program, managers can just choose an appropriate category and then click Submit. Managers retain the option of changing the sequence in which the system runs a list of reports and can also run individual reports instead of an entire list.

You can also set up program versions in the Managers Reports Setup program and then specify the version number in a processing option for the Managers Reports program. Creating program options allow you to set up lists of reports to meet a wide range of needs. You could create a version for the Payroll Department, for example, that included several lists of reports that need to be run biweekly and another version that could be run monthly.

When you create custom reports and want to add them to a report list, you might need to alter one or more of the data items that you have included in the report's data structure to successfully run the report. To accomplish this mapping, use the Map Report Data Structure program (P08770), which is available by choosing the Map Data Structure row menu option in the Managers Report Setup program.

Prerequisites

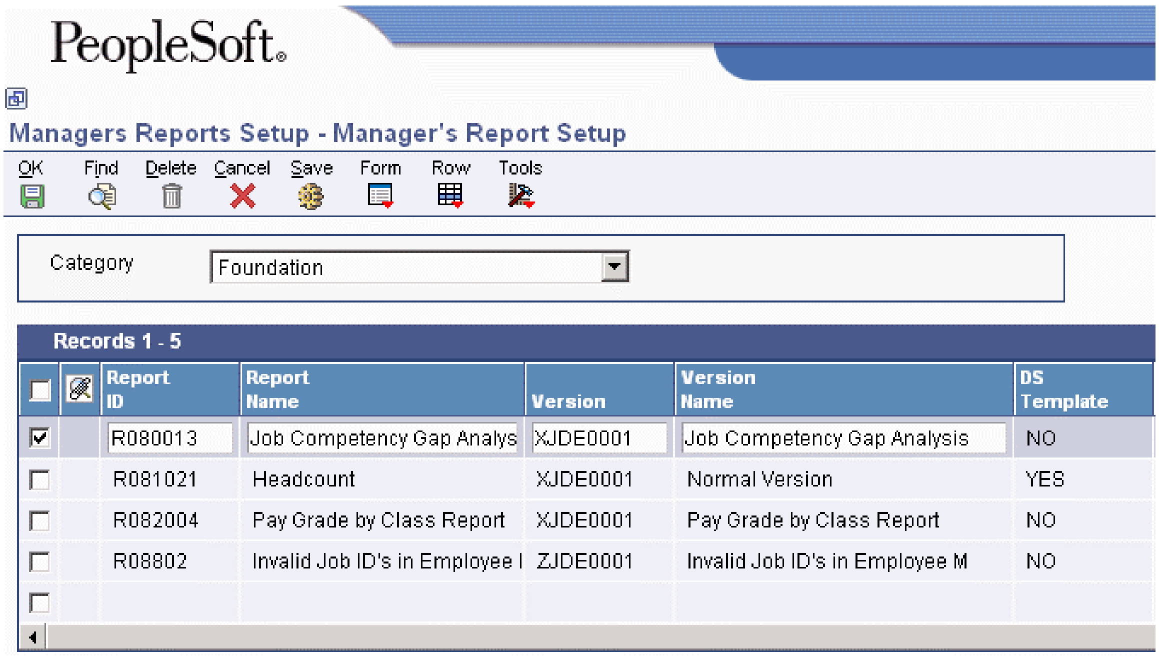
- ❑ To set up new category codes to which you can assign a new selection of reports, before starting the following process, see *Understanding User Defined Codes for Human Capital Management Systems* in the *Human Capital Management Foundation Guide*.
- ❑ To create a user defined code, see *Adding a User Defined Code* in the *Foundation Guide*. To create a new category for human resources reports, use 08 in the Product Code field and RP in the User Defined Codes field.

► To set up manager reports

From the Self Service Setup menu (G05BESS4), choose Managers Reports Setup.

1. On Manager's Report Setup, complete the following field and click Find to display the report names that are currently assigned:

   - Category



2. To assign a report to a category, complete the following fields:

   - Report ID
   - Version

   You can use search parameters to limit your search for a type of report. For example, you can enter R08* in the Application column header and click Find to locate the human resources reports.

3. After you have added the necessary reports, click OK.

See Also

- *Running Managers Reports* in the *Human Capital Management Self-Service Guide* for the steps that managers and their delegates can use to run reports

Setting Up Organizational Charts for the Web

You can use the Generate Graphic Organization Chart program (P08713W) to customize the appearance of your organizational charts. If you choose to complete none of the setup options, managers can still enter an employee ID and then click the Display Chart option to produce a chart.

► To set up organizational charts for the Web

From the Manager Self Service menu (G05BMSS1), choose Generate Graphic Organization Chart.

1. On Organization Chart, choose Display Options from the Form menu.
2. On Org Chart Display Options, choose the following optional options to display on a chart:
   - Address Number
   - Job Title
3. Enter a color value for each of the following chart options:
   - Level 1
   - Level 2
   - Level 3
   - Background
4. To define chart layout options, complete the following fields:
   - Cell Height
   - Cell Width
   - Font Size
   - Columns/Page
   - Rows/Page
   - Chart Height
   - Chart Width
   - Line Wrap
   - Show Page Number
   - Repeat top level manager on each page
5. To display employee pictures on charts, enter a fully qualified directory path where the .jpg files are stored in the following field:
   - Image Location
6. To save your choices, click OK.

Overview of the eRecruit System

Traditionally, the process of recruiting new employees has been one of the least efficient human resource processes. The manual steps typically associated with recruitment are time-consuming and inefficient. Organizations can increase efficiency and reduce costs by using their corporate Websites to attract candidates for job openings. Automating the recruitment process through the use of technology effectively controls costs and reduces the amount of time needed to fill an open requisition.

The use of the Internet for recruiting purposes has increased dramatically. Recent surveys indicate that the majority of the world's largest companies use their corporate Websites as a recruiting tool to attract potential employees. Posting jobs on your corporate Website allows you to publicize your staffing needs at no additional cost. Electronic recruitment allows you to collect, store, and retrieve information about potential candidates for job openings, reducing the time-to-hire and effectively removing the most desirable candidates from the job market before your competitors can hire them.

The PeopleSoft EnterpriseOne eRecruit system includes the following business processes:

- Creating job postings
- Applying online
- Integrating eRecruit applicants into the applicant and requisition systems

The self-service transactions provided in the eRecruit system are targeted to both external applicants and internal applicants (employees). External applicants and employees can use eRecruit to perform the following tasks:

- Review information about current job openings in the organization
- Apply for a position within the organization
- Search for a job posting that matches the desired criteria
- E-mail a job posting to a third party who might be interested in the position
- Review the jobs for which the applicant has submitted applications

The PeopleSoft EnterpriseOne eRecruit system shares information with Applicant Information (P08401) and Requisition Information (P08102) programs and receives information from the Competency Information (P05104) program.

eRecruit Tables

The eRecruit system uses the following tables:

Table	Description
Extended Applicant Information (F08403)	Stores applicant information, such as the address number, recruitment number, and percentage of time the applicant is willing to travel for a job.
Applicant Login Information (F08405)	Stores applicant signon information for all users, such as user ID and the last date on which the applicant signed on to the system.
Job Posting Tab Settings (F08460)	Stores the preference to hide or show competencies in the Manage Job Postings program (P08470)
Standard Phrases (F08461)	Stores details about a standard phrase, such as phrase ID, phrase category, language preference, and the wording of the phrase.
Disable Applicant Activities (F08462)	Stores activities that you can set up to be enabled or disabled for the applicant, or disabled internally, externally, or both.
Posting Element Display Settings (F08463)	Stores the display options for a job posting.
Job Posting Fields by Tabs (F08464)	Stores all of the customizable fields that are associated with a job posting tab in the Manage Job Postings program (P08470).
Job Posting Field Preferences (F08465)	Stores the settings for fields in each tab of the Manage Job Postings program (P08470), such as whether the field is hidden when the user creates a job posting.
eRecruit General Constants (F08466)	Stores general e-mail and Website information, as well as the language that is associated with the Website and e-mail address.
Job Postings (F08470)	Stores basic header information for each job posting, such as the posting number and category, related requisition number, salary range, and dates for the posting.
Job Posting Competencies (F08471)	Stores the competencies that are related to job postings.
Job Posting Text (F08472)	Stores related details for each job posting description, such as the posting ID, language information, and descriptive text about the job posting.

Table	Description
Job Posting Sort Workfile (F08473)	Stores job posting information by language that the applicant uses when searching the postings, such as the category and description of the posting, internal and external posting dates, and location.
Job Basket (F08474)	Stores job posting information for the jobs that an applicant is considering.
Recruitment Information (F08490)	Stores applicant personal information details, such as name, address, phone, asking salary, and hours available to work.
EEO Survey (F08492)	Stores high-level information about the applicants who complete the optional EEO survey, such as recruitment number, minority identification, and sex.
References (F08496)	Stores contact information for the references that the applicant provides, searchable by recruitment number or posting number.
Recruit Apply Posting (F08498)	Stores details about the applicants who apply for a job posting, such as recruitment number, eRecruit status, and the date of the application submission.

User Defined Codes for eRecruit

The following user defined codes apply specifically to the PeopleSoft EnterpriseOne eRecruit system.

Ascending Descending (08R/AD)

You use ascending and descending codes to organize a search of job postings. The system allows you to sort by any combination of job location, job category, and date job posted in ascending or descending order for each criteria.

Ascending and descending codes are hard-coded and should not be changed. You can choose from the following codes:

- 0 – Ascending
- 1 – Descending

eRecruit Status (08R/AS)

You use eRecruit status codes to specify the applicant's current status in the application process for a particular job. In the first step, the applicant has not completed the job submission. In the second step, the applicant has submitted information that has not yet been reviewed by the recruiter. In the third step, the recruiter has reviewed the applicant's submission and indicated that the applicant is an actual candidate for the position. Therefore, the applicant's information will be transferred to the Applicant Master table (F08401). In the final step, the Applicant Master table has been updated.

eRecruit status codes are hard-coded and should not be changed. You can choose from the following codes:

- 0 – Entered but not submitted
- 1 – Submitted
- 2 – Marked for update to table F08401
- 3 – Updated to the Applicant Master

Disable Applicant Activities (08R/AA)

You use disable applicant activities codes to specify the information that an applicant can review when browsing job postings. For example, you can disable Paste Cover Letter so that the applicant does not see this form.

Disable applicant activities codes are hard-coded and should not be changed. You can choose from the following codes:

- 0 – Paste Resume
- 1 – Paste Cover Letter
- 2 – Enter References
- 3 – Send Confirmation to Applicant
- 4 – Personal Info/EEO
- 5 – Job Basket
- 6 – EEO Survey
- 7 – Apply to Posting
- 8 – View Submitted Applications
- 9 – Enter Job Specific Qualifications

Element ID (08R/EI)

You use element ID codes to specify the list of elements that the system can display when an applicant reviews job details. For example, you might display the job title, job location, and job category for the applicant. You specify the elements to display in the eRecruit Setup program (P08460).

Element ID codes are hard-coded and should not be changed. You can choose from the following codes:

- 1 – Job Title
- 2 – Job Location
- 3 – Job Posting ID
- 4 – Job Category
- 5 – Posting Date
- 6 – Position Openings
- 7 – Salary Range

- 8 – Posting Description
- 9 – Job Qualifications

Internal/External/Both (08R/IE)

You assign internal, external, and both codes to an applicant activity to denote whether the activity is used internally, externally, or both. Examples of applicant activities include:

- Paste resume
- Paste cover letter
- Enter references
- EEO survey

You might request references from your external applicants, but not from internal applicants (employees). You can assign an external code to this activity so that employees will not be asked to provide references.

The following internal, external, and both codes are hard-coded and should not be changed:

- 0 – Internal
- 1 – External
- 2 - Both

Job Posting Location (08R/JL)

You use job posting location codes to indicate the city or location within a city where the job opportunity exists. Applicants can search for job postings by location.

Except for the asterisk code that indicates all locations, job posting location codes are not hard-coded; you can add, revise, and remove codes to correspond to your business needs.

Letter Component (08R/LC)

You use letter component codes to format the subject and message of the e-mails sent when an applicant applies to a job posting. For example, the e-mail typically contains information such as the job posting, posting number, posting description, and applicant name.

The following letter component codes are hard-coded and should not be changed:

- 0 – Subject:
- 1 – Job Posting
- 2 – Posting Number
- 3 – Posting Description
- 4 – Application Date
- 5 – Date
- 6 – Dear
- 7 – Applicant Name
- 8 – Custom Text

Mandatory/Hide/Disable (08R/MH)

You assign mandatory, hide, and disable codes to a field in the Manage Job Postings program (P08470) in order to specify display options for the field. The following codes are hard-coded and should not be changed:

- Blank – Optional
- 0 – Mandatory
- 1 – Hide
- 2 - Disable

Phrase Category (08R/PH)

Caution

You should not edit phrase category codes in the UDC tables; instead, use the eRecruit Setup program (P08460).

You use phrase category codes to group standard phrases according to type. For example, you might create a number of standard phrases that your marketing department frequently uses, and assign them to a MKTG category.

Phrase category codes are not hard-coded, so you can add, revise, and remove codes to correspond to your business needs. Examples of phrase category codes might include:

- 0 – Marketing
- 1 – Technical
- 2 – Performance

Posting Category (08R/PC)

Caution

You should not edit phrase category codes in the UDC tables; instead, use the eRecruit Setup program (P08460).

You use posting category codes to group job postings according to type. For example, you might create an EXEC category that contains all of the settings that apply to executive job postings. The asterisk category is hard-coded and applies to all categories. You can add and revise posting categories that correspond to your business needs, but you cannot remove a posting category after you have attached postings to that category.

Examples of posting categories might include:

- 0 – Marketing
- 1 – Technical
- 2 – Performance

Posting Status (08R/PS)

You use posting status codes to indicate the status of a job posting. The system uses the active status in conjunction with the posting dates to determine whether or not a posting should display, either internally or externally. The special handling code 1 specifies which posting status is active.

An applicant who browses job postings sees only active postings. Postings displayed in the job basket as closed are at an inactive status. The inactive status indicates the posting has passed the expiration date or the posting has been marked as inactive.

Job Posting Tab (08R/WS)

The system uses job posting tab codes to identify the tab in the Manage Job Postings program (P08470) that contains the data item. The system uses these values when the user selects a setting for that data item (such as Mandatory, Hide, or Disable).

The following job posting tab codes are hard-coded and should not be changed:

- 0 – General Info
- 1 – Job Title
- 2 – Competencies

Resumé Flag (08R/RF)

The system uses resumé flag codes to indicate the type of attachments the applicant can submit to a particular job posting.

The following resumé flag codes are hard-coded and should not be changed:

- 0 – No resumé or cover letter
- 1 – Resumé attached
- 2 – Cover letter attached
- 3 – Both resumé and cover letter

Sort Fields (08R/SF)

You use sort fields codes to specify the sort parameters for search results when an applicant is browsing jobs. The applicant can sort by the following hard-coded sort field codes:

- 0 - Job Location
- 1 - Job Category
- 2 - Posting Date

Travel Percentage (08R/TP)

You use travel percentage codes to specify the percentage of time the applicant is willing to travel for a particular job. Travel percentage codes are not hard-coded, so you can add, revise, and remove codes to correspond to your business needs.

eRecruit System Setup

You must complete a few general system setup steps before you begin to set up the eRecruit process. System setup includes the following:

- Enabling the eRecruit system in the Common Settings for HR Employee Self-Service Programs program (P05004)
- Completing the processing options for the Recruitment Self Service Menu program (P08400)
- Completing the processing options for Applicant Login program (P08405)

Prerequisite

- ❑ Set the common setting for Using Self-Service Recruitment? to Yes – Enable Self-Service Recruitment in the Common Settings for HR Employee Self-Service Programs (P05004). See *Common Settings for Self-Service Applications* in the *Human Capital Management Self-Service Guide* for more information.

Processing Options for Recruitment Self Service Menu (P08400)

E-Mail Type Tab

This processing option specifies the e-mail address type that was previously defined in the system.

1. Electronic Address Type

Use this processing option to specify the e-mail address type that is associated with the employee in the Electronic Address table (F01151).

Processing Options for Applicant Login (P08405)

User ID and Password Tab

These processing options specify the minimum length for the user ID and password that the applicant uses to sign on to eRecruit.

---

1. Minimum User ID Length

Blank = 8 characters

Use this processing option to specify the minimum length for the User ID. The length can be from 1 to 70 characters. If left blank or zero, the system assigns a default value of 8 characters.

If you modify this processing option, you must also modify the help text item for New Applicant Registration (S08405B) so that the minimum User ID length matches.

2. Minimum Password Length

Blank = 8 characters

Use this processing option to specify the minimum length for the Password. The length can be from 1 to 70 characters. If left blank or zero, the system assigns a default value of 8 characters.

If you modify this processing option, you must also modify the help text item New Applicant Registration (S08405B) so that the minimum password length matches.

eRecruit Setup (P08460)

The eRecruit Setup program (P08460) allows you to set preferences for many of the recruiter activities, such as display options for the Manage Job Postings program (P08470), display options for job postings, and information about how the applicants will apply for job postings.

The eRecruit Setup program includes one power form that you can use to perform all of the setup steps that you need to set up the eRecruit system. From this form, you can update all tables related to the setup for eRecruit. Each section of the form represents a separate table.

Caution

Because each section of the power form represents a separate table, you must be sure to save the information that you add in each section before you proceed to the next section. For this reason, a Save button appears in each section. The system prompts you to save your work if you attempt to access another tab without first saving your work.

Defining Posting Categories

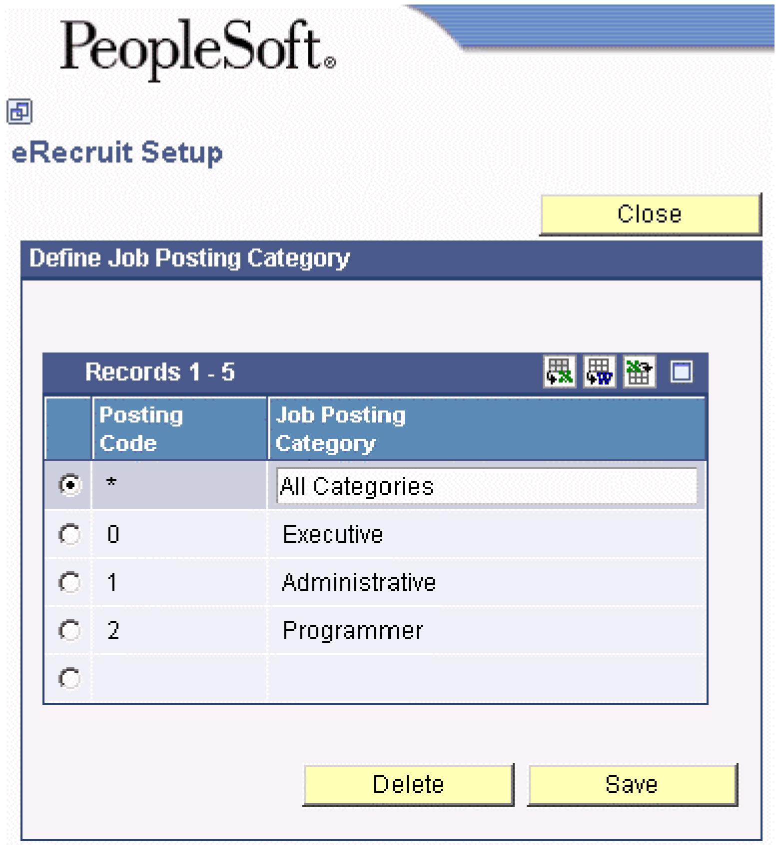
You create posting categories to classify the types of job postings that your company uses. Typically, you group the job postings according to your organization's business practices. Commonly used posting categories might include: Executive, Administrative, Financial, and Technical. When you group your job postings within these categories, applicants can easily search for the postings that best match their qualifications.

Grouping postings by category also allows you to define settings for each posting category, as discussed in a later setup step.

You can delete a posting category if you have not attached a job posting to it. When you delete the posting category, you also delete all of the settings for that posting category.

► To define posting categories

From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup.



1. On eRecruit Setup, complete the following required fields in the Job Posting Category Setup section, and then click Save:
   - Posting Code
   - Job Posting Category

Note

If you have attached job postings to a posting category, you cannot delete that category.

See Also

- *Defining Settings by Posting Category* in the *Human Capital Management Self-Service Guide* for more information about using category settings

Defining Settings by Posting Category

You define settings for each posting category in the eRecruit Setup program (P08460). The following table describes the settings that you define on each tab in the Define Settings By Posting Category section:

Field Preferences tab	You define field preferences to specify the fields that appear in the Manage Job Postings program (P08470) when the recruiter creates a job posting. You can also specify whether the system hides or shows competencies for each posting category.
Posting Display tab	You define settings for posting display to choose which portions of the posting are visible to the applicant, as well as the order of appearance. You can choose to define the settings differently for each posting category. Thus, an EXEC posting type might display different elements in a different order than an ADMIN posting type. Posting display elements are included in UDC (08R/EI).
Disable Activities tab	You can disable the applicant activities in UDC (08R/AA) to specify the activities that the applicant can perform when browsing job postings. You can disable the activity for internal applicants, external applicants, or both.
Confirmation E-mail tab	You can define by posting category the e-mail that the system sends to applicants when they apply for jobs.
Web Addresses tab	You can define settings for system level e-mail and Website addresses for all eRecruit correspondence. You can set up the addresses by posting category and language. E-mails that the system sends to the recruiter or applicant contain the e-mail address that you specify here. The Website URL is included in e-mails the system sends to the applicant.

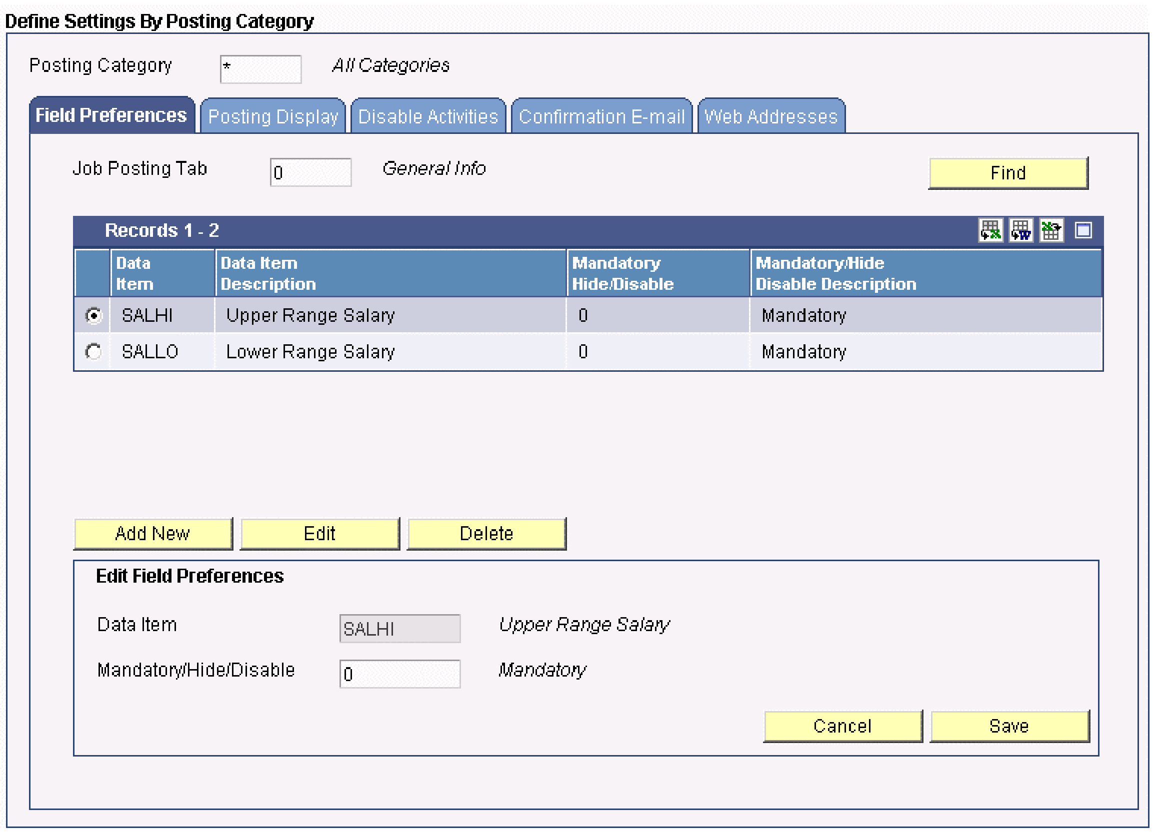
► To define settings by posting category

From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup.

1. In the Define Settings by Posting Category section, complete the following field to specify the category for which you will define settings:
    - Posting Category
2. Enter 0 in the Job Posting Tab field to define field preferences for the General Info tab in the Manage Job Postings program (P08470), and then click Find.

3. Choose the Field Preferences tab, click Add New, and then complete the following fields as needed to specify the fields that will appear in the Manage Job Postings program (P08470) when the recruiter creates a job posting:

   - Data Item
   - Mandatory Hide/Disable



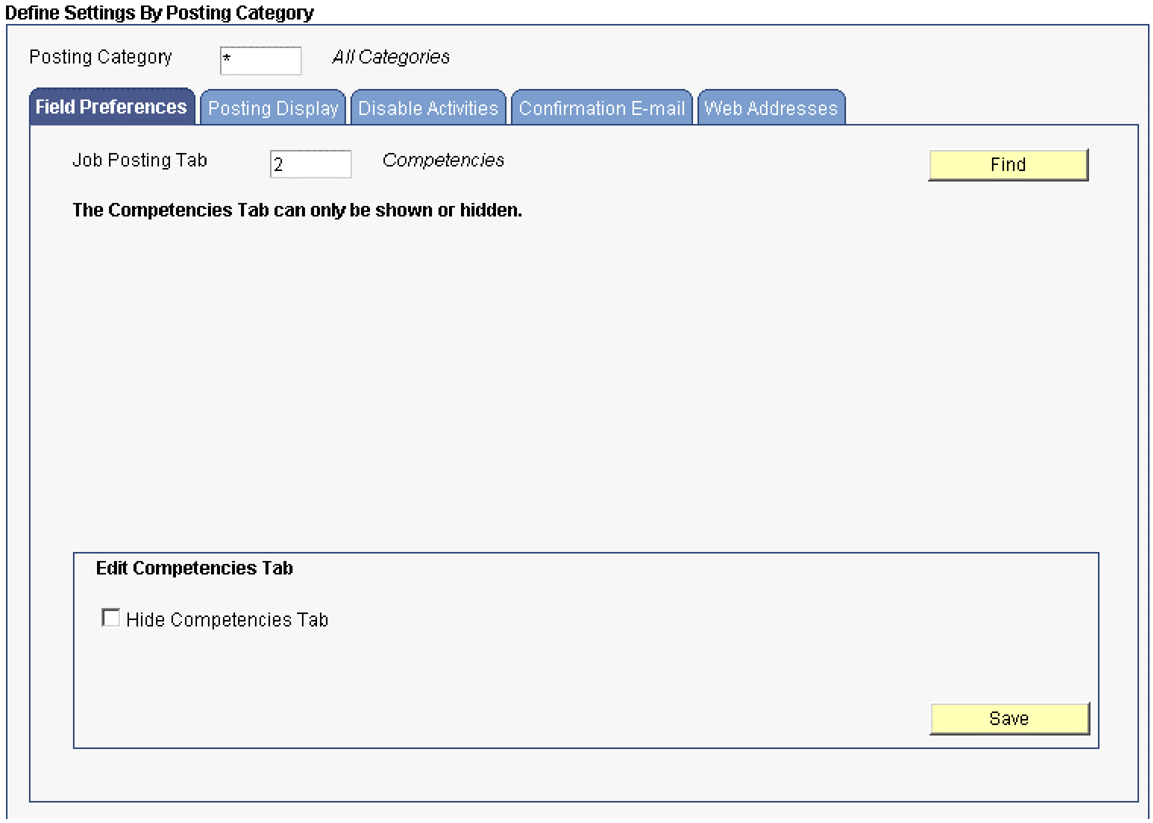
4. To edit field preferences, select the record that you want to edit, click Edit, and then change the following field, as needed:

   - Mandatory Hide/Disable

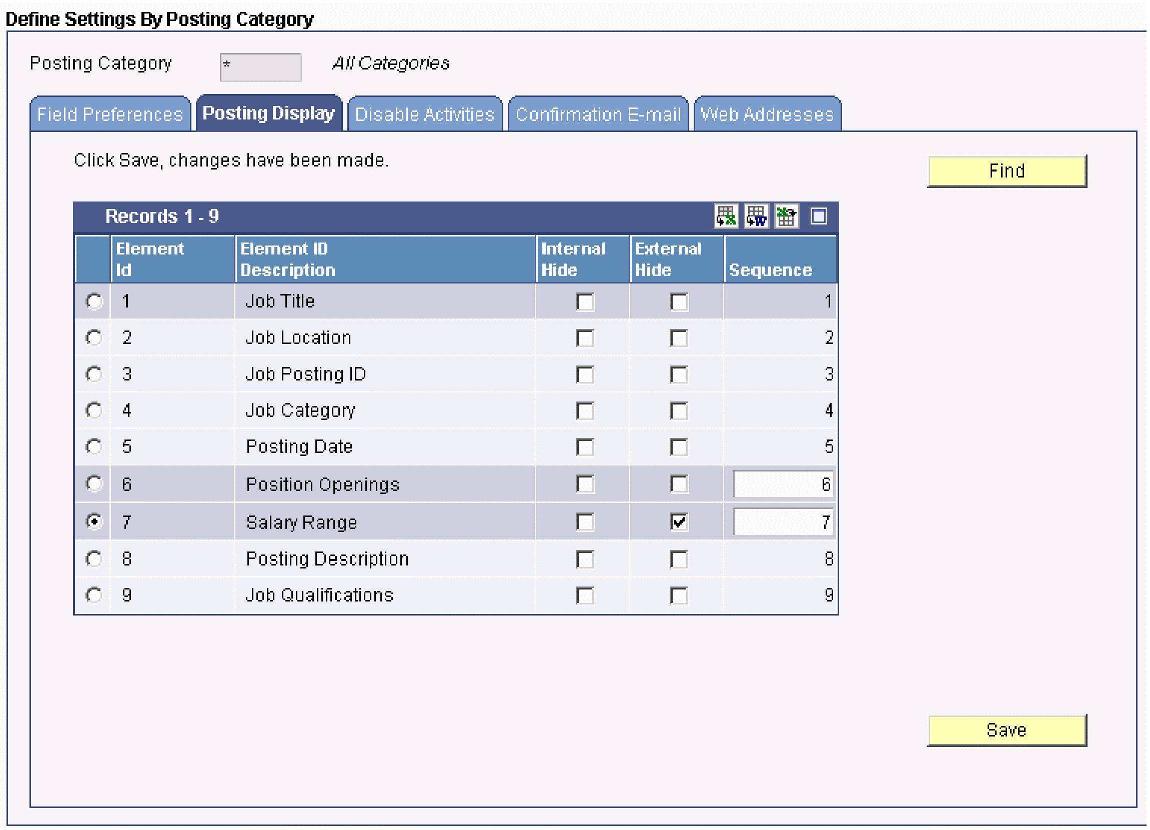
5. Enter 1 in the Job Posting tab field to define field preferences for the Job Title tab in the Manage Job Postings program (P08470), and then click Find.

6. Repeat steps 3 and 4, as needed.

7. Enter a 2 in the Job Posting tab field to define field preferences for the Competencies tab in the Manage Job Postings program (P08470), and then click Find.



8. To hide the Competencies tab for a posting category, choose the following option:
    - Hide Competencies tab
9. Choose the Posting Display tab and complete the following fields to define how the job postings appear to the applicant:
    - Element ID
    - External Hide
    - Internal Hide
    - Sequence



Note

You define posting display settings according to the posting category. For example, the elements that you display for an executive posting category and the order in which you display them might differ from the elements and order than you would display for an administrative posting category.

The detail area displays all of the available posting elements. You can hide the element or choose the order in which it appears, but you cannot delete the element.

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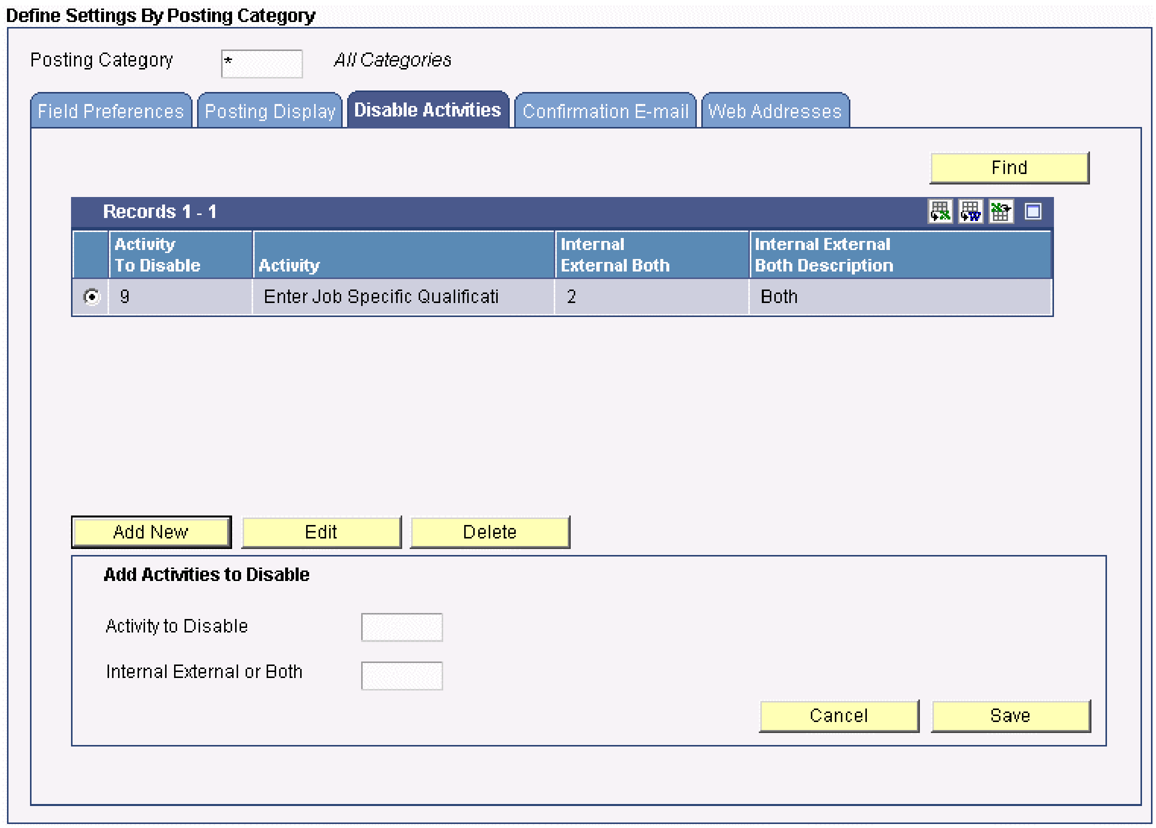
10. Choose the Disable Activities tab and complete the following fields to define the applicant activities that you want to disable for a particular posting type, and to indicate whether you want to disable the activity for internal applicants, external applicants, or both:

    - Activity To Disable
    - Internal External Both



Note

You must add the activity to the detail area in order to disable it. All activities listed in the Disable Applicant Activities UDC table (08R/AA) are enabled unless you add them to the detail area.

11. Choose the Confirmation E-mail tab and enter the text of the e-mail that you want to send to applicants when they apply for a job.

    You can create confirmation e-mails in multiple languages.

Caution

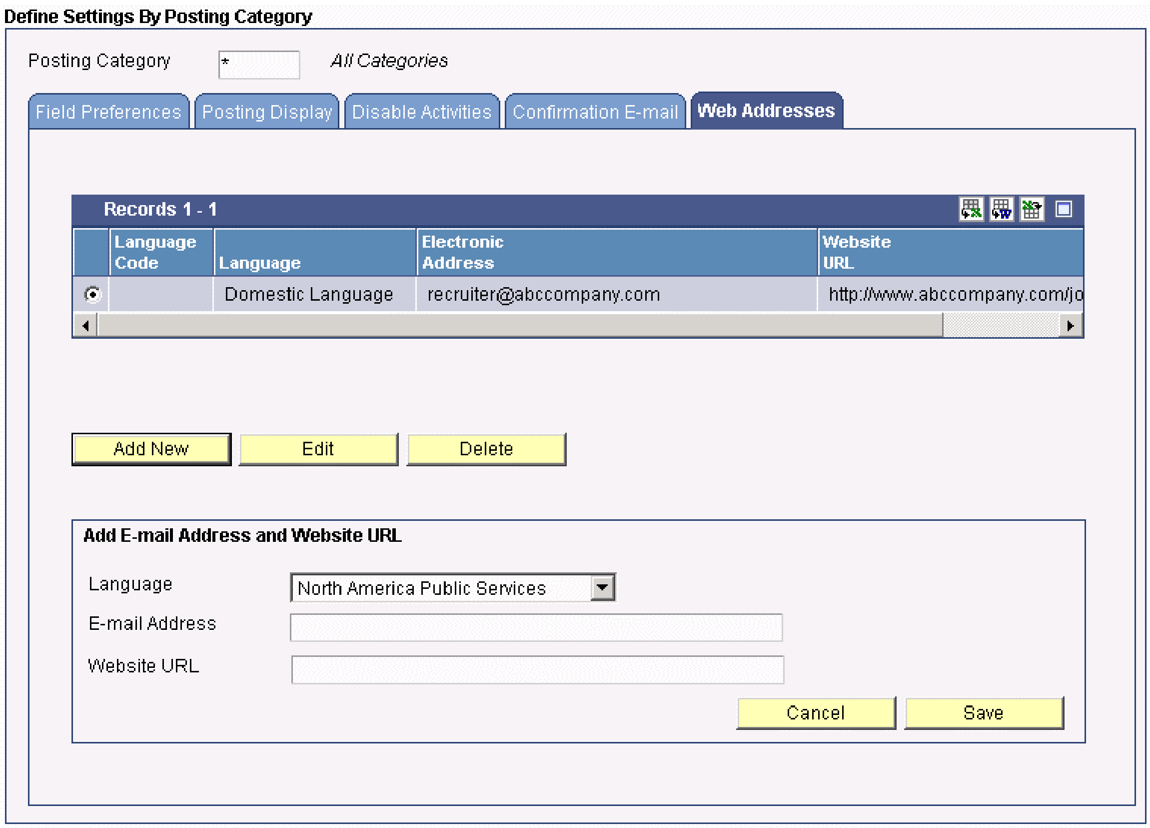
You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

-
 (line break)
- <P> (paragraph)
- <B> (bold)
- </B> (end bold)
- <U> (underline)
- </U> (end underline)

Tags are not case-sensitive.

12. To review the confirmation e-mail as the applicant will see it, click the Preview button.
13. Choose the Web Addresses tab and complete the following required fields to specify the general system-level e-mail address and Web site that the system uses in e-mails to applicants:

    - Language Code
    - Electronic Address
    - Website URL



If you do not complete these fields, the system does not send e-mails to applicants.

14. Click OK.

Defining Standard Phrase Categories

You define categories for standard phrases to classify the types of standard phrases that your company uses. Typically, you group the standard phrases according to your organization's business practices. Commonly used standard phrase categories might include Marketing and Technical.

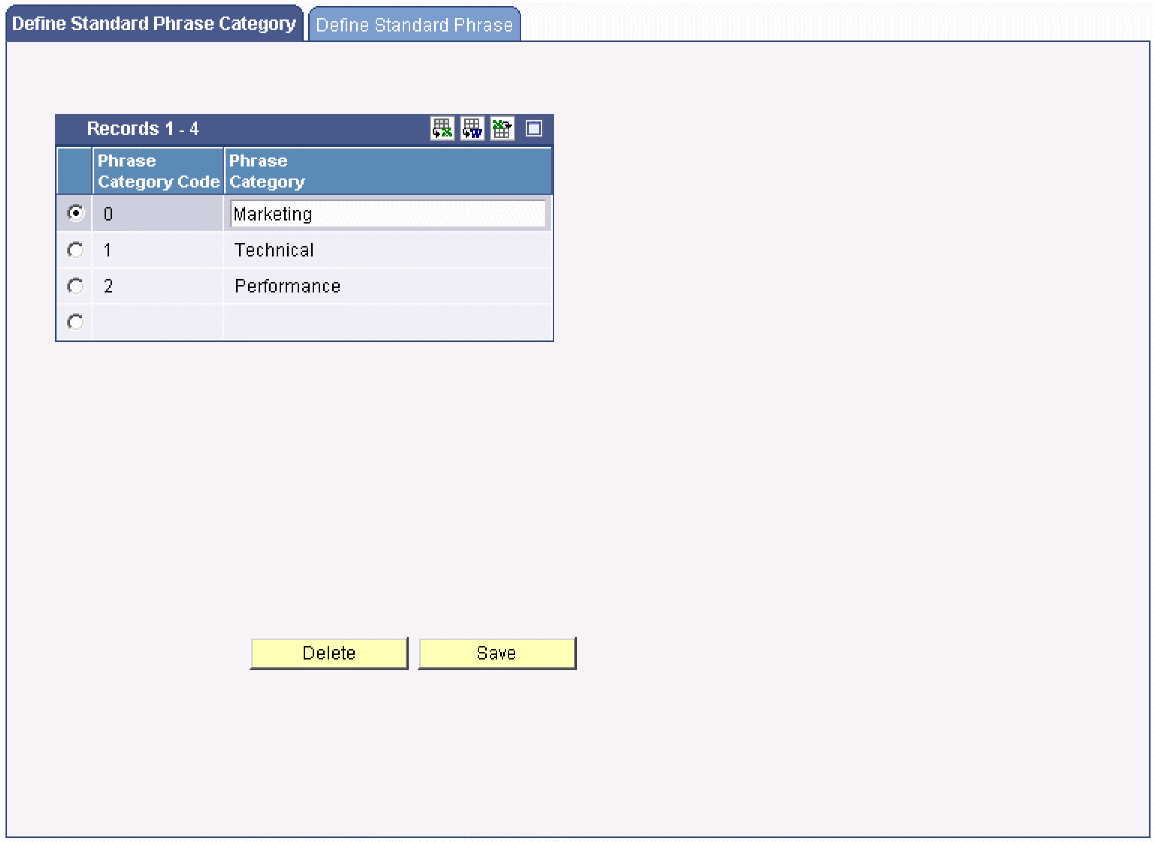
You can delete a standard phrase category if you have not attached a standard phrase to it. When you delete the standard phrase category, you delete all of the standard phrases for that category, as well.

► To define standard phrase categories

From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup.

1. On eRecruit Setup, complete the following required fields in the Define Standard Phrase Category section, and then click Save:

   - Phrase Category Code
   - Phrase Category



Note

If you have attached standard phrases to a standard phrase category, you cannot delete that category.

Defining Standard Phrases

Companies typically use basic phrases repeatedly when creating job postings. You can save time by creating standard phrases that you use frequently and storing them by category to use over and over again. The user who creates the job postings can choose to add a selected standard phrase to the posting.

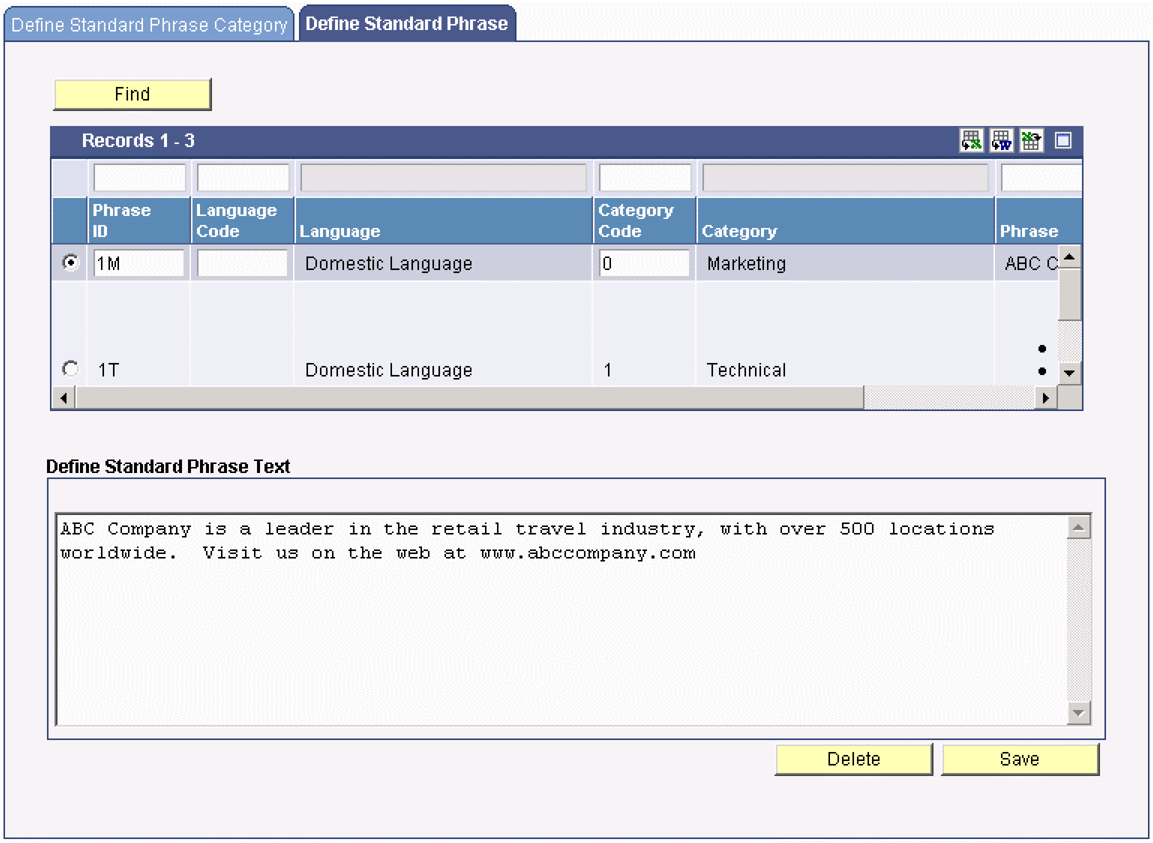
The following table illustrates examples of commonly used standard phrases:

Standard Phrase Category	Standard Phrase
Legal	We are an Equal Opportunity Employer.
Marketing	XYZ Travel is a leader in the retail travel industry, with over 500 locations worldwide. Visit us on the Web at www.xyztravel.com.
Benefits	We provide excellent benefits and compensation packages including medical, dental, vision, 401(k), employee stock purchase plan, health club, and quarterly bonus program.
Salary	Salary commensurate with experience.
Skills	• BA/BS degree plus 5 years industry experience • Excellent communication skills • Ability to work independently • Proficiency in Spanish a plus
Technical	• BS degree in Computer Science • 3 years experience • Working knowledge of C++, Java, HTML • Public sector industry knowledge

► To define standard phrases

From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup.

1. On eRecruit Setup, complete the following required fields in the Define Standard Phrase section:
   - Phrase ID
   - Phrase Category



2. Complete the following field, as needed:

    - Language Code

    When you leave the Language field blank, the system uses the Domestic Language that you specified in UDC (01/LP).

3. Enter the desired text for your standard phrase in the Define Standard Phrase Text box, and then click Save. To edit the text for a standard phrase, you must first select the phrase in the detail area.

Caution

You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

-
 (line break)
- <P> (paragraph)
- <B> (bold)
- </B> (end bold)
- <U> (underline)
- </U> (end underline)

Tags are not case-sensitive.

Managing Job Postings

The Manage Job Postings program (P08470) is a power form that combines on separate tabs all of the process steps needed to create job postings. From this form you can add, edit, review, copy, and delete job postings.

Recruiters can search job postings using the following filter fields:

- Created by User
- Business Unit
- Posting Category

Alternatively, you can enter search criteria in the Query By Example (QBE) fields.

Manage Job Postings integrates with the Requisition Information program (P08102) in the following ways:

- From the Row menu of the Work with Requisitions form (W08102I), you can access Manage Job Postings.
- From the Form menu on the Requisition Information form (W08102E), you can access Manage Job Postings.

When you delete a requisition, the system displays a message indicating that the associated job posting will be deleted as well. Conversely, when you delete a job posting, you can choose to delete or retain the associated requisition. You can have a requisition with no job posting, but you cannot have a job posting with no requisition.

Prerequisite

- ❑ Before you can create job postings, you must complete the setup steps in the eRecruit Setup program (P08460). See *eRecruit Setup (P08460)* in the *Human Capital Management Self-Service Guide* for more information.

Processing Options for Manage Job Postings (P08470)

This processing option specifies the competency description view that the system uses for the competencies that are related to job postings.

Competencies Tab

Use this processing option to specify the competency description view that the system uses for all of the competencies that are related to job postings. Valid values are:

COA

Manager Coaching View

EE

Employee View (default)

HR

Human Resource View

MGR

Manager View

Creating a Job Posting

You create job postings in the Manage Job Postings program (P08470), which is a power form that combines on separate tabs all of the process steps for creating the posting.

When you create a job posting, you use the Job Description to provide specific information about the job. When you set up a job posting for an opening for which the applicants will not apply online, include in this text the details about how to apply for the job. For example, your company might want to host a job fair to interview applicants for many openings. In this section, you can include details about the job fair and any associated contact information.

You might need to publish a job posting in more than one language. You can customize the job posting text by language using the Use Multiple Languages option.

You can attach to the job posting text standard phrases that you defined in the eRecruit Setup program (P08460) by accessing the Add Standard Phrase link to the Standard Phrase Search and Select program (P08461S).

If you are using the PeopleSoft EnterpriseOne Competency Management system, you can also attach selected competencies to the job posting.

After you create the job posting, the Copy function allows you to duplicate the posting easily.

Applicants can review the job postings that meet the following criteria:

- The posting has an active status
- The system date is within the date ranges for the posting

From the Form and Row menus of the Manage Job Postings program, you can access the programs that you use to complete the following business processes:

- Enter position information
- Enter requisition information
- Enter requisition activity information
- Review job entry and evaluation information
- Enter applicant information
- Work with job competency information

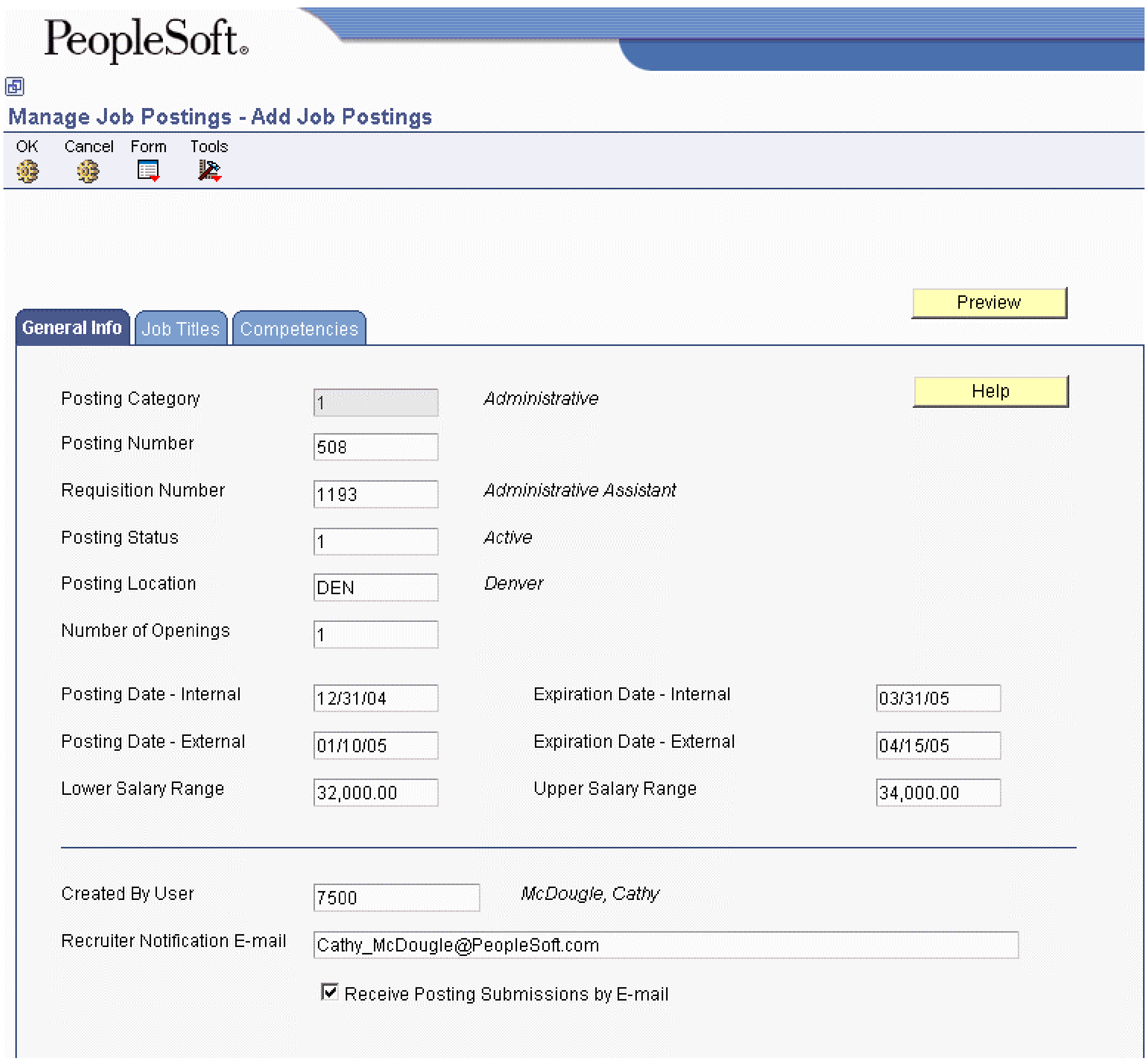
► To create a job posting

Use one of the following navigations:

From the eRecruit menu (G08BE1), choose Manage Job Postings.

From the Manager Self-Service menu (G05BMSS1), choose Manage Job Postings.

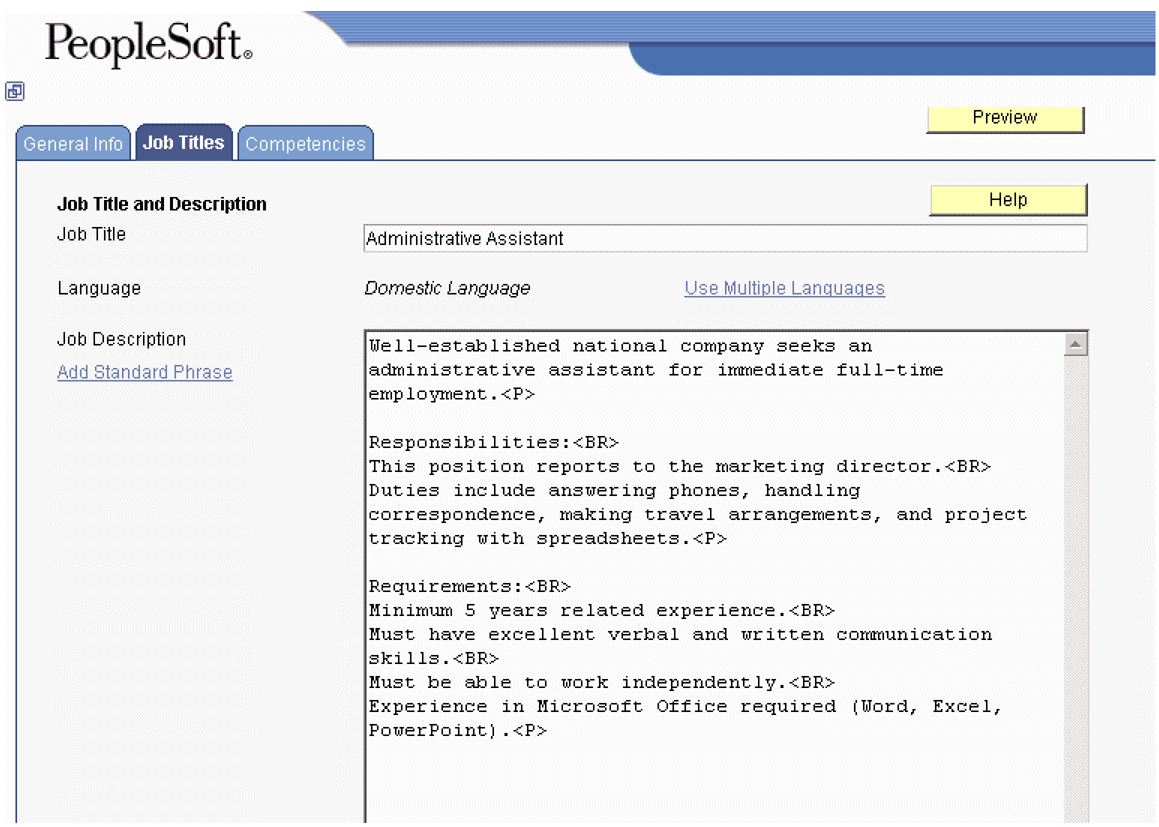
1. On Manage Job Postings, click Add.
2. On Category Selection, complete the following field, and then click OK:
   - Posting Category



3. On Add Job Posting, you can either complete the following field or leave it blank and allow the system to complete the field using next numbers:
   - Posting Number

   If you leave the field blank, the system enters the next number when you exit from the field.

4. On Add Job Posting, choose the General Info tab and complete the following fields:
    - Requisition Number
    - Posting Location
    - Lower Salary Range
    - Upper Salary Range
5. Complete the following fields to specify the date ranges for the internal and external posting:
    - Posting Date - Internal
    - Expiration Date – Internal
    - Posting Date – External
    - Expiration Date – External
6. Enter your e-mail address in the following field:
    - Recruiter Notification E-mail
7. If you want to receive an e-mail notification for each applicant submission to the job posting, click the following option:
    - Receive Posting Submissions by E-mail
8. Choose the Job Titles tab and complete the following fields:
    - Job Title
    - Language Code



9. In the following field, enter the information that you want the applicant to see regarding the job:

   - Job Description

   You can enter detailed information about the job, as well as any special instructions. For example, you might want the applicants for a job to apply at a job fair. You can provide all details about the job fair in the Job Description field, including e-mail links or a URL.

Caution

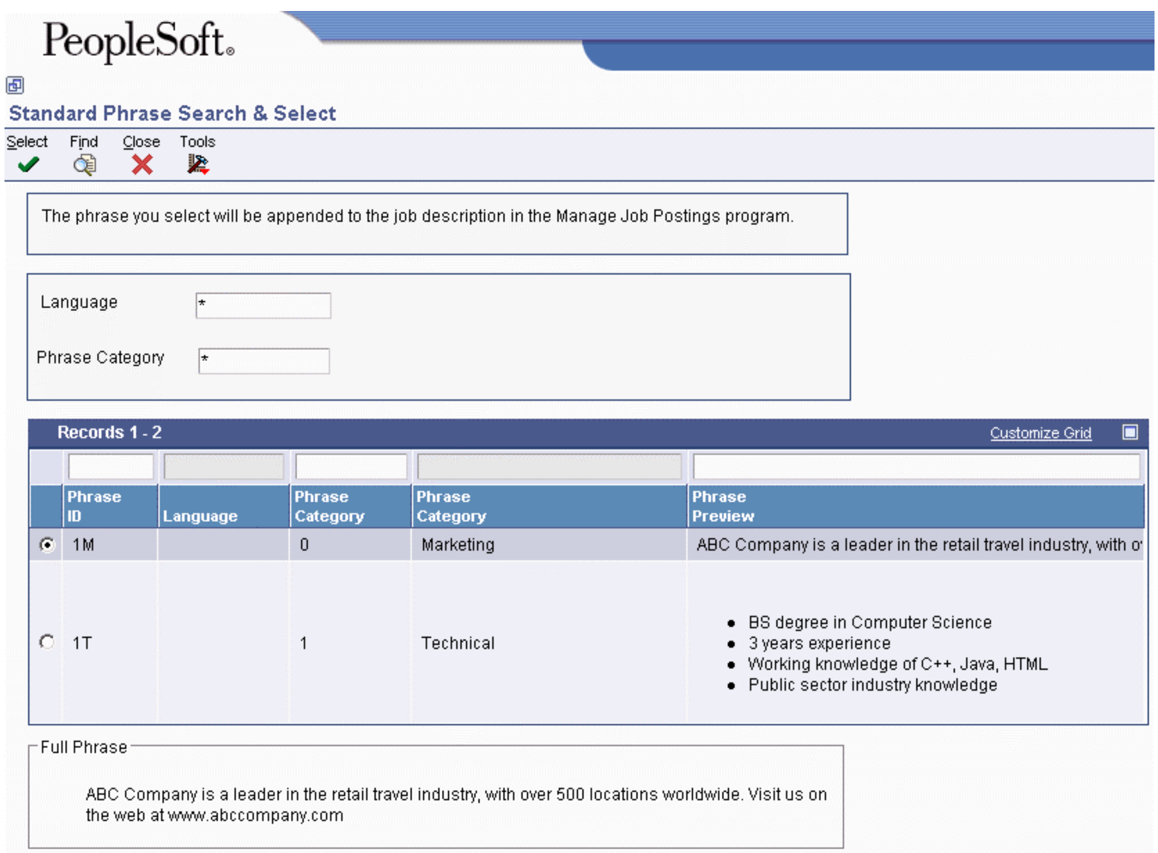
You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

-
 (line break)
- <P> (paragraph)
- <B> (bold)
- </B> (end bold)
- <U> (underline)
- </U> (end underline)

Tags are not case-sensitive.

---

10. To include a standard phrase in the posting text, click the Add Standard Phrase link.



11. On Standard Phrase Search and Select, select the phrase that you want to include in the job description, and then click Select.

    The standard phrase that you selected will be appended to the end of the job description text. Repeat this step for each standard phrase that you want to include.

12. On Add Job Posting, complete the following field with the keywords that the applicant will use to search for this job posting:

    - Keywords

    Do not use any special characters in the Keywords field. Separate the keywords with spaces only.

13. Click the Preview button to review the job posting as the applicant will see it.

    When you click Preview, the system saves the job posting.

14. Click OK to save the posting.
15. To create job titles and descriptions in multiple languages, click the Use Multiple Languages link.
16. To create a new Job Title and Description in another language, on Job Titles/Descriptions – Multiple Languages, click the Add New button, and then complete the following fields:

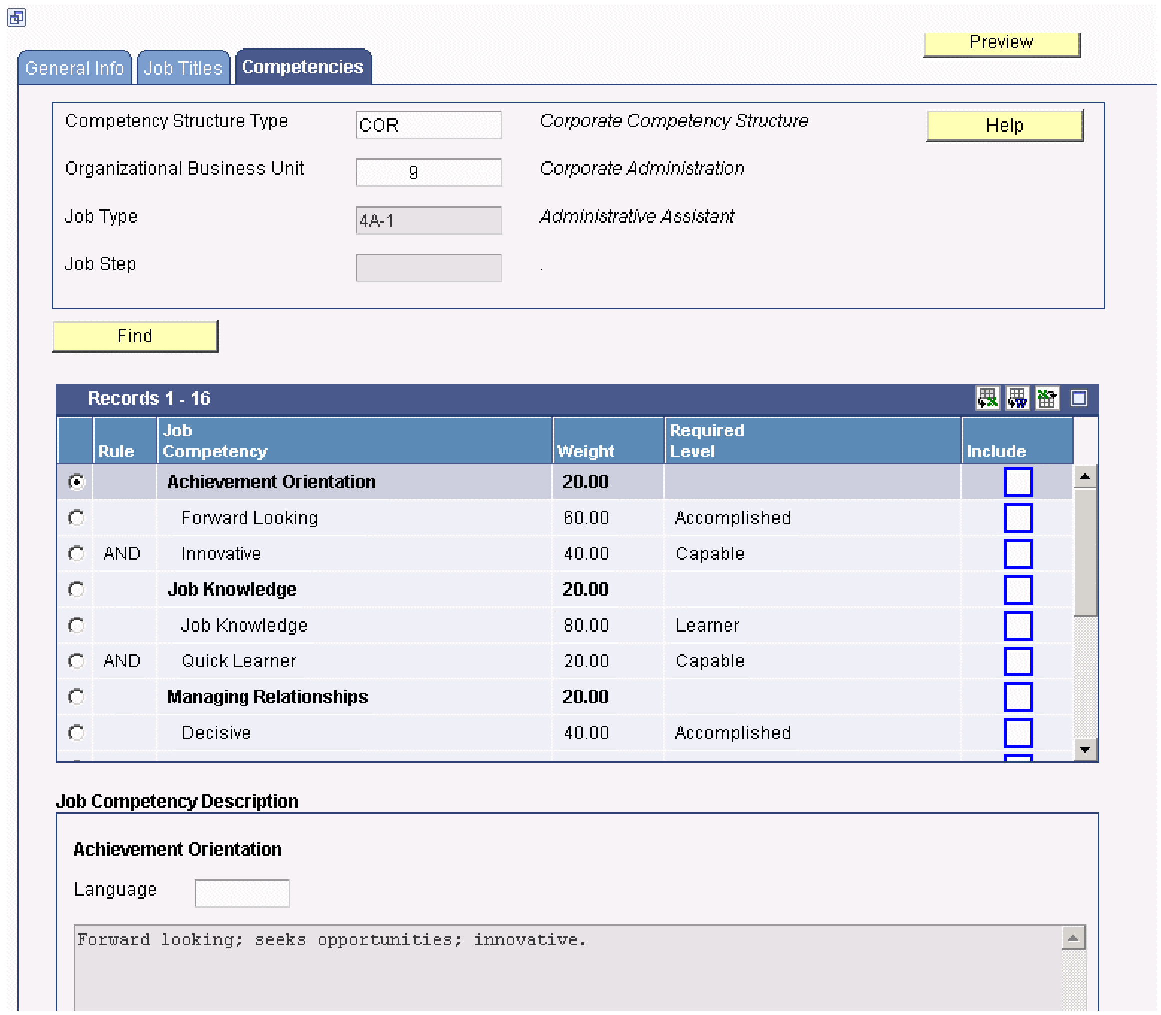
    - Job Title
    - Language
    - Job Description
    - Keywords

    The system allows you to create only one Job Title and Description per language. Repeat step 16 for as many languages as you require for this posting.

17. To attach competencies to the job posting, choose the Competencies tab, complete the following required fields, and then click Find:

    - Competency Structure Type
    - Business Unit
    - Job Type
    - Job Step

    When you click Find, the system saves the posting and finds the appropriate competencies for the job.



18. In the Include column, select the competencies to include in your job posting.

    The competencies in bold are job competencies, a more general competency category. The remaining competencies are competency options, which are more specific competencies that are related to the general category. You must include the job competencies if you want to include any of the subordinate competency options. Conversely, when you select a competency option, the system selects the job competency as well. When you deselect a job competency so that it is not included in the job posting, the system deselects all of the subordinate competency options.

19. Click OK.

► To edit a job posting

From the eRecruit menu (G08BE1), choose Manage Job Postings.

1. On Manage Job Postings, complete any of the following fields, and then click Find:

    - Created by User
    - Business Unit
    - Posting Category

2. Select the job posting that you want to edit, and then click Edit.

3. On Update Job Posting, edit the posting, as necessary, and then click OK:

Note

You can edit the job description in the same way in which you edit any Microsoft Word document. If you select a job title and click Delete, you will delete both the information in the detail area *and* the associated job description and keywords.

Reviewing the Job Postings Report (R08471)

From the eRecruit menu, choose Job Postings Report.

To review detailed information about job postings, you can print the Job Postings report. Recruiters can use the report to track active job postings. When creating the report, set the data sequence to sort by posting category first, then by posting number.

Processing Options for the Job Posting Report (R08471)

Detail Tab

This processing option specifies the level of detail that appears on the report.

1. Print Job Description Detail
Blank, 0 = Do not print detail
1 = Print Detail

Use this processing option to specify whether the report includes the text of the job posting description.

Building Job Posting Records (R08473)

From the eRecruit menu (G08BE1), choose Build Job Posting Records (R08473).

You run the Build Job Posting Records program to enable the system to display the job postings to applicants. This program deletes all records from the Job Posting Sort Workfile table (F08473) for the languages that you process, and creates new language-specific records based on the information in the following tables:

- Job Postings (F08470)
- Job Posting Text (F08472)

Applicants see the new language records when they browse job postings.

Applying Online

External applicants and employees can use eRecruit to browse for job postings (P08480 – Browse Job Postings). They can browse job postings by any combination of job category, job location, keywords, and job posting date. Applicants can organize the search in ascending or descending order for each criterion. Above the detail area, the system displays the number of records that it located for each search. When they locate jobs that interest them, applicants can review detail information about the job postings, apply for jobs, e-mail job postings to someone else, or move jobs to their job baskets. When applying, the applicant may also add references, review or edit personal information, enter job specific qualifications, and enter a cover letter or resumé, provided that the system is enabled for these processes.

The job basket provides a centralized location for applicants to track all job postings of interest to them. The applicant must be signed on to add jobs to the basket or to review the job basket. When browsing jobs, the applicant who is signed on also sees a check mark in the detail area next to jobs that have been added to the applicant's job basket. From the job basket, the applicant can apply for selected jobs or apply for all of the jobs in the basket.

Applicants enter personal information as part of the online application process. The applicant can return at a later date and update personal information. You run the Update Applicant Personal Information program (R08490) to update the personal information that the system stores.

Applicants can also review the jobs for which they have submitted applications and determine the dates of the submissions.

Online help provide detailed user information about the forms the applicant uses. The interface is standardized and intuitive to ensure ease of use.

Processing eRecruit Applicants

After applicants submit applications, you can review the submissions and select applicants that are viable candidates for the position. You can choose single or multiple records for immediate processing, or you can mark records to be processed later through a batch process.

Prerequisite

- Set the common setting for Using Self-Service Recruitment? to Yes – Enable Self-Service Recruitment in the Common Settings for HR Employee Self-Service Programs (P05004). See *Common Settings for Self-Service Applications* in the *Human Capital Management Self-Service Guide* for more information.

Reviewing Submitted Applications

The Review Applicants program (P08498) allows the recruiter to review the records of all applicants who have applied online to a job posting. The recruiter can search the records by any of the following:

- Applicant name
- Posting number
- Requisition number
- Requisition number ranges
- Date received
- Date received ranges
- Status

The recruiter can select a record and review the associated cover letter, resume, references, or job qualifications, if the system has been enabled for these processes. After reviewing the information, the recruiter updates the status of the applicant only if the applicant is being considered for the position. The system then adds the applicants' records to the Applicant Master table (F08401).

The recruiter can choose to mark individual records for immediate update, or select a group of records to update through a batch process.

► To review submitted applications

Use one of the following navigations:

From the Process eRecruit Applicants menu (G08BA2), choose Review Applicants.

From the Manager Self-Service menu (G05BMSS1), choose Review Applicants.

1. On Applicant Review, complete any of the following filter fields to locate applicants for a particular job posting, and then click Find:
   - Given Name
   - Surname
   - Beginning Date Range
   - Ending Date Range
   - Posting Number
   - eRec Sts
   - Lower Range
   - Upper Range
   - Created By
2. Select the applicant record that you want to review, and then click Select.
3. On Applicant Information, review the applicant's general information.
4. To review a cover letter or resumé, choose Cover Letter/Resumé from the Form menu.
5. To review job qualifications, choose Job Qualifications from the Form menu.

   Note

   The system must be enabled for cover letters, resumés, and job qualifications in order for the applicant to include them.

6. To select this applicant for immediate processing, choose Process Now from the Form menu.
7. To select this applicant for processing through the batch process, choose Mark for Batch from the Form menu.
8. If you previously selected this applicant for batch processing and now want to remove the applicant from the batch, choose Unmark for Batch from the Form menu.
9. Alternatively, you can select all available applicants for batch processing by choosing Mark All for Batch from the Form menu.
10. Click OK.

Processing Options for Review Applicants (P08498)

Process Tab

These processing options specify the statuses that the system assigns to the applicant during the eRecruit process.

1. Default Applicant Status:

Use this processing option to specify the applicant status that the system assigns to new applicants who originate from the eRecruit process when it adds the applicant to the Applicant Master table (F08401).

2. Default Candidate Requisition Status

Use this processing option to specify the requisition status that the system assigns to new applicants who originate from the eRecruit process when a record is created for the Requisition Information program (P08102).

The default value for the candidate requisition status is CAN. If you change this value, make sure that the status you use does not have a special handling code attached to it. Special handling codes have repercussions in the Requisition Information program.

Processing Recruitment Records (R08470)

From the eRecruit menu (G08BE1), choose Process Recruitment Records.

Use this program to process recruitment records based on data selection and the records that you selected as Mark for Update. The report displays exceptions only, unless you set processing option 3 to 1, in which case it displays information for all records.

The system updates the status of the applicant only if the applicant is being considered for the position. The system then adds the applicants' records to the Applicant Master table (F08401).

Processing Options for Process Recruitment Records (R08470)

Process Tab

These processing options specify the mode in which the system processes the records, as well as which records to process and the amount of detail information to display on the report.

1. Mode:

0 – Pending

1 – Final

Use this processing option to specify the mode in which the process will run. Valid values are:

0

Do not run the process in final mode. Do not update any information.

1

Run the process in final mode and update the appropriate tables.

If you leave this processing option blank, the system runs the report in pending mode.

2. Selected Records Only:

0 – Process all records

1 – Process only selected records

Use this processing option to specify which records the report processes. Valid values are:

0

Process all records that have an eRecruit status of 1 or 2.

1

Process only records that have an eRecruit status of 2.

If you leave this processing option blank, the system processes all records that have an eRecruit status of 1 or 2.

3. Show Detail:

0 – Do not show detail

1 – Show detail

Use this processing option to specify whether the report displays information for successfully processed records. The report always displays exception records, which are records that were not processed successfully. Valid values are:

0, Blank

Do not display information for successfully processed records.

1

Display information for all records.

If you leave this processing option blank, the report does not display the information for successfully processed records.

4. Default Applicant Status:

Use this processing option to specify the applicant status that the system assigns to new applicants who originate from the eRecruit process when it adds the applicants to the Applicant Master table (F08401).

5. Default Candidate Requisition Status:

Use this processing option to specify the requisition status that the system assigns to new applicants that originate from the eRecruit process when it creates a record in the Requisition Information program (P08102).

The default value for the candidate requisition status is CAN. If you change this value, make sure that the status that you use does not have a special handling code attached to it. Special handling codes have repercussions in the Requisition Information program.

Updating Applicant Personal Information (R08490)

From the Process eRecruit Applicants menu (G0G08BA2), choose Update Applicant Info.

Run the Update Applicant Personal Information batch program to update address book entries or applicant information for applicants with address book numbers. For applicants who have an address book search type of A, the system updates information in the address book tables, as well as the applicant information in the Applicant Master table (F08401) and the Extended Applicant Information table (F08403). When the search type is not equal to A, the system updates only the applicant information.

The system updates the following address book tables:

- Address By Date (F0116)
- Address Book – Who's Who (F0111)
- Address Book – Contact Phone Numbers (F0115)

When the applicant's personal information changes and the associated processing option is enabled, the system sends an e-mail notification to the recruiter who is associated with each posting to which the applicant has submitted an application.

Processing Options for Update Applicant Info (R08490)

Process Tab

This processing option specifies the mode the system uses to update the records.

---

1. Process Mode

'0' = Pending mode (Default)
'1' = Final mode

Use this processing option to specify the mode to use when processing Update Applicant Personal Info (R08490). Valid values are:

0
Pending Mode

1
Final Mode

In pending mode, the system does not update any database tables.

If you use final mode, the system prints the report, and updates the Address Book tables (F0116, F0111, F0115, F08401) and the Extended Applicant Information table (F08403) for an external applicant. The system updates only the Extended Applicant Information table for internal applicants.

Defaults Tab

This processing option specifies the electronic address type for the e-mail address that the applicant enters.

---

1. Electronic Address Type (required)

Use this processing option to indicate the type of address that is assigned to an electronic address. Address types are stored in UDC table 01/ET. Valid values are:

E

E-mail address

I

Uniform Resource Locator (URL)

Notifications Tab

This processing option specifies e-mail notification options.

1. Send Change Notification E-mail

Blank, N

E-mail will not be sent

Y

E-mail will be sent

Use this processing option to specify whether the report sends an e-mail notification to the posting owner when an applicant's information has changed and the applicant has applied for that posting. The system sends an e-mail notification when the Receive Resumé Submissions via E-mail option is turned on in the Manage Job Posting program (P08470).

Self-Service Time Entry

You can streamline and simplify the process of entering and reviewing employee timecard information by using self-service features. You can use the self-service approach for time entry to eliminate, or greatly reduce, the need for paper time sheets. You can also increase the accuracy and efficiency of your data entry by eliminating the need for a time entry clerk to manually transfer data from paper timesheets into the system.

Self-service time entry applications allow you to configure the user interfaces that employees use to enter timecards. You can create multiple interfaces to accommodate the different business requirements of employee groups within your organization.

When employees use self-service time entry, the system displays a welcome form called a director. You can configure this form to include user instructions for the time entry process, or to include information that employees need to complete their timecards for the specified pay period. The director form also includes links to the Employee Daily Time Entry (P051127) and Employee Summary Time Entry (P051128) programs, and a link to the Manager Review and Approval program (P051129) that managers or delegates can use to review and approve employee timecards.

When employees choose the appropriate link from the director form, the system displays a time entry form where they can enter their timecard information. You can configure this form to include only the fields that you want employees to complete. Using the ESS Time Entry Setup program (P051123), you can choose from over 50 predefined fields to appear on the employee time entry form. This program allows you to quickly and easily create custom time entry forms to meet your business requirements. You can also define the pay types that each employee can use to enter timecards, which helps to ensure the accuracy of the timecard data.

Note

Employees can enter timecards only for themselves using self-service time entry programs. Similarly, employees who are not managers are able to review only their own timecards. Managers can review their own timecards and those of their employees. If it is necessary for an employee to enter timecards for another employee, these timecards must be entered using standard time entry programs. See *Entering Timecards for Employees* in the *Time and Labor Guide* for instructions for entering timecards using the standard time entry programs.

After an employee enters timecards into the system, those timecards can be reviewed and then approved, changed, deleted, or rejected by the employee's manager. You can also set up manager delegates to perform the review and approval process in the event that an employee's manager is unavailable. Manager delegates are employees that are assigned permission to review and approve timecards on behalf of a manager. In addition, you can generate e-mail messages directly from the Manager Review and Approval program, which allow managers to automatically notify employees about the status of their timecards during the approval process.

When employees enter timecards using self-service applications, the system stores the timecards in the Employee Transactions - Batch File table (F06116Z1), which is a temporary workfile. After the timecards have been reviewed and approved, you can run the Time Entry Batch Processor program (R05116Z1I) to transfer the timecards from the workfile into the Employee Transaction Detail File table (F06116). When the timecards are in the Employee Transaction Detail File table, they can be included in payroll cycle processing.

Note

Because the timecards that are entered using self-service time entry applications are stored in the Employee Transactions - Batch File table (F06116Z1), employees can enter timecards while the payroll cycle is being processed without affecting that payroll cycle. Only timecards that have been moved into the Employee Transaction Detail File table (F06116) are included in the payroll cycle.

Entering Timecards Using Self-Service

The Time Entry Self Service Director program (P051125) serves as the entry point for employees and managers to access self-service time entry applications. You can customize the text that appears on this form and automatically complete the Pay Period Ending Date field so that employees can easily enter timecard information using self-service features.

Employees access the time entry applications by clicking links that appear on Time Entry Self Service Director. Employees can click the Summary Time Entry link or the Daily Time Entry link. In addition to the time entry application links, a link to the timecard review and approval application is provided for managers who must review and approve timecards.

Note

The Summary Time Entry, Daily Time Entry, and Manager Review/Approval links always appear on Time Entry Self Service Director. The Summary Time Entry and Daily Time Entry links are always active for all employees; however, the Manager Review and Approval link is active only for managers and their active delegates who can review employee timecards.

Prerequisite

- Set up the self-service time entry features. See *Setting Up Self-Service Time Entry* in the *Human Capital Management Self-Service Guide* for instructions.

Managing Self-Service Timecards Using Daily Time Entry

When you click the Daily Time Entry link from Time Entry Self Service Director (P051125), the system displays Employee Daily Time Entry (P051127). The fields that employees must complete are determined during the setup process. The format of the form is determined by the pay frequency of the employee who accesses the program. For example, when an employee who is paid weekly accesses Employee Daily Time Entry, the system displays summarized information for the seven days for which the employee can enter timecards. Similarly, when an employee who is paid biweekly accesses the form, the system displays summarized information for the 14 days for which the employee can enter timecards.

To enter timecard information, employees use a time entry grid that contains a column for each day in the pay period. Employees can enter all timecards for the same pay type on one line in the grid for the entire pay period. A separate line in the grid must be used for each pay type used during the pay period. For example, if an employee works eight hours of regular time each day and also works two hours of overtime each day, two lines of time entry are required to accurately track the time for the pay period. The employee must enter one line and designate the pay type as regular pay. The employee then enters normal hours worked for each day of the pay period on the same line. The employee must also enter a second line and designate the pay type as overtime pay. The employee then enters overtime hours worked for each day of the pay period on the same line.

Note

Only employees who are paid weekly, biweekly, or semimonthly can enter self-service timecards using Employee Daily Time Entry. Employees who are paid monthly must use Employee Summary Time Entry (P051128) to enter self-service timecards.

When an employee enters or updates timecards and clicks Save, the system stores the timecards in a temporary workfile called the Employee Transactions - Batch File table (F06116Z1). The system automatically assigns a status of 0 - Waiting for Approval to the timecard records that allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. When a manager approves a timecard, users can no longer update the information.

After the timecards are approved, the Time Entry Batch Processor program (R05116Z1I) is used to move timecards from the Employee Transactions - Batch File table into the Employee Transaction Detail File table (F06116). After timecards from the workfile are stored in the Employee Transaction Detail File table, they can be processed in a payroll cycle.

► To enter self-service timecards using daily time entry

From the portal that is created by your organization, access Time Entry Self Service Director.

1. On Time Entry Self Service Director, verify that the date in the following field is correct, and then click the Daily Time Entry link.
   - Pay Period Ending Date
2. On Employee Daily Time Entry, click a blank line in the time entry area at the bottom of the form.
3. Enter a value in the following field:
   - Pay Type
4. Enter the number of hours that are associated with the pay type that you entered in step 3 for each day of the pay period.
5. Complete any additional fields in the detail area.

   Note

   The fields that the system displays in the detail area are determined during self-service time entry setup. To review instructions for completing any of the fields that appear in the grid, see *Entering Daily Timecards for Employees* in the *Time and Labor Guide*.

6. Click Save to save the record and to display a new line in the time entry area.

   When you click Save, the system updates the totals in the review sections of the form.

7. Complete steps 2 through 6 until you have entered all timecard information. You must enter a separate line for each pay type.
8. Click Back to return to Time Entry Self Service Director.

► **To delete or modify self-service timecards using daily time entry**

From the portal that is created by your organization, access Time Entry Self Service Director.

1. On Time Entry Self Service Director, click the Daily Time Entry link.
2. On Employee Daily Time Entry, to delete timecards, click the Select option next to the records that you want to delete, and then click Delete.
3. To modify timecards, change any of the fields in the detail area of the form and then click Save.

   Note

   When a manager approves a timecard, you can no longer delete or modify the information.

4. Click Back to return to Time Entry Self Service Director.

Managing Self-Service Timecards Using Summary Time Entry

When you click the Summary Time Entry link from Time Entry Self Service Director (P051125), the system displays two sections on Employee Summary Time Entry (P051128) where employees can enter timecard information. In the Quick Entry section of the form, employees can enter lump sum amounts for regular, sick, vacation, and holiday hours that they worked during the pay period.

For example, if an employee uses 40 hours of vacation time during the pay period, they can enter the total vacation time in the Quick Entry section of the form. The pay types that are included in the Quick Entry section are specified in a processing option for the Time Entry Self Service Director program.

Additionally, employees can enter timecard records in the time entry grid at the bottom of the form. The fields that appear in the time entry grid are determined during the self-service time entry setup process.

Note

Employees whose pay frequency is monthly must use Employee Summary Time Entry to enter self-service timecards. Only employees whose pay frequency is weekly, biweekly, or semimonthly can enter self-service timecards using either Employee Daily Time Entry or Employee Summary Time Entry.

When an employee enters or updates timecards, the system stores them in a temporary workfile called the Employee Transaction - Batch File table (F06116Z1). These timecard records are assigned a status of 0 - Waiting for Approval, which allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. However, if a manager has already approved a timecard, the user cannot update the timecard.

After the timecards are approved, the Time Entry Batch Processor program (R05116Z1I) is used to move the timecards into the Employee Transaction Detail File table (F06116). After the system moves the timecards from the workfile into the Employee Transaction Detail File table, they can be processed in a payroll cycle.

► To enter self-service timecards using summary time entry

From the portal that is created by your organization, access Time Entry Self Service Director.

1. On Time Entry Self Service Director, verify that the date entered in the following field is correct, and then click the Summary Time Entry link.
   - Pay Period Ending Date
2. On Summary Time Entry, complete the following fields in the Quick Entry (Totals Only) section of the form to enter lump sum amounts:
   - Reg.
   - Vac
   - Sick
   - Holiday
3. To enter timecards in the detail area of the form, click a grid line and enter a pay type in the following field:
   - Pay Type
4. Complete any additional fields in the detail area.

   Note

   The fields that appear in the detail area are determined during self-service time entry setup. For instructions for completing any of the fields that appear in the grid, see *Entering Timecards for Employees* in the *Time and Labor Guide*.

5. Click Save to save the record and display a new line in the time entry area.

   Note

   If you click Close without first saving the timecard, the system displays a Save Any Unsaved Records? dialog so you can choose to save any unsaved changes or cancel the Close request.

6. Complete steps 2 through 5 until you have entered all timecard information.
7. Click Back to return to Time Entry Self Service Director.

► **To delete or modify self-service timecards using summary time entry**

From the portal that is created by your organization, access Time Entry Self Service Director.

1. On Time Entry Self Service Director, click the Summary Time Entry link.
2. On Employee Summary Time Entry, to delete timecards, click the Select option next to the records that you want to delete, and then click Delete.

   To select or remove a selected status for all of the timecard records that are displayed, you can use the Select All or Clear All options.

   The system displays a confirmation dialog that you must use to confirm the delete action. The dialog indicates the number of records that are selected and provides Yes and No options so that you can proceed with the delete action or stop the delete action and return to Employee Summary Time Entry.

3. To modify timecards, change any of the fields in the detail area of the form and then click Save.

   Note

   You cannot delete or modify a timecard if a manager has already approved it.

4. Click Back to return to Time Entry Self Service Director.

Reviewing and Approving Self-Service Timecards

After employees enter self-service timecards into the system, managers must review those timecards. Using the Manager Review and Approval program (P051129), managers can review, change, reject, and approve employee timecards. Along with reviewing and approving timecards, managers can use this program to view a list of employees who are missing timecards for the pay period. You can also set up the review and approval process to be completed by manager delegates.

Managers or their delegates can review the timecards for a group of employees and approve or reject all of the timecards at once, or timecards can be approved, changed, or rejected individually. Managers can also select multiple timecards or employees to approve or reject at one time.

In addition to approving and rejecting timecards, managers also can assign the Paid - Not Approved status to timecards. This status is used for informational purposes, and the timecards that are assigned this status are processed in the same way approved timecards are processed. Managers might use this status if a timecard is incorrect but the approval deadline does not allow for the timecard to be changed and re-entered by the employee. Assigning the Paid - Not Approved status allows the system to pay the employee for the timecard. The manager would then need to follow up with the employee to ensure that the timecard information is corrected during a future pay period.

Managers also can send e-mail messages to employees using the Send E-Mail to Employee link on Self Service Manager Review and Approval. Managers might use this function to notify employees of the reason a timecard was changed or rejected, or to remind employees who have not entered timecards for the period to enter their timecards before the deadline.

The system stores timecards that employees enter into the system in a temporary workfile called the Employee Transactions - Batch File table (F06116Z1). After the timecards are reviewed and approved or rejected, the Time Entry Batch Processor program (R05116Z1I) moves all of the timecards with an Approved or Paid Not Approved status into the Employee Transaction Detail File table (F06116). When timecards are in the Employee Transaction Detail File table, they can be processed in a payroll cycle.

Note

To use the missing timecards option during the review and approval process, you must set the processing options for the Time Entry Self Service Director program (P051125) to turn on that feature. To display a list of employees who have not entered timecards for the pay period, the system must search through the entire employee database to find all of the employees that report to the specified manager; therefore, this process might take a significant amount of processing time.

See Also

- *Working with Time Entry Batch Processing* in the *Time and Labor Guide* for more information about processing self-service timecards

► To review and approve self-service timecards

From the portal that is created by your organization, access Time Entry Self Service Director.

1. On Time Entry Self Service Director, verify that the date in the following field is correct, and then click the Manager Review/Approval link.
   - Pay Period Ending Date
2. On Self Service Manager Review and Approval, verify the values in the following fields:
   - Manager Number

   Note

   If you are a delegate who is reviewing and approving timecards for a manager, enter the approving manager address book number and then click Refresh to display subordinate employees.

   - Pay Period Ending Date
3. To specify which timecards to review, click one of the following options and then click Find Timecards:
   - Waiting Approval
   - Approved
   - Rejected
   - Paid Not Approved
   - Missing Timecard

4. To approve all of the timecards for multiple employees, click the Select option next to each employee for whom you want to approve timecards, and then click Approve.
5. To reject all of the timecards for multiple employees, click the Select option next to each employee for whom you want to reject timecards, and then click Reject.
6. To reject all of the timecards for multiple employees, but allow them to be processed in a payroll cycle, click the Select option next to each employee for whom you want to assign the Paid - Not Approved status, and then click Paid Not Approved.
7. To review the timecard detail for an individual employee, click the Select option next to the employee's record in the detail area of the form, and then click Detail.

   Note

   If the employee entered timecards using daily time entry, the system displays Employee Daily Time Entry when you review timecard detail. Similarly, if the employee used summary time entry, the system displays Employee Summary Time Entry. If the employee entered timecards using both applications during the same pay period, the system displays all of the employee’s timecards on Employee Summary Time Entry.

   If necessary, you can change any of the information for each timecard that is displayed on the time entry form.

8. To approve selected timecards for the employee, click the Select option next to each timecard that you want to approve, and then click Approve.
9. To reject selected timecards for the employee, click the Select option next to each timecard that you want to reject, and then click Reject.
10. To assign the Paid - Not Approved status to selected timecards for the employee, click the Select option next to each timecard for which you want to assign this status, and then click Paid Not Approved.
11. When you have finished reviewing all of the employee's timecards, click OK to return to Self Service Manager Review and Approval.
12. To send an e-mail message to an employee, click the Select option next to the employee, and then click the Send E-Mail to Employee link.

    Note

    You can send e-mail messages to only one employee at a time. Do not choose multiple employees when sending e-mail messages from Self Service Manager Review and Approval.

13. On Self-Service E-Mail Message, complete the following field:
    - Subject:
14. Type your message in the text box and then click Send.
15. On Manager Self-Service Review and Approval, click Previous to return to Time Entry Self Service Director.

Setting Up Self-Service Time Entry

Before employees can enter timecard information using the self-service time entry applications, you must create the text that appears on the time entry forms, set up user interfaces, assign manager delegates for managers who review and approve timecards, and specify the available pay types that can be used for each employee group.

First, you must set up the director form. The director form is the first form that employees see when they access the self-service time entry system. You can enter text that will appear on this form. This text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that might be needed for employees to enter timecards correctly.

In addition to director text, the director form also contains links to the actual time entry interfaces. You can activate the links to the Employee Summary Time Entry program (P051128), the Employee Daily Time Entry program (P051127), or to both programs. Though the system displays all of the links on the form, which links are active is determined by the processing option settings for the Time Entry Self Service Director program (P051125).

After you set up the director, you must set up user interfaces for the time entry applications. You can create multiple interfaces to accommodate the business requirements of different companies or business units within your organization. To set up a user interface for self-service time entry, you choose which fields you want to display on the time entry forms. The following fields are set as default fields that the system automatically displays on Employee Daily Time Entry and Employee Summary Time Entry:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked
- Equipment Hours

The system also provides you with over 50 additional predefined fields to choose from. These fields allow you to quickly and easily configure your user interfaces to meet the business needs of your organization.

You can specify which pay types are available to employees within different employee groups. For example, employees in business unit 100 might need to use different pay types than employees in business unit 200, or employees with Job Type A-200 might use different pay types than employees with Job Type B-55. You can use the Classification/Pay Cross Reference program (P05932) to specify the available pay types for each employee group. When you set up this information, employees can enter timecards for only the pay types that are assigned to their employee group. If you do not set up this information, employees will receive a hard error on this field and will not be able to complete time entry.

You can define employee groups according to the following criteria:

- Job Type only
- Job Type and Job Step only
- Business Unit only
- Union Code only
- Shift Code only
- Job Type, Job Step, Business Unit, Union Code, and Shift Code

You can select the fields that you use to define employee groups for pay type assignment in the processing options for the Time Entry Self Service Director program.

To set up delegates who can assist managers with timecard approvals, you can use the Manager Delegates Setup program (P051126) to designate one or more subordinate employees as delegates for each manager. You also assign an authority level for each delegate. Manager delegates are employees who are given permission to perform duties on behalf of a manager. For example, if a manager is not available to review and approve timecards before the timecard approval deadline, a manager delegate could review and approve the timecards for that manager.

Managing the Time Entry Director Form

The Time Entry Self Service Director program (P051125) displays the first form that employees see when they access the self-service time entry system. You define the text that appears on this form. This text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that employees might need to enter timecards correctly. If you choose to include pay-period specific information in director text, you must revise the text for each pay period.

The following examples illustrate the types of information that you might want to include in director text:

Example 1

July 1–15 time entry reports are due by noon July 16: 80 total hours.

Overtime reminder: All employees who are eligible for overtime are responsible for coding all overtime hours worked to pay code 300. If you have any questions about overtime eligibility, please speak with your manager or a human resources representative.

Example 2

To enter timecards using this self-service form, verify that the date in the Pay Period Ending Date field is correct and then click the Summary Time Entry link to access the time entry screen. On the time entry screen, complete all of the fields and then click Save. Your manager will review your timecards and you will receive an e-mail response regarding the approval status of your timecards. If you have questions regarding the time entry process or the review and approval process, please speak with your manager or a human resources representative.

In addition to director text, the director form also contains the following links to employee or manager programs (interfaces):

- Daily Time Entry
- Summary Time Entry
- Manager Review and Approval

You use the processing options for the Time Entry Self Service Director program to specify which of these links are active.

The director form also automatically displays the last day of the pay period, based on information that you enter in the processing options.

► To set up director text for self-service time entry

From the Time Entry Self service Setup menu (G05BESS41), choose Director Text Setup.

1. On Work With Director Text, click Add.
2. On Define Director Text, complete the following fields:
   - Company
   - Business Unit
3. In the text pane, enter the text that you want to appear on the employee self-service time entry form.

   Note

   You can enter text only in the text pane. Do not enter rich text, OLE objects, or images in the text pane. Also, when you enter text into the text pane, you must enter the HTML code `<BR>` when you want a line break. Using the Enter key will not simulate a line break when the text appears on the director form.

4. Click OK.
5. To enter different director text for different groups within your organization, complete steps 1 through 4 for each company and business unit combination for which you want to create director text.
6. To use the same director text for all employees in your organization, complete these steps once and enter 0 in the Company field and leave the Business Unit field blank.

► To revise director text for self-service time entry

From the Time Entry Self service Setup menu (G05BESS41), choose Director Text Setup.

1. On Work With Director Text, click Find.
2. Choose the record in the detail area that you want to revise and click Select.
3. On Define Director Text, revise the text that appears in the text pane.

Note

You can only enter text in the text pane. Do not enter any other type of text, OLE objects, or images into the text pane. Also, when you enter text into the text pane, you must enter the HTML code `<BR>` when you want a line break. Using the Enter key will not simulate a line break when the text appears on the director form.

---

4. Click OK.

Processing Options for Time Entry Self Service Director (P051125)

Date/Pay Cycle Code Tab

Use these processing options to specify the pay period ending dates that are displayed on the Time Entry Self Service Director form. The system displays the date that is linked to the employee pay cycle code. To ensure that the correct date is displayed on time entry forms, these processing options must be updated each pay period.

---

1. Pay Period Ending Date - Weekly

Use this processing option to specify the last day of the workweek for weekly processing periods.

Weekly Pay Cycle Code

Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

2. Pay Period Ending Date - Bi-Weekly

Use this processing option to specify the last day of biweekly processing periods.

Bi-Weekly Pay Cycle Code

Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

3. Pay Period Ending Date - Semi-Monthly

Use this processing option to specify the last day of semimonthly processing periods.

Semi-Monthly Pay Cycle Code

Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

---

4. Pay Period Ending Date - Monthly

Use this processing option to specify the last day of monthly processing periods.

Monthly Pay Cycle Code

Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

Pay Type Tab

Use these processing options to specify the pay types that the system uses to create timecards for lump sum entries in the Quick Entry section of the summary time entry forms.

1. Pay Type - Regular

Use this processing option to specify the pay type that the system assigns to timecard information that is entered for regular pay in the self-service time entry program.

2. Pay Type - Sick Leave

Use this processing option to specify the pay type that the system assigns to timecard information that is entered for sick pay in the self-service time entry programs.

3. Pay Type - Vacation

Use this processing option to specify the pay type that the system assigns to timecard information that is entered for vacation pay in the self-service time entry programs.

4. Pay Type - Holiday

Use this processing option to specify the pay type that the system assigns to timecard information that is entered for holiday pay in the self-service time entry programs.

5. Pay Type - Overtime

Use this processing option to specify the pay type that the system assigns to timecard information that is entered for overtime pay in the self-service time entry programs.

6. Cross Reference Search

1 = Job Type

2 = Job type and Job Step

3 = Business Unit

4 = Union Code

5 = Shift Code

0 = By all fields blank(default)

Use this processing option to specify the criteria that are used to set up a pay type cross-reference table for employee self-service time entry. You use the pay type cross-reference table to define pay types that various employee groups can use for time entry.

For example, if you want to assign pay types to employees by job type and job step, enter 2. If you enter 2, you should define pay types for all employee groups that use job type and job step.

To assign pay types to employee groups by business unit, enter 3.

To assign pay type cross-references that use different criteria for each employee group, enter 0. Entering 0 allows pay types to be assigned to specific employee groups and allows for a default set of pay types to be set up by leaving all of the options blank. This also allows any or none of the options to be used to define pay type cross-references.

Valid values are:

1

Job type

2

Job type and job step

3

Business unit

4

Union code

5

Shift code

0 or Blank (default)

Any or all cross reference options

Leave Entry Tab

Use these processing options to specify how the system verifies employee available leave balances and which table the system uses to retrieve employee leave balances.

---

1. Leave Time Available

0= Do not Perform Editing

1= Perform Editing, Hard Error if Insufficient Balances Exist

2= Perform Editing, Warning Message if Insufficient Balances Exist

3= Perform Editing, Use Available Plus Accured Balances, Hard error if Insufficient Balances Exist

4= Perform Editing, Use Available Plus Accured Balances, Warning Message if Insufficient Balances Exist

Use this processing option to specify the method that the system uses to respond to leave requests or for leave taken by an employee. If you enter any value other than 0, an employee can take only available leave. This value is in effect for all pay types that are set up to use leave tracking. Valid values are:

0

Do not validate available leave time.

1

Display a hard error if an insufficient available balance exists.

2

Display a warning if an insufficient available balance exists.

3

Display a hard error if the combined available and accrued balances are insufficient.

4

Display a warning if the combined available and accrued balances are insufficient.

2. Leave History Source

0= Employee Transaction History Summary(F06146)

1= Fiscal And Anniversary Year History (F06147)

Use this processing option to specify the table from which the system retrieves history information. Valid values are:

0 or Blank

Calendar Month DBA Summary History table (F06145) or Employee Transaction History Summary table (F06146)

1

Fiscal and Anniversary Year History table (F06147)

Account Number Tab

Use these processing options to specify how the system validates account numbers that are included on employee timecards.

---

1. Validate # sign

0= Allow # Sign(Default)
1= Do Not allow

Use this processing option to specify whether the system allows employees to enter a pound sign (#) in place of a valid account number. If this is not allowed, the system verifies the validity of the account numbers associated with each timecard. Valid values are:

0
Allow a pound sign (#) entry

1
Do not allow a pound sign (#) entry

2. Posting Account Only
0= Allow All Accounts(Default)
1= Allow Only Postable Accounts

Use this processing option to specify whether the system verifies that the account number entered for timecards can be posted. Valid values are:

0
Allow all account numbers (default)

1
Allow only account numbers that can be posted

3. Dynamic Account Creation
0= Dynamic Account Creation Turned Off
1= Dynamic Account Creation Turned On

Use this processing option to specify whether the system uses dynamic account creation when an account number that does not exist in the Account Master table (F0901) is entered on a timecard. You should set this option to 0 if dynamic account creation is not included in your accounting process. Valid values are:

0

Do not dynamically create accounts.

1

Create accounts dynamically.

4. Validate Account

0 = Do not validate account

1 = Validate Account

Use this processing option to specify whether the system automatically verifies and retrieves the correct account number from the Employee Master Information table (F060116). When this processing option is set to 1, the system first compares the account number that is entered on the timecard to existing account information in the Employee Master Information table. If the employee enters no account number, then the system uses data that is linked to the account number such as the job location, cost code, pay type, and union, to retrieve the correct account number. Valid values are:

0

The system does not verify and retrieve the account number.

1

The system verifies and retrieves the account number.

Multicurrency Tab

Use these processing options to enable the multicurrency feature for Employee Self-Service Time Entry and to specify the currency that the system uses. To use multicurrency, this feature must also be activated in the Time Entry MBF Processing Options (P050002A), Recharge tab, Enable Multi-Currency Functionality. Also on the Recharge tab, you should enter appropriate values for the remaining processing options.

1. Multicurrency

1= Enable Multicurrency

0= Do not enable multicurrency Functionality

Use this processing option to specify whether to enable multicurrency time accounting. When multicurrency time accounting is enabled and a timecard is saved, the system retrieves the currency code and then saves it in the Employee Transactions - Batch File (F06116Z1). Valid values are:

1

Enable multicurrency time accounting.

0

Do not enable multicurrency time accounting

2. Currency Mode

D= Domestic Currency
F= Foreign Currency

Use this processing option to specify the currency that the system uses for the transaction. To use the currency of the country where the employee's home company is located, choose Domestic. To use the currency for another country as the base currency, choose Foreign. Valid values are:

D

Domestic Currency

F

Foreign Currency

Manager Tab

Use this processing option to specify whether the missing timecard feature can be used.

1. Multicurrency

1= Enable Multicurrency
0= Do not enable multicurrency Functionality

Use this processing option to specify whether managers can view records for employees who have not entered timecards for the specified period. Valid values are:

0

Enable the missing timecard option

1

Disable the missing timecard option

Administrator Tab

Use these processing options to specify whether the system displays each of the available time entry links on the self-service time entry forms. You can also specify the text that the system displays for each link.

---

1. Show Daily Time Entry Link

0 = Show Daily

1= Don't show Daily Link

Use this processing option to specify whether the system displays a link to the Employee Daily Time Entry program (P051127). If you do not display the Daily Time Entry link, the employee cannot access the program. Valid values are:

0

The system displays the Daily Time Entry Link.

1

The system does not display the Daily Time Entry Link.

Daily Time Entry Override Name

Use this processing option to override the text for the link to the Daily Time Entry program. You must display the Daily Time Entry link in order for the system to display the text that you enter in this processing option.

2. Show Summary Time Entry Link

0 = Show Summary Link

1 = Don't show Summary Link

Use this processing option to specify whether the link to the Summary Time Entry application is displayed for users. If you do not show the Summary Time Entry link, the employee will not be able to see the link to Summary Time Entry, and will not be able to access the program. Valid values are:

0

Show Summary Time Entry Link

1

Don't show Summary Time Entry Link

Summary Time Entry Override Name

Use this processing option to override the text for the link to the Summary Time Entry program. You must display the Summary Time Entry link in order for the system to display the text that you enter in this processing option.

---

3. Show Manager Approval Time Entry Link
0 = Show Manager Approval Link
1 = Don't show Manager Approval Link

Use this processing option to allow Employee Self Service Time Entry users to approve timecards using the Manager Approval program. If you do not show the Manager Approval link, employees cannot access Manager Approval. Valid values are:

0

Show Manager Approval Link

1

Don't show Manager Approval Link

Manager Approval Time Entry Override Name

Use this processing option to override the text for the Manager Approval link. You must choose to show the Manager Approval link in order for the system to display the text that you enter in this processing option.

Creating the Employee Self-Service Time Entry Interface

Before employees can enter timecard information into the system, you must define the information that appears on the interface that employees use. The following fields are set up to display by default on all self-service time entry forms; however, you can choose to display additional fields:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked
- Equipment Hours

You can use the ESS Time Entry Setup program (P051123) to choose from over 50 additional predefined fields to appear on the employee time entry interface. These fields allow you to quickly and easily create time entry forms that meet the requirements of your organization. Depending on your business needs, you can create different time entry interfaces for each home company and home business unit combination within your organization.

For example, if you want employees in Company A to enter simple time entry records that do not require a large amount of data entry, you can choose to display only the default fields for Company A employees.

Conversely, you might want employees in Company B to enter detailed time entry information. In this case, you might select a large number of additional fields to appear on the employee time entry interface for Company B. Examples of additional fields that you might want to display are:

- Company - Home
- Object Account
- Subsidiary
- Item Number
- Unites - Pieces
- Amount - Sales
- Union Code
- Work State
- Billing Rate

► To create the employee self-service time entry interface

From the Time Entry Self service Setup menu (G05BESS41), choose Self Service Screen Setup.

1. On Work With ESS Time Entry Setup, click Add.
2. On ESS Time Entry Setup Revisions, complete the following fields:
    - Company
    - Business Unit
3. To specify which time entry programs you want employees to use, click one of the following options:
    - Summary Time Entry
    - Daily Time Entry
    - Both
4. On the Fields 1-22 tab, click any of the following options that you want to appear on the time entry interface:
    - Account Number
    - Job Type
    - Job Step
    - LS Amnt

- Opt Sequence
- Equip Worked On
- Union
- Batch
- Uprate Amount
- Shift Differential
- Amount or Percent
- Billing Rate
- Home Company
- Cost Code

5. Click the Fields 23-42 tab and then click any of the following options that you want to appear on the time entry interface:
    - Home Business Unit
    - Tax Area
    - Item
    - Piece Rate
    - Pieces
    - Phase
    - Record Type
    - WCI Code
    - SC/WC
    - Check Route
    - Cat 001
    - Cat 002
    - Cat 003
    - Cat 004
    - Bill RtCd
    - Equipment Object
    - Equipment Blrt
6. Click the Fields 43-52 tab and then click any of the following options that you want to appear on the time entry interface:
    - Cost Type 1
    - Cost Object 1
    - Cost Type 2
    - Cost Object 2
    - Cost Type 3
    - Cost Object 3
    - Cost Type 4
    - Cost Object 4
    - Activity Code

- Leave Type
- Leave ID Number

7. Click OK.
8. Complete steps 2 through 7 for each company and business unit combination for which you want to create a separate user interface. If you want to use the same user interface for all of the employees in your organization, you can create one interface by entering 0 in the Company field and leaving the Business Unit field blank.

Assigning Pay Types to Employee Groups

To simplify the time entry process and to ensure that employees enter timecards using the correct pay types, you can use the Classification/Pay Cross Reference program (P05932) to specify the available pay types for specified employee groups within your organization. Linking pay types with employee groups is also necessary for the self-service time entry programs to function properly. You can define groups based on job types, job steps, business units, shift codes, union codes, or any combination of these fields. You can use the processing options for the Time Entry Self Service Director program (P051125) to specify which of these fields you want to use to create employee groups for pay type classification purposes.

When you assign pay types to specific employee groups, employees can use only the pay types that have search criteria that match the information in the Employee Master Information table (F060116). For example, if you assign a pay type to business unit 100 and job type A-50, only employees who are listed in the Employee Master Information table with business unit 100 and job type A-50 can enter timecards using that pay type. Additionally, only the pay types associated with an employee group are displayed with the search function for the pay type field during the time entry process.

You can also set up a set of default pay types for employees who are listed in the Employee Master Information table with business unit and job type values that do not meet specified search criteria. You might want to do this in order to identify employee groups for which you have not set up pay type information. For example, if you set up pay type information for each employee group within your organization, you can set up default information and include only one pay type in the default set. If an employee does not meet the search criteria for any of the other employee groups, that employee can enter time using only the pay type that you have set up in the default set. You can then review time entry records to find employees who have entered timecards using that pay type. By identifying those employees, you can identify employee groups for which you need to set up pay type information.

You might also want to use a default set of pay types if you have a large number of employees in different employee groups who can use the same pay types. For example, if only three of the business units within your organization require unique pay types, you might set up pay types for each of the three business units. However, if the rest of the employees within your organization use the same pay types, you can set up a default set of pay types for those employees rather than setting up the same pay type information for each business unit.

Note

Assigning pay types to employee groups is required in order for self-service time entry programs to function properly. You must set up pay type information so that employees in your organization can use the pay types you set up. If no pay types are set up, then employees will receive a hard error on the pay type field and will not be able to enter a self-service timecard.

► To assign pay types to business units

From the Rate Derivation Setup menu (G05BRD4), choose Classification Pay/X-Ref.

1. On Work With Classification Pay/Cross Reference, click Add.
2. On Classification/Pay Cross Reference Revisions, complete any of the following fields to define the employee group to which you want to assign pay types:
   - Job Type
   - Job Step
   - Union Code
   - Business Unit
   - Shift Code

   Note

   To create a default set of pay types, leave all of these fields blank.

3. In the detail area of the form, enter the beginning pay type code in a range of pay types in the following field:
   - From Trans
4. Enter the ending pay type code in a range of pay types in the following field:
   - Thru Trans

   Note

   When you are entering a range of pay types to assign to an employee group, both the pay type in the From Trans field and the pay type in the Thru Trans field are included in the range and assigned to the specified group. If you do not want to enter a pay type range, you can enter the same pay type code in the From Trans and Thru Trans fields.

5. Choose a blank row in the detail area and complete steps 3 and 4 until you have assigned all of the pay types for the specified business unit.
6. Click OK.

Setting Up Manager Delegates

After employees enter timecards in the system, managers can review and approve, change, or reject those timecards. Occasionally, managers are not available to review and approve timecards. In these circumstances, you can use the Manager Delegates Setup program (P051126) to set up delegates to perform certain review and approval functions on behalf of the manager.

When you set up manager delegates, you can assign an authorization level to each delegate. The authorization level specifies how much authority the delegate has during the timecard review and approval process. Delegates with an authorization level of 2 are only able to approve or reject timecards, and delegates with an authorization level of 1 are able to approve, change, delete, and reject timecards on behalf of the manager.

You can also assign effective dates to delegate records. For example, if a manager is on vacation for two weeks, you might set up a delegate that has review and approval authority during the time that the manager is unavailable. After the ending date that is assigned to the delegate record is reached, the delegate no longer has authorization to review and approve employee timecards. A manager can have no more than two active delegates at any given time.

► To set up manager delegates

From the Time Entry Self Service Setup menu (G05BESS41), choose Manager Delegate Setup.

1. On Work With Manager Delegates Setup, review and verify the information in the following field:
   - Manager
2. Complete the following fields for each delegate, and then click OK:
   - Delegate Number
   - Effective Date
   - Ending Date
   - Authorization Type

Processing Options for Manager Delegates Setup (P051126)

Defaults Tab

This processing option specifies whether the Manager field is accessible and the address book value can be changed. When the value is set to the default (0), the system automatically detects the address book number of the manager who is currently signed onto the system, disables the field, and displays only delegates who are subordinate to the displayed manager. When the value is set to (1), the system activates the Manager field, does not automatically detect an address book number, and displays the subordinate delegates for any manager whose address book number is entered.

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1. User Level

   0 = Manager/Employee Level (Default)

   1 = System Administrator Level

Use this processing option to specify whether to display delegates for different managers or to display the delegates for only one manager. Valid values are:

0

Only see one manager's delegates. (defualt)

1

Can change managers to see everyone's delegates.

EnterpriseOne PeopleBooks Glossary

"as of" processing	A process that is run at a specific point in time to summarize item transactions.
52 period accounting	A method of accounting that uses each week as a separate accounting period.
account site	In the invoice process, the address to which invoices are mailed. Invoices can go to a different location or account site from the statement.
active window	The window that contains the document or display that will be affected by current cursor movements, commands, and data entry in environments that are capable of displaying multiple on-screen windows.
ActiveX	A technology and set of programming tools developed by Microsoft Corporation that enable software components written in different languages to interact with each another in a network environment or on a web page. The technology, based on object linking and embedding, enables Java applet-style functionality for Web browsers as well as other applications (Java is limited to Web browsers at this time). The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can "contain" them—for example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.
activity	In Advanced Cost Accounting, an aggregation of actions performed within an organization that is used in activity-based costing.
activity driver	A measure of the frequency and intensity of the demands that are placed on activities by cost objects. An activity driver is used to assign costs to cost objects. It represents a line item on the bill of activities for a product or customer. An example is the number of part numbers, which is used to measure the consumption of material-related activities by each product, material type, or component. The number of customer orders measures the consumption of order-entry activities by each customer. Sometimes an activity driver is used as an indicator of the output of an activity, such as the number of purchase orders that are prepared by the purchasing activity. See also cost object.
activity rule	The criteria by which an object progresses from a given point to the next in a flow.
actual cost	Actual costing uses predetermined cost components, but the costs are accumulated at the time that they occur throughout the production process.
adapter	A component that connects two devices or systems, physically or electronically, and enables them to work together.
add mode	The condition of a form where a user can enter data into it.
advanced interactive executive	An open IBM operating system that is based on UNIX.
agent	A program that searches through archives or other repositories of information on a topic that is specified by the user.

aging	A classification of accounts by the time elapsed since the billing date or due date. Aging is divided into schedules or accounting periods, such as 0-30 days, 31-60 days, and so on.
aging schedule	A schedule that is used to determine whether a payment is delinquent and the number of days which the payment is delinquent.
allegato IVA clienti	In Italy, the term for the A/R Annual VAT report.
allegato IVA fornitori	In Italy, the term for the A/P Annual VAT report.
application layer	The seventh layer of the Open Systems Interconnection Reference Model, which defines standards for interaction at the user or application program level.
application programming interface (API)	A set of routines that is used by an application program to direct the performance of procedures by the computer's operating system.
AS/400 Common	A data source that resides on an AS/400 and holds data that is common to the co-existent library, allowing PeopleSoft EnterpriseOne to share information with PeopleSoft World.
assembly inclusion rule	A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.
audit trail	The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.
automatic return	A feature that allows a user to move to the next entry line in a detail area or to the first cell in the next row in several applications.
availability	The expression of the inventory amount that can be used for sales orders or manufacturing orders.
available inventory	The quantity of product that can be promised for sale or transfer at a particular time, considering current on-hand quantities, replenishments in process, and anticipated demand.
back office	The set of enterprise software applications that supports the internal business functions of a company.
backhaul	The return trip of a vehicle after delivering a load to a specified destination. The vehicle can be empty or the backhaul can produce less revenue than the original trip. For example, the state of Florida is considered a backhaul for many other states—that is, many trucking companies ship products into the state of Florida, but most of them cannot fill a load coming out of Florida or they charge less. Hence, trucks coming out of Florida are either empty or produce less revenue than the original trip.
balance forward	The cumulative total of inventory transactions that is used in the Running Balance program. The system does not store this total. You must run this program each time that you want to review the cumulative inventory transactions total.

balance forward receipt application method	A receipt application method in which the receipt is applied to the oldest or newest invoices in chronological order according to the net due date.
bank tape (lock box) processing	The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.
base location	[In package management] The topmost location that is displayed when a user launches the Machine Identification application.
basket discount	A reduction in price that applies to a group or "basket" of products within a sales order.
basket repricing	A rule that specifies how to calculate and display discounts for a group of products on a sales order. The system can calculate and display the discount as a separate sales order detail line, or it can discount the price of each item on a line-by-line basis within the sales order.
batch job	A job submitted to a system and processed as a single unit with no user interaction.
batch override	An instruction that causes a batch process to produce output other than what it normally would produce for the current execution only.
batch process	A type of process that runs to completion without user intervention after it has been started.
batch program	A program that executes without interacting with the user.
batch version	A version of a report or application that includes a set of user-defined specifications, which control how a batch process runs.
batch/lot tracking	The act of identifying where a component from a specific lot is used in the production of goods.
batch/mix	A manufacturing process that primarily schedules short production runs of products.
batch-of-one processing	A transaction method that allows a client application to perform work on a client workstation, and then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store-and-forward.
binary large object (BLOB)	A collection of binary data stored as a single entity in a [file].
binder clip	See paper clip.
black products	Products that are derived from the low or heavy end of the distillation process—for example, diesel oils and fuel oils. See also white products.
blend note	Document that authorizes a blending activity, and describes both the ingredients for the blend and the blending steps that occur.

blend off	Reworking off-specification material by introducing a small percentage back into another run of the same product.
blind execution	The mode of execution of a program that does not require the user to review or change the processing options set for the program, and does not require user intervention after the program has been launched.
boleto	In Brazil, the document requesting payment by a supplier or a bank on behalf of a supplier.
bolla doganale	VAT-Only Vouchers for Customs. In Italy, a document issued by the customs authority to charge VAT and duties on extra-EU purchasing.
bookmark	A shortcut to a location in a document or a specific place in an application or application suite.
bordero & cheque	In Brazil, bank payment reports.
broker	A program that acts as an intermediary between clients and servers to coordinate and manage requests.
BTL91	In the Netherlands, the ABN/AMRO electronic banking file format that enables batches with foreign automatic payment instructions to be delivered.
budgeted volume	A statement of planned volumes (capacity utilization) upon which budgets for the period have been set.
bunkering	A rate per ton or a sum of money that is charged for placing fuel on board; can also mean the operation itself.
business function	An encapsulated set of business rules and logic that can normally be re-used by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	Encapsulated, reusable business logic that is created by using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.
business object library	[In interoperability] The repository that stores EnterpriseOne business objects, which consist of Java or CORBA objects.
business unit	A financial entity that is used to track the costs, revenue, or both, of an organization. A business unit can also be defined as a branch/plant in which distribution and manufacturing activities occur. Additionally, in manufacturing setup, work centers and production lines must be defined as business units; but these business unit types do not have profit/loss capability.

business view	Used by EnterpriseOne applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables with data that will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.
business view design aid (BDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.
buy-back crude	In foreign producing oil countries, that portion of the host government's share of "participation crude" which it permits the company holding a concession to "buy back."
CAB	In Italy, the bank branch code or branch ID. A five-digit number that identifies any agency of a specific bank company in Italy.
cadastro de pessoas físicas	Cadastro de pessoas físicas. In Brazil, the federal tax ID for a person.
category code	A code that identifies a collection of objects sharing at least one common attribute.
central object	A software component that resides on a central server.
central objects merge	A process that blends a customer's modifications with the objects in a current release with objects in a new release.
central server	A computer that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers.
certificate input	See direct input.
certificate of analysis (COA)	A document that is a record of all of the testing which has been performed against an item, lot, or both, plus the test results for that item and lot.
change management	[In software development] A process that aids in controlling and tracking the evolution of software components.
change order	In PeopleSoft, an addendum to the original purchase order that reflects changes in quantities, dates, or specifications in subcontract-based purchasing. A change order is typically accompanied by a formal notification.
chargeback	A receipt application method that generates an invoice for a disputed amount or for the difference of an unpaid receipt.
chart	EnterpriseOne term for tables of information that appear on forms in the software. See forms.
check-in location	The directory structure location for the package and its set of replicated objects. This location is usually \\deploymentserver\release\path_code\ package\packagename. The subdirectories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.

checksum value	A computed value that depends on the contents of a block of data, and that is transmitted or stored with the data to detect whether errors have occurred in the transmission or storage.
class	[In object-oriented programming] A category of objects that share the same characteristics.
clean cargo	Term that refers to cargoes of gasoline and other refined products. See also dirty cargo.
client access	The ability to access data on a server from a client machine.
client machine	Any machine that is connected to a network and that exchanges data with a server.
client workstation	A network computer that runs user application software and is able to request data from a server.
ClieOp03	In the Netherlands, the euro-compliant uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
ClieOp2	In the Netherlands, the uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
cluster	Two or more computers that are grouped together in such a way that they behave like a single computer.
co-existence	A condition where two or more applications or application suites access one or more of the same database tables within the same enterprise.
cold test	The temperature at which oil becomes solid. Generally considered to be 5 degrees F lower than the pour point.
commitment	The number of items that are reserved to fill demand.
common object request broker architecture	An object request broker standard that is endorsed by the Object Management Group.
compa-ratio	An employee's salary divided by the midpoint amount for the employee's pay grade.
component changeout	See component swap.
component object model (COM)	A specification developed by Microsoft for building software components that can be assembled into programs or add functionality to existing programs running on Microsoft Windows platforms. COM components can be written in a variety of languages, although most are written in C++, and can be unplugged from a program at runtime without having to recompile the program.

component swap	In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components. A component swap can also mean the substitution of one parent or component item for another in its associated bill of material.
conference room pilot environment	An EnterpriseOne environment that is used as a staging environment for production data, which includes constants and masters tables such as company constants, fiscal date patterns, and item master. Use this environment along with the test environment to verify that your configuration works before you release changes to end-users.
configurable network computing (CNC)	An application architecture that allows interactive and batch applications that are composed of a single code base to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of re-usable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.
configurable processing engine	Handles all "batch" processes, including reporting, Electronic Data Exchange (EDIt) transactions, and data duplication and transformation (for data warehousing). This ability does not mean that it exists only on the server; it can be configured to run on desktop machines (Windows 95 and NT Workstation) as well.
configuration management	A rules-based method of ordering assemble-to-order or make-to-order products in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited by using Boolean logic, and then translated into the components and routing steps that are required to produce the product. The resulting configuration is also priced and costed, based on the defined characteristics.
configured item segment	A characteristic of a configured item that is defined during sales order entry. For example, a customer might specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.
consuming location	The point in the manufacturing routing where a component or subassembly is used in the production process. In kanban processing, the location where the kanban container materials are used in the manufacturing process and the kanban is checked out for replenishment.
contra/clearing account	A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.
contribution to profit	Selling price of an item minus its variable costs.
control table	A table that controls the program flow or plays a major part in program control.
control table workbench	During the Installation Workbench process, Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes, menus, and user overrides tables.

control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
cost rollup	A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.
credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.

current cost	The cost that is associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.
customer pricing rules	In Procurement, the inventory pricing rules that are assigned to a supplier. In Sales, inventory pricing rules that are assigned to a customer.
D.A.S. 2 Reporting (DAS 2 or DADS 1)	In France, the name of the official form on which a business must declare fees and other forms of remuneration that were paid during the fiscal year.
data dictionary	A dynamic repository that is used for storing and managing a specific set of data item definitions and specifications.
data source workbench	During the Installation Workbench process, Data Source Workbench copies all of the data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System - release number data source. It also updates the Data Source Plan detail record to reflect completion.
data structure	A description of the format of records in a database such as the number of fields, valid data types, and so on.
data types	Supplemental information that is attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.
datagram	A self-contained packet of information that is forwarded by routers, based on their address and the routing table information.
date pattern	A period of time that is set for each period in standard and 52-period accounting and forecasting.
DCE	See distributed computing environment.
DEB	See déclaration d'echange de biens.
debit memo	In Accounts Payable, a voucher that is entered with a negative amount. Enter this type of voucher when a supplier sends you a credit so that you can apply the amount to open vouchers when you issue payment to the supplier.
debit memo	A form that is issued by a customer, requesting an adjustment of the amount, which is owed to the supplier.
debit statement	A list of debit balances.
de-blend	When blend off does not result in a product that is acceptable to customers. The further processing of product to adjust specific physical and chemical properties to within specification ranges. See also blend off.
déclaration d'echange de biens (DEB)	The French term that is used for the Intrastat report.
delayed billing	The invoicing process is delayed until the end of a designated period.

delta load	A batch process that is used to compare and update records between specified environments.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail	The specific information that makes up a record or transaction. Contrast with summary.
detail information	Information that primarily relates to individual lines in a sales or purchase order.
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store-and-forward.
direct input	The system calculates the net units when you enter gross volume, temperature, and gravity or density. This data is generally entered during product receiving from the certificate that is prepared by an independent inspector.
direct ship orders	A purchase order that is issued to a third-party supplier who designates the destination as the customer. A direct ship sales order is also created for the customer. Direct ship orders occur when a product is not available from a company-owned or company-operated source, so the system creates an order to ship the product from a third-party source directly to the customer. Sometimes referred to as a drop ship or third-party supply.
direct usage	Consumption of resources that are attributable to specific production runs because the resources were directly issued to the schedule/order.
director	An EnterpriseOne user interface that guides a user interactively through an EnterpriseOne process.
dirty cargo	Term that refers to crude oil cargoes or other non-refined petroleum cargoes. See also clean cargo.
dispatch planning	Efficient planning and scheduling of product deliveries. Considerations include: Dispatch groups Scheduled delivery date Scheduled delivery time Preferred delivery date Preferred delivery time Average delivery time for that geographical location Available resources Special equipment requirements at the product’s source or destination.

displacement days	The number of days that are calculated from today's date by which you group vouchers for payment. For example, if today's date is March 10 and you specify three displacement days, the system includes vouchers with a due date through March 13 in the payment group. Contrast with pay-through date.
display sequence	A number that the system uses to re-order a group of records on the form.
distributed computing environment (DCE)	A set of integrated software services that allows software which is running on multiple computers to perform seamless and transparently to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.
distributed data processing	Processing in which some of the functions are performed across two or more linked facilities or systems.
distributed database management system (DDBMS)	A system for distributing a database and its control system across many geographically dispersed machines.
do not translate (DNT)	A type of data source that must exist on the AS/400 because of BLOB restrictions.
double-byte character set (DBCS)	A method of representing some characters by using one byte and other characters by using two bytes. Double-byte character sets are necessary to represent some characters in the Japanese, Korean, and Chinese languages.
downgrade profile	A statement of the hierarchy of allowable downgrades. Includes substitutions of items, and meeting tighter specifications for those products with wider or overlapping specification ranges.
DTA	Datenträgeraustausch. A Swiss payment format that is required by Telekurs (Payserv).
dual pricing	To provide prices for goods and services in two currencies. During the euro transition period, dual pricing between the euro and Economic and Monetary Union (EMU) member currencies is encouraged.
dynamic link library (DLL)	A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.
dynamic partitioning	The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.
economy of scale	A phenomenon whereby larger volumes of production reduce unit cost by distributing fixed costs over a larger quantity. Variable costs are constant; but fixed costs per unit are reduced, thereby reducing total unit cost.
edit mode	A processing mode or condition where the user can alter the information in a form.
edit rule	A method that is used for formatting user entries, validating user entries, or both, against a predefined rule or set of rules.

embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field that is based on a processing option value, or calling a business function. Contrast with business function event rule. See also event rule.
employee work center	A central location for sending and receiving all EnterpriseOne messages (system and user-generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag-and-drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through EnterpriseOne messages or Microsoft Exchange.
Emulator	An item of software or firmware that allows one device to imitate the functioning of another.
encapsulation	The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.
engineering change order (ECO)	A work order document that is used to implement and track changes to items and resulting assemblies. The document can include changes in design, quantity of items required, and the assembly or production process.
enhanced analysis database	A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.
enterprise server	A computer containing programs that collectively serve the needs of an enterprise rather than a single user, department, or specialized application.
EnterpriseOne object	A re-usable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.
EnterpriseOne process	Allows EnterpriseOne clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances of a process. EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes do not have to wait if the server is particularly busy.
EnterpriseOne web development computer	A standard EnterpriseOne Windows developer computer with the additional components installed: Sun's JDK 1.1. JFC (0.5.1). Generator Package with Generator.Java and JDECOM.dll. R2 with interpretive and application controls/form.

environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.
firm planned order (FPO)	A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.

fixed quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a fixed quantity relationship to its parent, the amount of the component does not change when the software calculates parts list requirements for different work order quantities. Contrast with variable quantity.
flexible account numbers	The format of account numbers for journal entries. The format that you set up must be the three segments: Business unit. Object. Subsidiary.
form design aid (FDA)	The EnterpriseOne GUI development tool for building interactive applications and forms.
form exit	[In EnterpriseOne] An option that is available as a button on the Form Exit bar or as a selection in the Form menu. It allows users to open an interconnected form.
form interconnection	Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.
form type	The following form types are available in EnterpriseOne: Find/browse. Fix/inspect. Header detail. Headerless detail. Message. Parent/child. Search/select.
form-to-form call	A request by a form for data or functionality from one of the connected forms.
framework	[In object-oriented systems] A set of object classes that provide a collection of related functions for a user or piece of software.
frozen cost	The cost of an item, operation, or process after the frozen update program is run; used by the Manufacturing Accounting system.
frozen update program	A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.
globally unique identifier (GUI)	A 16-byte code in the Component Object Model that identifies an interface to an object across all computers and networks.
handle	[In programming] A pointer that contains the address of another pointer, which, in turn, contains the address of the desired object.

hard commitment	The number of items that are reserved for a sales order, work order, or both, from a specific location, lot, or both.
hard error	An error that cannot be corrected by a given error detection and correction system.
header	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
header information	Information that pertains to the entire order.
hover help	A help function that provides contextual information or instructions when a cursor moves over a particular part of the interface element for a predefined amount of time.
ICMS	Imposto sobre circulação de mercadoria e servicos. In Brazil, a state tax that is applied to the movement of merchandise and some services.
ICMS Substituto	Imposto sobre circulacao de mercadoria e servicos substituto. In Brazil, the ICMS tax that is charged on interstate transactions, or on special products and clients.
ICMS Substituto-Markup	See imposto sobre circulação de mercadoria e servicos substituto-markup.
imposto de renda (IR)	Brazilian income tax.
imposto sobre produtos industrializados	In Brazil, a federal tax that applies to manufactured goods (domestic and imported).
imposto sobre services (ISS)	In Brazil, tax on services.
inbound document	A document that is received from a trading partner using Electronic Data Interface (EDI). This document is also referred to as an inbound transaction.
indented tracing	Tracking all lot numbers of intermediates and ingredients that are consumed in the manufacture of a given lot of product, down through all levels of the bill of material, recipe, or formula.
indexed allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.
indirect measurement	Determining the quantity on-hand by: Measuring the storage vessels and calculating the content's balance quantity. or Theoretically calculating consumption of ingredients and deducting them from the on-hand balance.
indirect usage	Determining what should have been used by multiplying receipt quantity of the parent times the quantity per statement in the formula, recipe, or bill of material. This transaction typically affects both consumption on schedule as well as issue from on-hand balances.

in-process rework	Recycling a semi processed product that does not meet acceptable standards. Further processing takes the product out of a given operation and sends it back to the beginning of that operation or a previous operation (for example, unreacted materials). Rework that is detected prior to receipt of finished goods and corrected during the same schedule run.
INPS withholding tax	Instituto Nazionale di Previdenza Sociale withholding tax. In Italy, a 12% social security withholding tax that is imposed on payments to certain types of contractors. This tax is paid directly to the Italian social security office.
inscrição estadual	ICMS tax ID. In Brazil, the state tax ID.
inscrição municipal	ISS tax ID. In Brazil, the municipal tax ID.
integrated toolset	Unique to EnterpriseOne is an industrial-strength toolset that is embedded in the already comprehensive business applications. This toolset is the same toolset that is used by PeopleSoft to build EnterpriseOne interactive and batch applications. Much more than a development environment, however, the EnterpriseOne integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.
integrity test	A process that is used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interbranch sales order	A sales order that is used for transactions between branch/plants other than the selling branch/plant.
Interoperability	The ability of different computer systems, networks, operating systems, and applications to work together and share information.
inventory pricing rule	A discount method that is used for purchases from suppliers and sales to customers. The method is based on effectivity dates, up-to quantities, and a factor by which you can mark up or discount the price or cost.
inventory turn	The number of times that the inventory cycles, or turns over, during the year. A frequently used method to compute inventory turnover is to divide the annual costs of sales by the average inventory level.
invoice	An itemized list of goods that are shipped or services that are rendered, stating quantities, prices, fees, shipping charges, and so on. Companies often have their invoices mailed to a different address than where they ship products. In such cases, the bill-to address differs from the ship-to address.
IP	See imposto sobre produtos industrializados.
IR	See imposto de renda.
IServer Service	Developed by PeopleSoft, this Internet server service resides on the Web server and is used to speed up delivery of the Java class files from the database to the client.
ISS	See imposto sobre servicos.

jargon	An alternate data dictionary item description that EnterpriseOne or PeopleSoft World displays, based on the product code of the current object.
java application server	A component-based server that resides in the middle-tier of a server-centric architecture and provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that allows heterogeneous servers to access each other's data.
jde.ini	A PeopleSoft file (or member for AS/400) that provides the runtime settings that are required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine that is running EnterpriseOne, including workstations and servers.
JDE.LOG	The main diagnostic log file of EnterpriseOne. Always located in the root directory on the primary drive. Contains status and error messages from the startup and operation of EnterpriseOne.
JDEBASE Database Middleware	PeopleSoft proprietary database middleware package that provides two primary benefits: 1. Platform-independent APIs for multidatabase access. These APIs are used in two ways: a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the data source request. b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL. 2. Client-to-server and server-to-server database access. To accomplish this access, EnterpriseOne is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).
JDECallObject	An application programming interface that is used by business functions to invoke other business functions.
JDEIPC	Communications programming tools that are used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
JDENET	PeopleSoft proprietary middleware software. JDENET is a messaging software package.
JDENET communications middleware	PeopleSoft proprietary communications middleware package for EnterpriseOne. It is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all EnterpriseOne supported platforms.
just in time installation (JITI)	EnterpriseOne's method of dynamically replicating objects from the central object location to a workstation.
just in time replication (JITR)	EnterpriseOne's method of replicating data to individual workstations. EnterpriseOne replicates new records (inserts) only at the time that the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

Kagami	In Japan, summarized invoices that are created monthly (in most cases) to reduce the number of payment transactions.
latitude	The X coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
laytime (or layhours)	The amount of time that is allotted to a tanker at berth to complete loading or discharging cargo. This time is usually expressed in running hours, and is fixed by prior agreement between the vessel owner and the company that is chartering the vessel. Laytime is stipulated in the charter, which states exactly the total of number of hours that are granted at both loading and unloading ports, and indicates whether such time is reversible. A statement of "Seventy-Two Hours, Reversible" means that a total of 72 hours is granted overall at both ports, and any time saved at one port can be applied as a credit at the other port. For example, if the vessel uses only 32 hours instead of 36 hours to load cargo, it can apply an additional four hours to the 36 hours allotted at the discharge port. Such considerations are important for purposes of computing demurrage.
leading zeros	A series of zeros that certain facilities in PeopleSoft systems place in front of a value that is entered. This situation normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers that you enter. The result appears as 00004567.
ledger type	A code that designates a ledger which is used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions can also be stored in the CA (foreign currency) ledger type.
level break	The position in a report or text where a group of similar types of information ends and another one begins.
libro IVA	Monthly VAT report. In Italy, the term for the report that contains the detail of invoices and vouchers that were registered during each month.
line of business	A description of the nature of a company's work; also a tool to control the relationship with that customer, including product pricing.
linked service type	A service type that is associated with a primary service type. Linked service types can be cancelled, and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status that the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.
livro razao	In Brazil, a general ledger report.
load balancing	The act of distributing the number of processes proportionally to all servers in a group to maximize overall performance.

location workbench	During the Installation Workbench process, Location Workbench copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
log files	Files that track operations for a process or application. Reviewing log files is helpful for troubleshooting problems. The file extension for log files is .LOG.
logic data source	Any code that provides data during runtime.
logical compartment	One of two ways that is identified in the transportation constants to display compartments on vehicles. Logical display numbers the compartments sequentially. For example, if two vehicles are on a trip and each vehicle has three compartments, the logical display is 1,2,3,4,5,6.
logical file	A set of keys or indices that is used for direct access or ordered access to the records in a physical file. Several logical files can have different accesses to a physical.
logical shelf	A logical, not physical, location for inventory that is used to track inventory transactions in loan/borrow, or exchange agreements with other companies. See also logical warehouse.
logical warehouse	Not a physical warehouse containing actual inventory, but a means for storing and tracking information for inventory transactions in loan/borrow, or exchange agreements with other companies.
longitude	The Y coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
LSV	Lastschriftverfahren. A Swiss auto debit format that is required by Telekurs (Payserv).
mail merge	A mass-mail facility that takes names, addresses, and (sometimes) pertinent facts about recipients and merges the information into a form letter or a similarly basic document.
mailmerge workbench	[In EnterpriseOne] An application that merges Microsoft Word 6.0 (or higher) word-processing documents with EnterpriseOne records to automatically print business documents.
main fuels	Usually refers to bulk fuel products, but sometimes includes packaged products.
maintenance loop	See maintenance route.
maintenance route	A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks which can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.

maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.
manufacturing and distribution planning	Planning that includes resource and capacity planning, and material planning operations. Resource and capacity planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.

modal	A restrictive or limiting interaction that is created by a given condition of operation. Modal often describes a secondary window that restricts a user’s interaction with other windows. A secondary window can be modal with respect to its primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.
model work order	For scheduled preventive maintenance or for a condition-based alert, a model work order functions as a template for the creation of other work orders. You can assign model work orders to service types and condition-based alerts. When the service type comes due or the alert is generated, the system automatically generates a work order that is based on information from the model work order.
modeless	Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user’s interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time, but also permits other user activities.
multiple stocking locations	Authorized storage locations for the same item number at locations, in addition to the primary stocking location.
multitier architecture	A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.
named event rules (NER)	Also called business function event rules. Encapsulated, re-usable business logic that is created by using event rules, rather than C programming.
national language support (NLS)	Mechanisms that are provided to facilitate internationalization of both system and application user interfaces.
natureza da operação	Transaction nature. In Brazil, a code that classifies the type of commercial transaction to conform to the fiscal legislation.
negative pay item	An entry in an account that indicates a prepayment. For example, you might prepay a supplier before goods are sent or prepay an employee’s forecasted expenses for a business trip. The system stores these pending entries, assigning them a minus quantity as debit amounts in a designated expense account. After the prepaid goods are received or the employee submits an expense report, entering the actual voucher clears all of the negative pay items by processing them as regular pay items. Note that a negative pay item can also result from entering a debit memo (A/P) or a credit memo (A/R).
net added cost	The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.
next status	The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).
node	A termination point for two or more communications links. A node can serve as the control location for forwarding data among the elements of a network or multiple networks, as well as performing other networking and, in some cases, local processing.

non-inventory items	See non-stock items.
non-list price	A price for bulk products that is determined by its own algorithms, such as a rolling average or commodity price plus.
non-prime product	A manufactured product with revenue potential that is less than the product planned for, or scheduled to be produced.
non-stock items	Items that the system does not account for as part of the inventory. For example, office supplies, or packaging materials can be non-stock items.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions.
nota fiscal fatura	In Brazil, a nota fiscal and invoice information.
notula	In Italy, the process whereby a business does not recognize value added tax until the payment of a voucher.
object configuration manager (OCM)	EnterpriseOne's object request broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it by using defaults and overrides for a given environment and user.
object embedding	When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.
object librarian	A repository of all versions, applications, and business functions that are re-usable in building applications.
object linking	When an object is linked to another document, a reference is created with the file in which the object is stored, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file in which it is saved, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.
object linking and embedding (OLE)	A technology for transferring and sharing information among applications by allowing the integration of objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. OLE is a compound document standard that was developed by Microsoft Corporation. It enables you to create objects with one application, and then link or embed them in a second application. Embedded objects retain their original format and links to the application that created them. See also object embedding, object linking.
object management workbench (OMW)	The change management system that is used for EnterpriseOne development.

object-based technology (OBT)	A technology that supports some of the main principles of object-oriented technology: Classes. Polymorphism.I Inheritance. Encapsulation.
object-oriented technology (OOT)	Brings software development past procedural programming into a world of re-usable programming that simplifies development of applications. Object orientation is based on the following principles: Classes. Polymorphism.I Inheritance. Encapsulation.
offsetting account	An account that reduces the amount of another account to provide a net balance. For example, a credit of 200 to a cash account might have an offsetting entry of 200 to an A/P Trade (liability) account.
open database connectivity (ODBC)	Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface comprises set of function calls, methods of connectivity, and representation of data types that define access to data sources.
open systems interconnection (OSI)	The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.
order detail line	A part of an order that contains transaction information about a service or item being purchased or sold, such as quantity, cost, price, and so on.
order hold	A flag that stops the processing of an order because it has exceeded the credit or budget limit, or has another problem.
order-based pricing	Pricing strategy that grants reductions in price to a customer. It is based upon the contents and relative size (volume or value) of the order as a whole.
outbound document	A document that is sent to a trading partner using EDI. This term is also referred to as an outbound transaction.

outturn	The quantity of oil that is actually received into a buyer's storage tanks when a vessel is unloaded. For various reasons (vaporization, clingage to vessel tank walls, and so on), the amount of a product pumped into shore tankage at unloading is often less than the quantity originally loaded onto the vessel, as certified by the Bill of Lading. Under a delivered or CIF outturn transaction, the buyer pays only for the barrels actually "turned out" by the vessel into storage. When a buyer is paying CIF Bill of Lading figures, a loss of 0.5% of total cargo volume is considered normal. Losses in excess of 0.5%, however, are either chargeable to the seller or are covered by specialized insurance that covers partial, as well as total, loss of the cargo.
overhead	In the distillation process, that portion of the charge that leaves the top of the distillation column as vapor. This definition is strictly as it relates to ECS.
override conversion method	A method of calculating exchange rates that is set up between two specific currencies. For those specific currencies, this method overrides the conversion method in General Accounting Constants and does not allow inverse rates to be used when calculating currency amounts.
package / package build	A collection of software that is grouped into a single entity for modular installation. EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where the installation program can find them on the deployment server. It is a point-in-time "snapshot" of the central objects on the deployment server.
package location	The directory structure location for the package and its set of replicated objects. This location is usually \\deployment server\release\path_code\package\ package name. The replicated objects for the package are placed in the subdirectories under this path. This location is also where the package is built or stored.
package workbench	During the Installation Workbench process, Package Workbench transfers the package information tables from the Planner data source to the System - release number data source. It also updates the Package Plan detail record to reflect completion.
packaged products	Products that, by their nature, must be delivered to the customer in containers which are suitable for discrete consumption or resale.
pane/panel	A resizable subarea of a window that contains options, components, or other related information.
paper clip	An icon that is used to indicate that a media object is attached to a form or record.
parent/child form	A type of form that presents parent/child relationships in an application on one form: The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.

parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2. In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.
payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.
persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.

potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
preventive maintenance cycle	The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.
preventive maintenance schedule	The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.
primary service type	A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all of the tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.
pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings, define the relationships among parents and components, and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.
product line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.

program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or diskettes.
project	[In EnterpriseOne] A virtual container for objects being developed in Object Management Workbench.
projected cost	The target expenditure in added value for material, labor, and so on, during manufacture. See also standard cost.
promotion path	The designated path for advancing objects or projects in a workflow.
protocollo	See registration number.
PST	Provincial sales tax. A tax that is assessed by individual provinces in Canada.
published table	Also called a “Master” table, this is the central copy to be replicated to other machines and resides on the “publisher” machine. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers that use EnterpriseOne’s data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).
query by example (QBE)	Located at the top of a detail area, this area is used to search for data to display in the detail area.
rate scheduling	A method of scheduling product or manufacturing families, or both. Also a technique to determine run times and quantities of each item within the family to produce enough of each individual product to satisfy demand until the family can be scheduled again.
rate type	For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you can use both period average and period-end rates, distinguishing them by rate type.
real-time	Pertaining to information processing that returns a result so rapidly that the interaction appears to be instantaneous.
receipt routing	A series of steps that is used to track and move items within the receipt process. The steps might include in-transit, dock, staging area, inspection, and stock.
referential integrity	Ensures that a parent record cannot be deleted from the database when a child record for exists.

regenerable	Source code for EnterpriseOne business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, either for a new platform or when new functionality is added.
register types and classes	In Italian VAT Summary Reporting, the classification of VAT transactions.
relationship	Links tables together and facilitates joining business views for use in an application or report. Relationships that are created are based on indexes.
rélevé d'identité bancaire (RIB)	In France, the term that indicates the bank transit code, account number, and check digit that are used to validate the bank transit code and account number. The bank transit code consists of the bank code and agency code. The account number is alphanumeric and can be as many as 11 characters. PeopleSoft supplies a validation routine to ensure RIB key correctness.
remessa	In Brazil, the remit process for A/R.
render	To include external data in displayed content through a linking mechanism.
repasse	In Brazil, a discount of the ICMS tax for interstate transactions. It is the adjustment between the interstate and the intrastate ICMS tax rates.
replenishment point	The location on or near the production line where additional components or subassemblies are to be delivered.
replication server	A server that is responsible for replicating central objects to client machines.
report design aid (RDA)	The EnterpriseOne GUI tool for operating, modifying, and copying report batch applications.
repost	In Sales, the process of clearing all commitments from locations and restoring commitments, based on quantities from the Sales Order Detail table (F4211).
resident	Pertaining to computer programs or data while they remain on a particular storage device.
retorno	In Brazil, the receipt process for A/R.
RIB	See rélevé d'identité bancaire.
ricevute bancarie (RiBa)	In Italy, the term for accounts receivable drafts.
riepilogo IVA	Summary VAT monthly report. In Italy, the term for the report that shows the total amount of VAT credit and debit.
ritenuta d'acconto	In Italy, the term for standard withholding tax.
rollback	[In database management] A feature or command that undoes changes in database transactions of one or more records.
rollup	See cost rollup.

row exit	[In EnterpriseOne] An application shortcut, available as a button on the Row Exit bar or as a menu selection, that allows users to open a form that is related to the highlighted grid record.
runtime	The period of time when a program or process is running.
SAD	The German name for a Swiss payment format that is accepted by Postfinance.
SAR	See software action request.
scalability	The ability of software, architecture, hardware, or a network to support software as it grows in size or resource requirements.
scripts	A collection of SQL statements that perform a specific task.
scrub	To remove unnecessary or unwanted characters from a string.
search/select	A type of form that is used to search for a value and return it to the calling field.
selection	Found on PeopleSoft menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	To convert a software object into a stream of bytes to store on a disk or transfer across a network.
server map	The server view of the object configuration mapping.
server workbench	During the Installation Workbench process, Server Workbench copies the server configuration files from the Planner data source to the System release number data source. It also updates the Server Plan detail record to reflect completion.
service interval	The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.
service type	An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task that is represented by the service type becomes necessary.
servlet	A [small] program that extends the functionality of a Web server by generating dynamic content and interacting with Web clients by using a request-response paradigm.
share path	The network node under which one or more servers or objects reside.
shop floor management	A system that uses data from multiple system codes to help develop, execute, and manage work orders and rate schedules in the enterprise.
silent mode	A method for installing or running a program that does not require any user intervention.

silent post	A type of post that occurs in the background without the knowledge of the user.
simulated cost	After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods—for example, standard, future, and simulated current costs. See also cost rollup.
single-byte character set (SBCS)	An encoding scheme in which each alphabetic character is represented by one byte. Most Western languages, such as English, can be represented by using a single-byte character set.
single-level tracking	Finding all immediate parents where a specific lot has been used (consumed).
single-voyage (spot) charter	An agreement for a single voyage between two ports. The payment is made on the basis of tons of product delivered. The owner of the vessel is responsible for all expenses.
slimer	A script that changes data in a table directly without going through a regular database interface.
smart field	A data dictionary item with an attached business function for use in the Report Design Aid application.
SOC	The Italian term for a Swiss payment format that is accepted by Postfinance.
soft commitment	The number of items that is reserved for sales orders or work orders in the primary units of measure.
soft error	An error from which an operating system or program is able to recover.
software action request (SAR)	An entry in the AS/400 database that is used for requesting modifications to PeopleSoft software.
SOG	The French term for a Swiss payment format that is accepted by Postfinance.
source directory	The path code to the business function source files belonging to the shared library that is created on the enterprise server.
special period/year	The date that determines the source balances for an allocation.
specification merge	The Specification merge is comprised of three merges: Object Librarian merge (via the Object Management Workbench). Versions List merge. Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification table merge workbench	During the Installation Workbench process, Specification Table Merge Workbench runs the batch applications that update the specification tables.

specifications	A complete description of an EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
spot charter	See single-voyage charter.
spot rates	An exchange rate that is entered at the transaction level. Spot rates are not used on transactions between two EMU member currencies because exchange rates are irrevocably fixed to the euro.
stamp tax	In Japan, a tax that is imposed on drafts payable, receipts over 30000 Japanese yen, and all contracts. The party that issues any of the above documents is responsible for this tax.
standalone	Operating or capable of operating independently of certain other components of a computer system.
standard cost	The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.
standard costing	A costing method that uses cost units that are determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.
subprocess	A process that is triggered by and is part of a larger process, and that generally consists of activities.
subscriber table	The Subscriber table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher table (F98DRPUB), that identifies all of the subscriber machines for each published table.
summary	The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information which is stored in certain tables. Contrast with detail.
super backflush	To create backflush transactions for material, labor, or both, against a work order at predefined pay points in the routing. By doing so, you can relieve inventory and account for labor amounts at strategic points throughout the manufacturing process.
supersession	Specification that a new product is replacing an active product on a specified effective date.
supplemental data	Additional types of data for customers and suppliers. You can enter supplemental data for information such as notes, comments, plans, or other information that you want in a customer or supplier record. The system maintains this data in generic databases, separate from the standard master tables (Customer Master, Supplier Master, and Address Book Master).

supplying location	The location from which inventory is transferred once quantities of the item on the production line have been depleted. In kanban processing, the supplying location is the inventory location from which materials are transferred to the consuming location when the containers are replenished.
system code	A numeric or alphanumeric designation that identifies a specific system in EnterpriseOne software.
system function	[In EnterpriseOne] A named set of pre-packaged, re-usable instructions that can be called from event rules.
table access management (TAM)	The EnterpriseOne component that handles the storage and retrieval of user defined data. TAM stores information such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
table conversion workbench	During the Installation Workbench process, Table Conversion Workbench runs the table conversions that change the technical and application tables to the format for the new release of EnterpriseOne. It also updates the Table Conversions and Controls detail records to reflect completion.
table design aid (TDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing database tables.
table event rules	Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create an EnterpriseOne database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although EnterpriseOne allows event rules to be attached to application events, this functionality is application-specific. Table event rules provide embedded logic at the table level.
table handle	A pointer into a table that indicates a particular row.
table space	[In relational database management systems] An abstract collection of containers in which database objects are stored.
task	[In Solution Explorer and EnterpriseOne Menu] A user defined object that can initiate an activity, process, or procedure.
task view	A group of tasks in Solution Explorer or EnterpriseOne Menu that are arranged in a tree structure.
termo de abertura	In Brazil, opening terms for the transaction journal.
termo de encerramento	In Brazil, closing terms for the transaction journal.
three-tier processing	The task of entering, reviewing, approving, and posting batches of transactions.
three-way voucher match	The process of comparing receipt information to supplier’s invoices to create vouchers. In a three-way match, you use the receipt records, the purchase order, and the invoice to create vouchers.

threshold percentage	In Capital Asset Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.
throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.

tree structure	A type of graphical user interface that displays objects in a hierarchy.
trigger	Allows you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event which is associated with the data item. EnterpriseOne also has three visual assist triggers: Calculator. Calendar. Search form.
two-way voucher match	The process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
universal batch engine (UBE)	[In EnterpriseOne] A type of application that runs a noninteractive process.
unnormalized	Data that is a random collection of data elements with repeating record groups scattered throughout. Also see Normalized.
user overrides merge	The User Overrides merge adds new user override records into a customer's user override table.
user-defined code (UDC)	A value that a user has assigned as being a valid entry for a given or specific field.
utility	A small program that provides an addition to the capabilities which are provided by an operating system.
variable numerator allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a variable.
variable quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a variable quantity relationship to its parent, the amount of the component changes when the software calculates parts list requirements for different work order quantities. Contrast with fixed quantity.
variance	1. In Product Costing and Manufacturing Accounting, the difference between the frozen standard cost, the current cost, the planned cost, and the actual cost. For example, the difference between the frozen standard cost and the current cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated by using the current bill of material, routing, and overhead rates. 2. In Capital Asset Management, the difference between revenue that is generated by a piece of equipment and costs that are incurred by the equipment.
versions list merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release as well as their processing options data.
VESR	Verfahren Einzahlungsschein mit Referenznummer. The processing of an ESR pay slip with reference line through accounts receivable and accounts payable.

visual assist	Forms that can be invoked from a control to assist the user in determining what data belongs in the control.
voucher logging	The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account.
wareki date format	In Japan, a calendar format, such as Showa or Heisei. When a new emperor begins to reign, the government chooses the title of the date format and the year starts over at one. For instance, January 1, 1998, is equal to Heisei 10, January 1st.
wash down	A minor cleanup between similar product runs. Sometimes used in reference to the sanitation process of a food plant.
wchar_t	An internal type of a wide character. Used for writing portable programs for international markets.
web server	A server that sends information as requested by a browser and uses the TCP/IP set of protocols.
work order life cycle	In Capital Asset Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents.
workfile	A system-generated file that is used for temporary data processing.
workflow	According to the Workflow Management Coalition, worlflow means "the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules."
workgroup server	A network server usually containing subsets of data that are replicated from a master network server.
WorldSoftware architecture	The broad spectrum of application design and programming technology that PeopleSoft uses to achieve uniformity, consistency, and complete integration throughout its software.
write payment	A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.
write-off	A method for getting rid of inconsequential differences between amounts. For example, you can apply a receipt to an invoice and write off the difference. You can write off both overpayments and underpayments.

Z file	For store and forward (network disconnected) user, EnterpriseOne store-and-forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, EnterpriseOne stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server; and the transactions are edited again by a master business function. The master business function then updates the records in your transaction files.
z-process	A process that converts inbound data from an external system into an EnterpriseOne software table or converts outbound data into an interface table for an external system to access.
zusammenfassende melding	In Germany, the term for the EU Sales Listing.

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