PeopleSoft®

PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook

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PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook
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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code

Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number

Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date

Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status

Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant

Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit

Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code

Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code

Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company

Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne HCM Fundamentals Preface

This preface discusses:

- PeopleSoft products.
- Common elements used in this PeopleBook.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne Human Resources Management
- PeopleSoft EnterpriseOne Employee Self-Service
- PeopleSoft EnterpriseOne Manager Self-Service
- PeopleSoft EnterpriseOne U.S. Payroll
- PeopleSoft EnterpriseOne Time and Labor
- eRecruit
- HCM Foundation

Common Elements Used in This PeopleBook

Business Unit

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.

Note. You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Effective Date Enter the date that identifies when a date is first valid. The effective date is used generically. It can be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.

Employee Identification Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Fiscal Year Enter a four-digit number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Setup form).

Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005, and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 2005 rather than 2006.

Search Type Enter a UDC (system 01, type ST) that specifies the kind of address book record to search for. Examples include:

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

TAX: Tax authorities

Mailing Name Enter the company or person to whom billing or correspondence is addressed.

City Enter a name that indicates the city associated with the address.

Postal Code Enter the United States ZIP code or the postal code that specifies where a letter is to be routed. Attach this code to the address for delivery in other countries. This code is used as the low end value when doing Postal Code Transaction range processing.

Address Line 1 Enter the first line of a mailing address for an employee, customer, or supplier in the Address Book system. The U.S. Internal Revenue Service (IRS) restricts the size of the address that prints on an employee's year-end tax return. To comply with IRS regulations, the system has these restrictions:

- On W-2 returns, the system prints only the last three nonblank address lines plus the city, state, and postal code.
- On 1099 returns, the system prints only the last nonblank address line plus the city, state, and postal code.
- On other U.S. federal magnetic media, the system prints only the last nonblank address line plus the city, state, and postal code.

Address Line 2

The second line of the mailing address for an employee, customer, or supplier in the Address Book system.

Attention Payroll users: The Internal Revenue Service (IRS) restricts the size of the address that prints on employee's year-end forms. To comply with IRS regulations, the address that prints on W-2 forms includes only the last three nonblank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last nonblank address line plus the city, state, and postal code. If you process year-end information using the federal magnetic media format, the address that prints on those forms contains only the last nonblank address line plus the city, state, and postal code.

Address Line 3

Enter the third line of the mailing address for an employee, customer, or supplier in the Address Book system.

Attention Payroll users: The Internal Revenue Service (IRS) restricts the size of the address that prints on employee's year-end forms. To comply with IRS regulations, the address that prints on W-2 forms includes only the last three nonblank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last nonblank address line plus the city, state, and postal code. If you process year-end information using the federal magnetic media format, the address that prints on those forms contains only the last nonblank address line plus the city, state, and postal code.

Address Line 4

The fourth line of the mailing address for an employee, customer, or supplier in the Address Book system.

Attention Payroll users: The Internal Revenue Service (IRS) restricts the size of the address that prints on employee's year-end forms. To comply with IRS regulations, the address that prints on W-2 forms includes only the last three nonblank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last nonblank address line plus the city, state, and postal code. If you process year-end information using the federal magnetic media format, the address that prints on those forms contains only the last nonblank address line plus the city, state, and postal code.

Batch Number

Enter the number that the transmitter assigns to the batch. During batch processing, the system assigns a new batch number to the PeopleSoft transactions for each control (user) batch number it finds.

Beginning Effective Date

Enter the date on which an address, item, transaction, or table record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent:

- The date on which a change of address becomes effective
- The date on which a lease becomes effective
- The date on which a price becomes effective
- The date on which the currency exchange rate becomes effective
- The date on which a tax rate becomes effective

Job Step

Enter a user defined code (06/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates table.

Job Type

Enter a user defined code (06/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.

You associate pay and benefit information with a job type when you define jobs on Job Entry and Evaluation (P08001). Certain pay and benefit information that you associate with a job type defaults in the Employee Entry forms when you are adding a new employee to the database.

Job Type/Step

Enter a user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.

The Job Type/Step information on the Position Master Detail form comes from the Job Master, which contains specific combinations of user-defined job types (07/G) and user-defined job steps (07/GS). You cannot enter a job type/step combination that has not been set up in the Job Master.

Union Code

Enter a user defined code (06/UN) that represents the union or plan in which the employee or group of employees work or participate.

Home Business Unit

The number of the business unit in which the employee generally resides.

Ending Effective Date

Enter the date when an employee should no longer be included in a payroll cycle or the date when an employee stops participating in the company's benefit plans.

You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year).

This date may also be the date that a deduction, benefit, or accrual instruction stops.

The stop date must be less than the timecard date. To stop a DBA before the next pay cycle, make the stop date one day prior to the first day of the next pay cycle. For example, if the pay cycle runs from 10/01 through 10/15, set the DBA stop date as 9/30.

If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.

For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.

For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.

Remark

Enter a generic field that you use for a remark, description, name, or address.

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne HCM Fundamentals

This chapter discusses:

- HCM Fundamentals overview
- HCM Fundamentals integrations
- HCM Fundamentals implementation

HCM Fundamentals Overview

The Human Capital Management (HCM) system provides a versatile, cost-effective, and timesaving solution for managing your employee information and accounting for employee time worked. You use this system to track information that human capital management users typically share. If you are not using the PeopleSoft Payroll system, you can use HCM as a stand-alone time and labor tracking system.

You can use this system to do these tasks:

- Track employees and employee job information.
- Enter time for employees.
- Manage your worldwide labor expenses and billings.
- Track job costs by creating journal entries for the general ledger.
- Streamline your hiring processes.
- Set up the deductions, benefits, and accruals (DBAs) that you use during payroll processing and benefits administration.

See Also

PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook, "Getting Started with PeopleSoft EnterpriseOne Time and Labor," Time and Labor Overview

HCM Fundamentals Integrations

The Human Capital Management system integrates with these EnterpriseOne systems:

- EnterpriseOne Human Resources
- EnterpriseOne Benefits

- EnterpriseOne Payroll
- EnterpriseOne Time and Labor
- EnterpriseOne Self-Service
- EnterpriseOne Address Book
- EnterpriseOne General Accounting
- EnterpriseOne Job Cost
- EnterpriseOne Service/Contract Billing
- EnterpriseOne Equipment/Plant Maintenance
- EnterpriseOne Work Orders

The Human Capital Management Fundamentals system contains the central databases for all information that human resources and payroll users typically share. For example, you use the foundation system to track this information:

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

An integrated, central database means that, when the human resources clerk updates an employee's information, the employee's payroll information is also updated. A central database accomplishes:

- Eliminating redundant data entry.
- Maintaining current and accurate information across all your business operations.
- Improving communication among departments.

Both human resources and payroll users can enter information into the HCM Fundamentals system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need for their jobs. Typically, your system administrator sets up system security during system implementation. The system administrator can set up security for an entire form or for individual fields on a form.

These tables show how the HCM Fundamentals system supports human resources, benefits administration, and payroll:

Workforce Management System Integration	Benefits	Human Resources	Payroll
Quick Hire	Blank	X	Blank
Pay Types, Deductions, Benefits, and Accrual Setup	X	Blank	X
Time Entry	Blank	Blank	X
Automatic Accounting Instructions	Blank	Blank	X

Workforce Management System Integration	Benefits	Human Resources	Payroll
Job Information	X	X	X
Employee Information	X	X	X
Employee Self-Service	X	X	X
Employee History and Turnover Tracking	Blank	X	Blank

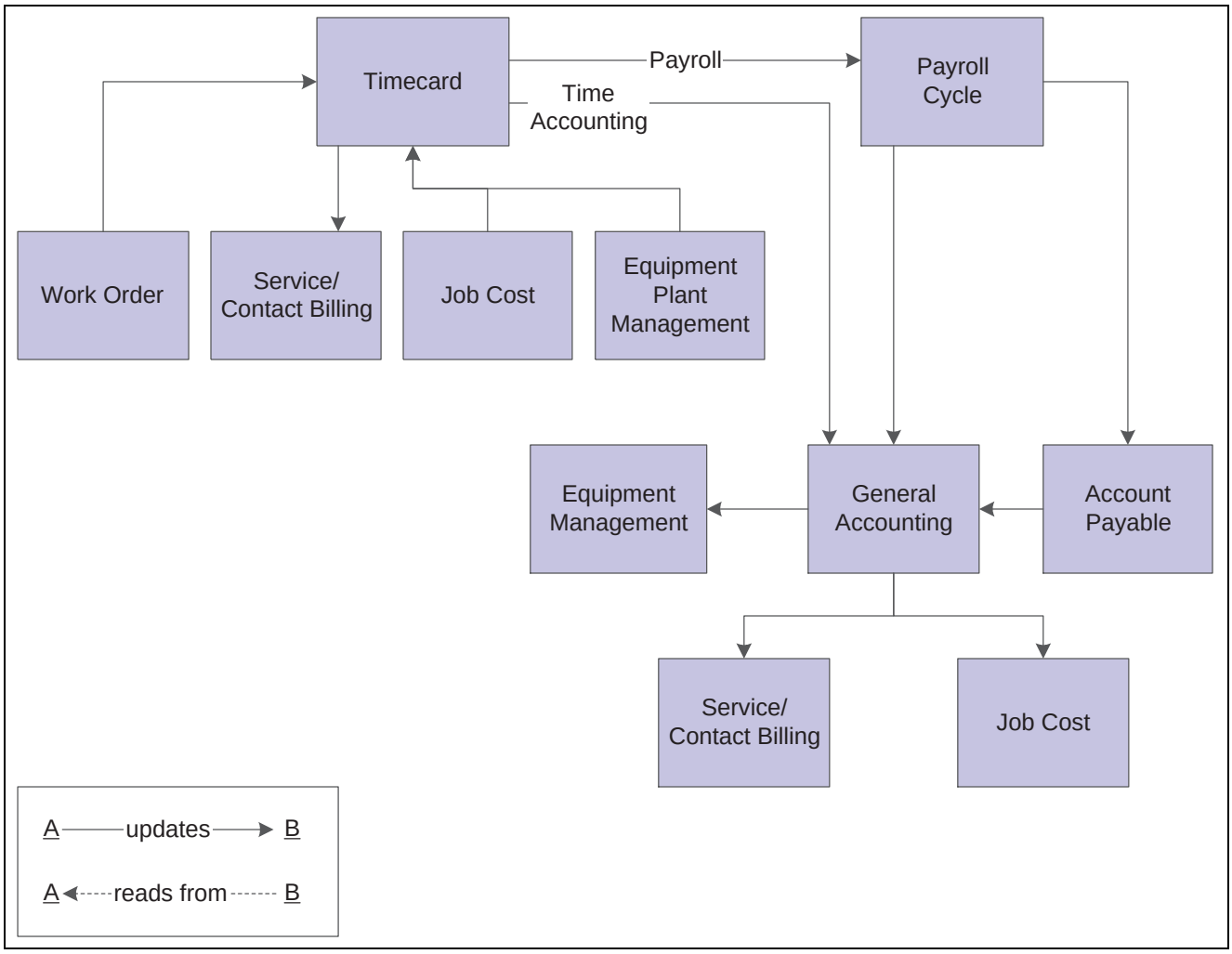
Benefits	Human Resources
Benefits Administration	Application Information
Benefits Setup	Position Control
Employee Self-Service	Blank

To simplify your processes and facilitate communication within your organization, the HCM Fundamentals system also integrates with these PeopleSoft systems:

System	Description
Address Book	The Address Book system contains employee names, addresses, and tax IDs.
General Accounting	If you are using the HCM Fundamentals system for stand-alone time and labor tracking (that is, you are creating timecards, but not processing them using PeopleSoft Payroll), you can set up the foundation system to integrate with the General Accounting system. This integration allows you to update general ledger transactions and account balances. The foundation system can create and post transactions to the general ledger using the automatic accounting instructions (AAIs) that you define. You can use full detail on your labor accounts and summarize your liabilities and cash accounts.
Job Cost	You can use the HCM Fundamentals system to enter labor and equipment time by day. Then you can use the Job Cost system to analyze the labor and equipment costs for a job.
Service/Contract Billing	You can use the HCM Fundamentals system to enter labor and equipment time by job (business unit). Then you can use the Service/Contract Billing system to: • Bill customers for the labor and equipment expenses that are associated with the job • Bill customers for payroll burden expenses • Bill customers for contract time that is associated with the job

System	Description
Equipment/Plant Maintenance	You can use the HCM Fundamentals system to enter labor and equipment time. Then you can use the Equipment/Plant Maintenance system to: • Charge a job for use of equipment • Track labor for equipment maintenance • Track labor for work orders
Work Orders	You can use the HCM Fundamentals system to enter labor and equipment time against a work order. You can use the Work Orders system to identify specific costs of a task or to track equipment repair costs. You can create work orders for small projects and service calls.

This illustration shows how the HCM Fundamentals system integrates with other PeopleSoft systems:



HCM Fundamentals system integration with other PeopleSoft systems

HCM Fundamentals Implementation

This section provides an overview of the steps that are required to implement the HCM system.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in this guide with information about where to find the most current version of each.

Global Implementation Steps for HCM Fundamentals

This table lists the suggested global implementation steps for PeopleSoft EnterpriseOne HCM Fundamentals:

Step	Reference
1. Set up companies, fiscal date patterns, and business units.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, "Setting Up an Organization"
2. Set up accounts, and the chart of accounts.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, "Setting Up Accounts"
3. Set up the General Accounting constants.	*PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook*, "Setting Up the General Accounting System"
4. Set up multicurrency processing, including currency codes and exchange rates.	• *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook*, "Setting Up General Accounting for Multicurrency Processing" • *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook*, "Setting Up Exchange Rates"
5. Set up ledger type rules.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, "Setting Up Ledger Type Rules for General Accounting"
6. Enter address book records.	*PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, "Entering Address Book Records"

Implementation Steps for HCM Fundamentals

This table lists the implementation steps for the HCM Fundamentals system.

Step	Reference
1. Set up system controls.	Chapter 4, "Setting Up System Options," page 17
2. Set up general options, position control options, company options, business unit constants, and common settings for Human Capital Management.	Chapter 3, "Setting Up General System Controls," page 13
3. Define category codes, select fields for future data revisions, and release record reservations.	Chapter 5, "Setting Up Employee Information," page 37
4. Select data for history tracking purposes and initialize history and turnover tracking.	Chapter 6, "Setting Up Employee History and Turnover Tracking ," page 43

Step	Reference
5. Set up cross-reference tables by business unit, job classification constants, and union local and job cross-references.	Chapter 7, "Setting Up Job Information," page 49
6. Set up shift-rate differentials, occupational pay rates, pay type cross-reference tables, and then run the Synchronize Employee Master Rates with Union Rates report (R059122).	Chapter 8, "Setting Up Earnings Information," page 55
7. Set up tax area information, corporate tax IDs, activate Quantum for Payroll, test the Quantum connection, set up the GeoCoder, and then run these UBEs:	• Tax Area Table report (R07500). • GeoCoder Employee Batch Processing report (R070103). • Cost Center Tax Area Processing report (R079052). • Populate Vertex Filing Status Process report (R0701730). Chapter 9, "Setting Up Tax Information," page 65
8. Set up workflow for Human Capital Management.	• Chapter 10, "Setting Up Workflow," page 85 • PeopleSoft EnterpriseOne HCM 8.11 Application Fundamentals PeopleBook, Setting Up Workflow
9. Set up a web mail merge queue, convert mail merge templates, add a web mail merge template, or add a web mail merge template record and data structure.	Chapter 11, "Setting Up Web Mail Merge," page 89
10. Set up pay types.	Chapter 15, "Setting Up Pay Types," page 119
11. Set up calculation tables and attach calculation tables to DBAs.	Chapter 17, "Setting Up Calculation-Table Information," page 131
12. Set up basic DBA information, General Accounting information, the basis of calculation, add text to DBAs, set up group plan DBAs, set up tax status for deductions, and set up tax status for benefits.	Chapter 18, "Setting Up Deductions, Benefits, and Accruals ," page 137
13. Set up rollover calculation tables and rollover information for DBAs.	Chapter 19, "Setting Up Rollover Information for DBAs ," page 155
14. Set up limits for tax-deferred compensation deductions, tax-deferred compensation deductions for the U.S., and taxable fringe benefits for the U.S.	Chapter 20, "Setting Up Limits for Tax-Deferred Compensation Deductions ," page 167
15. Set up category codes for DBAs.	Chapter 21, "Setting Up Category Codes for DBAs," page 175
16. Set up a DBA based on another DBA.	Chapter 22, "Setting Up a DBA Based on Another DBA," page 177
17. Set up advance deductions, a deduction DBA to adjust negative pay, a deduction DBA for overpayment, and a DBA to calculate if no gross pay.	Chapter 23, "Setting Up Advanced DBAs," page 179
18. Set up garnishment deductions, fee deductions, tax levy deductions, and a wage assignment deduction.	Chapter 24, "Setting Up Deductions for Wage Attachments," page 193

CHAPTER 2

Understanding Human Capital Management Fundamentals

This chapter discusses:

- System features.
- HCM Self-Service.
- Tables used by Human Capital Management Fundamentals.

System Features

The Human Capital Management Fundamentals system provides convenient features that you can use to track employee, job, and time entry information. You can also perform convenient functions, such as the future date changes and mass changes.

This section discusses:

- Comprehensive employee information.
- Integrated employee history and turnover analysis.
- Complete job information.
- Complete time and labor tracking.
- Parent/child relationship reporting.

Comprehensive Employee Information

You can use your Human Capital Management Fundamentals system to track comprehensive employee information such as:

- Employee pay status
- Government-required information
- Department
- Tax area
- Benefit group

You can also track any additional information that your organization needs, including information that is specific to your business, your industry, or the country in which an employee works. Examples of the type of information that you can track include:

- Job skills

- Education
- Work experience
- Foreign language competency
- Professional licenses
- Government-required information

When management requests information, you can rapidly respond to their needs by creating reports of employee data by department, supervisor, job, or other categories. Or managers can access the database to create their own reports.

Integrated Employee History and Turnover Analysis

You can set up your system so that each time you add or change employee information, the system automatically creates a historical record of the new information.

You can also set up your system to track employee turnover. Turnover is a change that involves movement, such as a promotion, a change in business unit, or employees leaving your company for any reason.

You can use history and turnover information to perform these tasks:

- Review an employee's salary increases over time.
- Perform turnover analysis for a department or job.
- Track the reason for each change.

You can create activity reports to monitor history and turnover; if a trend develops, you can take steps to identify and resolve the issues.

Complete Job Information

You can track complete job information, including job descriptions and job evaluation information.

You can use job information to perform these tasks:

- Match individuals to appropriate job openings.
- Compare jobs and pay ranges.
- Meet the standards that support equal pay for equal work.
- Post job descriptions from the database to your internal job listings.
- Analyze jobs to determine appropriate wage and salary ranges.

Complete Time and Labor Tracking

You can enter as much or as little timecard information as your organization needs. You can simplify time entry by:

- Defining default job information at the employee or group level.
- Automatically creating overtime pay from regular hours.
- Uploading time entry information from a third-party source to create timecards.

Parent/Child Relationship Reporting

You can document the structure of your organization and report on the parent/child relationships among employees. For example, a report for top management might show a broad organizational structure, such as branch offices that report to the main headquarters. Individual departments might need a report that shows each employee who reports to a single manager.

HCM Self-Service

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.

Human Resources

Below is a list of the employee applications that you can use based on the human capital management modules that you have purchased:

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

Below is a list of the manager applications that you can use based on the human capital management modules that you have purchased:

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

Payroll

Below is a list of the employee applications that you can use based on the human capital management modules that you have purchased:

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

Time and Labor

Below is a list of the employee applications that you can use based on the human capital management modules that you have purchased:

- Enter timecards
- Review timecard information

Below is a list of the manager applications that you can use based on the human capital management modules that you have purchased:

- Review self-service timecards
- 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:

- 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 this 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.

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 email-based process flow across a network. Workflow can send messages and approval forms to employees as a part of the process. Workflow can also email 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 emails a notification message to the payroll department.

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

- 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.

These 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.

Tables Used by Human Capital Management Fundamentals

This list includes the primary tables in the Human Capital Management Fundamentals system:

Table	Description
Address Book Master (F0101)	Contains name and address information for all employees. This information has a search type of E (Employee).
Employee Master Information (F060116)	Contains detailed information about employees, such as salary, pay grade, birth date, and job type.
Employee Master Additional Information File (F060120)	Contains additional information about each employee.
Employee Master - International Data (F060117)	Contains country-specific information about each employee. The F060117A tag file contains the longer alien registration number field
Future Data EE Master Revisions (F06042)	Contains future changes to employee master records.
Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is the combination of the job type and job step.
HR History (F08042)	Contains employee history records for each employee master (F060116) field.
Supplemental Database Setup (F00090)	Contains data types and their respective column headings. Use these data types to specify the types of supplemental information that you want to track for jobs, employees, applicants, and requisitions.
Supplemental Data (F00092)	Contains multiple values with a specific type of data for individual applicants, employees, jobs, and requisitions.
Payroll General Constants (F069096)	Contains default information that applies to all Human Capital Management payroll records in the system. This table also contains default information that applies to specific modules.
HR History Constants (F08040)	Contains default information that applies to all Human Capital Management records in the system. This table also contains default information that applies to specific modules.

CHAPTER 3

Setting Up General System Controls

This chapter provides an overview of general system setup and discusses how to set up system controls.

Understanding General System Setup

Before using any features in your Human Capital Management Foundation system, you need to define critical information that the system uses for processing. You also need to define information that you will use to enter data throughout the system.

This information consists of:

Topic	Description
System controls	Set up system controls to activate specific features and systems, such as: • Country-specific Human Capital Management system • Personic Workflow
System options	Set up system options to define default information and to activate processes, such as: • History tracking • Recruitment management • Pay grade step management • Position budget management
Company options	Set up company options to define default information that applies to all of the employees in a particular company within your organization. For example, company options let you define different standard hours per day for each company within your organization.
Business-unit constants	Set up business unit constants to define default information associated with a business unit.
Common settings	Set up common settings to control specific display or processing features of benefits enrollment, compensation management, and self-service applications.

Topic	Description
Employee information	Set up employee information to: • Track information that is unique to your organization or your industry. • Define the fields for which you will allow future changes.
Employee history and turnover tracking	Set up employee history and turnover tracking to track historical records of employee information.
Job information	Set up job information to track complete information about the jobs within your organization.
Earnings information	Set up earnings information to define the types of pay that your employees receive.
Tax information	If you are using the Payroll system, set up tax information so that you can process payroll for employees.

Setting Up System Controls

You use system controls to control specific features or activate various modules within your software. For example, if you are using your software in conjunction with Personic Workflow or Criterion Blueprint, you need to activate the Personic or Criterion modules.

This section provides an overview of system controls for system activation and system controls for processes and features and discusses how to set up system controls.

Understanding System Controls for System Activation

Consult this table to understand the data items that you can activate for certain Human Capital Management and Payroll processes:

Item	Description
To activate French Canadian Specific HCM Fundamentals system	SY05QU. Use HCM Foundation-French CDN Specific. Set this data item to Yes if you have the French Canadian version of Foundation. You need to do this in addition to entering the Country Code on User Profile Revisions.
To activate the U.S. specific HCM Fundamentals system	SY05U. Use HCM Foundation-U.S. Specific. This data item allows the system to provide U.S.-specific fields and forms in the Human Capital Management Foundation system.
To activate the Canadian specific HCM Fundamentals system	SYO5C. Use HCM Foundation-Canadian Specific. This data item allows the system to provide Canadian-specific fields and forms in the Human Capital Management Foundation system.

Item	Description
To activate PeopleSoft EnterpriseOne Payroll B73.3 or later	SY07P733. Use PeopleSoft EnterpriseOne Payroll B73.3 Or Later. Set this data item to Yes if you are using PeopleSoft EnterpriseOne Payroll B73.3 and above. If this data item is set to Yes, the system searches for history records in the F07* tables. If this data item is set to No, the system searches for history records in all of the tables that begin with F06.
To activate Criterion	SY05CRTN. Use Criterion Integration.
To activate Personic	SY05PRSC. Use Personic Integration.
To activate ADP	SY08ADP. Use ADP Integration.

Understanding System Controls for Processes and Features

Consult this table to understand the data items that you can activate for certain Human Capital Management and Payroll processes:

Item	Description
To activate Wage and Salary Administration	SY08W. Use HRM Wage and Salary Administration. This system control will be available in a future release.
To activate the Quantum GeoCoder	HRGEO. Set this option to Yes to use the Quantum GeoCoder to automatically assign tax area information to employee and business unit records. This option is available for U.S. and Canadian Payroll only.

See Also

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Managing Recruiting and Hiring Processes with Personic Workflow"

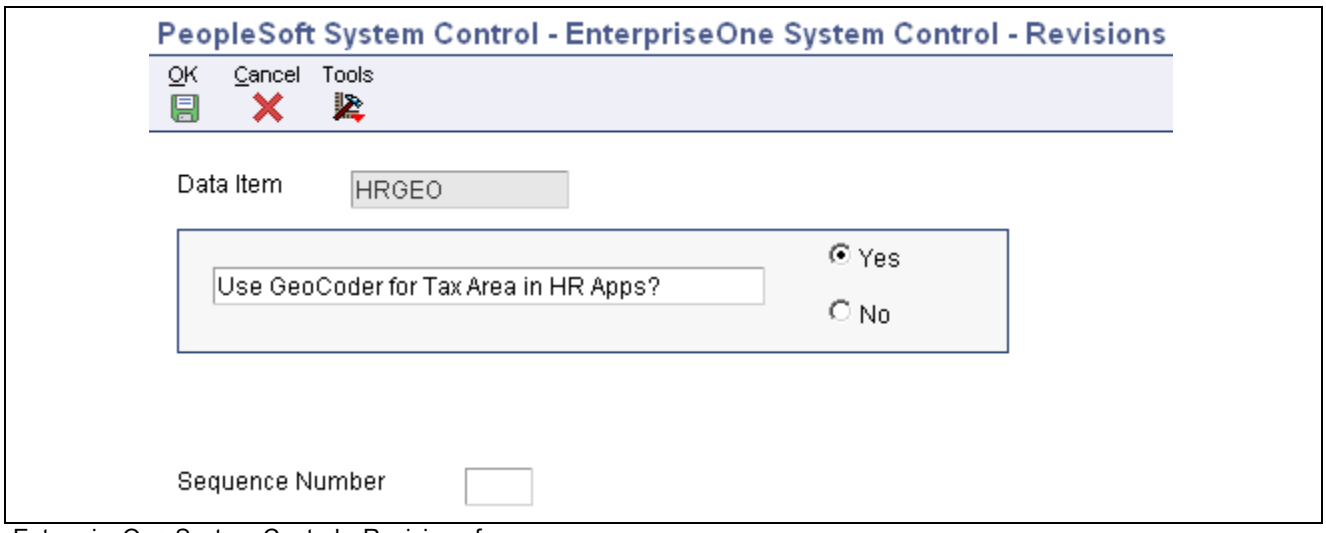
PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Managing Workforce Processes with Criterion BluePrint (PeopleClick)"

Form Used to Set Up System Controls

Form Name	Form ID	Navigation	Usage
EnterpriseOne System Control - Revisions	W99410B	HRM Setup (G05B4), PeopleSoft System Control On the Work With EnterpriseOne System Control form, select the row containing the data item that you want to activate and click Select.	Set up system controls.

Setting Up System Controls

Access the EnterpriseOne System Control - Revisions form.



EnterpriseOne System Control - Revisions form

To set up system controls:

1. On EnterpriseOne System Control - Revisions, select Yes.
2. Click OK.

CHAPTER 4

Setting Up System Options

This chapter provides an overview of system options setup and discusses how to:

- Set up general options.
- Set up position control options.
- Set up company options.
- Set up business-unit constants.
- Set up common settings for Human Capital Management.

Understanding System Options Setup

This section provides an overview of system options setup and lists prerequisites.

System Options Setup

To define default information that applies to your entire system, you set up system options. These options control the types of information that you track and the rules that the system uses to perform certain calculations. For example, you use system options to specify the date that the system will use for tracking changes.

You use system options to control:

Information Type	Description
Pay information	To ensure that you enter acceptable pay rates for employees, set up the system to verify appropriate pay types for employee pay grades or pay-grade steps.
Employee history and turnover	To define whether you want to keep historical records of employee information, set up employee history and turnover options. These options are crucial to successful history and turnover tracking.
Recruitment	To automate the process of creating and maintaining requisitions, set up requisition information.
Position control information	To create, monitor, and control position budgets, set up position information.

Prerequisites

Before you complete the tasks in this section:

- Choose data for history tracking.
- Research whether you should add employee records to the database before or after setting up employee history and turnover tracking options.

See Chapter 6, "Setting Up Employee History and Turnover Tracking ," page 43.

Setting Up General Options

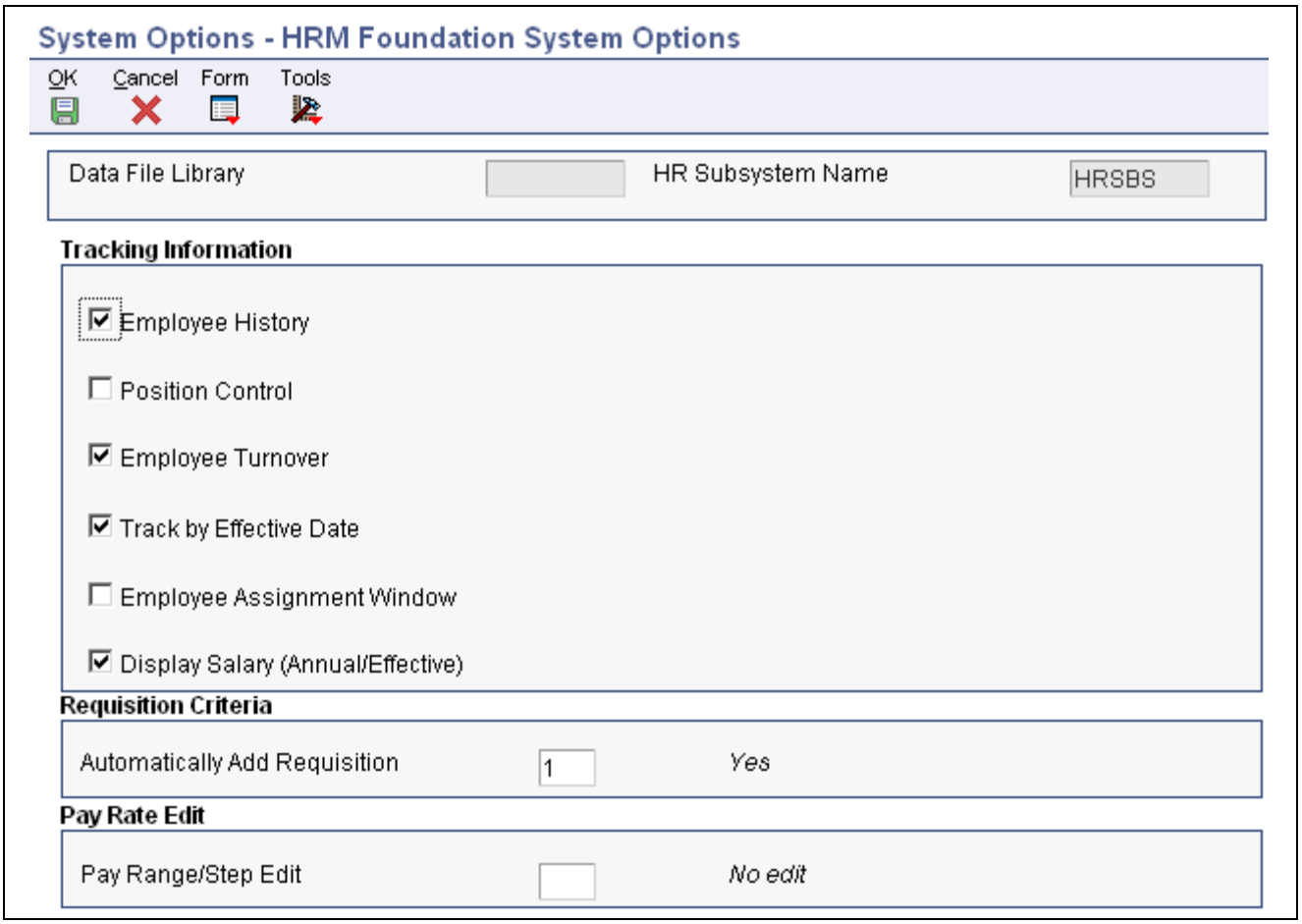
This section discusses how to set up general options.

Form Used to Set Up General Options

Form Name	Form ID	Navigation	Usage
HRM Foundation System Options	W05001SJ	HRM Setup (G05B4), System Options Click Select on the Work with HRM Foundation System Options form.	Set up general options.

Setting Up General Options

Access the HRM Foundation System Options form.



HRM Foundation System Options form

Employee History Enter a code that determines whether the system creates employee history records when you enter or change employee information. The system can create employee history records for only that information that is stored in the Employee Master table (F060116). To specify the information for which you want to track history, use the program, Select Data Items for History Tracking (P08041).

Employee history records are stored in the HR History table (F08042).

Position Control Enter a code that indicates whether you want the system to create records in the Position Activity table (F08111) when you enter or change position-related information for an employee. If you choose to use this feature, you must also choose to track employee history.

If you Select the Position Control option, select Position Control from the Form menu and complete the steps to set up position control options.

Employee Turnover Enter a code that determines whether the system creates employee turnover records when you change employee information.

Turnover information consists of any records in the Employee Turnover Analysis table (F08045) with a change reason that is not blank.

Track by Effective Date Enter a code that indicates the date on which the system creates employee history and turnover records, in relation to the date of the change. This field

controls the dates that appear on history and turnover reports and review forms. It does not function as a suspense operation that allows you to enter a change now, and update the history and turnover tables at a later time. When this field is activated, the system tracks both the effective date of a change and the date that the change was entered into the system. Values are:

On: Use the effective date of the change (data item EFTO) to track employee history and turnover

Off: Instead of using the effective date of change, use the date on which you entered changes into the system If you choose to use the effective date of the change, the system prompts you to enter an effective date each time you change any employee information for which you are tracking history or turnover.

If you choose to use the effective date of the change, you must also choose to track employee history, employee turnover, or both.

Employee Assignment Window

Enter a value that specifies whether the system displays the Employee Assignment window when an employee changes to a new job, position, or home business unit.

You use the employee assignment window to update requisition information for the requisitions affected by the change.

Display Salary (Annual/Effective)

Enter a value that specifies whether the system displays annual or effective salaries for employees.

An employee's annual salary is the number of hours per year that the employee works multiplied by the employee's hourly rate. The effective salary is (annual salary divided by pay frequency) multiplied by periods to pay. For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract.

You can set up your system to use the Pay Grade Step table as the source of employee pay rates. The pay rates in the Pay Grade Step table are based on the table's number of hours worked per year (hours per day time days per year).

When the employee's standard hours per year are different than the amount in the table, the employee's hours per year times the table's hourly rate is the employee's effective salary.

When the table hours and employee hours are the same, the employee's effective and annual salaries are the same. Values are:

On: Display annual salaries

Off: Display effective salaries

Automatically Add Requisition

Enter a value that specifies whether the system automatically creates a requisition for the position when you terminate an employee.

Pay Range/Step Edit

Enter a value that specifies pay range minimum and maximum, or pay grade step amount editing.

Allowed values are:

Blank: No Edit

1: Warning message if out of range for pay grade or not the pay grade step amount, processing allowed to continue.

2: Hard error if out of range for pay grade or not the pay grade step amount, processing stops, no file updates.

Setting Up Position Control Options

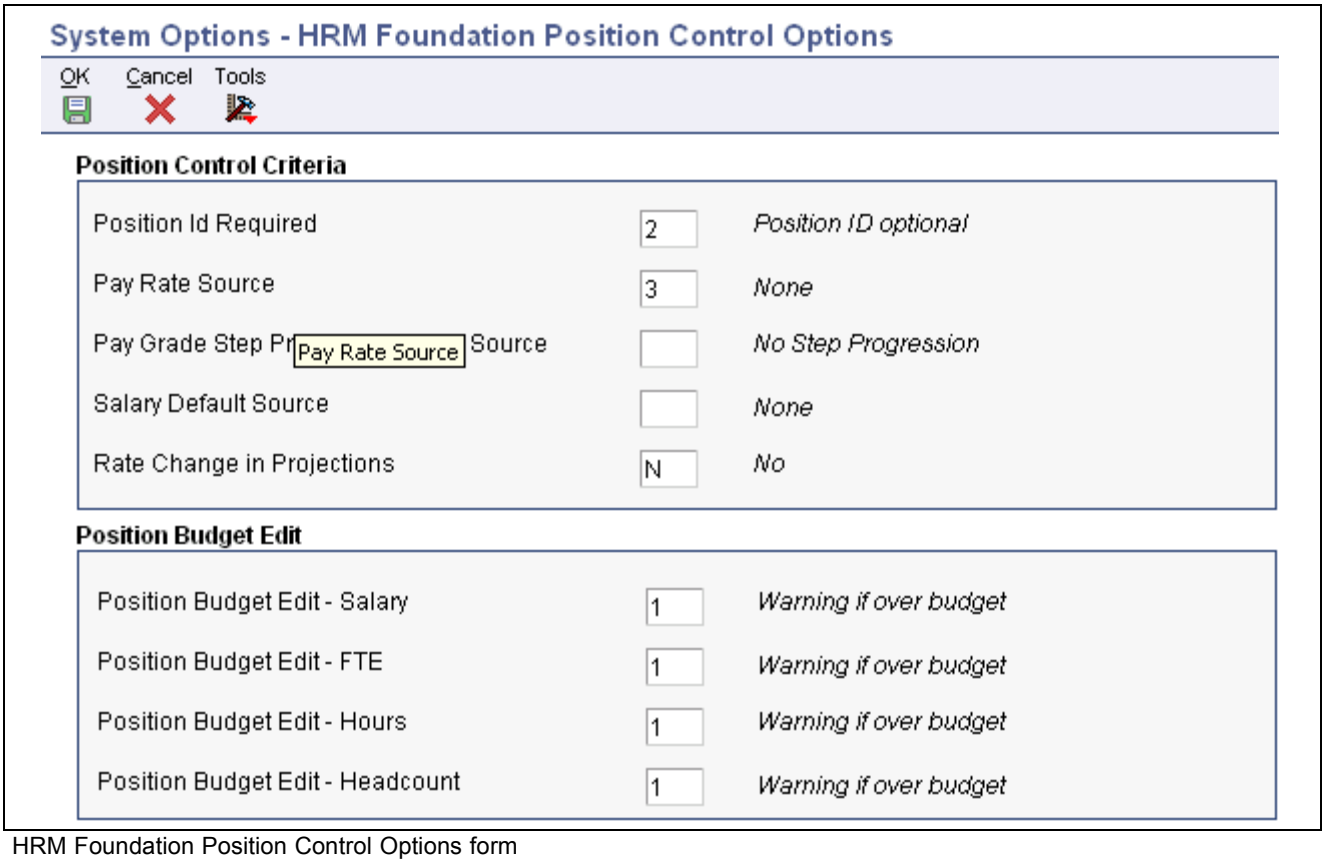
This section discusses how to set up position control options.

Form Used to Set Up Position Control Options

Form Name	Form ID	Navigation	Usage
HRM Foundation Position Control Options	W05001SK	HRM Setup (G05B4), System Options On the Work with HRM Foundation System Options form, select Position Control from the Row menu.	Set up position control options.

Setting Up Position Control Options

Access the HRM Foundation Position Control Options form.



HRM Foundation Position Control Options form

Position control options for system setup

Set up position control options if you clicked the Position Control option when you set up general system options.

Position Id Required

Enter a code that determines whether you are using the position control feature and, if so, whether all employees are required to have a position ID. Codes are:

1: Position ID is required.

2: Position ID is optional. The Position ID field appears on the HR Employee Entry form.

3: Position ID is not required, and the Position ID field does not appear on the HR Employee Entry form.

If you leave this field blank, the system assumes that the Position ID is optional (code 2).

When you set this option to position ID required, the job ID associated with a position in the Position Master table becomes the default job for the employee.

Pay Rate Source

Enter a constant that specifies the default source for employee pay rates. When you add or change employee information, the system uses this constant to locate a pay rate for an employee when you leave the salary and hourly rate fields blank.

1: Pay Rate Tables

2: Pay Grade Step Table

3: None You choose a pay rate source in Setting Up System Options.

To calculate a salary for the employee, the system multiplies the employee's standard hours per year by the hourly rate from the table.

Pay Grade Step Progression Rate Source

Enter a code that specifies the default pay grade step that the system uses to locate a pay rate for employees who have a salary forecast change date. The system uses this rate to calculate annual position budget amounts that are based on employee records.

1: Same Grade Step

2: Next Grade Step

Salary Default Source

Enter a code that specifies the salary/rate default source for creating new positions or defining vacancies when the Create Next Year's Position program (P081820) is run. Allowed values are:

Blank: None

1: Pay Grade Minimum

2: Pay Grade Midpoint

3: Pay Grade Maximum

4: Pay Grade Step Amount When the pay grade step is the source, that table's calculated hours/year (hours per day times days per year) will be used as the default standard hours per year. If this data does not exist in the table, the normal defaults will be used to determine the standard hours per year basis:

- Home Company Standard Hours Per Year.

- Default Company Standard Hours Per Year.
- Data Dictionary.
- 2080.

Rate Change in Projections Enter a constant that determines if future rate changes, based on an employee's salary forecast change date, will be taken into account in the calculation of position projected year end values. Values are:

Y: Yes

N: No

Position Budget Edit - Salary Enter a value that specifies whether you want the system to use position budget editing, and if so, whether the system displays a warning or error message when you enter or change a salary that is over the budgeted salary for the position. The system checks (edits) the Salary, Hourly Rate and Position fields on P0801CMP against the Position Master Table (F08101). Values are:

Blank: No edit

1: Warning message if over budget, but allowed to continue.

2: Hard error if over budget, processing stops, no table updates.

Position Budget Edit - FTE Enter a value that specifies whether you want the system to use position budget editing for full-time equivalents (FTE), and if so, whether the system displays a warning or error message when a change to the full-time equivalent field is not within the budgeted full-time equivalents for the position. Values are:

Blank: No edit

1: Warning message if over budget, but allowed to continue.

2: Hard error if over budget, processing stops, no table updates.

Position Budget Edit - Hours Enter a value that specifies whether you want the system to use position budget editing for work hours, and if so, whether the system displays a warning or error message when the employee's work hours are not within the budgeted effective hours for the position. Values are:

Blank: No edit

1: Warning message if over budget, but allowed to continue.

2: Hard error if over budget, processing stops, no table updates.

Position Budget Edit - Headcount This field specifies whether you want the system to use position budget editing for headcount, and if so, whether the system displays a warning or error message when you enter or change headcount that is not within the budgeted effective headcount for the position. Values are:

Blank: No edit

1: Warning message if over budget, but allowed to continue.

2: Hard error if over budget, processing stops, no table updates.

Setting Up Company Options

This section provides an overview of company option setup, lists prerequisites, and discusses how to set up company options.

Understanding Company Option Setup

You set up company options to define default information that applies to all of the companies within your organization, and to define additional information that is specific to individual companies within your organization.

Typically, you first set up options for the default company, Company 0 (zero). You can also set up company options for each company within your organization. If you do not set up company options for a company within your organization, the system uses the default company options when processing information for that company.

If you set up company options for each company within your organization, you can override some of the default company options. For example, you can enter standard hours per year for a particular company that vary from the standard hours per year that you entered for the default company.

Some of the default company options apply to all of the companies within your organization, and cannot be overridden at the individual company level. For example, if you signify that you are not using accounts payable integration or step progression processing at the default company level, none of the companies within your organization can use these options. However, if the default company options are set to activate these options, it is not necessary for all companies in your organization to use them. For example, if you have only one company within your organization that processes step progression information, you must set the default company options to allow step progression processing.

You also set up company options to control payroll processing for the employees of each company. For example, you define this information at the default company level:

- How the system retrieves PDBA history.
- Whether the system overrides home company information on timecards.
- Whether each company and business unit use the same debit account for automatic deposit processing.
- How the system determines payment dates during payroll processing.

You must set up company options for the default company before you can process a payroll or account for labor.

Note. If you use the EnterpriseOne General Accounting system, you must set up separate company options for that system.

Prerequisite

Verify that the companies within your organization have been set up in the General Accounting system. Typically, the Accounting Department is responsible for setting up companies.

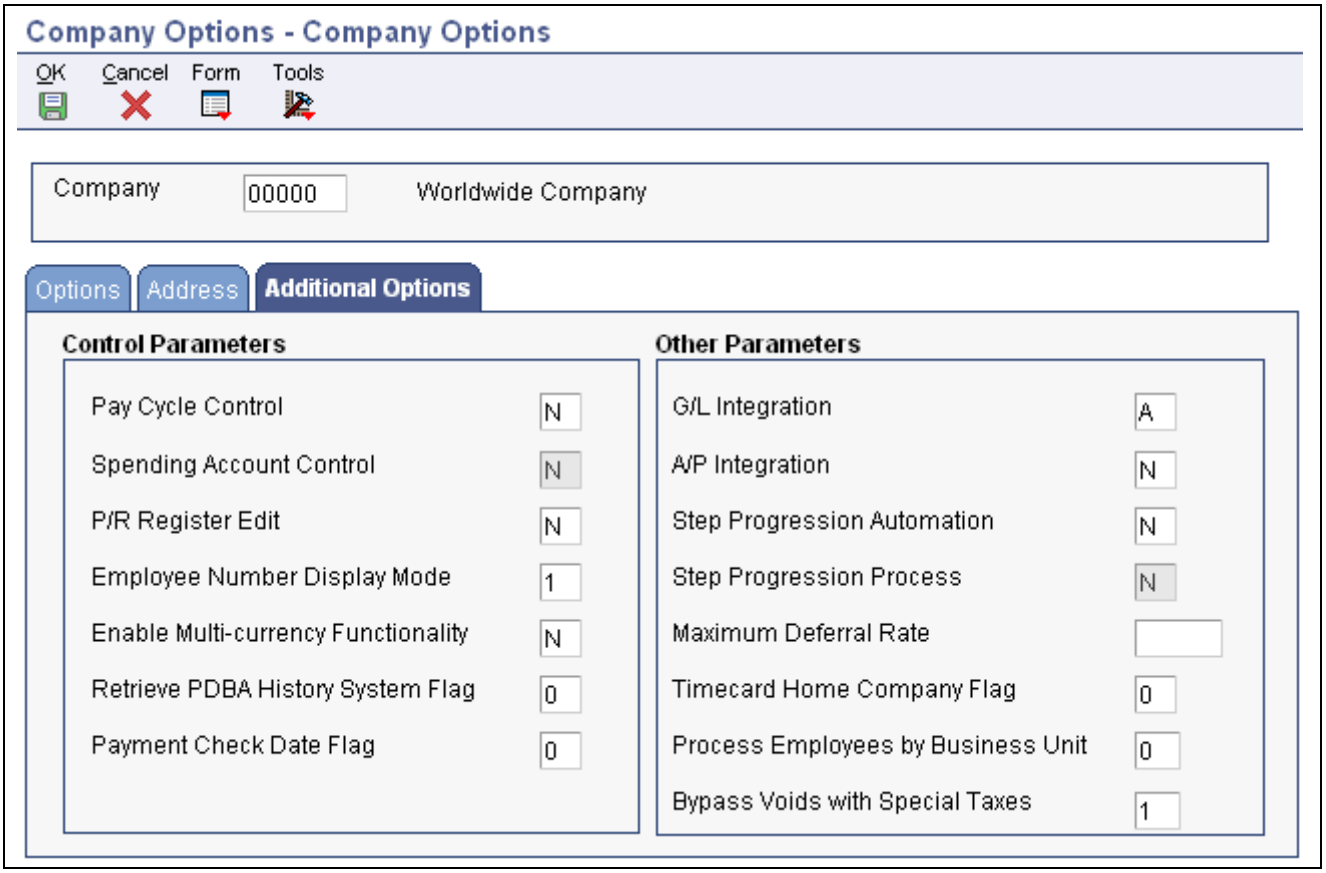
See *PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up an Organization”.

Form Used to Set Up Company Options

Form Name	Form ID	Navigation	Usage
Company Options	W05001CA	HRM Setup (G05B4), Company Options Click Add on the Work With Company Option form.	Set up company options.

Setting Up Company Options

Access the Company Options form.



Company Options form

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.

Note: You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Hrs/Day Enter a value that indicates the number of hours in a standard working day. This information may be used for automatic overtime computations and other scheduling purposes.

Days/Wk Enter the number of days in the work week. This number may be used (among other reasons) in the computation of automatic overtime.

Wks/Yr Enter the number of work weeks in the year.

The number of bi-weekly, semi-monthly, and monthly periods in the year will be assumed to be 26, 24, and 12, respectively.

Hrs/Yr Enter the number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay-rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate).

When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses this sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period:

1. Employee entry forms (this field).
2. Pay Grade Step table (hours per day multiplied by days per year).
3. Payroll company constants for the employee's company.
4. Payroll company constants for the default company (company 00000).
5. Data dictionary.
6. System default value of 2080 standard hours per year.

Country Code Enter a user defined code list 00/CN that indicates the country in which the employee resides.

SUI Calculation Switch Enter a value that determines how the system adjusts state unemployment insurance.

Vertex can self-adjust or not self-adjust the amount of tax calculated. Values are:

0: Self-adjust. This method always brings the tax up to what it should be.

The formula used is as follows: Current period tax = (YTD gross + current gross) x SUI rate - YTD SUI tax.

1: Do not self-adjust. The tax is calculated on the current period wages only.

2: Self-adjust when maximum base is reached.

If you have employees in working multiple states, set this value to 1 (do not self-adjust).

125 Cash Option Enter a *1* if you have a cash option for your 125 Plan . This will be used for taxation purposes for SUI and SDI. Certain states allow a 125 exemption amount if a cash option is allowed.

Fiscal Year (Beginning Month) Enter the number of the month in which the payroll fiscal year begins.

Annual Leave Hours Enter the standard number of hours generated as Annual Leave during automatic wage processing.

State Enter a user defined code (00/S) that specifies the state or province. This code is usually a postal service abbreviation.

County Enter the name of a county, parish, or other political district that is necessary for the address or for tax purposes.

Pay Cycle Control Enter a code specifying whether to incorporate execution control into the payroll cycle steps. Valid codes are:

Y: You must set up execution control, by version, to determine who can execute the steps within the payroll cycle.

N: No execution control. The person who runs the first pre-payroll step must run all steps in the cycle. This is the default value.

Spending Account Control Enter a code indicating whether to use flexible spending accounts in processing payroll. Valid codes are:

Y: Use flexible spending accounts.

N: Do not use flexible spending accounts. This is the default code.

P/R Register Edit Enter a code that specifies a type of error. The system always notes errors in the Payroll Register if the gross pay amount minus the taxes and applicable deductions does not equal net pay. Values are:

Y: Hard error. You must correct the error and run Pre-Payroll again. This is the default code.

N: Soft error. This error is noted on the Payroll Register but Payroll Cycle processing can continue. You must make the necessary corrections after the Payroll Cycle is complete.

Employee Number Display Mode Enter a code that specifies the type of employee number displayed on inquiry screens. Values are:

1: Display the eight-digit Address Book number (default).

2: Display the nine-digit Social Security number.

3: Display the eight-digit Additional Employee number preceded by a forward slash (/).

All forms of employee number remain valid.

Enable Multi-currency Functionality Enter a code that enables multicurrency functions within the Human Resources and Payroll systems. Values are:

Y or *1:* Yes

N or *0:* No

Retrieve PDBA History System Flag Enter an option that identifies how the system retrieves PDBA history during payroll processing. You can set up the system to retrieve employee PDBA history for only the Corporate Tax ID in which the employee works during the pay period, or you can set up the system to retrieve all PDBA history for an employee, regardless of Corporate Tax ID.

You might choose to set up the system to retrieve PDBA history across all Corporate Tax IDs if employees in your organization frequently change companies. Retrieving PDBA history across multiple tax IDs allows the system to collect amounts that remain in arrears under one Corporate Tax ID if the employee moves to a company with a different Corprate Tax ID.

You can also determine how the system retrieves PDBA history at the PDBA level. Values are:

0: Use the information from PDBA setup to determine how the system retrieves PDBA history amounts.

1: Retrieve PDBA history only for the Corporate Tax ID in which the employee worked during the pay period, ignoring the setting at the PDBA level.

2: Retrieve PDBA history across all Corporate Tax IDs, ignoring the setting at the PDBA level.

Payment Check Date Flag Enter an option that determines how the system derives payment dates for interim payments. You can set this option to derive the payment date using the Master Pay Cycles, or you can set this option to override the Master Pay Cycle dates using a system-calculated date.

If you choose to override the Master Pay Cycle dates, the system derives the payment date by adding the number of days entered in the Payment Date Offset field on the Interim Header Entry form to the system date. For example, if you use a Payment Date Offset of 4, the system calculates the payment date for all interims entered on Monday as Monday +4, which would be Friday. You might use this option if you enter interims continuously throughout a pay period, and you want them all to have the same payment date. However, to accomplish this, you must change the Payment Date Offset number on a daily basis. Values are:

0: Derive payment date using Master Pay Cycles (default)

1: Derive payment date using System Date + Payment Date Offset formula

G/L Integration Enter a code that indicates how batches of payroll journals are posted to the General Ledger. Valid codes are:

A: Automatic. If batches are in balance and there are no errors, the system posts batches automatically during the final update step of the payroll cycle. This is the default value.

M: Manual. Each batch must be posted manually.

N: None. There is no General Ledger interface.

T: Time Accounting

A/P Integration Enter a value to specify the level of integration. A/P Integration is used to set the level of integration between the Payroll and the Accounts Payable systems. Pro forma vouchers are created during the payroll journal entries step of the payroll cycle. Actual vouchers are created in accounts payable during the final update step.

N: No integration.

0: Create vouchers for both DBAs and taxes that have been setup with A/P integration.

1: Create vouchers only for DBAs that have been setup with A/P integration.

2: Create vouchers only for taxes that have been setup with A/P integration.

Step Progression Automation Enter a code that specifies whether you want the system to process job step progression information during payroll cycle processing or whether you want to process the information as a stand-alone feature outside of the payroll cycle. Be aware that processing job step progression during the payroll cycle might significantly increase pay cycle processing time.

Note: This field works in conjunction with the Step Progression Process field on the Company Options form. In order to process job step progression information, the Step Progression History Update field must be set to 1 or 2. Also, this field is initially populated with the value from the Company Options setup. You can override the value here. However, if you change the value in the Company Options, the system does not change the value in this field. Values are:

Y: Process job step progression information during payroll processing.

N: Process job step progression as a stand-alone feature. (default)

Step Progression Process Enter a code that specifies whether the Step Progresssion History files are updated and the level of detail in which the update occurs. If you choose 1, you must set up job step progression parameter tables for each union for which you want to process step progression information. If you choose 2, you must set up job step progression parameter tables for each business unit and union combination for which you want to process step progression information. If you choose 1 or 2, it is not mandatory that companies within your organization process step progression information. However, if you choose N, no companies in your organization can process step progression information. Values are:

1: Update using Union, Job Type, and Job Step.

2: Update using Home Business Unit, Union, Job Type, and Job Step.

N: Do not update Step Progression History tables.

Maximum Deferral Rate Enter the maximum percentage of pre-tax earnings that an employee is allowed to defer to a 401(k) plan. This rate is used in the 415 Nondiscrimination Test.

For example, to enter a rate of 12.75 percent, enter *12.75* in this field.

Timecard Home Company Flag Enter a code that determines whether the system overrides the value in the Home Company field on employee timecards with the Home Company from the Employee Master. If you choose to override the value on the timecard, the system performs the override at different times depending on how the timecard is entered into the system. These examples illustrate when the override would occur if you set this option to 0 and you enter a timecard with a home company that is different than the home company in the Employee Master:

If you enter a regular timecard, the system overrides the home company when the timecard is processed in pre-payroll.

If you enter a timecard using the Time Entry Interim Generator, the system overrides the home company when you exit the row in the detail area of the time entry form.

If you enter timecards for interim payments using the Interim Payment Workbench, and if the Company field on the Interim Entry form is blank, the system overrides the home company when you click OK during interim entry.

Note. The system never overrides the home company on timecards that are entered using the Interim Entry form if there is a value in the Company if Different than Home Company field, which is also on the Interim Entry form. The Company if Different than Home Company field is intended to be used as an override to this functionality. The Interim Entry form does not consider the value in this field when determining whether to override the home company for the interim payment.

Warning! If your organization has multiple home companies with the same Corporate Tax ID, and those companies use the same bank account for payroll payments, set this option to 0. Setting this option to 1 might cause undesirable results.

Values are:

0: Override the Home Company field on the timecard with the Home Company from the Employee Master table (F060116). This is the default.

1: Do not override the Home Company field on the timecard with the Home Company from the Employee Master table (F060116).

Process Employees by Business Unit

Enter a value that specifies how the system processes information. Values are:

1: Process employees by Business Unit (as set up in P07236). This option should be used if different auto deposit information per business unit is needed.

0: Process employees as one large group regardless of the business unit they work in. If 0 is chosen, auto deposit information from Business Unit 1 will be used. This must be set up in the P07236 Program.

Bypass Voids with Special Taxes

Enter a code that indicates whether you want to bypass or process voided payments if those payments contain special taxes. Values are:

Blank: Process voided payments with special taxes.

1: Bypass voided payments with special taxes.

See Also

PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook, "Integrating Accounts Payable," Understanding Accounts Payable Integration

PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook, "Setting Up Payroll Cycle Information," Setting Up Debit Account Information for Automatic Deposits

Setting Up Business-Unit Constants

This section provides an overview of business unit constants setup and discusses how to set up business unit constants.

Understanding Business Unit Constants Setup

You set up business-unit constants to define default information that is associated with a business unit. Default business-unit information expedites data entry for time entry and payroll information.

Setting up business-unit constants also allows you to:

- Define taxing authorities for a business unit.
- Apply flat burden rates to a specific business unit.
- Set up the business unit to act as a certified job for governmental reporting purposes. Job information for the business unit will be included in certified payroll reports.

You can associate a business unit with one company only.

When you set up a business unit, the system adds that business unit to the Business Unit Master table (F0006) if the business unit does not already exist in that table. In many companies, business units are set up in the EnterpriseOne General Accounting system by the Accounting department.

You must use the General Accounting system, and not the Payroll system, to change any of these:

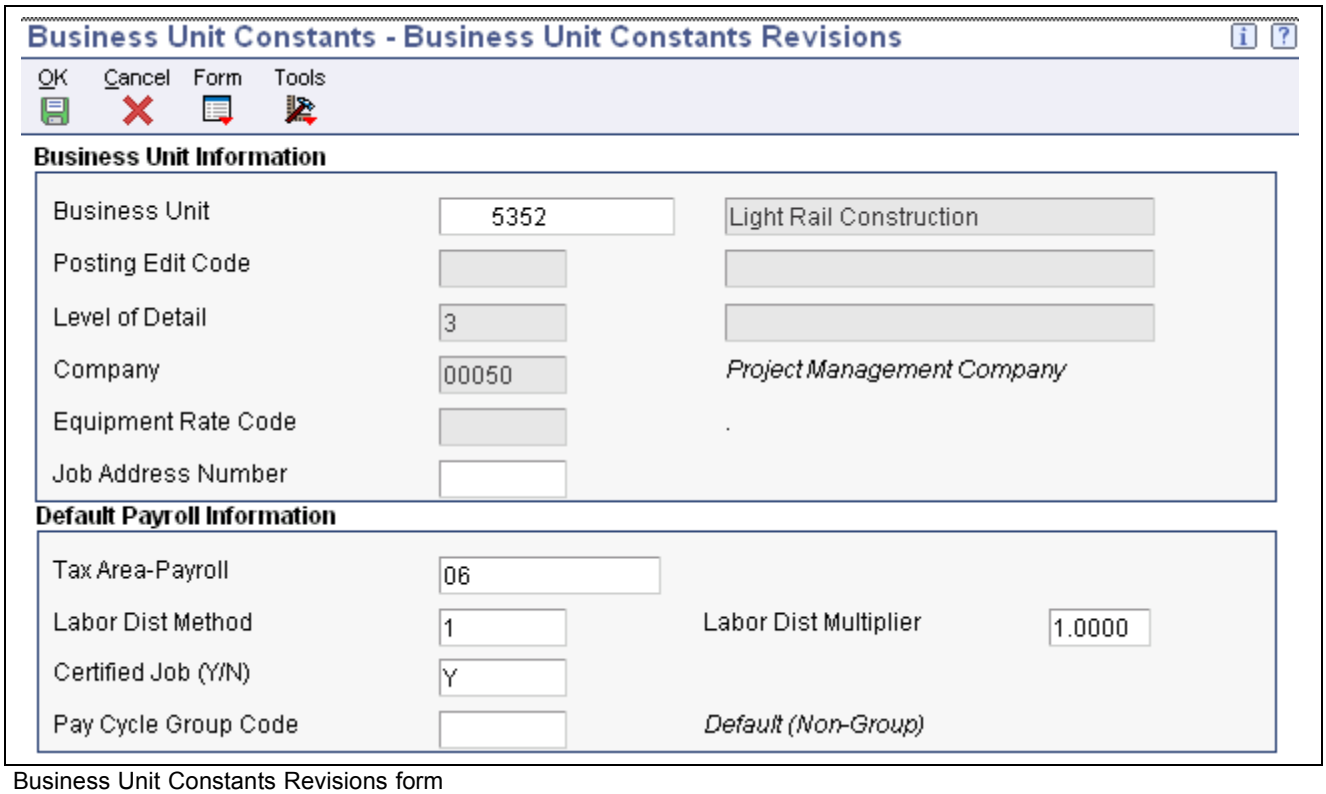
- Posting Edit - Business Unit
- Level of Detail - Business Unit
- Company
- Equipment Rate Code
- Address Number

Forms Used to Set Up Business Unit Constants

Form Name	Form ID	Navigation	Usage
Business Unit Constants Revisions	W059051AC	HRM Setup (G05B4), Business Unit Constants Click Add on the Work With Business Unit Constants form.	Set up business unit constants.

Setting Up Business Unit Constants

Access the Business Unit Constants Revisions form.



Business Unit Constants Revisions form

Tax Area-Payroll Enter a value that specifies a taxing authority. All time entries for this Cost Center default to the value entered in this field.

Labor Dist Method Enter a value that controls whether the labor costs include a flat burden for payroll taxes and benefits. Values are:

0: The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero.

1: The flat burden factor is always greater than 1.0000, so the labor costs include a flat burden.

Labor Dist Multiplier Enter a multiplier to load direct labor costs with burden. For example, a factor of *1.32* would load every dollar of labor cost with 32 cents worth of burden.

Certified Job (Y/N) Enter a value that specifies whether to include information about this job in certified payroll reports used for governmental reporting. Values are:

Y: Include job information on certified payroll reports.

N: Do not include job information. This is the default.

Pay Cycle Group Code Enter a user defined code (system 06, type PG) that indicates a pay cycle group. If you enter a pay cycle group code here, the system processes only those timecards whose business unit has that pay cycle group assigned in the business unit constants. The type code explained below determines which business unit is used in the selection process.

This field and the accompanying Type field override the DREAM Writer home business unit selection. Employees must first be selected in the DREAM Writer Data Selection, then timecards for those employees are selected based on Pay Cycle Group Code and Type.

If you use the GeoCoder, the system uses the address information for the business unit to determine the GeoCode for the Tax Area - Payroll field. The system automatically populates this field if there is only one possible GeoCode available. If you are using the GeoCoder interactively to assign tax area information and the field remains blank, or if you use the batch GeoCoder, see Assigning Tax Area Information Using the GeoCoder in the HCM Fundamentals Guide for additional information.

Auto Deposit Instructions form (W07236B)

Bank Transit Number Enter the payment routing number for the employee's financial institution. This number is on the employee's check or deposit slip. It is located between the MICR colons (:) at the bottom of the check. If you change this number for an employee, the system creates a pre-note for the employee's next auto deposit.

Bank Account Number Enter the employee's unique account number at the financial institution. You can obtain the number from the MICR line of a voided check or a deposit slip from the employee's account. You must include dash cue symbols in the field.

However, they are recorded in a translated mode as a hyphen. You can also obtain account numbers from other sources, such as passbooks or debit cards.

When transcribing information, left justify and enter only numbers (0 through 9), alphabetic (A through Z), and hyphens (-). If less than 17 characters are required, leave the unused spaces blank. Spaces left within the depositor's account number will be ignored when the paperless entry is prepared. For example, 0123 4 56789 will appear as 0123456789 in the entry record, and 0123-4 56789 will appear as 0123-456789.

If you change this number, the system automatically pre-notes the employee's auto deposit record again.

Auto Deposit Company Identification Enter a ten-character, alpha-numeric code that identifies the originator of a file. This code must be included on all prenotification records and on each entry initiated pursuant to such prenotification. The company ID may begin with the ANSI one-digit Identification Code Designator (ICD), followed by the identification number. The ANSI identification numbers and related Identification Code Designators (ICD) are:

- IRS Employer Identification Number (EIN) 1.
- Data Universal Numbering Systems (DUNS) 3.
- User Assigned Number 9.

Company Name Enter the Immediate Origin Name for the ACHA file header record. Typically the name of the company sending the deposits to the clearing house bank.

Immediate Destination for AutoDeposit Enter a ten-character code that specifies the Routing Number of the ACH Operator or receiving point to which the pre-note file is being sent. This code begins with a blank in the first position, followed by the four digit Federal Reserve Routing Symbol, the four digit ABA Institution Identifier, and the Check Digit (bTTTTAAAAC).

Immediate Origin for AutoDeposit Enter a ten-character code that specifies the Routing Number of the ACH Operator or sending point that is sending the pre-note file. This code begins with a blank in the first position, followed by the four-digit Federal Reserve

Routing Symbol, the four-digit ABA Institution Identifier and the Check Digit (bTTTTAAAAC).

SCC Enter a code that identifies the general classification of dollar entries to be exchanged. This standard is used to facilitate transmission of data between organizations. Automated Clearing House (ACH) entries required for payroll deposits use these service class codes:

200: ACH entries mixed debit and credits

220: ACH credits only (batch format)

225: ACH debits only (batch format).

At the time of this writing, only the use of class *200* is recommended.

Discretionary Data Enter additional codes that are of significance to your company.

This field enables specialized handling of all subsequent entries in the batch. There is no standardized interpretation of the value you enter by the banking system.

File ID Modifier Enter a code in the file header record that the system uses to distinguish multiple files created on the same date and among the same participants. Values can include only upper case A-Z and numeric 0-9.

Header Record for Auto Deposits Enter a code that identifies the first physical record(s) on magnetic tape files. The header record identifies the data file and provides security and control information relative to that file.

Trailer Record for Auto Deposits Enter a code that identifies the trailer record for auto deposit tape files. This code is used for magnetic tape files only. It is the last physical record(s) for each file. The trailer record identifies the data file and tape volume and provides the checking mechanism for processing verification (i.e., block counts).

Setting Up Common Settings for Human Capital Management

This section provides an overview of common settings for Human Capital Management and discusses how to set up common settings for Human Capital Management.

Understanding 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.

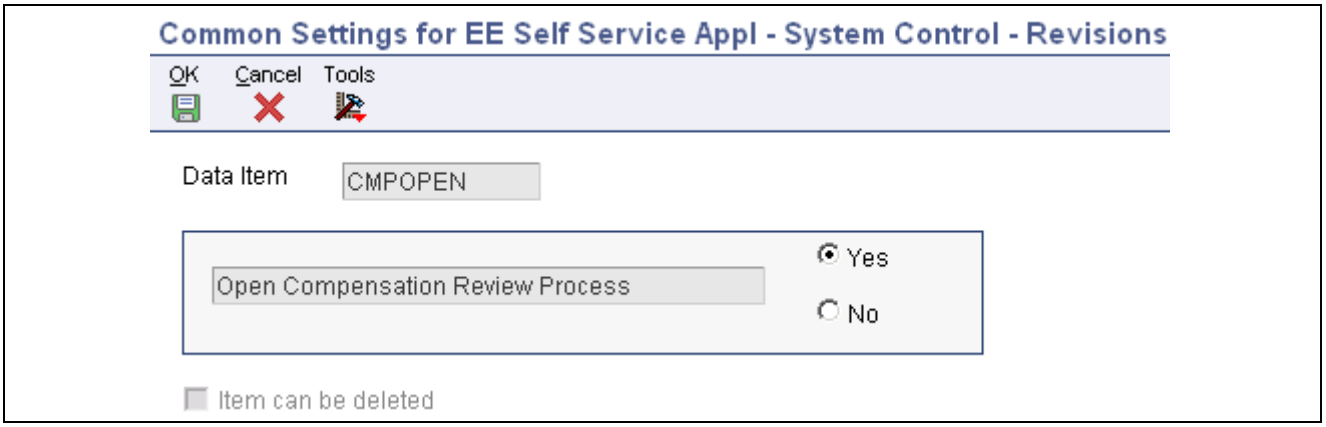
Setting up the common settings updates the Common Settings for HR Employee Self Service Programs table (F05004).

Form Used to Set Up Common Settings for Human Capital Management

Form Name	Form ID	Navigation	Usage
System Control - Revisions	W05004B	Self Service Setup (G05BESS4), Common Settings for EE Self Service Appl Compensation Mgmt System Setup (G08CM14), HRM Common Settings On the Work With HRM Common Display Settings form, select the row containing the data item for which you want to change the current setting and click Select.	Set up common settings for Human Capital Management.

Setting Up Common Settings for Human Capital Management

Access the System Control - Revisions form.



System Control - Revisions form

To set up common settings for human capital management:

1. On System Control - Revisions, select the Yes or No option to specify the current setting and then click OK.
2. On the Work With HRM Common Display Settings form, click Add to add extra data items.

   Any data item that you add must already exist in the system.
3. On the System Control - Revisions form, complete the Data Item field.
4. Select the Yes or No option to specify the current setting and then click OK.
5. If you need to remove a data item that you have added, on the Work With HRM Common Display Settings form, select the data item and click Delete.

   The data item is a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

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

CHAPTER 5

Setting Up Employee Information

This chapter provides overviews of employee information setup and record reservation setup for simultaneous changes and discusses how to:

- Define category codes.
- Choose field for future data revisions.
- Release a record reservation.

Understanding Employee Information Setup

This section provides an overview of employee information setup and lists prerequisites.

Employee Information Setup

Before you begin adding employee records to your system, you should set up employee information. If you need to track information that is unique to your organization or your industry, you can define category codes. To allow users to enter future changes for specific types of information, you can choose fields for future data revisions.

In organizations where more than one person might enter employee information into the system simultaneously, you might want to implement record reservation (record locking) settings that result in a warning when a conflict occurs. You can implement record reservation by adding a new record to UDC 00/RR. In this record, you need to set the code value to P0801 and the special handling code to *1*.

Understanding Record Reservation Setup for Simultaneous Changes

To prevent loss of data when two users simultaneously attempt to update the same record in the database, you can activate record reservation. When you activate record reservation for a particular program, only one user at a time can access a record in the table that the program uses for data storage. For example, assume that record reservation has been activated for the employee master group of programs (P0801). User 1 is updating salary information for an employee in the Employee Basic Compensation program (P0801CMP). At the same time, User 2 opens the Basic Compensation program and attempts to access the same employee record. User 2 receives an error message indicating that the employee record is reserved. The system prevents User 2 from gaining access to the record. The record remains reserved until User 1 saves any changes and closes the program.

Note. Two significant limitations to record reservation exist: you can activate record reservation only for those programs that are designed to use it and programs that do not use record reservation can update reserved records.

Only programs that are designed for record reservation can use this feature. In PeopleSoft Human Capital Management software, these programs include:

- Employee/Personal (P0801EMP)
- Employee Organizational Assignments (P0801ORG)
- Employee Basic Compensation (P0801CMP)
- Employee Eligibility, NDT, and Participation (P0801ELI)
- Employee Payroll (P0801PRL)
- Employee National and Fiscal Data - Australia (P75A0801)
- Employee National and Fiscal Data - Canada (P0801CA)
- National/Fiscal Data - Regional Information (P76M0801)
- Employee National and Fiscal Data - USA (P0801US)

To activate record reservation for any of the programs in the employee master group, you must activate it for all the programs.

To activate record reservation for these programs you need to create a new record in UDC 00/RR and use these values:

Codes	Description 01	Special Handing	Hard Coded
P0801	Employee Master	1	Y

Prerequisite

Set up the user defined codes for employees.

See Chapter 13, "Understanding User Defined Information Setup," User Defined Codes for Human Capital Management Foundation, page 106.

Defining Category Codes

This section provides an overview of category code definition and discusses how to define category codes.

Understanding Category Code Definition

You might need to track information that is unique to your organization or your industry. For example, you might need to track the employees who are participating in the company stock purchase plan. Category codes are provided that you can define to track any type of additional information that your organization needs.

Category codes are a type of user defined code that you use to classify employees for tracking and reporting. You can define up to 20 category codes to meet the specific requirements of your organization.

Form Used to Define Category Codes

Form Name	Form ID	Navigation	Usage
User Defined Codes	W0004AA	Employee Category Codes (G05BE41), choose an option Click Add on the Work With User Defined Codes form.	Define category codes.

Defining Category Codes

Access the User Defined Codes form.

Codes Enter a list of valid codes for a specific user defined code list.

Description 1 Enter a user defined name or remark.

Description 2 Enter additional text that further describes or clarifies a field in the system.

Choosing Fields for Future Data Revisions

Choosing fields for future data revisions activates data items in the Employee Master Information table (F060116) so that they can be updated using the future data forms. For example, you activate the Marital Status field so that, in the event of marriage, you can change the employee's marital status in the Employee Master Information table using a future data form.

Note. Some fields have default activation values that you cannot change.

This section discusses how to choose fields for future data revisions.

Form Used to Choose Fields for Future Data Revisions

Form Name	Form ID	Navigation	Usage
Work With Future Data Fields	W06041B	Employee Management Setup (G05BE4), Specify Future Data Fields	Choose fields for future data revisions.
Change Verification	W06041C	Click Yes or No to confirm.	Accept changes.

Choosing Fields for Future Data Revisions

Access the Work With Future Data Fields form.

To choose fields for future data revisions:

From the Employee Management Setup menu (G05BE4), choose Specify Future Data Fields.

1. On the Work With Future Data Fields form, complete the Data Item field and click Find.
2. For each data item, review the value in the Y N field:

   You can enter future data changes for data items for which you enter a *Y* (yes) value.

   Y N are codes used to indicate whether the field in the Employee Master Information table is to be included in the Future Data Facility processing capabilities.
3. To indicate that you want to allow future data revisions for a data item, choose a data item that has *N* in the Yes or No field, and then click Select.
4. On the Change Verification form, click Yes to accept the change.
5. Repeat steps 2-4 for each data item for which you want to allow future data revisions.

Releasing a Record Reservation

This section provides an overview of record reservation releases and discusses how to release a record reservation.

Understanding Record Reservation Releases

When a program that uses record reservation is interrupted, orphaned reservation records might remain in the Business Object Reservation table (F00095). This can occur, for example, when technicians are working with a server, or when a workstation shuts down without warning. If an interruption stops one of the programs in the Employee Master group (P0801) before it releases the reservations that it creates, other users cannot update the records until the orphaned reservations are removed.

You can use the Remove Business Object Reservation program (P00095) to release unwanted record reservations. This program stores reservation information in the Business Object Reservation table (F00095).

Form Used to Release a Record Reservation

Form Name	Form ID	Navigation	Usage
Business Object Reservations	W00095A	Maintenance Request Advanced Operations (G1753), Business Object Reservations	Release a record reservation.

Releasing a Record Reservation

Access the Business Object Reservations form.

Object Name Enter the name that identifies a system object. PeopleSoft EnterpriseOne architecture is object-based. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple applications. The Object Librarian tracks each object. Examples of system objects include:

- Batch Applications (such as reports).
- Interactive Applications.

- Business Views.
- Business Functions.
- Business Functions Data Structures.
- Event Rules.
- Media Object Data Structures.

To help find the specific records that are orphaned, and to help avoid accidentally removing active reservations from the table, you can use QBE values to limit your search.

User ID Enter the code that identifies a user profile.

To release a record reservation, choose a row and then click Delete.

The system automatically displays a confirm delete dialog.

CHAPTER 6

Setting Up Employee History and Turnover Tracking

This chapter provides an overview of employee history and turnover tracking setup and discusses how to:

- Choose data for history tracking purposes.
- Initialize history and turnover tracking.

Understanding Employee History and Turnover Tracking Setup

To help you manage your employee information, you can set up your system to store historical records of employee information. This action means that when you enter or update employee information, the system creates a historical record of the old information. For example, when an employee receives a promotion or changes marital status, you can update the employee's current information to reflect the change and store the previous information in historical records.

You can also set up your system to store turnover records. Turnover records show employee movement within your organization, such as when an employee changes jobs, as well as movement resulting from new hires and terminations.

You can use history and turnover information to:

- Review the employee's job progression since you began tracking history.
- Review salary increases given at the same time that a job change was made.
- Analyze historical changes to employee information.
- Monitor employee movement within your company.

When you initialize history and turnover tracking, the system creates initial history records for all employee records in the Employee Master Information table (F060116). Furthermore, the system tracks history only for specific fields that you choose to track before you initialize. The history records are dated so that you can determine when you began tracking history and turnover.

You can track history and turnover for any fields that the system stores in the Employee Master Information table. Choosing these fields before initializing is important to eliminate cluttering the HR History table (F08042) with unneeded history information.

Setting up history and turnover tracking also includes enabling your history and turnover tracking options in HRM System Options (P05001S), and entering all employee records in the database. Whether you need to initialize history and turnover tracking depends on the order in which you complete these tasks and your history record specifications. This table explains when you might or might not initialize history:

Action	Description
Do not initialize history and turnover tracking.	Choose data for history tracking purposes and then enable the history and turnover system options. After enabling the history and turnover system options, enter or upload all employee records into the database. In this case, you might not want to initialize history. The system creates initial history records for all employees as they are entered into the system. This option is preferable if you want history records for every employee on the date that they are entered into the system. However, you do not get the chance to verify the employee information before creating history records.
Initialize history and turnover tracking.	Choose data for history tracking purposes and then enter or upload all employee records into the database. After entering employee records, enable the history and turnover system options, and then initialize history and turnover tracking. This option allows you to verify your employee records before creating initial history records. This process is preferable if you want to avoid adding and then deleting incorrect history records from the History table. The system creates history records beginning with the date that you set in the Effective Date processing option for the Initialize Employee History and Turnover program (R050810).

See Also

Chapter 4, "Setting Up System Options," page 17

Chapter 27, "Adding Employee Records One at a Time," page 205

Choosing Data for History Tracking Purposes

This section provides an overview of data selection for history tracking purposes and discusses how to choose data for history tracking.

Understanding Data Selection for History Tracking Purposes

You choose the data items for which you want to track history before you initialize history and turnover tracking. Limiting the data items for which you track history makes it easier to locate information when you review history records. For example, you might choose to track history for data items such as Employment Status, Salary, and Pay Status; but not for items that rarely change, such as Gender and Tax ID.

If you do not choose data for history tracking purposes before you initialize, the system automatically tracks history for every item in the Employee Master Information table (F060116).

After initializing, you can deactivate certain Employee Master Information table data items if you do not want to track certain history items anymore.

Forms Used to Choose Data for History Tracking Purposes

Form Name	Form ID	Navigation	Usage
Work With History Data Items	W08041F	Employee History Setup (G05BH4), Select Data Items for History Tracking	Choose data for history tracking purposes.

Choosing Data for History Tracking Purposes

Access the Work With History Data Items form.

Data Item Enter a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

Y N Enter the code in this field indicates whether the adjoining piece of information should be tracked for Human Resources history purposes. Values are:

Y: Yes, track this piece of information.

N or blank: No, do not track this piece of information.

The program automatically puts a *Y* in this field for Address Number (data item AN8) because the address number must be tracked with history.

Note. If the code is changed from *N* to *Y,* history tracking begins at that point in time. Previous information cannot be retrieved.

Initializing History and Turnover Tracking

This section provides an overview of history and turnover tracking initialization, list prerequisites, and discusses how to:

- Initialize history and turnover tracking.
- Set processing options for Initialize Employee History and Turnover (R050810).

Understanding History and Turnover Tracking Initialization

After choosing data for history tracking, you initialize history and turnover tracking (R050810). The system activates history tracking for your chosen fields on the Employee Master Information table (F060116). You can review which fields are in the Employee Master Information table when you choose data for history tracking purposes.

If you set up your system options for history and turnover tracking before you begin entering employee records, you do not need to initialize history and turnover tracking. In this case, the system automatically creates history and turnover records when you add new employee records.

You need to run this program only if you begin using the history and turnover features after you have been using the system for a while. You can use these initial history and turnover records to determine when you began tracking history and turnover. After initializing, the system continues to create history and turnover records each time you change employee information fields that update the Employee Master Information table.

Prerequisite

Add all employee records to your system.

See Chapter 27, “Adding Employee Records One at a Time,” page 205.

Initializing History and Turnover Tracking

Select Employee History Setup (G05BH4), Initialize History & Turnover.

Setting Processing Options for Initialize Employee History and Turnover (R050810)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Initialize

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1) Enter a date to be used as the Effective Date for all history records. Blank will default the date when each employee record was last changed.

Effective Date:

Use this processing option to specify a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

2) Choose what files to initialize given these choices:

Use this processing option to specify the files that the system initializes. Values are:

H: Initialize History file only (default).

T: Initialize Turnover file only.

B: Initialize both History and Turnover files.

3) To clear records from the indicated file(s) before initialization, enter one of these values:

Use this processing option to specify which files are cleared before initialization. Values are:

1: Clear the entire selected file(s).

2: Clear History/Turnover records for the selected employees only.

Blank: Do not clear records. (Default)

4) Enter a change reason for initial turnover and history records. A blank will default a change reason of '001'.

Use this processing option to specify the reason for one of these:

- Changing an active employee record.
- Terminating an employee.
- Recommending a change in salary or rate.

This is a user defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

What You Should Know About Processing Options

This table describes processing options:

Item	Description
Effective dates (1)	PeopleSoft recommends that you enter an effective date for this processing option. The effective date should be a day prior to the date of your first date for reporting turnover. The system considers employees active as of the initialize effective date.
Change reason (4)	Enter a numeric change-reason code for this processing option.

CHAPTER 7

Setting Up Job Information

You can set up job-classification constants to maintain various classifications of jobs related to job type, job step, union, and business unit. For payroll, you can identify combinations of job types and job steps that you want to print on the Certified Payroll Register report (R07371) to meet taxing authority regulations.

This chapter lists prerequisites and discusses how to:

- Set up a cross-reference table by business unit.
- Set up job classification constants.
- Set up union local and job cross-references.

Prerequisites

Before you complete the tasks in this section:

- Set up the user defined codes for jobs.

  See Chapter 13, "Understanding User Defined Information Setup," Understanding User Defined Codes for Human Capital Management Systems, page 105.

- Review the pay range and step information that you have set up in your system options.

  See Chapter 4, "Setting Up System Options," page 17.

Setting Up Cross-Reference Tables by Business Unit

This section provides an overview of cross-reference table by business unit setup and discusses how to set up cross-reference tables by business unit.

Understanding Cross-Reference Tables by Business Unit Setup

When you define a job, you can enter a benefit group, union code, and workers compensation information for it. Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee who is assigned to the job. You can override this default job information for individual employees, if necessary.

In some cases, you might need to override default job information for all of the employees who work in a specific business unit. In this case, you can set up a cross-reference table for the job ID and business unit. For example, assume this scenario:

- Your organization has 5000 machinists.
- Of those machinists, 4,500 work in business unit 5, union 1000, and benefit group 100.
- The remaining 500 machinists work in business unit 6, union 1100, and benefit group 200.

To streamline the process of entering job information for employees, you can enter union *1000* and benefit group *100* when you define the job machinist, and then set up a cross-reference table for the machinists in business unit 6.

The system uses the information in the cross-reference table to automatically update the records for the employees in that business unit with the correct union, benefit group, and workers compensation information.

Form Used to Set Up Cross-Reference Tables by Business Unit

Form Name	Form ID	Navigation	Usage
Business Unit/Job ID Cross Reference	W08005A	Job Specifications Setup (G05BJ4), Business Unit-Job ID Cross Reference	Set up cross-reference tables by business unit

Setting Up Cross-Reference Tables by Business Unit

Access the Business Unit/Job ID Cross Reference form.

Benefit Group Enter the benefit group (user defined code 06/BG) to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.

WCI Code Enter a user defined code (00/W) that represents a workers' compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers' compensation insurance reports.

S C Enter a user defined code (07/WH) that specifies any special circumstances associated with the workers compensation insurance (WCI) code, resulting in multiple rates for the same WCI code due to location or risk, for example. The subclass should remain blank if multiple rates do not exist. Default codes are:

Blank: There are no special circumstances associated with this code.

F: There are special circumstances associated with this code.

Setting Up Job Classification Constants

You set up job-classification constants to maintain various classifications of jobs, related to job type, job step, union, and business unit.

Forms Used to Set Up Job Classification Constants

Form Name	Form ID	Navigation	Usage
Job Classification Constant Revisions	W05923D	Job Specifications Setup (G05BJ4), Job Classification Table Revisions Click Add on the Work With Job Classification Constant form.	Set up job classification constants.

Setting Up Job Classification Constants

Access the Job Classification Constant Revisions form.

Business Unit Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Alt.Job Type Enter a user defined code (06/ G) that identifies a job classification that will replace the job type code on certain reports. A value here replaces the code in the Job Type field.

Alt.Job Step Enter a user defined code (06/ GS) that identifies a step within the job classification that will replace the job step code on certain reports. A value here replaces the code in the Job Step field.

Hourly Rate Lower Enter the minimum hourly rate that an employee can be paid.

Hourly Rate Upper Enter the maximum hourly rate that an employee can be paid.

EEO Job Enter a user defined code (06/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by the PeopleSoft EnterpriseOne system. You can add codes if needed.

Rpt. Cls. Enter a user defined code (07/RU) that identifies the type of information an employee with the specified job type and job step can access. Codes are:

N: Employees at the job type/job step do not have access to any information for reporting purposes. This is the default.

H: Employees at this job type/job step have access to all hours amounts related to those job type/job step codes which have a lower classification than the employee's classification.

D: Employees at this job type/job step have access to all dollar amounts related to those job type/job step codes which have a lower classification than the employee's classification.

Y: Employees at this job type/job step have access to all information related to those job type/job step codes which have a lower classification than the employee's classification.

Cert Flg. Enter a user defined code (07/CF) that specifies the type of information to be printed on the Certified Payroll Register for the Job Type and Job Step. The codes are:

N: Do not print any information related to this Job Type/Job Step on the Certified Payroll Register.

Y: Print all information related to this Job Type/Job Step on the Certified Payroll Register.

H: Print Hours Only for this Job Type/Job Step on the Certified Payroll Register.

Setting Up Union Local and Job Cross-References

This section provides an overview of union local and job cross-references setup, lists prerequisites, and discusses how to set up union local and job cross-references.

Understanding Union Local and Job Cross-References Setup

You set up union local and job cross-references to cross-reference parent unions with local unions. You use these tables when a parent union has members working for a local union and those members must be paid the local union's wage rate and receive the corresponding benefits. By cross-referencing one union's (local or parent) job to another union, you ensure that the system uses the correct rates and benefits to calculate payroll.

The cross-reference tables are specific to business units and jobs and provide for the retrieval of hourly rates and group DBAs. If you define these tables, you do not have to change an employee's union information during time entry. The system substitutes the employee's union and obtains the related local union.

You can also set up cross-references between local units of the union.

Prerequisites

Before you complete the tasks in this section:

- Define both the parent and local unions in the system.

  See Chapter 13, "Understanding User Defined Information Setup," User Defined Codes for Human Capital Management Foundation, page 106.

- Define the pay rates and group DBAs for the local union that has the job.

  See *PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook*, "Setting Up Pay Information," Setting Up Pay Rate Tables; Chapter 8, "Setting Up Earnings Information," page 55 and Chapter 18, "Setting Up Deductions, Benefits, and Accruals ," Setting Up Group Plan DBAs , page 149.

Forms Used to Set Up Union Local and Job Cross-References

Form Name	Form ID	Navigation	Usage
Union Local Cross Reference Maintenance Revisions	W059301AB	Rate Derivation Setup (G05BRD4), Union Local Job/X-Ref Click Add on the Work With Union Local Cross Reference Maintenance form.	Set up union local and job cross-references.

Setting Up Union Local and Job Cross-References

Access the Union Local Cross Reference Maintenance Revisions form.

Union Local Enter a user defined code (06/U2) that represents a local unit of a union.

Job Typ Enter a user defined value (06/G) that associates pay and benefit information with a job type when you define jobs on Job Entry and Evaluation (P08001). Certain pay and benefit information that you associate with a job type defaults in the Employee Entry forms when you are adding a new employee to the database.

CHAPTER 8

Setting Up Earnings Information

This chapter provides an overview of earnings information setup and discusses how to:

- Set up shift-rate differentials.
- Set up occupational pay rates.
- Set up pay type cross-reference tables.
- Run the Synchronize Employee Master Rates with Union Rates report.

Understanding Earnings Information Setup

You set up earnings information to define the types of pay that your employees receive. Earnings information consists of these rates and tables:

Item	Description
Shift rate differentials	You set up shift rate differentials to add a flat dollar or percentage amount to an employee's hourly rate when the employee works a shift that receives an additional amount of pay per hour.
Occupational pay rates	You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type.
Pay type cross-reference tables	You set up pay type cross-reference tables to indicate valid pay types by job type and job step.

Setting Up Shift-Rate Differentials

This section provides an overview of shift-rate differentials setup and discusses how to set up shift-rate differentials.

Understanding Shift-Rate Differentials Setup

A shift rate differential is a flat dollar or percentage amount added to an employee's hourly rate. You set up shift rate differential codes to assign them to employees who receive additional compensation for shift work.

You assign shift differentials to user defined shift codes (06/SH). You can also assign business units and union codes to shift differentials. When you define a shift differential, you must set effective dates for the table. The system compares the effective dates to the work dates you that enter in time entry.

A shift rate differential can be either a flat dollar amount or a percentage of the employee's hourly rate. The system uses a flat dollar amount or a percentage shift differential with one of these methods:

- The first method is hourly rate plus the shift differential, multiplied by the pay type multiplier and then multiplied by the hours worked.
- The second method is hourly rate multiplied by the pay type multiplier plus the shift differential and then multiplied by the hours worked.

The difference between the two methods is significant only when a multiplier other than 1 is entered.

These methods are associated with the shift code that you set up. You also associate these methods with pay types when you set up pay types. To have the system use the shift differential method associated with the pay type when you enter a timecard, you must set up shift codes and leave the shift differential method blank. When a shift code is entered on a time entry form, the system uses the shift differential method associated with the pay type from the Payroll Transaction Constants table (F069116) if it finds a blank shift differential method in the Shift Differential Table (F069246). The system also uses the shift differential method associated with the pay type when you don't enter a shift code.

Use shift code information to ensure that an employee is paid the correct amount for working on a shift with a rate differential. Use these guidelines for using shift code information:

- If an employee always works a shift for which a shift rate differential is applicable, include the shift code in the Employee Master Information table (F060116).
- If an employee occasionally works a different shift, you can override the information on the applicable time card.

See Also

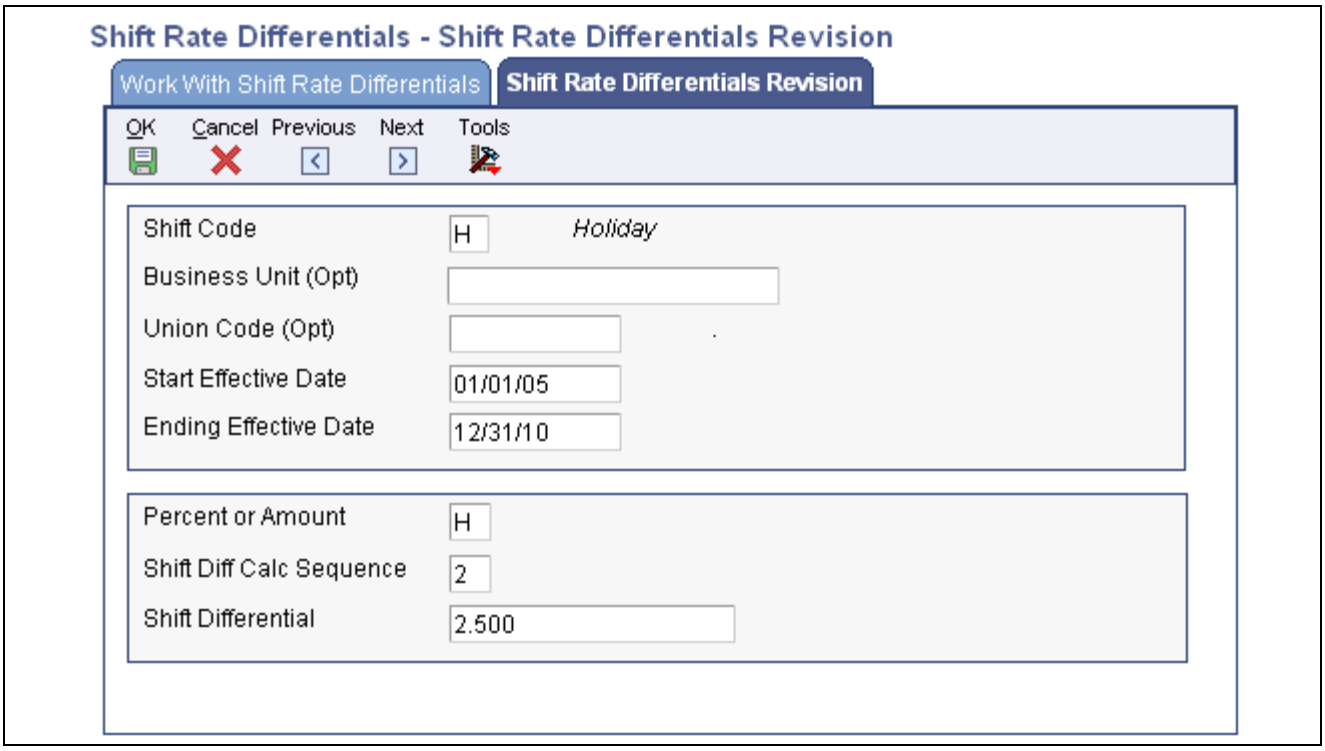
- Entering Timecards for Employees in the Time and Labor Guide
- Entering Timecards for Employees Using Speed Time Entry in the Time and Labor Guide

Form Used to Set Up Shift-Rate Differentials

Form Name	Form ID	Navigation	Usage
Shift Rate Differentials Revision	W059241C	Rate Derivation Setup (G05BRD4), Shift Rate Differentials Click Add on the Work With Shift Rate Differentials form.	Set up shift-rate differentials.

Setting Up Shift-Rate Differentials

Access the Shift Rate Differentials Revision form.



Shift Rate Differentials Revision form

Shift Code

Enter a user defined code (00/SH) that identifies daily work shifts.

In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.

For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Start Effective Date

Enter the date on which an address, item, transaction, or table record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Percent or Amount

Enter a code that specifies whether Shift Differential contains an hourly rate or a percentage. Values are:

H: The system adds the amount in Shift Differential to the hourly rate.

%: The amount in Shift Differential is a percentage of the hourly rate that the system adds to the hourly rate.

Shift Diff Calc Sequence Enter a code that specifies how the system calculates shift differential information. Values are:

1: The system applies the pay type multiplier to the shift differential: Gross = (rate + shift differential) x (multiplier) x hours.

2: The system applies the pay type multiplier only to the hourly rate and does not include the shift differential: Gross = (rate x multiplier) + (shift differential) x hours.

Blank The system follows the shift differential method that is associated with the pay type from the Payroll Transaction Constants table (F059116).

The multiplier is the pay rate multiplier from the Payroll Transaction Constants table.

When the pay rate is derived from the Union Rate table, the multiplier is assumed to be 1 as it is built into the table. In this case, all methods produce the same result.

When you enter the Shift Code field on a timecard, the system provides values for the Shift Differential Method and the Shift Differential Amount fields from the Shift Table (F069246). If the shift differential method was set up as blank for the entered shift code, (on Shift Rate Differentials P059241) the system retrieves the shift differential method from the entered pay type in the Pay Type table (F069116), as set up in PDBA Setup P059241.

Shift Differential Enter an additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).

Business Unit (Opt) Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Setting Up Occupational Pay Rates

This section provides an overview of occupational pay rates setup and discusses how to set up occupational pay rates

Understanding Occupational Pay Rates Setup

You set up occupational pay rates for employees who perform various job types and have different hourly rates for each job type. Pay rates are specific to an employee. They can be specific to a business unit and union for that employee.

To revise multiple occupational pay rates, choose a record on Work with Occupational Pay Rates and choose Multiple Pay Rates from the Row menu.

To use the occupational pay rate in time entry, you must enter the associated job type from the Employees Pay Rate File table (F060146) on the timecard.

See Also

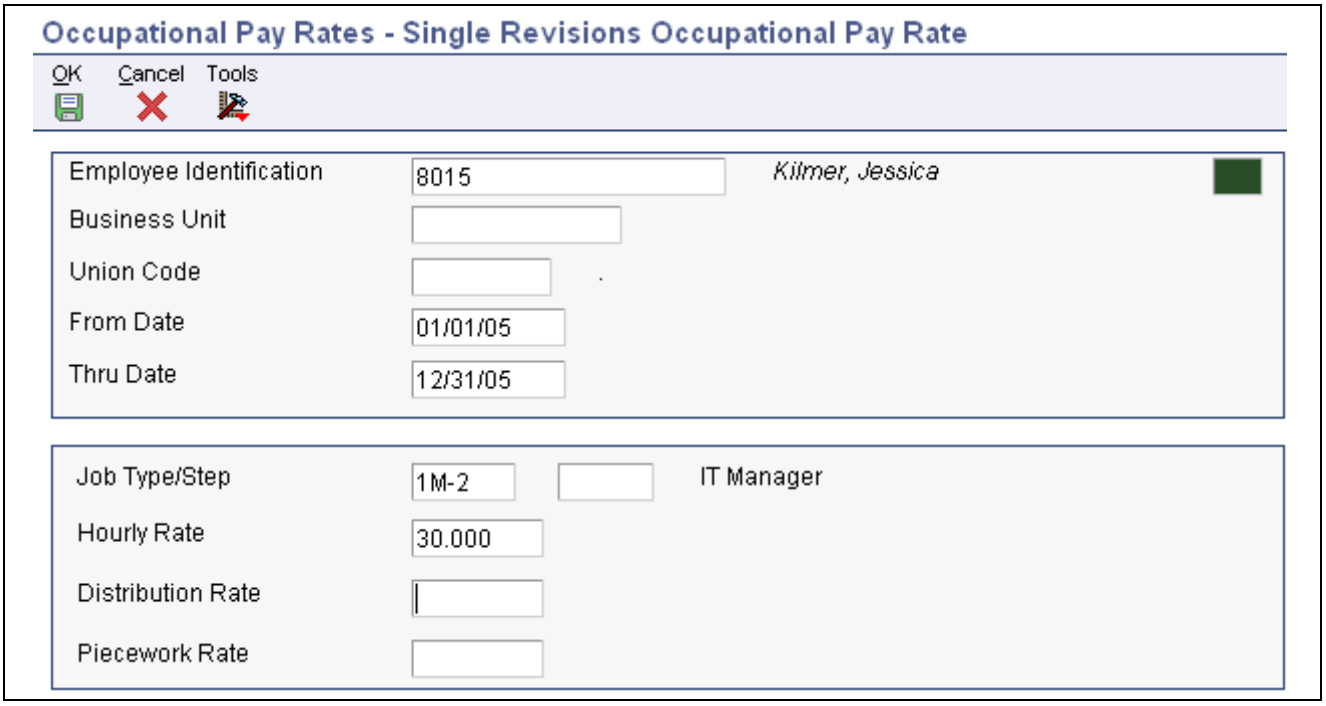
PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook, "Overriding Timecard Information," Overriding an Hourly Rate for an Employee

Form Used to Set Up Occupational Pay Rates

Form Name	Form ID	Navigation	Usage
Single Revisions Occupational Pay Rate	W050231B	Rate Derivation Setup (G05BRD4), Occupational Pay Rates Click Add on the Work with Occupational Pay Rates form.	Set up occupational pay rates.

Setting Up Occupational Pay Rates

Access the Single Revisions Occupational Pay Rate form.



Single Revisions Occupational Pay Rate form

Employee Identification Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

From Date

Enter the date on which an address, item, transaction, or table record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these:

- The date on which a tax rate becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a price becomes effective.
- The date on which a lease becomes effective.
- The date on which a change of address becomes effective.

Thru Date

Enter the date on which the item, transaction, or table becomes inactive, or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.

Hourly Rate

Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.

In the Employee Master table, this number is the employee's base hourly rate.

In the Union Rates table, it is the straight time rate.

Note. If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.

Distribution Rate

Enter a number that specifies the rate that the system uses to bill for labor services. This rate is often referred to as the billing or recharge rate. The system charges the resulting amount, based on this rate, to the primary distribution account for the timecard. The system also enters an offset to an account that is derived from automatic accounting instructions. This rate does not affect employee payroll.

To allow billing rates in time entry, the employee record type must be set to 2 (payroll and recharge processing) or 3 (recharge processing only) with the Employee Payroll program (P0801PRL).

Piecework Rate

Enter the rate paid for the type of component (piece) produced. If you enter a rate in this field, this rate overrides the rate in the Employee Master file.

Setting Up Pay Type Cross-Reference Tables

This section provides an overview of pay type cross-reference table setup and discusses how to set up pay type cross-reference tables.

Understanding Pay Type Cross-Reference Table Setup

You set up pay type cross-reference tables to indicate valid pay types by job type and job step. For example, use these tables to prevent a salaried person from receiving overtime pay or a temporary employee from receiving holiday pay.

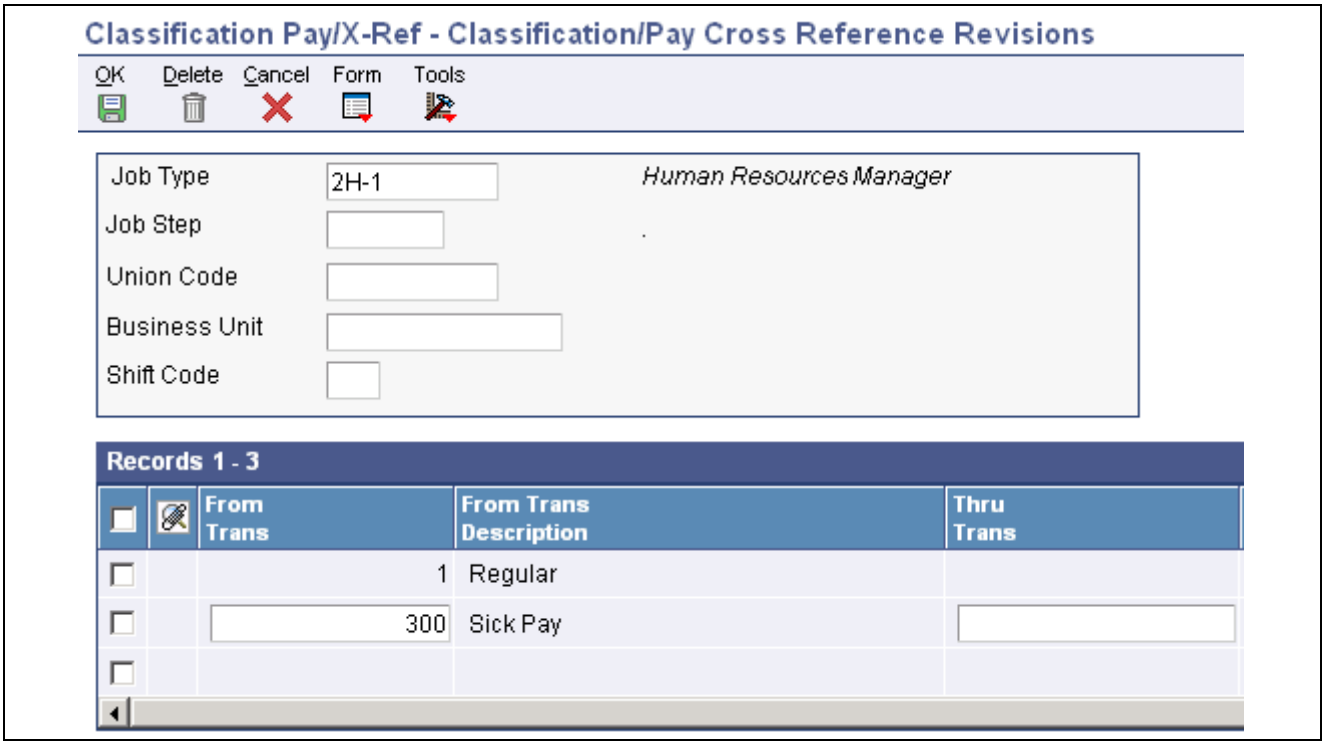
To verify pay types against the pay type cross-reference tables, you must set the appropriate processing options in the time entry programs.

Form Used to Set Up Pay Type Cross-Reference Tables

Form Name	Form ID	Navigation	Usage
Classification/Pay Cross Reference Revisions	W05932C	Rate Derivation Setup (G05BRD4), Classification Pay/X-Ref Click Add on the Work With Classification/Pay Cross Reference form.	Set up pay type cross-reference tables

Setting Up Pay Type Cross-Reference Tables

Access the Classification/Pay Cross Reference Revisions form.



Classification/Pay Cross Reference Revisions form

From Trans Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

Thru Trans Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

Shift Code Enter a user defined code (00/SH) that identifies daily work shifts.

In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.

For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Running the Synchronize Employee Master Rates with Union Rates Report (R059122)

This section provides an overview of the Synchronize Employee Master Rates with Union Rates Report and discusses how to set processing options for Synchronize Employee Master Rates with Union Rates (R059122).

Understanding the Synchronize Employee Master Rates with Union Rates Report

A system administrator can use this program to update the Employee Master Information table (F060116) after the union rates have changed. Processing options can be used to set an effective date for the changes and to limit the update to only those records with a change. You can also set a processing option for the Union Rates Master Revisions program (P059121) that automatically sends a message when changes are entered into the Union Rates File table (F069126). This message might trigger the decision to run the Synchronize Employee Master with Union Rates report (R059122).

Setting Processing Options for Synchronize Employee Master with Union Rates (R059122)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Date

Use this processing option to specify the date that the system uses for retrieving historical information.

1. Effective Date for Rates and History Use this processing option to specify the date that the system uses to look up rates in the Union Rates File table (F069126). The system also uses this date to update employee history records when rates are changed in the Employee Master Information table (F060116).

Employee History

Use this processing option to record the reason that rates are updated.

1. Change Reason for Employee History Use this processing option to specify the change reason code for employee history. When you change a rate in the Employee Master Information table (F060116), the system also uses this code to update employee history information.

Process

Use these processing options to specify the default processes that the system uses.

1. Changes Only or All Rates Use this processing option to specify whether the system processes all records or only rate records that have changed since the last time that the program was run. Values are:

0: The system processes only records in the Union Rates File table (F069126) that have changed since the date of the last update.

1: The system processes all of the rates in the Union Rates File table and updates the Employee Master Information table (F060116).

2. Proof or Final Mode Use this processing option to specify whether the system runs the report in proof mode or final mode. When you specify proof mode, the system displays all changes, but does not update permanent files such as the Employee Master Information table (F060116). When you specify final mode, the system displays the changes and records them in final files. Values are:

0: Proof mode

1: Final mode

3. Full Report or Exceptions Only Use this processing option to specify the type of records that appear on the report. Values are:

0: All employee records appear on the report.

1: Only employee records with errors appear on the report.

CHAPTER 9

Setting Up Tax Information

This chapter provides an overview of tax information setup and discusses how to:

- Set up tax area information.
- Set up corporate tax IDs.
- Set up state common paymaster.
- Activate Quantum for payroll.
- Test the Quantum connection.
- Set up the GeoCoder.
- Run the Update Tax Area Table report.
- Run the Geocoder Employee Batch Processing report.
- Run the Cost Center Tax Area Processing report.
- Run the Populate Vertex Filing Status Process report.

Understanding Tax Information Setup

This section provides an overview of tax information setup and lists prerequisites.

Tax Information Setup

Before you begin processing payroll for employees, you must set up tax information so that employee taxes are calculated properly. Tax amounts and some federal and state insurance amounts are calculated by a third-party software package called Quantum for Payroll Tax. Quantum for Payroll Tax is a product made by Vertex, Inc. that integrates with the EnterpriseOne Payroll system. You should also set up a corporate Tax ID for each taxing authority to which you report tax information.

The EnterpriseOne Payroll system passes information such as the taxing authority, taxable wages, exemptions, and supplemental wages to Quantum for Payroll Tax. For unemployment insurance, you must set up tables that Quantum for Payroll Tax uses to calculate the appropriate taxes.

You can also use the GeoCoder, another product made by Vertex, Inc. that can significantly reduce the effort required to assign tax code information. GeoCoder can automatically generate and assign state, local, municipal, and other codes to employee records for each state that you choose. To use the GeoCoder, you must use Quantum for Payroll Tax to calculate payroll tax information.

Setting up tax area information is not required for any system functions unless you are using the EnterpriseOne Payroll system. However, you might want to set up tax areas so that you can transfer this information to your payroll service provider. When tax areas are set up, the system can also automatically provide the appropriate codes to programs that you use for employee information and hiring such as Employee Master (P0801) and Employee Quick Hire (P060116Q).

You can use the Cost Center Tax Area Processing program (R079052) to automatically provide system level tax area information. You normally use this UBE when you are initially setting up your software, but you might also use it when adding a business unit or changing the address of a business unit. The Business Unit Constants program (P059051A) uses the tax area code that the Cost Center Tax Area Processing program supplies. This program also supports similar changes for Canadian organizations by supplying cost center tax area codes for provinces.

You can use the GeoCoder Employee Batch Processing program (R070103) to update information that you receive monthly from Vertex, Inc. You normally use this program when you initially set up your software, periodically after new employees are hired, and when employee addresses change. This program automatically updates the tax area (residence) and tax area (work) values on the country-specific form that is included in the employee hiring process. This form also supports a similar function for the Canadian hiring process.

Many companies are structured under multiple federal and state tax IDs, and they often operate in many different states. When an employee changes companies within a common paymaster group, EnterpriseOne Payroll can recognize and track their year to date State Unemployment Insurance (SUI) wages from the previous company so that the calculation of the tax is accurate and accumulation towards the annual limit does not start over.

Prerequisites

Before you complete the tasks in this section:

- Set up statutory codes in UDC 06/SC.

  See Chapter 13, “Understanding User Defined Information Setup,” Understanding User Defined Codes for Human Capital Management Systems, page 105.

- Review the information about tax area codes in the global solutions guide for your country.
- Install Quantum for Payroll Tax.
- Activate the Quantum interface and test the Quantum connection.

  See Chapter 9, “Setting Up Tax Information,” Activating Quantum for Payroll, page 76 and Chapter 9, “Setting Up Tax Information,” Testing the Quantum Connection, page 78.

- Activate the GeoCoder.

  See Chapter 9, “Setting Up Tax Information,” Setting Up the GeoCoder, page 78.

Setting Up Tax Area Information

This section provides an overview of tax area information setup and discusses how to set up tax area information.

Understanding Tax Area Information Setup

Before using the EnterpriseOne Payroll system to process a payroll, you must set up tax area information. If you are using the EnterpriseOne Payroll system without Quantum for Payroll Tax, you use the Tax Area Information program (P069012) to set up tax areas for these uses:

- Provide essential key information that the system uses for payroll history tracking.
- Store tax information that can be passed to a payroll service provider.
- Store statutory code information that the system can print on forms, such as paychecks and payroll advice forms.

If you use Quantum for Payroll Tax and the GeoCoder software from Vertex, Inc., you do not need to use the Tax Area Information program. When you set up tax area codes with the GeoCoder, the system automatically adds all required codes to F069016.

To control whether the system requires tax area information when you enter employee records, you can set a processing option for the Employee Master (P0801) and the Employee Quick Hire (P060116Q) programs. You set up tax areas for the locations where employees live and work, and for the taxes that need to be withheld.

If you use Quantum for Payroll Tax the Quantum software performs the calculations, based on the information that you set up. Quantum for Payroll Tax calculates the employee-paid amounts even if you do not set up the tax area information.

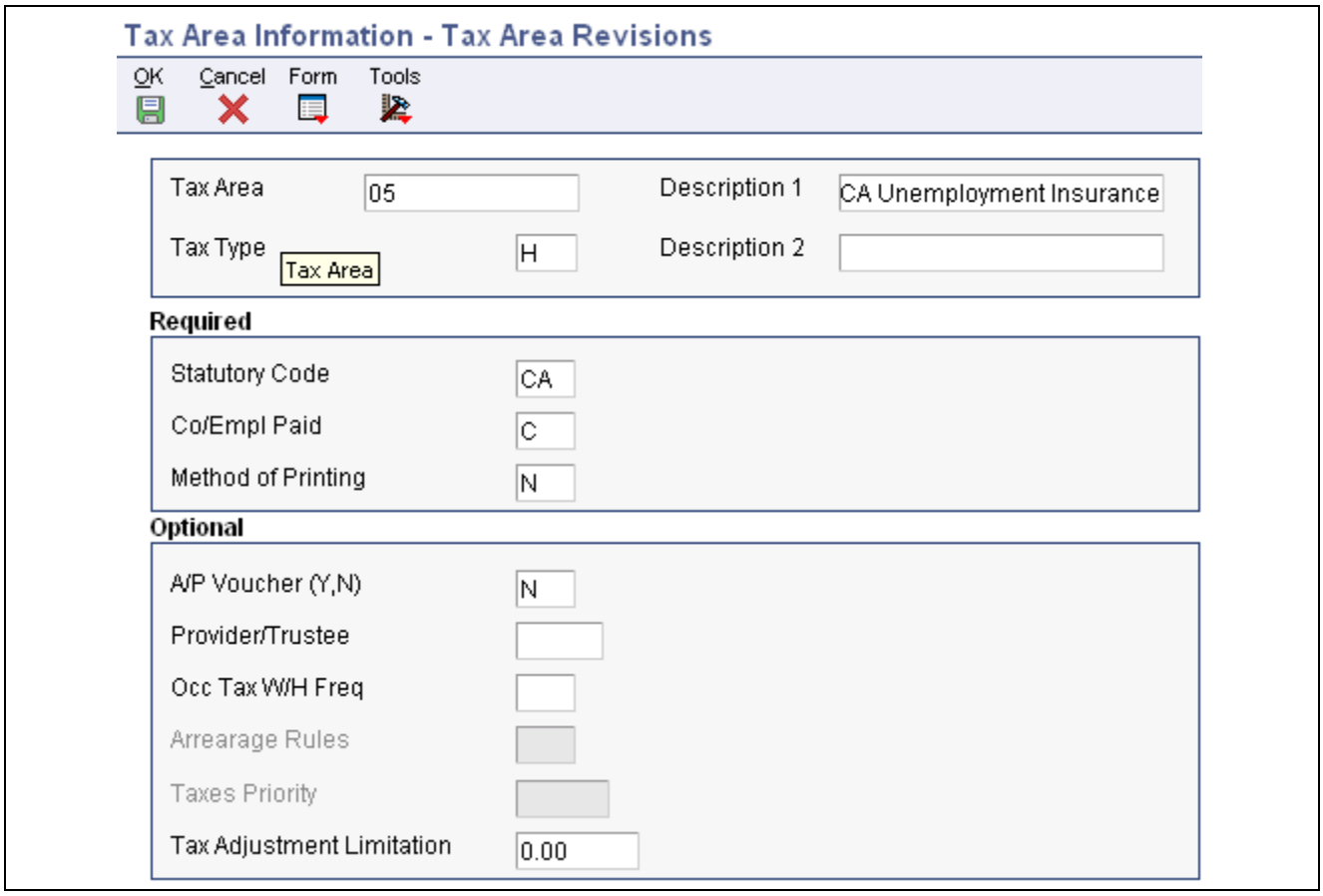
After you set up tax area information, you need to update F069016. If you are using Quantum for Payroll Tax, run the Update Tax Area Table program (R07500) after you set up the GeoCoder.

Form Used to Set Up Tax Area Information

Form Name	Form ID	Navigation	Usage
Tax Area Revisions	W069012C	Taxes and Insurance Setup (G07BPTI4), Tax Area Information	Access the Work With Tax Area Information form.
Tax Area Revisions	W069012B	Click Add on the Work With Tax Area Information form.	Set up tax area information.

Setting Up Tax Area Information

Access the Tax Area Revisions form.



Tax Area Revisions form

Tax Area Enter a code that identifies a geographical location and the tax authorities for an employee work site, including employee and employer statutory requirements. In the Vertex payroll tax calculation software, the tax area code is synonymous with GeoCode. To determine the values for your location, refer to the documentation for the tax calculation software that you are using.

Tax Type Enter a code that specifies the type of payroll tax being processed. This is a user defined code (07/TX). To set up state minimum wage amounts, you must enter *MW* in this field. To do so, you must first add MW to UDC 07/TX. However, you should not change the codes and definitions that PeopleSoft provides with the software.

Description 1 Enter a description for the data items. Enter text in upper and lower case. The system uses this name to search for similar data items. To enter an alpha description, follow these conventions:

- Dates: Begin all date fields with the word *Date*.
- Amounts: Begin all amount fields with the word *Amount*.
- Units: Begin all unit, quantity, and volume fields with the word *Units*.
- Name: Begin all 30-byte description fields with the word *Name*.
- Prompt: Begin any Y/N prompting field with the word *Prompt*.
- Address Number: Begin all address numbers (employee, customer, owner) with the words *Address Number*.

If you are entering state or provincial taxes, it is recommended that you start begin descriptions with the two-letter state or province abbreviation.

This naming convention provides you with an easier search because the system groups all taxes with the same abbreviation together.

Co/Empl Paid

Enter a code that specifies whether the payroll tax associated with the tax authority is paid by the company, as an expense, or by the employee, as a deduction (withholding). Values are:

C: Company Paid

E: Employee withheld

Method of Printing

Enter a code that identifies whether the PDBA is to be printed on the pay stub or whether it is to be printed on a payment that is separate from other PDBAs.

Values for pay types and payroll taxes include:

Y: Print on pay stub (default).

S: Print separate payment (one item per payment).

C: Print separate payment (C types combined).

N: Do not print on pay stub.

Values for DBAs include:

Y: Print as total deductions (default).

S: Print separate payment (one item per payment).

C: Print separate payment (include detail).

N: Do not print on pay stub.

I: Print individual DBA codes.

T: Print by DBA print group.

The separate payment feature is not available for any payroll taxes being withheld from the employee's payment.

Statutory Code

Enter a code that specifies the two-character or three-character state or province code that prints on statutory reports such as W-2s and T4s.

For example, on W-2s and T4s, instead of printing 06 which might be the taxing authority for the state of Colorado, the system prints the statutory code CO.

Enter in an alpha code from UDC table 07/SC.

A/P Voucher (Y,N)

Enter a code to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Values are:

N: No, do not generate a voucher.

Y: Yes, generate a voucher.

Complete this field if you are integrating Payroll with Accounts Payable and you need to activate vouchering for this tax type.

Provider/Trustee

Enter the address book number for the supplier who receives the final payment.

In PeopleSoft Benefits Administration, this is the address book number of the company that issues the plan and receives premium payments for it.

For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.

Occ Tax W/H Freq Enter a code that designates if the occupational head tax is to be withheld monthly (M), quarterly (Q), or annually (A).

Arrearage Rules (Future use) Enter a code to indicate the method the system uses to back off payroll taxes when the employee is in a negative pay situation. Values are:

P: The tax can be reduced as much as needed, either partially (to the stated limit) or in full.

N: The tax can not be reduced.

Q: The tax can be reduced as much as needed, and the amount is placed in arrears.

When left blank the system enters the default value P.

Taxes Priority (Future use) Enter a code that specifies the order in which the system should back out (reverse) the deduction of the payroll taxes when an employee's gross pay does not cover payroll taxes.

Values are 0001 through 9999. The system starts with the highest code.

For example, the system backs out 9999 before 0001.

Tax Adjustment Limitation Enter the maximum amount of payroll tax that the system backs out of net pay to meet the 'Minimum Check' requirements.

Note. If you are setting up tax area information to record state minimum wage rates, enter the minimum wage rate in this field.

See Also

Chapter 9, "Setting Up Tax Information," Setting Up the GeoCoder, page 78

Chapter 9, "Setting Up Tax Information," Running the Update Tax Area Table Report, page 80

PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook, "Integrating Accounts Payable"

Setting Up Corporate Tax IDs

You must set up a corporate tax ID for each taxing authority to which you report. You set up corporate tax ID codes for each company so that the system can store employee tax history for reporting purposes.

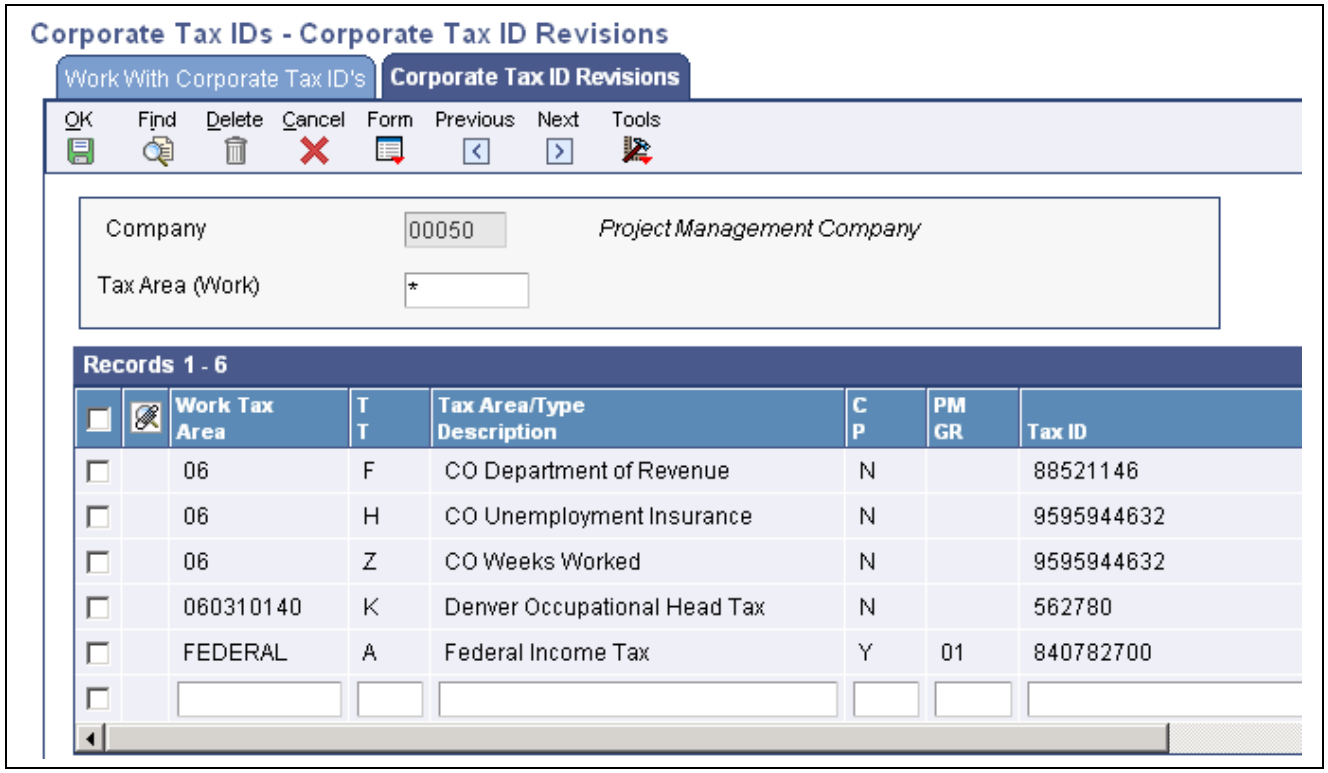
This section discusses how to set up corporate tax IDs.

Forms Used to Set Up Corporate Tax IDs

Form Name	Form ID	Navigation	Usage
Work With Corporate Tax ID's	W059081AA	Taxes and Insurance Setup (G07BPTI4), Corporate Tax IDs	Access the Work With Corporate Tax ID's form.
Corporate Tax ID Revisions	W059081AB	Click Add on the Work With Corporate Tax ID's form.	Set up corporate tax IDs.

Setting Up Corporate Tax IDs

Access the Corporate Tax ID Revisions form.



Corporate Tax ID Revisions form

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in F0010 and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.

Note. You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Work Tax Area Enter a value that specifies the tax area in which an employee works. If you are using PeopleSoft Time Accounting without either the PeopleSoft Payroll or Human Resources systems, the system does not calculate taxes. However, you must enter a value in this field before you can exit the form. You use the

Tax Area Information form on the Additional Constants and Tables menu to set up a tax area.

T T

Enter a code that specifies the type of payroll tax being processed. This is a user defined code (07/TX). To set up state minimum wage amounts, you must enter *MW* in this field. To do so, you must first add MW to UDC 07/TX. However, you should not change the codes and definitions that PeopleSoft provides with the software.

If you have a line for tax type H, you must have a line for tax type Z with the same tax ID.

For U.S. federal taxes, enter a single line for all federal taxes using tax type A.

Tax ID

Enter a number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on.

This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.

Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

C P

Enter a value that specifies whether the company is part of a paymaster group for purposes of FICA calculation. Values are:

Y: Company is part of a paymaster group. This value enables an employee to have wages in more than one company within the paymaster group, yet be subject to only one annual limitation for the purpose of calculating taxes.

N: Company is not part of a paymaster group. This is the default value.

A *Y* in this field must be accompanied by a code in the PMGR (Paymaster Group Code) field.

PM GR

Enter a code that identifies in which paymaster group the company resides. This code enables the Payroll system to group multiple companies together to check for limitations on unemployment and FICA taxes.

If you specify a common paymaster, you must specify a paymaster group code.

Complete the C P and PM GR fields if you have more than one company that you include under the same federal tax ID.

Parent Co

Enter the address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates F0150) for the blank structure type. This address number must exist in F0101 for validation purposes. Examples of address book records that would have a parent number include:

- Subsidiaries with parent companies.
- Branches with a home office.
- Job sites with a general contractor.

For payroll year-end reporting, to report multiple companies with the same tax ID under one parent company, enter the address number for the parent (reporting) company for all child companies as well as for the parent company.

Setting Up State Common Paymaster

This section provides an overview of state common paymaster and discusses how to set up tax parameters to recognize tax limits for employees who change companies.

Understanding State Common Paymaster

When an employee changes companies within a common paymaster group, companies need to track taxes such as State Unemployment Insurance (SUI) and State Disability Insurance (SDI), which have statutory limits. When companies track these tax accumulations, they can pay only appropriate taxes and avoid extra taxation that can apply if tax accumulation starts over.

Note. Rules vary among states. Some states do not recognize common paymaster, while others implement it using different requirements. Users need to be familiar with these rules for each state in which they do business.

(CAN) A similar feature exists for Canadian users. When an employee changes companies that share Business Identification Numbers (BIN), companies can track taxes and accumulations for EI, CPP, and QPP tax types so that they pay only appropriate taxes and statutory limits do not start over.

(USA) You can set up common paymaster for companies in the United States using either of these approaches:

- Companies share the same tax ID for each allowable tax type.
- Companies with different tax IDs use a paymaster group code (UDC 06/PM).

(USA) To share the same tax ID, enter a common tax ID number for each combination of work tax area and tax type. These entries are required for each state.

(USA) Required tax types for SUI limits are:

- G: State unemployment (employee portion).
- GM: State miscellaneous (employee portion).
- G1: State miscellaneous 1 (employee portion).
- G2: State miscellaneous 2 (employee portion).
- H: state unemployment (employer portion).
- HM: State miscellaneous (employer portion).
- H1: State miscellaneous 1 (employer portion).
- H2: State miscellaneous 2 (employer portion).

(USA) Required tax types for SDI limits are:

- I: State disability (employee portion).
- J: State disability (employer portion).

(USA) To set up Common Paymaster using the CP and PM GR fields, set the CP field (Common Paymaster) to *Y* and the PM GR field (Paymaster Group Code) to the user defined code such as *01* for each work tax area and tax type.

Note. You must also set up a user defined code such as *01* in UDC 06/PM. You use this code to group multiple companies together.

(USA) You can implement a shortcut to set up additional companies. After setting up common paymaster for the first company, you can copy the first company setup and then assign a new company number.

(CAN) You can set up Common Paymaster for Canadian companies using either of these approaches:

- Companies share the same tax ID for each allowable tax type.
- Companies with different tax IDs use a paymaster group code (UDC 06/PM).

(CAN) To share the same tax ID (BIN Number), you need to:

- Enter appropriate settings on the Corporate Tax ID Revisions form.
- Enter an EI Rate Code for each employee on the Canadian Tax Info by EE form that is consistent with the work tax area.

(CAN) To share the same tax ID (BIN Number), set up only tax type CD for each work tax area. You can share a BIN number for up to 10 work tax areas. The system uses only the first nine digits of the BIN number to establish a match for the company and carry wages forward.

(CAN) Set up work tax areas, as needed, using work tax area codes CFEDU01 through CFEDU10.

Note. Although six tax types exist for Canada, you set up only tax type CD.

(CAN) Tax types for CPP limits are:

- CB: Canadian pension plan (employee portion).
- CE: Canadian pension plan (employer portion).

(CAN) Required tax types for EI limits are:

- CC: Canadian employee insurance (employee portion).
- CD: Canadian employee insurance (employer portion).

(CAN) Required tax types for QPP limits are:

- CG: Quebec provincial plan (employee portion).
- CH: Quebec provincial plan (employer portion)

(CAN) To set up common paymaster using the CP and PM GR fields, set the CM field (Common Paymaster) to *Y* and assign the PM GR field (Paymaster Group Code) to a value that you set up in UDC 06/PM such as *01* for each work tax area and tax type.

Note. You must also set up a code of *01* in UDC 06/PM. You use this code to group multiple companies together.

Prerequisite

Ensure that common paymaster is set up at the Federal level before entering settings for the state level.

See Chapter 9, “Setting Up Tax Information,” Setting Up Corporate Tax IDs, page 70.

Forms Used to Set Up State Common Paymaster

Form Name	Form ID	Navigation	Usage
Work With Tax Area Information Corporate Tax IDs	W059081AA	Taxes and Insurance Setup (G07BPTI4), Corporate Tax IDs	Select a company.
Corporate Tax ID Revisions	W059081AB	Select a record for a state.	Enter settings to set up Common Paymaster.
Work With Employee Information	W0801A	Employee Management (G05BE1), Employee Information	Access the Canadian Tax Info by EE form.
Canadian Tax Info by EE	W770105C	(CAN) For Canadian users, select an employee and then select Tax Overrides from the Row menu.	(CAN) Enter a value for EI Rate Code that is consistent with the employee Work Tax Area.

(USA) Set Up State Common Paymaster for the United States

Access the Corporate Tax ID Revisions form.

CP Enter a value that specifies whether the company is part of a paymaster group for purposes of FICA calculation. Values are:

Y: Company is part of a paymaster group. This enables an employee to have wages in more than one company within the paymaster group, yet be subject to only one annual limitation for the purpose of calculating taxes.

N: Company is not part of a paymaster group. This is the default value.

A *Y* in this field must be accompanied by a code in the PM GR (Paymaster Group Code) field.

PM GR Enter a code that identifies which paymaster group the company resides. This code enables the Payroll system to group multiple companies together to check for limitations on unemployment and FICA taxes.

If you specify a common paymaster, you must specify a paymaster group code.

Complete the C P and PM GR fields if you have more than one company that you include under the same federal tax ID.

(CAN) Set Up Common Paymaster for Canada

Access the Corporate Tax ID Revisions form.

EI Rate Code Enter a code that allows you to override supplemental taxes for federal and state taxes and to add additional local residence taxes. Values are:

F: Override the federal supplemental tax for this employee.

S: Override the state supplemental tax for this employee.

R: Add additional local residence tax.

When you override supplemental taxes, you must leave the Tax Area and Tax Type fields blank.

The statutory code that corresponds to the employer-paid EI rate that is to be used for this employee. For example, you might use U01 if the employee is eligible for a sick leave plan and is subject to a reduced employer-paid EI rate.

Activating Quantum for Payroll

You must activate the Quantum interface prior to using the Quantum system with your software. Because constants settings are loaded during software initialization, you must exit and restart your software for the constants settings to take effect.

This section lists prerequisites and discusses how to activate Quantum for payroll tax.

Prerequisite

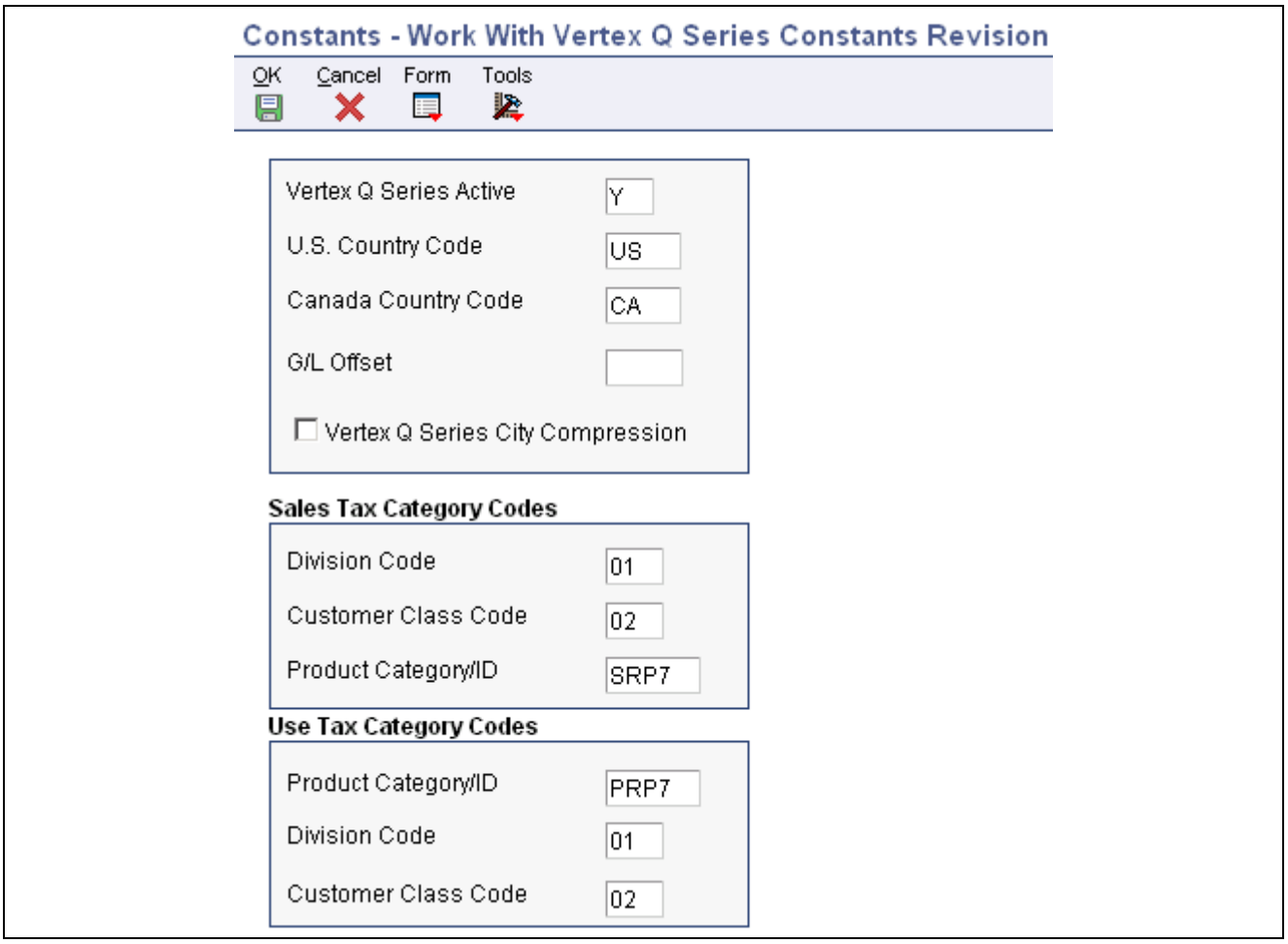
You must set up database connections to establish communication with the Quantum system and perform data exchange with the Quantum for Payroll Tax tables.

Form Used to Activate Quantum for Payroll

Form Name	Form ID	Navigation	Usage
Work With Quantum Constants Revision	W7306B	Vertex Quantum Sales and Use Tax (G731), Constants	Activating Quantum for payroll.

Activating Quantum for Payroll

Access the Work With Quantum Constants Revision form.



Work With Quantum Constants Revision form

Quantum Active Enter a value that specifies whether the system uses the Vertex Tax Compliance system for tax calculations.

Y: Use Vertex system to calculate taxes.

N: Do not use Vertex system to calculate taxes. Instead, use PeopleSoft EnterpriseOne tax calculations.

This field is the only required field to activate Quantum for Payroll Tax.

U.S. Country Code Enter the code used to indicate to the Vertex Sales and Use Tax system that you choose to represent the United States.

Required only for testing the Quantum connection.

Canada Country Code Enter the code used to specify Canada to the Vertex Sales and Use Tax System.

Required only for testing the Quantum connection.

Note. The remaining fields on this form are not required with Quantum for Payroll Tax, but they might be required when activating Quantum for Sales and Use Tax.

Testing the Quantum Connection

After you activate Quantum, we recommend that you conduct a test to determine whether you have successfully connected to the Quantum system. This test requires that you enter a city, state, and postal code on the Retrieve GeoCode form and observe whether the system returns a GeoCode. If you receive a code, then the connection is working.

This section discusses how to test the Quantum connection.

Form Used to Testing the Quantum Connection

Form Name	Form ID	Navigation	Usage
Retrieve GeoCode	W73GEOA	Enter P05005 in the Fast Path.	Test the Quantum connection.

Testing the Quantum Connection

Access the Retrieve GeoCode form.

To test the Quantum connection: :

1. On the Retrieve GeoCode form, enter *CO* and *DENVER* in the State and City fields respectively.

   The state code is a user defined code (00/S) that specifies the state or province. This code is usually a postal service abbreviation.

   If you are properly connected to the Quantum system, 060310140 appears in the GeoCode column.

2. If nothing appears in the GeoCode column, a setup or configuration error might have occurred.

   Verify these values:

   - On the Work with Quantum Constants Revision form, the Quantum Active field is set to *Y,* and the Canada Country Code field is set to *CA*.
   - You have initialized the constants values by exiting and restarting your software.
   - The Data Source, Server, User ID, and Password are set up properly in the Quantum Database Connection table (F7308).
   - All of the required business functions are mapped to the server where the Quantum software is located.
   - A Connect Successfully (or Not Connect Successfully) message exists in the jde.log file.

See Also

EnterpriseOne Tools 8.94 PeopleBook:Configurable Network Computing Implementation

ERP/SCM 9.0 Installation iSeries Guide

Setting Up the GeoCoder

This section provides an overview of GeoCoder setup, lists prerequisites, and discusses how to set up the GeoCoder.

Understanding GeoCoder Setup

Use the Quantum GeoCoder to automatically assign geocodes, or tax areas, to employees and business units, based on the address information in the employee record or the business unit record. The system uses these codes to determine appropriate tax information for each employee. When you create an employee record, if only one geocode is appropriate for an address, the system automatically assigns the geocode to the record. If multiple geocodes can be used for a specified address, the system displays a list of possible geocodes from which to select.

You can use a Vertex compression capability with the GeoCoder to improve the ability of the system to recognize many city names that contain abbreviated words and phonetic misspellings. This feature is activated in the Quantum Sales and Use Tax Constants program (P7306).

When you set up GeoCoder, you can choose individual states where your employees live and work; or you can choose all states. To limit the size of F07500 and processing time, you might select only the states in which your employees live and work.

The GeoCoder database stores tax rates and other pertinent jurisdictional tax data for all U.S. and Canadian tax authorities, which include over 66,000 locations. Tax jurisdictions are identified in Quantum for Payroll Tax by a GeoCode. All states and counties are on file, as well as all cities with populations over 250. If a city has a population under 250 and levies a tax, that city is also included in the database. Vertex, Inc. compiles the data that makes up the GeoCode, using state, city, zip code, and county, and maintains the tax rates that are associated with each.

To use GeoCoder, you must use Quantum for Payroll Taxes to calculate payroll tax information. Additionally, you must activate the Quantum system and set up the appropriate database connections. To activate the Quantum system, you can use the Common Settings for HR Employee Self Service Program (P05004) to activate system control data item HRGEO. This data item activates the GeoCoder in all PeopleSoft Human Capital Management applications. If HRGEO is not already present in the program, you must add it.

When you use GeoCoder to generate tax area codes, the system saves the information in tables that are used by the EnterpriseOne Payroll system. A version of GeoCoder is also available that you can use to generate tax area codes that are used by the EnterpriseOne systems and Quantum for Sales and Tax Use.

Prerequisite

Activate the Quantum system with data item HRGEO.

See Chapter 4, “Setting Up System Options,” Setting Up Common Settings for Human Capital Management, page 34.

Form Used to Set Up the GeoCoder

Form Name	Form ID	Navigation	Usage
GeoCoder Report Setup	W07500A	Taxes and Insurance Setup (G07BPTI4), Tax Area Table Setup	Set up the GeoCoder.

Setting Up the GeoCoder

Access the GeoCoder Report Setup form.

Show Selected Enter a value that specifies whether the record has been selected to be run as part of the New Hire report setup.

1: This record has been selected.

0: This record has not been selected.

Show All Enter a value that specifies whether the record has been selected to be run as part of the New Hire report setup.

1: This record has been selected.

0: This record has not been selected.

Select All Enter an option that selects all tax areas, which enables you to update each tax area record in F069016 when you process the Update Tax Area Table program (R07500).

See Also

Chapter 3, "Setting Up General System Controls," page 13

Interface for Vertex Quantum for Sales and Use Tax Guide

Interface for Vertex Quantum for Sales and Use Tax Guide

Running the Update Tax Area Table Report

This section provides an overview of the Update Tax Area Table report and discusses how to:

- Run the Update Tax Area Table report.
- Set processing options for Update Tax Area Table.

Understanding the Update Tax Area Table Report

Periodically, tax area information changes. For employee payroll taxes to calculate correctly, you must verify that the correct tax area information for each state or province in which your organization conducts business is set up correctly in your system.

Vertex, Inc. periodically provides updates to ensure the accuracy of your organization's payroll calculations. You can automatically update the tax area information that is stored in F069016 with the tax information that is included in the updates that you receive from Vertex, Inc.

To update tax information automatically, you must first use the GeoCoder Report Setup program (P07500) to specify each state or province for which you want to update tax information. If your organization is large, you might select all states and provinces to ensure that your information is complete. After you specify the states and provinces that you want to update, you need to run the Update Tax Area Table program (R07500). You should run this program each time you receive an update from Vertex, Inc.

When you run the Update Tax Area Table program, you normally use the default program version. The default program version is set up to automatically update the Payroll Tax Area Profile table using the default settings. The report that the Update Tax Area Table program creates lists the state names that you specified, the tax area code and the number of new geocodes that the system generated for each state. You can set a processing option to specify to update existing records with county information that is linked to the geocodes or to save county information only for new records.

Running the Update Tax Area Table Report

Select Taxes and Insurance Setup (G07BPTI4), Update Tax Area Table.

Setting Processing Options for Update Tax Area Table (R07500)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

Use this processing option to specify parameters for information that this program saves in the Payroll Tax Area Profile table (F069016).

1. Update Current F069016 Records? Use this processing option to specify whether to save county information for all tax records or only for new tax records. The system saves the name of the county that is linked with the tax geocode in the second description for tax records of F069016. If you update existing records, the system removes current information from the second description of all Canadian and United States taxes and replaces it with the county name. If you do not update existing tax records, the system saves county information only for new records. Values are:

Blank or *0:* Do not update existing tax records.

1: Update existing tax records.

Running the GeoCoder Employee Batch Processing Report

This section provides an overview of the GeoCoder Employee Batch Processing report and discusses how to:

- Run the GeoCoder Employee Batch Processing report.
- Set processing options for GeoCoder Employee Batch Processing.

Understanding the GeoCoder Employee Batch Processing Report

Organizations who use the EnterpriseOne Payroll system and Vertex software receive monthly updates that include frequently revised rates, regulations, codes, and other data that need to be incorporated into their system. Included in these updates are code changes for tax areas that affect employee taxes. You can use the GeoCoder Employee Batch Processing program (R070103) to update the tax area information for locations in which employee live and work.

You normally use the GeoCoder Employee Batch Processing program when you initially set up your software, periodically after new employees are hired, and when employee addresses change. This program automatically updates the Tax Area (Residence) and Tax Area (Work) values in the Employee National and Fiscal Data - USA program (P0801US). The Employee National and Fiscal Data - USA program is used in the employee hiring process for the United States. The GeoCoder Employee Batch Processing program also updates tax area information for organizations that do business in Canada.

When you run the GeoCoder Employee Batch Processing program, the system produces a report that displays any errors that might exist. If no errors exist, the report indicates that status.

Running the GeoCoder Employee Batch Processing Report

Select Employee Management menu (G05BE1), Geocoder Employee Batch Processing.

Setting Processing Options for GeoCoder Employee Batch Processing (R070103)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

These processing options specify whether the system updates F060116, the type of employee identification number that the system is using, and whether the system compares existing information to new information that might exist in an update operation.

1. Update Tax Area in Employee Master (Required)

Use this option to determine the processing mode for the GeoCoder Employee Batch Processing program (R070103). You can run this program in proof mode and print a report only, or you can run this program in final mode and produce a report and update the tax areas in the Employee Master table. Values are:

Blank: Proof Mode - Print report only.

1: Final Mode - Print report and update table.

2. Employee Type (Required)

Use this option to indicate which number is used as the employee's identification number. Values are:

Blank or *A:* Address Number (Default.)

S: Social Security Number.

O: Other Third Party Number.

3. Validate Tax Area (Required)

Use this option to determine which tax areas the geocoder automatically assigns, and which fields the program updates in the Employee Master table when the program is run in final mode. You can assign geocodes to the employee's work and resident tax areas, and update both fields in the Employee

Master table, or you can assign a geocode to the resident tax area only, and update only the resident tax area in the Employee Master table. Values are:

Blank: Resident and Work Tax Areas.

1: Resident Tax Area Only.

Running the Cost Center Tax Area Processing Report

This section provides an overview of the Cost Center Tax Area Processing report and discusses how to:

- Run the Cost Center Tax Area Processing report.
- Set processing options for Cost Center Tax Area Processing.

Understanding the Cost Center Tax Area Processing Report

The Cost Center Tax Area Processing program (R079052) is normally used to set up tax area information at a system level, based on address book information that you enter about each cost center when you are initially setting up your software. The system communicates the address book information to the GeoCoder program from Vertex, Inc. and GeoCoder returns nine digit geocodes for each cost center that are used by the Business Unit Constants program (P059051A).

This batch-processing program selects business units in F0006 to assign and validate tax areas. To assign or validate a business unit tax area, the job address book number must not be blank in F0006. The batch program provides the city, state, and zip code that is linked to each job address number to the Vertex system. The Vertex GeoCoder returns each corresponding tax area and updates F0006. The report that the batch-processing program produces lists any errors that might exist. When no errors exist, the report also reports that status.

You might also use the Cost Center Tax Area Processing program when adding a business unit or changing the address of a business unit. This program also supports similar changes for Canadian organizations by supplying cost center tax area codes for provinces.

Running the Cost Center Tax Area Processing Report

Select Employee Management menu (G05BE1), Cost Center Tax Area Processing.

Setting Processing Options for Cost Center Tax Area Processing (R079052)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Process

Use this processing option to specify whether the system updates F0006 or just produces a report.

Update Business Unit (Required) Use this option to specify the processing mode for Cost Center Tax Area Processing (R079052). You can run this report in proof mode to produce a report without updating F0006 or run this report in final mode to produce a report and update F0006 table. Values are:

Blank: Proof Mode - Print report only.

1: Final Mode - Print report and update table.

Running the Populate Vertex Filing Status Process Program

This section provides an overview of the Populate Vertex Filing Status Process Program and discusses how to set processing options for Populate Vertex Filing Status Process.

Understanding the Populate Vertex Filing Status Process Program

When you install Vertex enhancements that affect pretax deductions, fringe benefits, or alternate calculation codes, you need to run the Populate Vertex Filing Status Process program (R0701730). This program saves taxable fringe benefit and other information in the Populate Vertex Filing Status table (F0701730). When you run this UBE, you can set processing options to delete all records from the table before saving new information or just save new information.

Setting Processing Options for Populate Vertex Filing Status Process (R0701730)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Default

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Delete all records from F0701730 before running? Use this processing option to delete all records from F0701730 before running it.

1: Yes, delete all records.

0 or Blank: No, don't delete records.

CHAPTER 10

Setting Up Workflow

This chapter provides overviews of Workflow, Workflow setup for Human Capital Management, recipient and recipient rules setup, and the Process Master verification processes and discusses how to set up Workflow for Human Capital Management.

Understanding Workflow

Enterprise Workflow Management (Workflow) is an electronic messaging system that automates tasks by using an email-based process flow across a network. For the Human Capital Management system, Workflow can be integrated with these tasks:

- Changing an employee's salary using workflow in the Human Resources Guide
- Terminating an employee in the Human Capital Management Foundation Guide
- Updating the status of a requisition in the Human Resources Guide
- Requesting a verification-of-employment letter in the Human Capital Management Self-Service Guide
- Reviewing upcoming employee reviews by supervisor in the Human Capital Management Self-Service Guide
- Setting up information for new employees in the Human Capital Management Self-Service Guide

This guide documents all processes that Workflow performs for the Human Capital Management system. However, you can customize or deactivate certain Workflow processes to meet your business needs. For example, if your company does not pay vacation accruals when an employee is terminated, and you are using Workflow to terminate an employee, you can deactivate the Workflow process that automatically pays employee vacation accruals.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Understanding Workflow Setup for Human Capital Management

This section provides an overview of Workflow setup for Human Capital Management and lists prerequisites.

Workflow Setup for Human Capital Management

A system administrator can create new Workflow processes to work with programs that are capable of using them. For example, you might want to create custom Workflow processes that you can use outside of your annual benefits enrollment period, with programs that are normally included in that process. A system administrator can use the Object Manager Workbench program (P98220), a development tool that is included with your software, to copy the process for approving benefits enrollment and modify it to automate changes that happen throughout the year, such as an employee name or address change.

The system administrator can use the Object Management Workbench program (P98220) to modify existing Workflow processes to meet the needs of your organization. Before creating a new Workflow process for a program, review the processing options for the program to see if an option already exists to enter an email address. When a single notification message is required, self-service programs sometimes include this option.

See Also

EnterpriseOne Tools 8.94 PeopleBook: PeopleSoft Process Modeler

EnterpriseOne Tools 8.94 PeopleBook: Object Management Workbench

Understanding Recipients and Recipients Rules Setup

Setting up recipients and recipient rules determines message routing for certain Workflow approvals and notifications. For example, you can set up Workflow to notify one person or a list of people when you terminate an employee.

This task applies only to Workflow processes that might require more than one person for approvals. For certain Workflow tasks, you might only need to set a processing option to specify one recipient.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Understanding the Process Master Verification Processes

A Workflow process might include one or more subprocesses. For example, three subprocesses make up the Workflow process for setting up new employees. The three processes are listed in the Process Master program (P98800) as EESETUP01-Employee setup approval, EESUTSK03-Get task approval, and EESUTSK01-Employee task setup.

As part of Workflow setup, you should verify that each subprocess for a Workflow process is activated.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Prerequisites

Ensure that you have Solution Modeler installed on your personal computer. Open the Solutions Modeler Applications program (P9040) before you open the Object Manager Workbench program (P98220).

Setting Up Workflow for Human Capital Management

This section discusses how to set up workflow for Human Capital Management.

Forms Used to Set Up Workflow for Human Capital Management

Form Name	Form ID	Navigation	Usage
Object Management Workbench	W98220A	In Windows, Cross Application Development Tools menu (GH902), Object Management Workbench	Set up workflow for Human Capital Management.
Copy Non-OL Object	W9861BA	N/A	Identify benefits enrollment processes
Workflow Design	W9860AB	N/A	Make changes to the Workflow process.

Setting Up Workflow for Human Capital Management

Access the Object Management Workbench form.

To create a new workflow process:

1. Select the Search tab and then select Category in the Workflow field.
2. Select *Process Name*|*Process Version* in the Search Type field.
3. To search for all available processes, enter *BENAPPRV*|* in the Search field.

   To view all available processes, enter *. You can use the *BENAPPRV*|* process as a template for processes that you create to enable other benefits enrollment processes.
4. To initiate a search, click the magnifying glass icon on the Search field.
5. In the left pane, expand your project tree and focus on the Objects node.

   Expand the project tree that includes your own address book number.
6. To move the Workflow process into your project, in the Search pane, double-click *BENAPPRV.*

   Alternatively, you can click *BENAPPRV* and then click the arrow that is pointing left between the panes.
7. In the left pane, click *BENAPPRV* and then click Copy.
8. On the Copy Non-OL Object form, complete these fields:
   - Copy To Process
   - Copy To Version

- Description
- Product Code

  To identify benefits enrollment processes, assign a name such as *BENAPPR401, BENAPPRMAR, BENAPPRNHR,* or *BENAPPROPN.*

9. Click OK.
10. On the Workflow Design form, select the Design Tools tab and then click Start Workflow Modeler to make any changes to the workflow process.

    Note. You must delete all active instances of a workflow process and make it inactive before you can modify it.

11. On the Object Manager Workbench form, click on the process copy in your project, and then click the Design icon between the panes.
12. On the Workflow Design form, select the Design Tools tab, and to activate or deactivate the workflow process, click Change Workflow Status.

    Prior to entering changes to the process you need to deactivate the process.

13. To save changes, click OK.

CHAPTER 11

Setting Up Web Mail Merge

This chapter provides an overview of web mail merge setup and discusses how to:

- Set up a web mail merge queue.
- Set processing options for Web Mail Merge Workbench (P05WMMWB).
- Migration setup.
- Initial template setup.
- Set up a mail merge data structure.

Understanding Web Mail Merge Setup

You set up mail merge in one of two ways:

- Migrate existing HTML template documents and their data structures from previous version of PeopleSoft software to the current version.
- Set up your software for the first time.

You can use Mail Merge Workbench Setup (P05WMMWB) to update the data structures for existing templates, edit existing templates, or add new mail merge templates. Your software includes a selection of mail merge templates that you can use for applications such as HIPAA, COBRA, or generic letters. You can also create template documents in any word processing program from which you can save a document in HTML format. The extension of the template document must be .htm (*not* .html).

A web mail merge template consists of four parts:

- Database records (F980014W and F9800014T).
- Media Object Queue record (F98MOQUE).
- Web mail merge data structure (F05WMM01 and F05WMM02).
- HTML template document.

Web mail merge uses template documents that are standard HTML files. These files are stored in a folder that is accessible from the enterprise server where your system business functions are running. The system uses a media object queue to define the output directory path for each document template. You need to set up at least one queue. If desired, you can assign a separate queue for each template. You need to create a folder on the enterprise server where you store web mail merge template documents. When you set up one or more queues for web mail merge, you specify a queue name and a directory path that includes this folder. The system saves this information in the Media Object Queues table (F98MOQUE).

Note. For web mail merge, you do not normally use OLEQUE as the queue name. OLEQUE is a default name that is used generically for all media objects.

You can add new web mail merge document templates to your system in two ways. You can create an HTML template document and then generate a new data structure based on the merge fields that exist in the template. Alternately, you can first create a new data structure and then generate a new document template from the data items in the data structure. The system saves template information in the Web Mail Merge Template Tag (F980014T) and Mail Merge Web Objects (F980014W) tables.

Web Mail Merge uses a list of data items called a data structure to specify the merge fields in each of the template documents. The system stores your data structure information in the Web Mail Merge Data Structure Header (F05WMM01) and Web Mail Merge Data Structure Detail (F05WMM02) tables.

Note. Web mail merge data structures are not the same as data structures that exist in previous Windows versions of PeopleSoft EnterpriseOne software. However, you can generate a mail merge data structure from a previous data structure.

The mail merge applications that generate merge documents use three business functions. The first business function generates a unique document identification number and a header record in the Web Mail Merge Letter Header table (F05WEBMM). The system uses the second business function once for each letter that you add to the merge document and saves records in the Mail Merge Runtime Web Data table (F980014D). These records contain the data that is used to replace the merge fields in a template document. The third business function generates an HTML mail merge file that contains one letter for each record in the Mail Merge Runtime Web Data table. The merge letter is stored in the same folder as the template document.

Prerequisite

To generate web mail merge letters, the system requires a language-specific Encoding Name. Use the Unicode Flat File Encoding Configuration program (P93081) to enter the new record into the Unicode Flat File Encoding Configuration table (F93081). For English on an NT server, use code *CP1252*. For English on an AS400 server, use code IBM-37.

Setting Processing Options for Web Mail Merge Workbench (P05WMMWB)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Default

This processing option specifies the name of the media object queue that the system uses as the default. You set up an output queue name and directory path information on the Media Object Queue Revisions form (W98MOQUEB) that you access from a Form menu option in the Web Mail Merge Workbench program.

1. Output Queue Name Use this processing option to specify the name of the default media object queue where the system stores mail merge templates and mail merge letters.

2. Starting Merge Field Delimter Use this processing option to specify a string of 1 to 5 characters to use to identify the start of a merge field in the HTML template document. If you wish to use the default Microsoft Word delimiter leave this field blank.

3. Ending Merge Field Delimiter Use this processing option to specify a string of 1 to 5 characters to use to identify the end of a merge field in the HTML template document. If you wish to use the default Microsoft Word delimiter leave this field blank.

Setting Up a Web Mail Merge Queue

This section lists prerequisites and discusses how to set up a web mail merge queue.

Prerequisites

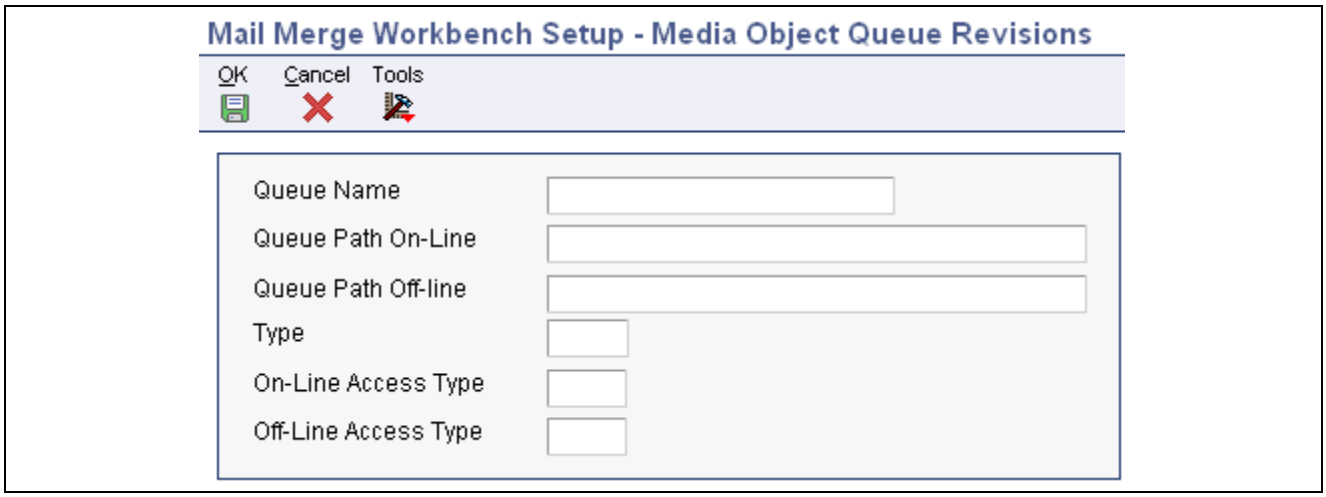
Before you complete the tasks in this section, enter an output queue name in the processing option for the Web Mail Merge Workbench program (P05WMMWB). The system saves this value in the Output Queue field of the Mail Merge Web Objects table (F980014W).

Form Used to Set Up a Web Mail Merge Queue

Form Name	Form ID	Navigation	Usage
Media Object Queue Revisions	None	HRM Setup (G05B4), Mail Merge Workbench Setup Select MO QUEUE from the Form menu on the Work With Web Mail Merge Templates form. Click Add on the Work With Media Object Queues form.	Set up a web mail merge queue

Setting Up a Web Mail Merge Queue

Access the Media Object Queue Revisions form.



Media Object Queue Revisions form

Queue Name Enter a value that specifies a media object queue name. A queue name is the first half of a properly defined Media Object queue. The second half is the media object path. This value will be entered in to the Output Queue field on the Web Mail Merge Template Details form.

Note. OLEQUE is reserved as a default queue name. You normally set up one or more queues specifically for web mail merge, including appropriate directory paths.

Queue Path On-Line Enter a directory path to a network folder where web mail merge document templates and letters are stored. The first half of a properly defined queue is the queue name. The second half of a properly defined queue is a directory path.

On some servers, the directory separator character is a back-slash (\). On other servers, the directory separator character is a forward-slash (/). For AS400 users, the directory path must be relative to the root of the Integrated File System (IFS). For example, the fully-qualified path to the folder might be //servername/root/mailmerge. Because the root folder is //servername/root, the value for Queue Path On-Line appears as follows:

/mailmerge

From a Windows perspective, the value uses a back-slash character and contains the full, absolute path as follows:

\\servername\root\mailmerge.

For non-AS400, non-UNIX users: Specify the same path for Queue Path On-Line and Queue Path Off-Line.

Some platforms might require that you run special software to allow their Windows workstation to access files on a UNIX Enterprise Server.

Queue Path Off-line Enter a fully-qualified (absolute) directory path to the location where web mail merge document templates and letters are stored. The first half of a properly defined queue is the queue name. The second half of a properly defined queue is a directory path.

A valid queue path might appear as:

\\servername\sharename\foldername

The system uses this path when loading the HTML file into Microsoft Word and when displaying letters in a media object. This display function occurs when you are using a Fat client environment. The path statement is formatted using Windows (Fat32) formatting. The statement must include the server name and all sub-folders. For example:

\\AS400server\root\mailmerge

Type Enter the type of media object queue. The default value of *02* specifies the OLE queue. Generic queue types are defined in UDC H91/QT.

For web mail merge, the system does not use this value.

On-Line Access Type Enter the status of a Media Object queue. For web mail merge, the system does not use this value.

Off-Line Access Type Enter he status of a Media Object queue. For web mail merge, the system does not use this value.

Migration Setup

This section discusses template setup and describes how to migrate mail merge documents from a previous software release to a current release:

Prerequisite

Before migrating web mail merge documents from a previous software version, you need to:

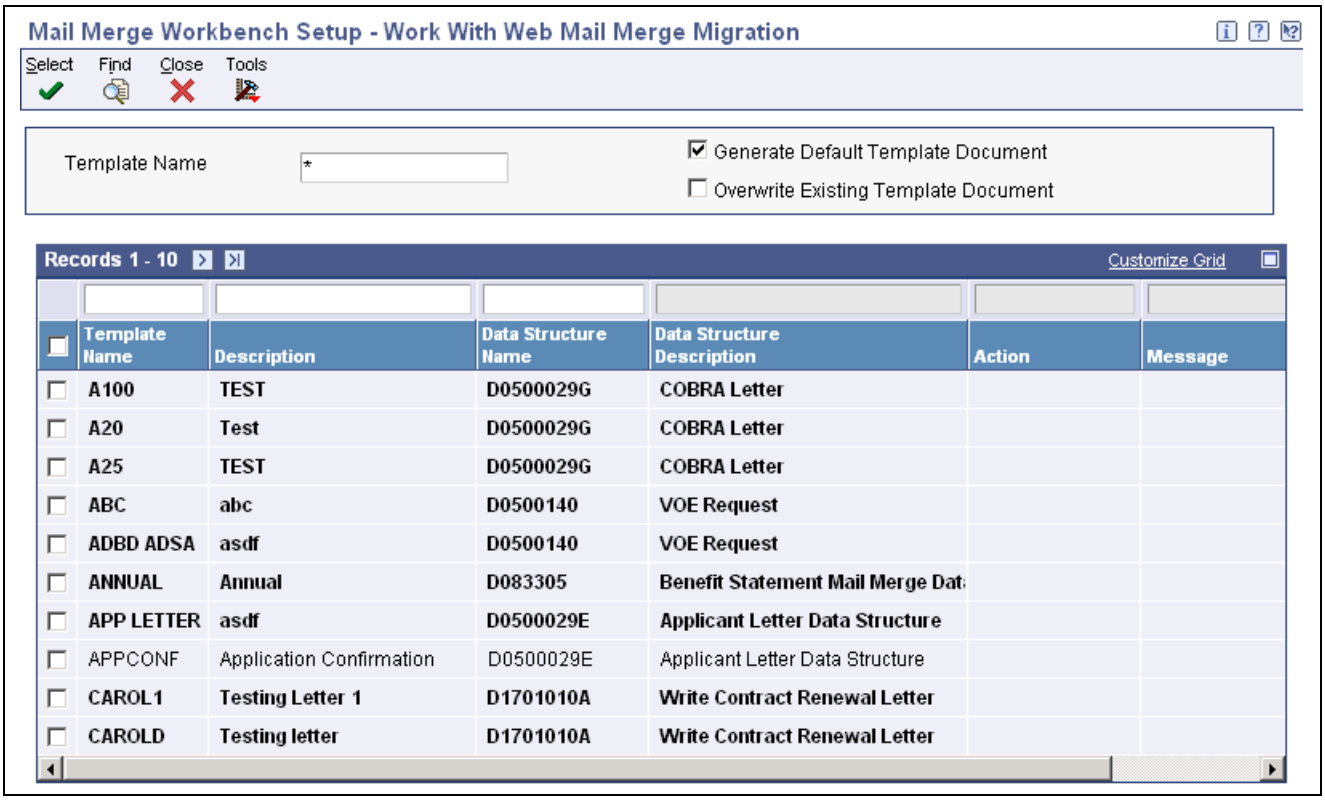
1. Set up a web mail merge queue.
2. Set processing options for the Web Mail Merge Workbench program (P05WMMWB).

Forms Used to Migrate Mail Merge Templates

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup Select Migration from the Form menu. Click Validate from the Form menu.	This process defines the output queue (from processing options), updates the data structure, and generates required database records. Click Find to display the new values in the Data Structure Name, Output Queue, and Queue Path columns.
Work With Web Mail Merge Migration	W05WMMWBO	Select an existing record and then click Select.	Updates an existing template record and populates the Action and Message columns indicating completion status.
Template Validation	W05WMMWBH	Select Generate Doc File.	Generate a new HTML document file.
View Template Document	W05WMMWBC	Click Cancel.	View the new document file. When you click Cancel, the system automatically displays the Web Mail Merge Template Details form.
Web Mail Merge Template Details	W05WMMWBB	Click Edit Template Document.	This action loads the template into Microsoft Word for editing. Edit the structure as needed and then Save As an HTML file. If additional Save As options exist, save the file as Filtered or Compact HTML to reduce the size of the resulting file. **Note.** This function requires a security setting in your internet browser that allows Active X controls.

Migrate Mail Merge Templates

Access the Work With Web Mail Merge Migration form.



Work With Web Mail Merge Migration form

To migrate an existing mail merge template:

1. Select Migration from the Form menu.
2. Select one or more letter records on the Work With Web Mail Merge Migration form and then click Select.

   This process completes output queue information from the processing options, updates the data structure, and generates database records in the F980014W and 980014T tables.
3. Select the updated record on the Work With Web Mail Merge Templates form and then select Validate from the Row menu.

   The validation option displays any functions that still need to be performed. Typically, the Document File Exists option is not checked and needs to be completed.
4. Click Close on the Template Validation form.
5. Select a template record on the Work With Web Mail Merge Templates and then click Select.
6. Select Generate Doc File from the form menu on the Web Mail Merge Template Details form.

   This action creates a new document file and automatically displays the View Template Document form.
7. Review the information and then click Cancel on the View Template Document form.
8. Click the Edit Template Document button on the Web Mail Merge Template Details form.

   This action loads the new letter into Microsoft Word.

   Note. Requires an appropriate security setting in your internet browser to allow Active X Controls.
9. Edit the Word file as appropriate and then save the file as an HTML file.

If your version of Microsoft Word includes an option to save the file as Filtered HTML or Compact HTML, use this option. The resulting file is much smaller.

Note. Do not change the folder location when you save the HTML file.

Initial template setup

This section describes how to perform the initial setup for web mail merge templates.

Forms Used to Set Up Mail Merge Templates

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup	Generate new web mail merge template records.
Media Object Mail Merge Template	W05WMMWBN	Select a record and then select Attachments from the Row menu. Click Export Template.	The system displays the HTML code entries. Exporting the template writes the template to an HTML file on the server. The system automatically displays the View Template Document form.
View Document Template	W05WMMWBC	Click Cancel.	Review the new document.

Set Up Initial Templates

Access the Work With Web Mail Merge Templates form.

CHAPTER 12

Setting Up a Web Mail Merge Data Structure

This chapter provides an overview of web mail merge data structures and discusses how to:

- Manually construct a data structure.
- Generate a data structure from a template document.
- Generate an updated data structure from an existing data structure.
- Manage Web Mail Merge Templates.

Understanding Web Mail Merge Data Structures

Although many organizations use only the data structures and templates that support existing functions in the PeopleSoft software such as mailing HIPAA letters or generating a generic letter, you can create new data structures and template documents that are tailored to individual requirements. You can create new data structures using any of these approaches:

- Construct a data structure.
- Generate a data structure from a template document.
- Generate an updated data structure from an existing data structure.

Prerequisites

Before creating new data structures, you need to:

1. Set up a web mail merge queue.
2. Set processing options for the Web Mail Merge Workbench program (P05WMMWB).

Construct a Data Structure

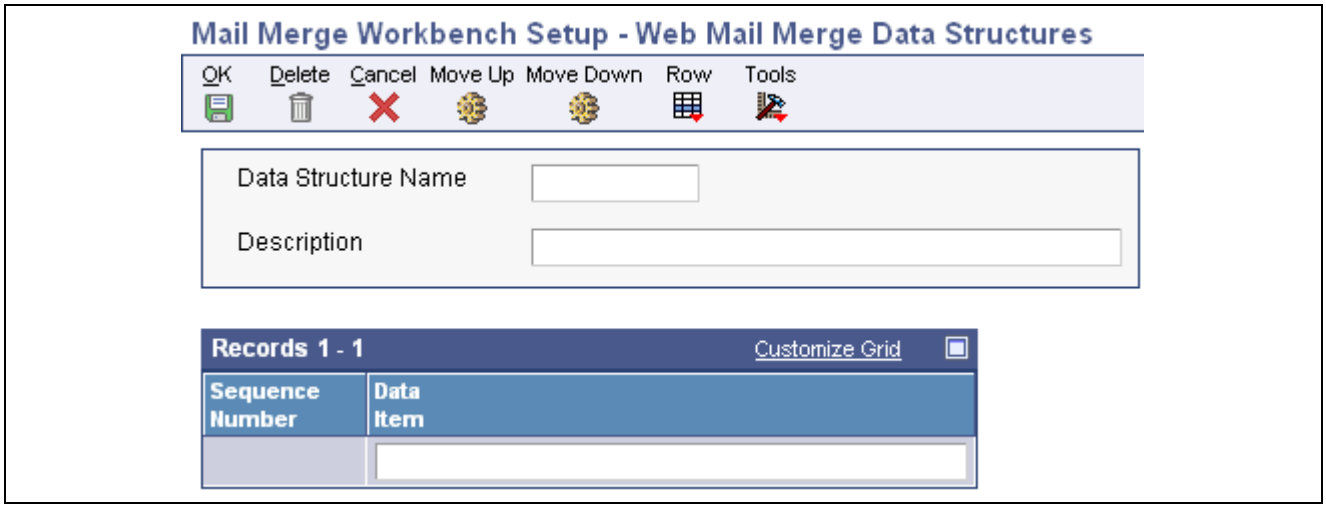
This section describes how to construct a data structure.

Forms Used to Construct a Data Structure

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup Select Data Structures from the Form menu.	Access the Work With Web Mail Merge Data Structures form.
Work With Web Mail Merge Data Structures	W05WMMWBF	Click Add.	Access the Web Mail Merge Data Structures form.
Web Mail Merge Data Structures	W05WMMWBG	Click OK.	Create the new data structure.

Manually Enter a Data Structure

Access the Web Mail Merge Data Structures form.



Web Mail Merge Data Structures form

To manually enter a data structure:

1. Complete these header fields:

   Data Structure Name Enter a unique name that identifies the data structure. The system enters this value into the template database record when setting up a web mail merge template.

   Description Enter a short description of the data structure.

2. Enter a list of data items in the Data Item column.

   These data items are used as merge fields in the template document. The value in the Data Item column can be any string of characters except the characters that are used for the start and end delimiters. The spelling and upper or lower case of each item is important and must match exactly. The system automatically generates each number in the Sequence Number column.

3. Click the Move Up and Move Down buttons to rearrange the items in the list

4. Click OK when all data items are entered and are in the correct order.

Generate a Data Structure

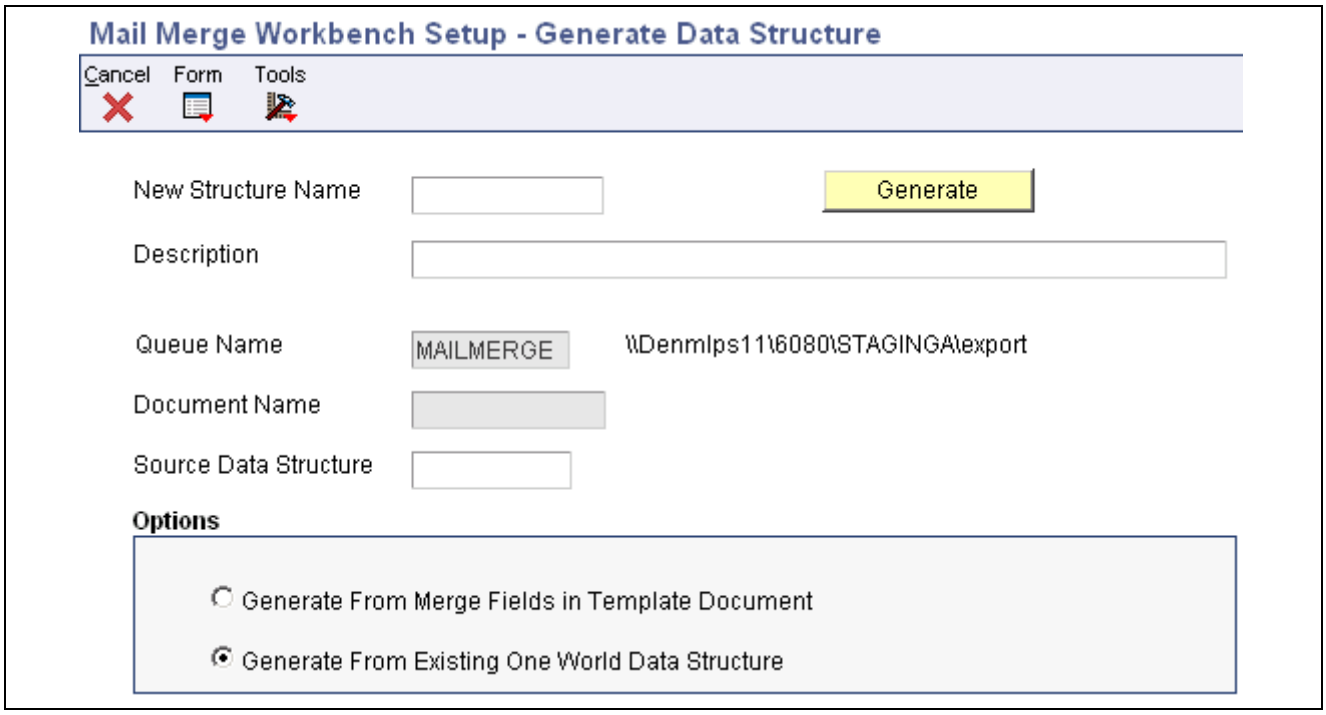
This section describes how to generate a new data structure from a template document.

Forms Used to Generate a Data Structure

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup Select Data Structures from the Form menu.	Access the Work With Web Mail Merge Data Structures form.
Work With Web Mail Merge Data Structures	W05WMMWBF	Select Generate from the Form menu.	Access the Generate Data Structure form.
Generate Data Structure	W05WMMWBK	Click Generate.	This form can also be accessed by selecting Generate DS from the Form menu on the Web Mail Merge Template Details form. Access the Get Delimiters form.
Get Delimiters	W05WMMWBM	Click OK to save the new data structure information.	Enter start and end delimiter characters or click Set Default Delimiters to load the values that are specified in the processing options.

Generate a Data Structure From a Template Document

Access the Generate Data Structure form.



Generate Data Structure form

To generate a new data structure from a template document:

1. Complete these fields:

   New Structure Name Enter a unique name that identifies the DS. The system enters this value into the template database record when setting up a web mail merge template.

   Description Enter information that identifies the purpose of the data structure.

   Queue Name Enter the name of a media object queue record that defines the location of mail merge template documents.

   Document Name Enter the name of the template document. If generating a data structure for the HIPAA letter, for example, then the value in this field should be *HIPAA*.

2. Select the Generate From Merge Fields in Template Document option.
3. Select Generate.

   If the system displays a warning message, click OK. This message informs you that changing the layout of an existing data structure can cause processes using that data structure to fail. This failure can be caused by a mismatch of the order and naming of items in the data structures of the template documents. Also, the business function (B0500725 – Write Web Mail Merge Data) that writes the merge data at runtime also depends on the items in this data structure to be in a specific order.

4. Complete the Start Delimiter and End Delimiter fields on the Get Delimiters form.

   Alternatively, you can click Set Default Delimiters to load the fields with the values specified in the corresponding processing options.

5. Click OK to generate the data structure.

   When the process has completed, the system displays a message that indicates whether the data structure was created successfully.

Generate an Updated Data Structure

This section describes how to generate an updated data structure from an existing data structure.

Forms Used to Generate an Updated Data Structure

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup	Access the Work With Web Mail Merge Data Structures form.
Work With Web Mail Merge Data Structures	W05WMMWBF	Select Data Structures form the Form menu on the Work With Web Mail Merge Templates form.	Access the Generate Data Structure form.
Generate Data Structure	W05WMMWBK	Select Generate from the Form menu on the Work With Web Mail Merge Data Structures form.	Generate a new, web mail merge data structure that is based on an existing data structure. This data structure might exist, for example, in PeopleSoft EnterpriseOne Xe software.

Update a Data Structure

Access the Generate Data Structure form.

To generate an updated data structure from an existing data structure:

1. Complete these fields:

   New Structure Name Enter a unique name that identifies the DS. The system enters this value into the template database record when setting up a web mail merge template.

   Description Enter a value that defines the updated data structure.

   Source Data Structure Enter the name of the previously existing PeopleSoft EnterpriseOne data structure. When exiting this field, if the New Structure Name is blank, the system defaults the value of this field into the New Structure Name field.

2. Select the Generate From Existing One World Data Structure option.
3. Select Generate.

   If the system prompts you with a warning message, click OK. This message informs you that changing the layout of an existing data structure can cause processes using that data structure to fail. This failure could be caused by a mismatch of the order and naming of items in the data structure of the template documents. Also, the business function (B0500725 – Write Web Mail Merge Data) that writes the merge data at runtime depends on the items in this data structure to be in a specific order.

   When the process has completed, the system displays a message indicating whether the data structure was created successfully.

Manage Web Mail Merge Templates

This section describes how to manage web mail merge templates.

Understanding Mail Merge Template Management

You can use the Work With Web Mail Merge Templates program to add, update, and delete mail merge templates. This form includes row menu options that you can use with existing templates:

- View Doc File

  Displays the template document in a read-only form.

- Validate

  Verifies whether the template is setup correctly. If errors exist, the system displays a form that lists the errors. These validations are performed:

  - The output queue record exists in the F98MOQUE table.
  - The output folder defined in the F98MOQUE record exists.
  - The HTML template document exists.
  - The data structure exists.
  - Valid merge field delimiters been entered.
  - Merge fields exist in the template document that do not exist in the data structure. Fields can exist in the data structure that do not exist in the template document without interference.

- Test

  Generates a letter for the selected template using default merge data. This process replaces the merge fields in the template document with the name of the merge field. For example, «szNameMailing» is replaced with szNameMailing. The generated document displays in a read-only form. When exiting the display form, the system deletes the merged document.

- Update Template

  Updates the selected template and attempts to correct problems that might exist. A data structure is generated if one does not exist. If a data structure exists, the system updates the data items. This function checks for the existence of the F980014T record and updates the field delimiters if necessary. The Output Queue value is validated and the existence of the output queue folder is verified.

- Attachments

  Allow you to import and export media object templates. Several templates such as (HIPAA, COBRA, W4FORM are predefined in the software. These templates have the default HTML source code for the template document attached as a media object. This source code can be exported to the output folder, replacing the existing template document. You can also import the source of an existing template document into the media object.

This form also includes these form menu options:

- Data Structures

  Calls the Work With Web Mail Merge Data Structures form so you can make changes to existing data structures.

- MO Queue

Calls the Work With Media Object Queues so you can add or update a mail merge output queue.

- Generate DS

  Calls the Generate Data Structure so you can generate a web mail merge data structure from an existing data structure or from the fields in a template document.

- Migration

  Calls the Work With Web Mail Merge Migration form so you can convert a template from the old Microsoft Word format to the new web mail merge format. This function also generates the associated data structure and creates a generic template document.

Form Used to Web Mail Merge Templates

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Templates	W05WMMWBA	HRM Setup (G05B4), Mail Merge Workbench Setup	Perform various management of web mail merge templates.

Manage Templates

Access the Work With Web Mail Merge Templates form.

CHAPTER 13

Understanding User Defined Information Setup

This chapter discusses:

- User defined information setup.
- User defined codes for Human Capital Management systems.
- User defined codes for Human Capital Management Foundation.
- (USA) User defined codes for the United States.

User Defined Information Setup

Before you can use any features of your Human Capital Management system, you need to define critical information that the system uses for processing. You set up some of this information to meet the specific needs of your organization. Such information is called user-defined information.

User-defined information consists of:

Item	Description
User defined codes	Set up user defined codes to customize your system to meet your specific business needs.
Supplemental data	Set up supplemental data to track detailed information about employees, applicants, requisitions, and jobs. You can track virtually any type of information that your organization needs. Supplemental data is not required by the system.

Setting up supplemental data is optional.

Understanding User Defined Codes for Human Capital Management Systems

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

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

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

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

User defined codes are central to PeopleSoft EnterpriseOne systems. You must be thoroughly familiar with user defined codes before you change them.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Foundation

User Defined Codes for Human Capital Management Foundation

The user defined codes for the Human Capital Management Foundation system are included in your software and are an integral part of the Human Capital Management features. While some of the codes cannot be changed, others are provided with lists of values that you can customize to suit the needs of your organization.

Accomplishment Type (05/AT)

You use accomplishment type codes to specify a type of accomplishment. Examples include:

- Industry certification
- Degree completed
- Training completed

Arrearage Method (05A/AR)

You use arrearage method codes to specify how the system collects payroll amounts that cannot be deducted from an employee's pay due to insufficient earnings.

Bank Transit (06/BC)

You use bank transit codes to identify an employee's financial institution. Banks might refer to this code as the ABA or payment routing number.

For Canadian banks, this number contains eight digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.

If you change this number for an employee, the system creates a prenote for the employee's next auto deposit.

Based On Date (08/BO)

You use based on date codes to define the date that you want to use to calculate the completion date of employee setup tasks.

Benefit Enrollment Events (08/BE)

You use benefit enrollment event codes to denote a benefits enrollment event such as:

- Marriage
- Divorce
- Birth of a child

Change Reason (06/T)

You use termination/change reason codes to indicate the reason that an employee's record changed. For example, you can enter the reason that you are recommending a salary or rate change.

Note. If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

Check Route (06/CR)

You use check route codes to specify the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

Competency Change Reason (05/CH)

You use change reason codes to indicate the reason an employee competency goal was changed. For example, you might enter a new goal for an employee after he or she has reached the current goal. Therefore, you would enter a competency change reason of Achievement of Goal.

Competency Type (05/CY)

You use competency type codes to represent a competency table, or category, for which you can track employee competencies. Values for competency type codes are:

- 001 - Training
- 002 - Skill
- 003 - Accomplishment
- 004 - Certification
- 005 - Degree
- 006 - Language

The values in this user defined code table are hard coded and cannot be changed. Therefore, each of the competencies that you track must pertain to one of these competency types. Adding additional values to this list requires system customization.

Default Autopay Type (06/20)

You use employee autopay type codes to designate the default pay type that the system uses to generate automatic payments in those instances in which the system does not use the employee labor distribution instructions. If you leave this field blank, the system uses pay type 001.

Delegate Authorization Type (08/AY)

You use delegate authorization type codes to specify the type of authorization given to a delegate. Values for delegate authorization type codes are:

- *1:* Approving
- *2:* Reporting
- *3:* Status Change
- *4:* Appraisal
- *5:* Managers Workbench

The values in this user defined code table are hard coded and cannot be changed.

Employee Benefit Status (06/EA)

You use employee benefit status codes to specify employee actions, such as new hire or rehire, for which the system searches as it tests for benefits eligibility. An asterisk indicates that the guidelines refer to all employee actions not otherwise specified.

Do not change the codes that are hard coded, such as A (Active) and X (Terminated). These are required codes in the system.

Employee Setup Action (08/S3)

You use employee setup action codes to define the event that should occur during the new-employee setup workflow process. Hire, Rehire, and Transfer are hard coded. Rehire, Transfer, and Relocation codes cannot be used until a future release.

Employee Setup Status (08/S1)

You use employee setup status codes to indicate the status of the entire employee-setup workflow process. Changing the setup status triggers the specific event associated with the status. For example, the system can display a W status if Workflow is waiting for a manager's approval. The system displays the status for the employee setup process on the Work With Employee Setup form (W08710C) and in the Employee tab area of the Employee Setup Entry form (W08710G).

These codes are hard coded in the system and should not be changed.

Explanations of the status codes and the sequence that the system might use to change them depending on how your processing options are set up:

- *P:* Pending.

  An assigned setup process begins with this status. You can make changes or delete the process if needed.

- *W:* Waiting for Approval.

  The system sets the process to this status when the process is initiated and if your processing options for Employee Setup Workbench are set to require a process approval.

- *V:* Approved.

  The system sets the process to this status when it obtains a process approval.

- *2:* Rejected.

  The system sets the process to this status when the process is rejected.

- *A:* Active.

The system sets the process to this status when the process is initiated and no approval is required. You cannot cancel the process when it is changed to an Active status.

Employment Status (06/ES)

You use employment status codes to specify an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample Values include:

- Blank: Full-time Regular
- *1:* Full-time Temporary
- *2:* Part-time Temporary
- *3:* Part-time Regular
- *4:* Seasonal
- *5:* Summer Intern

French Language PDBA (06/LF)

You use French language PDBA codes to specify the French equivalent of the English text that prints on an employee's pay stub as the PDBA description. If the employee is set up as a French language employee, the system will use the PDBA description from this table on the pay stub.

Gap Reason (08/GN)

You use gap reason codes to indicate the reason that a gap snapshot was taken. For example, for gap snapshot taken at the end of each fiscal year, you could use a reason code of Fiscal Year. You might also take a gap snapshot if major organizational changes occur, in which case you could use a reason code of Organizational Changes.

Goal Type (05/GT)

You use goal type codes to define the type of goal that an employee is working towards. For example, you might define a goal type for receiving certification or for moving to the next pay grade.

Institution (05/IC)

You use institution codes to identify the educational institution from which an employee receives a degree or training.

Investment Group (06/AI)

You use investment group codes to indicate the grouping to be used when you balance accruals for investing in various funds. For split investments, the total deduction must total 100% of the amount specified. For example, an employee has a savings plan deduction that he or she has elected to split three ways:

- 10%
- 20%
- 70%

These splits are three additional DBAs. To ensure that the three splits (or accruals) total 100%, you must:

- Use the same accrual investment group code for all three.
- Ensure that the total of the individual percentages is 100.
- Not use the accrual investment group code on the DBA upon which the splits are based.

- Verify that the split DBAs have no effect on net or gross.
- Verify that the split DBAs are not cash benefits.

Job Evaluation Method (08/EM)

You use job evaluation method codes to specify the method or grouping that you use to evaluate the jobs within your organization. Suggested values are:

- Blank: No Evaluation Completed
- *D:* Degree Method
- *E:* Evalucomp Method
- *F:* Factor Comparison Method
- *P:* Point Factor Method
- *H:* Hay Method

Job Group (08/JG)

You use job group codes to create groupings of similar jobs that are associated as a unit. Groupings can be based on functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are:

- Clerical/administrative
- Technical
- Engineering
- Scientific and professional
- Factory jobs
- Middle management
- Executive

Job Status Change Reason (08/JC)

You use job status change reason codes to indicate why job information was changed. For example, you might want to indicate that job information was changed because the job is no longer active.

Job Status (08/JS)

You use job status codes to indicate whether a job is currently active or inactive.

Licensing Body (05/LB)

You use licensing body codes to represent the name of the organization that grants a professional license or certification.

Locality (06/SL)

You use salary comparison locality codes to define the different salary localities within an organization. For example, an employee working in an East Coast locality might receive a higher salary than an employee doing the same job in a Midwest locality.

Pay Frequency (06/PF)

You use pay frequency codes to indicate how often an employee is paid. Codes are:

- *B:* Bi-Weekly
- *W:* Weekly
- *S:* Semi-Monthly
- *M:* Monthly
- *A:* Annually

The system uses the value in the Description 02 field on Work With User Defined Codes to calculate the amount per pay period for a salaried employee.

Pay Status (06/PS)

You use pay status codes to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from payroll processing.

To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.

Pay Type/Print Method Category (06/PC)

You use pay categories/DBA print group codes to specify the pay type categories that you want to use. Examples of pay type categories that you might want to use are:

- Regular pay.
- Overtime.
- Certified pay types (for reporting on the Certified Payroll Register).

Record Type (05/RT)

You use record type codes to indicate the type of resource for which you are entering competency information. Values in this list are hard coded and should not be changed. Record type codes include:

- *01:* Individual
- *02:* Asset (such as equipment)

Report Category (08/RP)

You use report category codes to group reports that you run using the Manger's Self-Service Workbench. Examples of report category codes that you might set up include:

- Payroll reports
- Government reports
- Requisition reports

Renewal (05/RC)

You use renewal codes to indicate the requirements that an employee must complete to renew a license or certification.

Salutation (06/SA)

You use salutation codes to identify the proper title for a given employee. Examples of salutation codes are:

- *Mr.*
- *Ms.*
- *Dr.*

Shift (06/SH)

You use shift codes to identify daily work shifts. In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard. If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Source (08/SS)

You use source codes to identify the source of salary information. Typically, this code refers to the source of salary information that you are using to make comparisons to salaries within your organization. Typical source codes might include:

- Trade publications
- Industry surveys

Spending Account Type (06/FS)

You use spending account type codes to define which type of spending account, if any, is associated with a pay type. Examples of spending account type codes that you might use are:

- *MED:* Medical expenses spending account (where the annual amount is accrued on Jan 1 or the beginning of the year).
- *DCR:* Dependent care expenses (where accrual of available funds is on a pay period by pay period basis).

Status (05/CR)

You use status codes to identify the status of an employee with regard to a particular competency. For example, you can specify a status for a language competency of:

- Fluent
- Read only
- Speak only

Status Change Type (08/S4)

You use status change type codes to identify the type of status change being processed using the Manager's Self-Service Workbench.

Statutory (06/SC)

You use statutory codes to specify the two-character or three-character state or province code that prints on statutory reports such as W-2s and T4s.

Suffix (06/SF)

You use suffix codes to identify the credentials for a given employee. Some examples of suffix codes are:

- *PhD*
- *MD*
- *CPA*

Supplemental Data UDCs

You use supplemental data UDCs to track information about employees, applicants, requisitions, and jobs that is not already tracked in the system. Although supplemental data can be completely user defined, we have created several UDCs to assist you in entering supplemental data information. If appropriate for your business needs, you might want to set up these UDCs:

- Appraisal Type (08/TY)
- Authority Level (08/AU)
- Employer Property (08/CC)
- Drug Testing Information (08/TD)
- Education (08/ED)
- Education Emphasis (08/EE)
- Employment Testing (08/TS)
- Grievance Type (08/GR)
- Interview Process (08/IP)
- Language Skills (08/LA)
- Licenses Held (08/LI)
- Miscellaneous Skills (08/SM)
- Employee Performance Appraisal (08/AP)
- School Attending (08/SH)
- Skills (08/SK)
- Training Information (08/TG)

Team (05/TM)

You can use team codes to create groups of employees. Examples of codes that you might use include Team 1 or Team A, or you could name teams after the supervisor-- for example, Team Smith or Team Allen.

Training Type (05/TY)

You use training type codes to categorize the types of training available to employees. Examples of training type codes include:

- Classroom training
- Computer-based training
- Correspondence training

Training Provider (05/PR)

You use provider codes to identify a person or institution that provides training to employees.

Training Reason (05/TN)

You use training reason codes to define the reason that an employee takes training courses.

Tax Method (06/TM)

You use tax method codes to specify which method should be used to calculate payroll tax information for the employee. Examples include:

- Contract Employee
- Pension Employee
- Railroad Employee

Type of Increase Next Review (06/RV)

You use type of increase next review codes to define the next type of salary or wage review due for an employee. Examples of type of increase next review codes that you might want to use are:

- Annual review
- Semiannual review
- Performance review
- Salary review

Type of Structure (00/TS)

You use type of structure codes to identify different types of organizational structures. Each structure that you create can have a different hierarchy. Examples of codes that you might set up include financial and responsibility structures.

Union (06/UN)

You use union codes to identify the union or plan in which the employee or group of employees works or participates.

User Defined Competency Description (08/UD)

You use user defined competency description codes to help an end user understand or work with job competencies. These codes are attached to individual job competencies. You can have several job competency descriptions for a single job competency. For example, you might have a description for:

- Employees
- Managers
- Human capital management professionals

Verification Method Codes (05/VM)

You use verification method codes to identify the method that you are using to verify employee competency levels.

Work Schedule Codes (05A/WS)

You use work schedule codes to identify a particular schedule that an employee might work. For example, if an employee works four ten-hour days each week, you might use code 410 to identify his or her schedule.

Workers' Compensation Insurance (00/W)

You use workers' compensation insurance codes to represent different classifications for workers' compensation insurance. Worker's compensation codes are used to associate employees or groups of employees with their workers' compensation insurance rate. This code should correspond to the classifications on your periodic worker's compensation insurance reports.

(USA) User Defined Codes for the United States

The user defined codes for the Human Capital Management Foundation system that are specific to the United States are included in the your software and are an integral part of the Human Capital Management features. While some of the codes cannot be changed, others are provided with lists of values that you can customize to suit the needs of your organization.

Home City Codes (06/W1)

You use home city codes to identify the city where the employee lives.

I-9 Status Codes (07/HN)

You use I-9 status codes to indicate the method used to verify that an employee is eligible to work in the United States. Examples are:

- *Y:* I-9 form on file
- *P:* Passport used for verification
- *R:* Resident alien or alien registration card
- *S:* Social Security card
- *L:* Driver's license and Social Security card
- *V:* Visa (worker's permit)
- *B:* Birth certificate
- *N:* Waiting for verification

School District Codes (06/SD)

You use school district codes to identify the school district in which an employee lives.

Working County Codes (06/W2)

You use working county codes to identify the county where an employee works. Typically, you need to use this code only if an employee works in a county that has different tax rules than the county where the employee lives.

EEO Job (06/J)

You use EEO job codes to specify classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the default codes. You can add codes if needed.

Ethnic (06/M)

You use ethnic codes to designate minority classifications according to the U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that are included in your software provides are hard coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.

Marital Status (06/MS)

You use marital status codes to specify an employee's federal marital status as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

CHAPTER 14

Understanding PDBA Setup

You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. Pay types and DBAs are referred to as PDBAs.

CHAPTER 15

Setting Up Pay Types

This chapter provides an overview of pay type setup and discusses how to set up pay types.

Understanding Pay Type Setup

This section provides an overview of pay type setup and lists prerequisites.

Pay Type Setup

You set up pay types to categorize various employee earnings to direct labor to different accounts in the general ledger. You can define up to 999 different pay types, using the range of numbers 001 to 999. For example, most companies need to set up different pay types for holiday, sick, and vacation or personal leave pay.

Setting up pay types also allows you to:

- Define how different pay types are used when you compute employee pay.
- Assign automatic pay methods for autopay employees.
- Enable leave tracking.
- Define a pay type to be tax exempt.
- Define information to be printed on 1099 and W-2 forms for the associated pay type for U.S. payroll.
- Define whether hours and dollar amounts should be passed to the general ledger.
- Define how the system retrieves employee PDBA history for each pay type.

You can also attach a media object to a pay type for explanatory notes or other information. If you attach a text media object to the pay type, the first two lines of text that you enter appear on reports that include the pay type description.

When you set up a basic pay type, you define the minimum amount of information that the system needs to perform the calculation.

Prerequisite

Set up user defined codes (07/FS).

Setting Up Pay Types

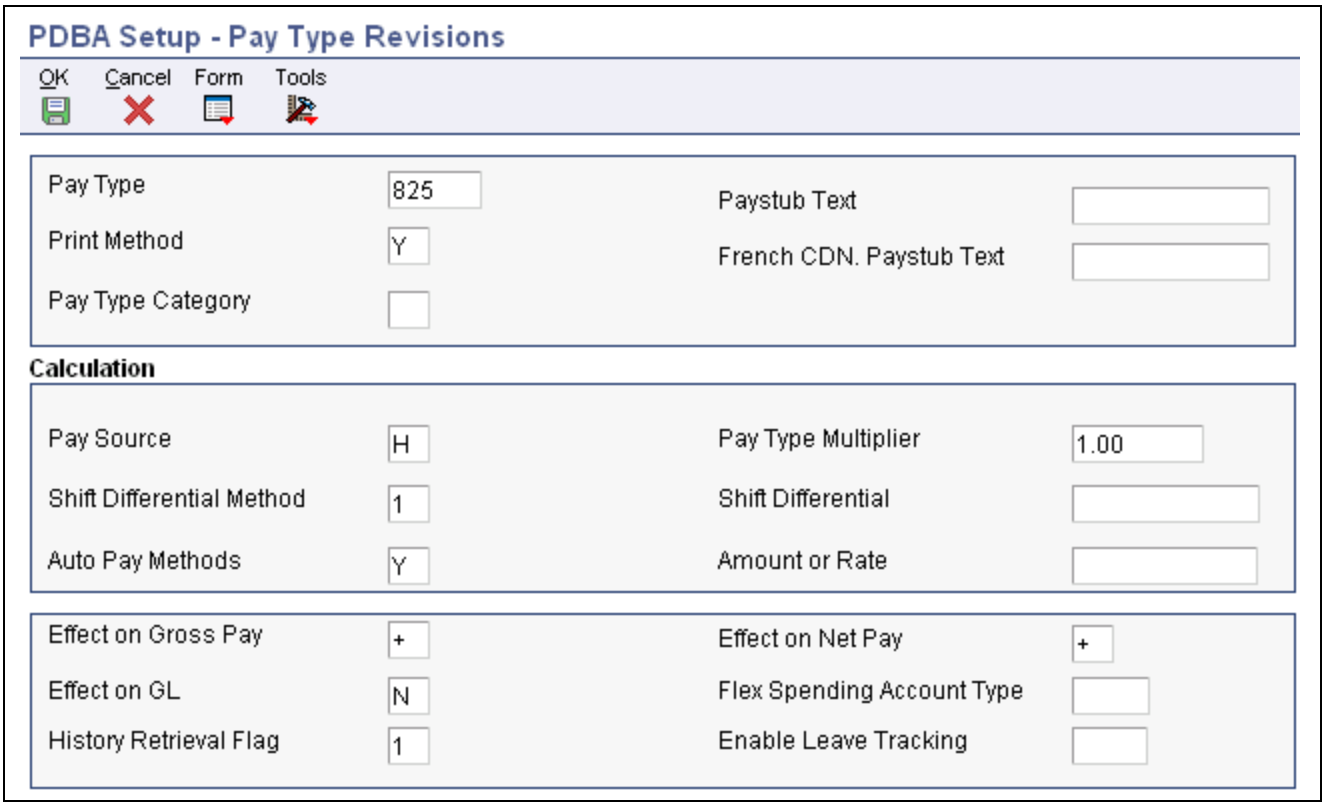
This section discusses how to set up pay types.

Forms Used to Set Up Pay Types

Form Name	Form ID	Navigation	Usage
Pay Type Revisions	W059116B	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select the Pay Type option in the PDBA Type area and click Add on the Work With PDBAs form.	Set up pay types.
PDBA Search & Select	W05PDBASA	Click the Search button in the Pay Type field on the Pay Type Revisions form.	Review pay types.
Pay Type Recap	W05SDBB	Select a pay type and then select PDBA Recap from the Row menu on the PDBA Search & Select form.	Review pay type information.
Tax Exemptions	W05TAXA	Select Tax Exemptions from the Form menu on the Pay Type Revisions form.	Review tax exempt pay types.
Category Codes Revisions	W059116C	Select Category Codes from the Form menu on the Pay Type Revisions form.	Assign category codes to pay types.

Setting Up Pay Types

Access the Pay Type Revisions form.



Pay Type Revisions form

Pay Type Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Paystub Text Enter the text that you want the system to print on the employee's paystub. If you are using the Time and Labor system, the system does not create payments. However, this field is required to complete the form. Generally, you enter a description of the PDBA.

Pay Type Category Enter a user defined code (07/PC) that specifies the pay type categories you want to use:

- For regular pay.
- To generate overtime.
- For reporting purposes on the Certified Payroll Register (U.S. only).

Effect on GL Enter a code that indicates whether the system writes journal entries from the Payroll system to the general ledger, and the method to use. Values are:

H: Write only hours to the general ledger. This code is valid for generating timecard journals. The code should not be used when journals are generated through the pay cycle.

M: Do not write monetary amounts or hours to the general ledger. Do not calculate workers' compensation and general liability.

N: Write monetary amounts and hours to the general ledger.

Y: Write only monetary amounts to the general ledger.

W: Do not write monetary amounts or hours to the general ledger, but calculate workers' compensation and general liability. Workers' compensation and general liability amounts will be written to the general ledger.

Pay Source

Enter a user defined code (07/PB) that defines the value upon which the system bases the employee's pay. *H,* hours worked, is the default value. Other Values exist for tip and piecework processing, and for Canadian lump-sum amounts, irregular commissions, and bonuses. Use *E,* estimated pay, for an advance pay interim check. The Interim Check program (Format 2) automatically deletes this type of timecard so that you can enter the actual time when it is known.

If you are setting up pay types for piece rate processing, you must enter *B* in the Pay Source field.

Pay Type Multiplier

Enter a factor by which the base hourly rate is multiplied to obtain the actual payment hourly rate. For example, you could use 1.5 to designate time-and-one-half for overtime pay. 0 is not a valid multiplier. The default value is 1.00.

Shift Differential

Enter an additional rate, expressed in dollars or percent, added to an employee's hourly rate, depending on the shift worked. This rate can be applied in one of two ways, as defined by the Shift Differential Calculation Sequence (data item CMTH).

Enter a monetary amount in this field. The system does not calculate percentage amounts for shift differentials that you enter at the pay type level.

Shift Differential Method

Enter a code that specifies how the system calculates shift differential information. Values are:

1: The system applies the pay type multiplier to the shift differential: Gross = (rate + shift differential) x (multiplier) x hours.

2: The system applies the pay type multiplier only to the hourly rate and does not include the shift differential: Gross = (rate x multiplier) + (shift differential) x hours.

Blank: The system follows the shift differential method that is associated with the pay type from the Payroll Transaction Constants table (F059116).

The multiplier is the pay rate multiplier from the Payroll Transaction Constants table.

When the pay rate is derived from the Union Rate table, the multiplier is assumed to be 1 as it is built into the table. In this case, all methods produce the same result.

Auto Pay Methods

Enter a code that determines how the system treats this pay type when computing automatically generated pay (typically for salaried employees). It also identifies supplemental pay. Valid codes are:

Y: The dollars with this pay type are part of the employee's base pay, for example, regular, holiday, sick, and vacation pay.

N: The dollars with this pay type are in addition to the employee's base pay, for example, overtime pay and time off without pay.

S: The hours with this pay type are subtracted from the employee's base pay at standard rate and added back at the entered pay rate.

B: The dollars with this pay type are in addition to the employee's base pay and are treated as supplemental pay for taxation purposes, for example, bonuses, commissions, and payoffs. Canadian bonuses, irregular commissions, and lump sums use auto pay method B.

C: The hours or dollars entered using this pay type override all auto pay instructions.

Amount or Rate

Enter a value that specifies a percentage, a monetary amount, or an hourly rate, depending on where it is used. Values are:

1: For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard.

2: For a pay type, amounts entered in this field override the hourly rate.

Effect on Gross Pay

Enter a code that indicates whether the pay type is added to, subtracted from, or does not affect the employee's gross pay. Values are:

+: Pay type will be added to the employee's gross pay

-: Pay type will be subtracted from the employee's gross pay

Blank: Pay type will not have an effect on the employee's gross pay

A pay type should not have a negative effect on gross pay. If you set up a pay type to have a negative effect on gross or net pay, gross-to-net errors appear on the Payroll Register. PeopleSoft recommends that you set up a deduction instead of a pay type that would have a negative effect on gross pay.

When you set up a pay type with no effect on gross pay and a positive effect on net pay, do not create a separate check. Creating a separate check will cause a gross-to-net error.

Effect on Net Pay

Enter a code that indicates whether the pay type is added to, subtracted from, or does not affect the employee's net pay. Values are:

+: Pay type will be added to the employee's net pay

-: Pay type will be subtracted from the employee's net pay

Blank: Pay type will not have an effect on the employee's net pay

A pay type should not have a negative effect on net pay. If you set up a pay type to have a negative effect on gross or net pay, gross-to-net errors appear on the Payroll Register. PeopleSoft recommends that you set up a deduction instead of a pay type that would have a negative effect on gross pay.

When you set up a pay type with no effect on gross pay and a positive effect on net pay, do not create a separate check. Creating a separate check will cause a gross-to-net error.

History Retrieval Flag

Enter an option that determines how the system retrieves PDBA history for an employee. This value works in conjunction with the Retrieve PDBA History System Flag on the Additional Options tab of the Company Options form for

Company 0 (zero). If that flag is set to look at each PDBA to determine how to retrieve PDBA history, you must enter a value in this field. Values are:

1: Retrieve PDBA historical amounts using the Corporate Tax ID associated with the Home Company on the employee's timecard. (Default)

2: Retrieve PDBA historical amounts across all Corporate Tax IDs for which the employee has history for the current year.

Enable Leave Tracking Enter a code that enables two types of leave tracking and verification. You can enable leave tracking for this pay type so that the system requires users to enter a leave type (UDC 07/LV) when entering leave time. You can also enable leave balance verification for this pay type so that when employees enter leave time, the system verifies that this pay type includes sufficient available balances. You need to use the second option in conjunction with two processing options on the Time Entry Master Business Function program (P050002A). If you set up time entry master business function so that the system verifies leave balances, then the system verifies only pay types that are identified at the pay type level. Values are:

0 or Blank:

Do not enable leave tracking or leave balance verification.

1: Enable leave tracking. Enable leave balance verification.

2: Enable leave tracking. Disable leave balance verification.

3: Disable leave tracking. Enable leave balance verification.

Tax Type 01 Specify up to 15 tax types for which the respective payroll tax is not to be computed for a pay, deduction, or benefit code.

If you enter * in the first element of this list, no taxes are computed.

CHAPTER 16

Understanding Deductions, Benefits, and Accruals (DBAs)

This chapter discusses:

- Deductions, benefits, and accruals.
- A comparison of benefits and accruals.
- DBA setup considerations.
- DBA calculations.
- Arrearage methods.

Deductions, Benefits, and Accruals

You set up deductions, benefits, and accruals (DBAs) to automate the process of subtracting money from an employee's paycheck, calculating employee benefits, and tracking accruals when you run a payroll cycle.

This table defines the terms deductions, benefits, and accruals:

Term	Definition
Deductions	Deductions represent monetary amounts, excluding taxes, withheld from an employee's earnings. You set up deductions to automate the process of subtracting monies when you run a payroll cycle.
Benefits	Benefits represent amounts that the company funds for additional employee compensation. A benefit can be cash or non-cash, either taxable or nontaxable. Benefit information can be passed to the general ledger to track burden. You set up benefit DBAs to automate the process of calculating benefits when you run a payroll cycle.
Accruals	Accruals represent a number of paid hours that the company funds as additional employee compensation. Usually, an employee accrues a certain number of hours per pay period. The system can carry over from year to year any accrued remaining balances, such as available vacation and sick time.

A Comparison of Benefits and Accruals

To determine whether a DBA should be set up as a benefit or an accrual, consider:

- Benefits might or might not affect gross or net pay.
- Accruals have no effect on an employee's gross or net pay.

DBAs Setup Considerations

Before you set up deductions, benefits, and accruals for your company, consider the functions that you want the DBA to perform:

- Which method should the system use to calculate the DBA?
- When will the system calculate the DBA?
- What are the effective dates for the DBA?
- Should the system pass the information to the general ledger?
- Do you want to base the calculation for the DBA on another DBA or on a pay type?
- Should the deduction arrear in a negative pay situation?
- Should an accrual balance roll over into the next year?
- Should taxes be calculated for this DBA?
- Do you want to set up limits for the DBA?
- Is the DBA mandatory or voluntary?

Assigning DBA Codes

When you set up DBAs, you assign each DBA a numeric transaction code. Because the numeric transaction codes 001-999 are reserved for pay types, use the numeric transaction codes 1000-9999 to define up to 9000 DBAs.

Grouping similar DBAs by function is a recommend approach. For example, you might group all long-term disability deductions and assign numbers within a range, leaving some numbers available for later additions, as follows:

- 1220: Long-term disability insurance coverage at 66 2/3 percent.
- 1222: Long-term disability insurance coverage at 50 percent.

DBAs are not specific to one company. You can use DBAs across different companies.

Assigning DBAs to Employees

To assign DBAs to employees, you can:

- You can set up a DBA for all employees.
- You can enroll an employee in benefit plans, and the system automatically assigns the employee DBAs associated with those benefit plans.
- You can assign specific DBAs to a single employee.

- For single transactions, you can enter a one time override DBA via time entry, one-time overrides, or from the EnterpriseOne menu.

The system does not limit the number of DBAs that you can assign to each employee.

You can define the amount of a DBA as follows:

- When you set up the DBA.
- At the group level.
- At the employee level.
- During one time override entry.

You can override the amount at any level for any given payroll. The amount at the employee level overrides the DBA setup.

Example: DBA Amounts as a One-Time Override

An employee has a health insurance deduction included in the assigned benefit plan. If the employee is hired in the middle of the pay period, you can enter a prorated amount in time entry for the first pay period. The system deducts the regular amount for health insurance in subsequent pay periods.

See Also

Chapter 31, “Entering Employee Instructions,” page 281

DBAs Calculation

The system can use different methods to calculate DBAs. The methods used to calculate DBAs include:

- Flat monetary amounts
- Percentages of gross pay
- Calculation tables with criteria that vary from employee to employee

Unlike the DBAs that the system calculates by flat monetary amounts and percentages, you can override a DBA at the employee level that is based on a calculation table, although this action is not recommended. A DBA based on a calculation table has a table-method code attached to the DBA that tells the system how to calculate the DBA. The system does not recognize another method to calculate a DBA when a table-method code is attached to the DBA.

Example: DBA Calculations

DBA calculations can be based on values, such as gross pay, hours, pieces, salary, month-to-date, or year-to-date earnings. You might set up:

- Flat monetary amount for health insurance with a deduction of 12.50 per pay period
- Percentage deduction of 4 percent per pay period to be used for a retirement savings plan
- Calculation table using these variables to determine an employee’s annual vacation accrual:
- 40 hours if employed 1-2 years
- 80 hours if employed 3-5 years

- 120 hours if employed 6-99 years

See Also

Chapter 18, “Setting Up Deductions, Benefits, and Accruals ,” page 137

Chapter 18, “Setting Up Deductions, Benefits, and Accruals ,” Setting Up Group Plan DBAs , page 149

Arrearage Methods

An arrearage occurs when the payroll system could not deduct an amount from the employee’s pay because the employee did not earn enough to pay for the deduction.

Examples of how the system manages DBA arrearages are:

- The first time an employee is paid during the pay period the system attempts to collect DBA amounts. If a remainder still exists when the new pay period begins, that remaining amount is arreared into the new period for collection.
- Each time an employee is paid during the pay period the system attempts to collect any remaining DBA amounts. If a remainder still exists when the new pay period begins, that remaining amount is arreared into the pay cycle for collection.
- Each time an employee is paid during the pay cycle the system attempts to collect any remaining DBA amounts. If a remainder still exists when the new pay period begins, that remaining amount is not arreared into the new pay period for collection. This arrearage method is used for DBAs such as a deduction for a charitable contribution.

The system can also track DBA balances and limits across multiple companies (indicated by Tax ID). If you have an employee that works for multiple companies during the course of a single pay period, the system tries to collect all appropriate DBAs plus any arrearages or balances each time the employee is paid.

Arrearage collection across companies (by Tax ID) is dependent upon company options for history retrieval. If you do not choose to retrieve history across Tax IDs, then an arrearage balance is not collected across multiple tax ids.

The system adjusts negative pay in different ways depending on the arrearage method that you use.

Example 1

An employee is paid on the first day of a weekly pay period and has a $30 deduction that is set to calculate once per pay period. Using arrearage method *S,* a partial or full deduction as needed, the remaining amount is placed in arrears for the current pay period only, and the arrearage balance is not written to history.

The employee’s gross pay for the first paycheck of the pay period is $35. After taxes, the amount calculated for the deduction is only $17.50, leaving an arrearage balance of $12.50.

On the third day of the pay period, the employee receives gross pay of $180. The remaining arrearage balance of $12.50 is deducted from this paycheck. The arrearage balance is 0, and the record is not written to history.

Example 2

An employee is paid on the first day of a weekly pay period and has a $30 deduction that is calculated once per pay period. Using arrearage method *S,* a partial or full deduction as needed, the remaining amount is placed in arrears for the current pay period only, and the arrearage balance is not written to history.

The employee's gross pay for the first paycheck of the pay period is $35. After taxes, the amount calculated for the deduction is only $17.50, leaving an arrearage balance of $12.50.

On the third day of the pay period, the employee receives gross pay of $15. After taxes, the amount calculated for the deduction is only $6, leaving an arrearage balance of $6.50. The employee receives no additional paychecks during this pay period. The arrearage balance of $6.50 is not carried forward into the following pay period, and the record is not written into history.

Example 3

An employee is paid on the first day of a weekly pay period and has a $30 deduction that is calculated once per pay period. Using arrearage method *Q,* a partial or full deduction as needed, the amount is placed in arrears and limits are not applied when collecting the arrearage.

The employee's gross pay for the first paycheck of the pay period is $35. After taxes, the amount calculated for the deduction is only $17.50, leaving an arrearage balance of $12.50.

On the third day of the pay period, the employee receives gross pay of $15. After taxes, the amount calculated for the deduction is only $6, leaving an arrearage balance of $6.50. This arrearage amount is written to history, and the system makes the deduction in the next pay period.

See Also

Chapter 4, "Setting Up System Options," Setting Up Company Options, page 24

Chapter 23, "Setting Up Advanced DBAs," Setting Up a Deduction DBA for Overpayment, page 188

CHAPTER 17

Setting Up Calculation-Table Information

This chapter provides an overview of calculation table setup, lists a prerequisite, and discusses how to:

- Set up calculation tables.
- Attach calculation tables to DBAs.

Understanding Calculation Table Setup

This section provides an overview of calculation table setup and lists prerequisites.

You can set up table-method DBAs to calculate DBAs based on various table calculations. A table-method DBA is a calculation table that has a table-method code attached to it to define how to calculate the DBA.

You set up calculation tables to define the parameters that the system uses to calculate DBAs. After setting up the calculation tables, you attach tables to a DBA by defining the appropriate table method when you set up a DBA.

You set up calculation tables to define the parameters for calculating DBAs that are based on variable values. You define valid ranges and amounts that are a function of certain table method codes.

Calculation tables contain user-defined information to help define your standard DBA methods of calculation. Calculation tables provide calculations based on values that vary from employee to employee.

When you define a calculation table, you must first determine what the calculation is based on, such as any of these factors:

- Age.
- Annual salary.
- Months of service.
- Hours worked in a pay period.

After you have defined the calculation table, you must determine the appropriate method of calculation. The method of calculation indicates what the ranges in the table represent, such as age ranges or salary ranges. The methods of calculation are attached to these numeric codes defined in the user defined code (system 06, type DM):

- *0:* Withholding periods.
- *1:* Salary range.
- *2:* Date range.
- *3:* Age range (calculated by date of birth).
- *4:* Hours worked.

- *5:* Pieces produced.
- *6:* Variable months.
- *7:* Workers compensation insurance.
- *8:* Gross pay.
- *9:* Age (calculated as of the date that you enter in the Employee Age field on the Personal form).

For example, to base a DBA on employee age, you can use code 3 or code 9 for the method of calculation.

Prerequisite

Select a table method from user defined code list 06/DM that is appropriate as a method of calculation. Read the descriptions to find a method that describes how you want the system to perform the calculation.

Setting Up Calculation Tables

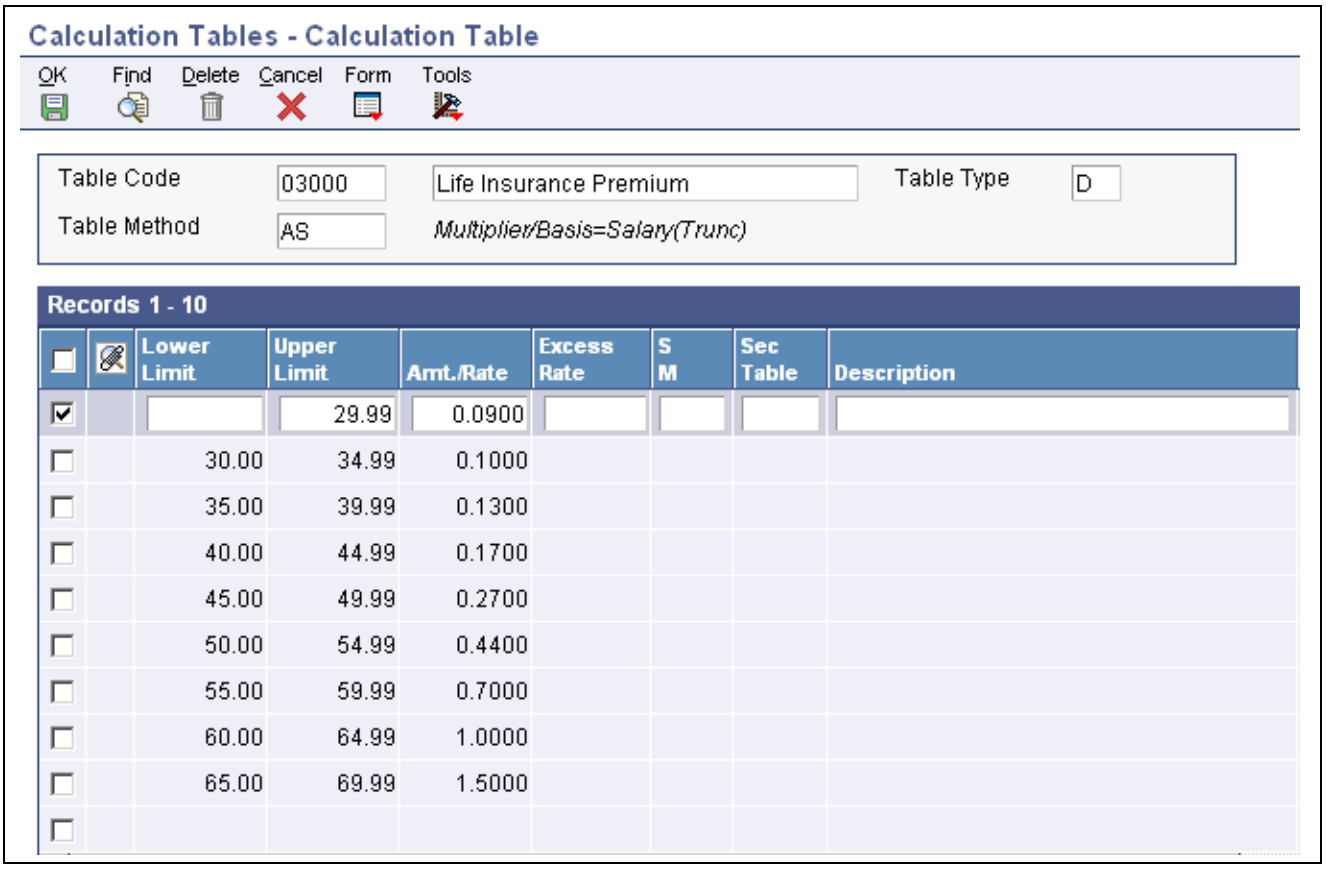
This section discusses how to set up calculation tables.

Form Used to Set Up Calculation Tables

Form Name	Form ID	Navigation	Usage
Calculation Table	W059021C	Pay/Deductions/Benefits Setup (G05BD4), Calculation Tables Click Add on the Work With Calculation Tables form.	Set up calculation tables.

Setting Up Calculation Tables

Access the Calculation Table form.



Calculation Table form

Note. You do not need to include a line in the calculation table for zero amounts. For example, if vacation time is not earned in the first year of employment, you do not need to include that year on the first line of the calculation table. The first line could start with 2.00 as the lower limit.

Table Type Enter a code that defines the purpose of the table. Values are:

D: The system uses the table to calculate DBAs.

R: The system uses the table to determine limits for rolling over sick and vacation accruals.

Table Code Enter a code that specifies to the Payroll system a table to be accessed in the Payroll Generic Tables table (F069026). The values that you enter in this field must be numeric.

Table Method Enter a code that specifies the method in which the DBA is calculated.

Amt./Rate Enter the amount or rate to be used in the calculation of a DBA. The system uses this field when the method of calculation specifies a *1, 2, 3, 4, 5,* or *6,* and therefore a specific basis table is retrieved for the ultimate calculation of the transaction.

Upper Limit Enter the upper or maximum amount to be compared.

Lower Limit Enter the lower or minimum amount to be compared.

Additional Rate Enter the rate for the system to use in the calculation of the transaction, via the table setup. The amount specified here overrides any other rate that

might be retrieved through the standard hierarchy for Accrual, Benefit, or Deduction calculation.

Amt./Rate 2 Enter the amount or rate that the system uses in the calculation of an Accrual, Benefit or Deduction. The system uses this field when the method of calculation specifies a *1, 2, 3, 4, 5,* or *6,* and therefore a specific basis table is being retrieved for the ultimate calculation of the transaction.

Limit Amt. Enter the maximum amount that can be withheld or accrued in a year for a deduction, benefit, or accrual. This amount is expressed in dollars for a deduction or benefit and in hours for an accrual.

For the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year:

- If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.
- If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.

Sec Table Enter a code that specifies the method under which the DBA is to be calculated. This calculation table serves as the secondary calculation table for the system. You must enter a code in this field if you enter a code in the secondary method field.

S M Enter a user defined code (system 06, type DS) that indicates what method is used for the calculation of DBAs.

Excess Rate Enter a rate that the system applies to the amounts that exceed the table defined amount.

See Also

Chapter 19, “Setting Up Rollover Information for DBAs ,” page 155

Chapter 42, “Understanding DBA Table Methods,” page 393

Attaching Calculation Tables to DBAs

After you set up your calculation tables, attach a calculation table to the DBA by entering the table code on DBA Setup. Although you can attach the same calculation table to more than one DBA, if you are attaching only one calculation table to one DBA, we recommends that you make the table code the same as the DBA code for convenience.

This section discusses how to attach calculation tables to DBAs.

Form Used to Attach Calculation Tables to DBAs

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select the DBA type and click Add on the Work With PDBAs form.	Attach calculation tables to DBAs.

Attaching Calculation Tables to DBAs

Access the Basic DBA Information form.

Method of Calculation Enter a user defined code (system 07, type DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

The method values are pre set by PeopleSoft. If you use methods 0–6, 8, 9, or G, you must also enter a value in the Table Code field.

For wage attachments use one of these methods:

C: Wage assignment (child support and maintenance).

G: Garnishment.

K: Loan.

L: Tax levy.

A: Fees.

%: Interest.

Table Code Enter the table number that the system uses if the calculation requires table values.

See Also

Chapter 18, "Setting Up Deductions, Benefits, and Accruals ," Essential DBA Information Setup, page 137

CHAPTER 18

Setting Up Deductions, Benefits, and Accruals

This chapter provides an overview of deductions, benefits, and accruals (DBA) setup and discusses how to:

- Set up basic DBA information.
- Set up general accounting and arrearage information.
- Set up the basis of calculation.
- Add text to DBAs.
- Set up group plan DBAs.
- Set up tax status for deductions.
- Set up tax status for benefits.

Understanding DBA Setup

This section discusses:

- Essential DBA information setup.
- The basis of calculation for DBAs.

Essential DBA Information Setup

You typically set up deductions, benefits, and accruals (DBAs) only if you are using the EnterpriseOne Payroll system. You might set up DBAs without the Payroll system if you have a customized interface with a payroll service bureau.

You set up DBAs to automate the process of subtracting monies, calculating benefits, and tracking accruals when you run a payroll cycle. You must set up DBAs before you can assign them to employees.

If you are using the Human Capital - Benefits module, you must also set up DBAs before you can enroll employees in benefit plans. You must also set up one or more DBAs for each benefit plan. When you enroll employees in benefit plans, the system automatically applies the appropriate DBAs to the DBA instructions for the employee, based on the DBA code.

When setting up essential DBA information, you define the minimum amount of information that the system needs to perform the calculation. Typically, you will want to calculate essential DBA information in one of three ways:

Calculation Type	Description
Monetary amount	You set up a monetary amount to calculate a specific amount of money for the designated pay periods. For example, an employee enrolls in the health care plan provided by the company, which requires a deduction of 5.00 USD each pay period. You might also set up a deduction for union dues.
Percentage rate	You set up a percentage rate DBA to calculate a percentage of gross pay. For example, the DBA might designate that 1 percent of gross pay should be deducted for United Way or another charitable fund.
Calculation tables	You set up calculation tables for DBAs that are calculated by a formula. The calculation table defines the parameters that the system uses to calculate the DBAs.

When setting up essential DBA information, you can:

- Define the actual amount or rate to calculate.
- Omit the actual amount or rate to calculate.

If you omit the actual monetary amount or the percentage rate information during setup, you can enter it when you assign the DBA at the employee or timecard level.

After setting up a DBA for which you have entered an amount or rate, you periodically might need to update that amount or rate. For example, when you set up a DBA for a medical deduction, you can enter the premium amount. A year later, when the medical plan carrier raises its premiums, you must update the premium amount for the DBA.

The Basis of Calculation for a DBA

The system must have a value on which to base the calculation for each DBA. This value is called the basis of calculation.

You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBA for each DBA that you create.

To determine which PDBA codes to assign to the DBAs that you set up, consider:

- If you base a DBA on another DBA, both the From PDBA Type field and the Thru PDBA Type field must contain the same code (the code for the basis DBA).
- If you base a DBA on all pay types, enter code 1 in the From PDBA Type and code 999 in the Thru PDBA Type field.
- If you base the DBA on a selected group of pay types, include only those pay types in the From PDBA Type and Thru PDBA Type fields.

  For example, if you base a DBA on all pay types except 801, enter *1* in the From PDBA Type field and *800* in the Thru PDBA Type field on the first line. On the second line, enter *802* in the From PDBA Type field and *999* in the Thru PDBA Type field.

Setting Up Basic DBA Information

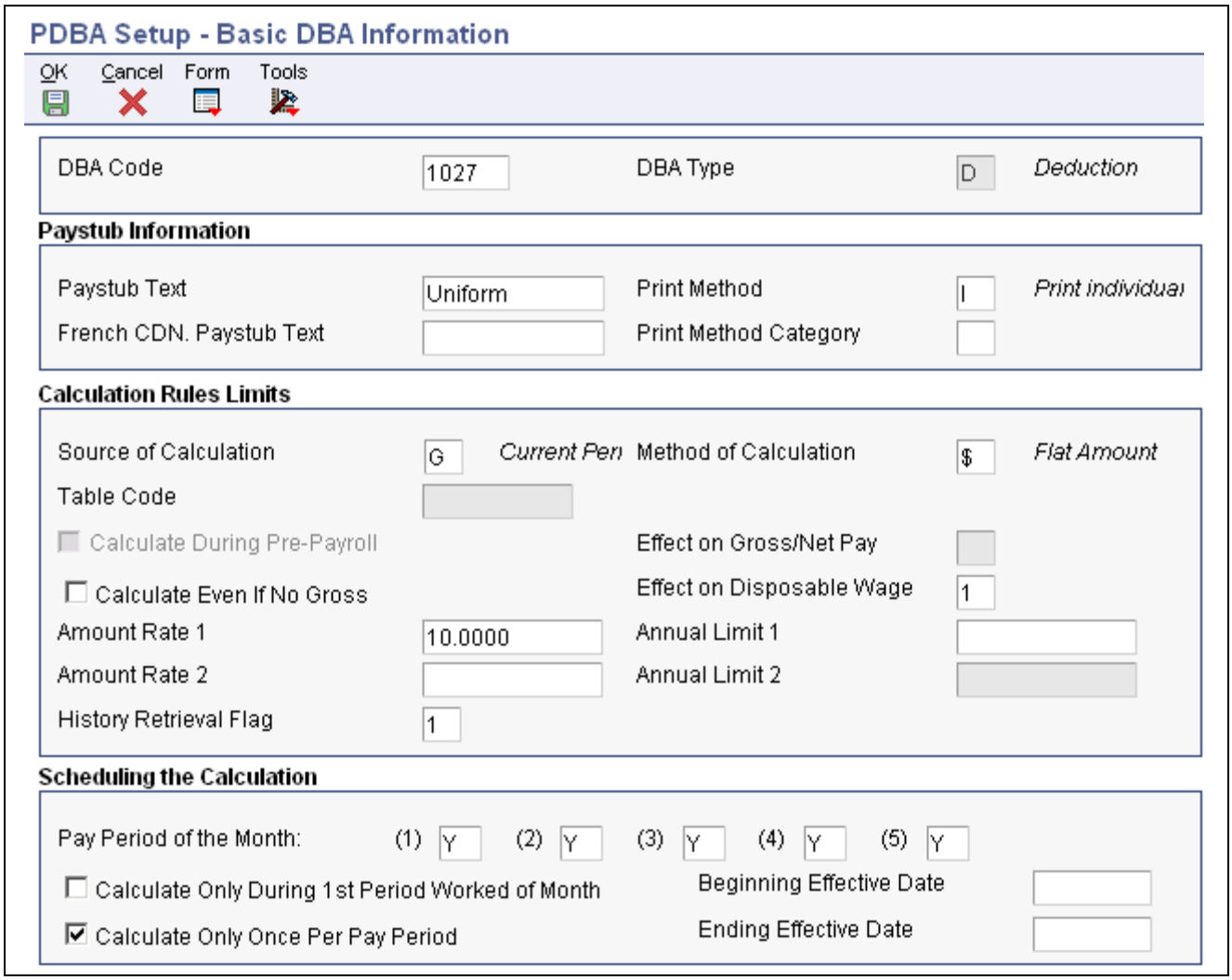
This section discusses how to set up basic DBA information.

Forms Used to Set Up Basic DBA Information

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a PDBA type and Click Add on the Work With PDBAs form.	Set up basic DBA information.
PDBA Search & Select	W05PDBASA	Click the Search button in the DBA Code field on the Basic DBA Information form.	Select a DBA.
Pay Type Recap	W05SDBB	Select a DBA and then select PDBA Recap from the Row menu on the PDBA Search & Select form.	Review a DBA.

Setting Up Basic DBA Information

Access the Basic DBA Information form.



Basic DBA Information form

DBA Code Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

DBA Type Enter a code that specifies the type of payroll entry. When you enter * in this field, the system displays all four types of PDBAs.Values are:

P: Time Cards (earnings)

D: Deductions withheld

B: Benefit (both cash and noncash)

A: Time accrual, such as sick and vacation time

Note. These values can be changed only by PeopleSoft.

Paystub Text Enter text that you want the system to print on the employee's paystub. If you are using the Time and Labor system, the system does not create payments. However, this field is required to complete the form. Generally, you enter a description of the PDBA.

French CDN. Paystub Text Enter text that you want the system to print on the employee's paystub. If you are using the Time and Labor system, the system does not create payments. However, this field is required to complete the form. Generally, you enter a description of the PDBA.

Print Method Enter a code that identifies whether the PDBA is to be printed on the paystub or whether it is to be printed on a payment that is separate from other PDBAs.

Values for pay types and payroll taxes include:

Y: Print on paystub (default).

S: Print separate payment (one item per payment).

C: Print separate payment (C types combined).

N: Do not print on paystub.

Values for DBAs include:

Y: Print as total deductions (default).

S: Print separate payment (one item per payment).

C: Print separate payment (include detail).

N: Do not print on paystub.

I: Print individual DBA codes.

T: Print by DBA print group.

The separate payment feature is not available for any payroll taxes being withheld from the employee's payment.

Print Method Category Enter a user defined code (07/PC) that specifies the pay type categories you want to use:

- For regular pay.
- To generate overtime.
- For reporting purposes on the Certified Payroll Register (U.S. only).

A user defined code (06/PC) that categorizes PDBAs, and prints the category on the pay stub. You can have more than one PDBA for each category. For example, V for overtime, might include time and a half and doubletime.

Source of Calculation Enter a user defined code (07/DB) that specifies the basis of a deduction, benefit, or accrual. When the system calculates the gross amount for disposable net wages, it does not use the basis of calculation. The gross amount includes all earnings that have a positive effect on the gross and net payment. For wage attachments use one of these codes:

1-8: Garnishment, tax levy, wage assignment (child support and maintenance)

R: Loan, interest

0: Fees

Method of Calculation A user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

The method values are pre set by PeopleSoft. If you use methods 0 - 6, 8, 9, or G, you must also enter a value in the Table Code field.

For wage attachments use one of these methods:

C: Wage assignment (child support and maintenance)

G: Garnishment

K: Loan

L: Tax levy

A: Fees

%: Interest

Table Code Enter the table number that the system uses if the calculation requires table values.

Calculate During Pre-Payroll Enter a code that specifies whether the system calculates a benefit during pre-payroll processing. Values are:

On: Yes, calculate the benefit during pre-payroll processing.

Off: No, calculate the benefit during the journal entry step of the payroll cycle.

In general, the system calculates all benefits and accruals during the processing of journal entries because they do not affect the gross-to-net calculation. Certain benefits, such as group life insurance and the corresponding excess life insurance benefit, must be calculated in pre-payroll because they affect the gross-to-net calculation.

If you want the benefit or accrual to print on the employee's paystub, use *On* and complete the Method of Printing field.

Effect on Gross/Net Pay Enter a code that specifies the effect a benefit has on gross and net income. Values are:

1: A non-cash benefit that is non-taxable. The benefit, which is a journal entry only, has no effect on gross or net income.

2: A cash benefit that is taxable. The system adds the benefit to gross and net income.

3: A non-cash benefit that is taxable. The system adds the benefit to the taxable gross income, but there is no effect on net income other than the tax that is withheld.

4: A cash benefit that is non-taxable. There is no effect on gross income, and the system adds the benefit to net income as an adjustment to net pay. In addition, the system adds this type of benefit to gross wages on the payroll register so that gross - deductions = net.

Calculate Even If No Gross Enter an option that specifies whether the system calculates a DBA in the absence of gross pay. Values are:

On: Yes, calculate this DBA when an employee has no gross pay and no PDBA codes exist in the basis of calculation.

Off: No, do not calculate this DBA when an employee has no gross pay and no PDBA codes exist in the basis of calculation.

When an employee has no gross pay, the system calculates the DBA when these conditions exist:

- The Calculate Even If No Gross option is turned on
- The source of calculation is G
- The method of calculation is $

The system then records the resulting amount in arrears and performs one of these functions:

- Creates an overpayment for a deduction
- Calculates it as a benefit or an accrual

Note. If the PDBA codes exist in the basis of calculation, the system attempts to calculate the DBA, regardless of this setting.

Effect on Disposable Wage This code designates whether a DBA is subtracted from gross to determine an employee's disposable wages. Valid codes are:

1: Voluntary.

These deductions are subtracted from gross to determine disposable wages for deductions with a Source of Calculation of 1, 5, and 7.

2: Mandatory.

These deductions are subtracted from gross to determine disposable wages for deductions with Source of Calculation of 1, 2, 4, 5, 6, and 7.

Amount Rate 1 Enter a value that specifies a percentage, a monetary amount, or an hourly rate, depending on where it is used. For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard. Values are:

1: Amount does not override the hourly rate.

For a pay type, amounts entered in this field do not override the hourly rate.

2: Amount overrides the hourly rate.

For a pay type, amounts entered in this field override the hourly rate.

Annual Limit 1 Enter the maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

In the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year. For example:

- If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.

- If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.

Amount Rate 2

Enter the second amount or rate associated with a deduction, benefit, or accrual. Because many DBA types require multiple tiers, two levels of Amount (Rate) exist. The system uses the first level, Amount (Rate) 1, until the annual limit is reached. Then, the second level, Amount (Rate) 2, begins the next time the employee is paid. Amount (Rate) 2 continues until the second annual limit is reached.

This field works in conjunction with the annual limit fields. The rate you enter in this field supersedes any other table rate for an employee, except for one-time overrides during time entry.

Annual Limit 2

Enter the maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

Note. This field represents the second level annual limitation. It is used when there is an initial limitation and a corresponding rate, which is followed up by a new rate and a final limitation. This field cannot be used independently. There must always be a value in the Annual (Level 1) field.

History Retrieval Flag

Enter an option that determines how the system retrieves PDBA history for an employee. This value works in conjunction with the Retrieve PDBA History System Flag on the Additional Options tab of the Company Options form for Company 0 (zero). If that flag is set to look at each PDBA to determine how to retrieve PDBA history, you must enter a value in this field. Values are:

1: Retrieve PDBA historical amounts using the Corporate Tax ID associated with the Home Company on the employee's timecard. (Default)

2: Retrieve PDBA historical amounts across all Corporate Tax IDs for which the employee has history for the current year.

Pay Period of the Month:

Enter a code designating the pay period in which the system calculates the DBA/auto deposit. Values are:

Y: Take the DBA/auto deposit during the current period.

N: Do not take the DBA/auto deposit during the current period.

**:* Take the DBA/auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.

Blank: Continue to look for a code at the lower level. The system searches for DBA/auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA/auto deposit in that period.

M: Applies only to benefits based on gross hours or dollars. An M in the fifth field only tells the system to calculate the benefit during the special timecard post. An M implies a Yes for a weekly withholding frequency.

Calculate Only During 1st Period Worked of Month

Enter a code that indicates whether the deduction, benefit, or accrual should calculate only during the first pay period that an employee works each month.

Calculate Only Once Per Pay Period Enter a code that indicates whether the deduction, benefit, or accrual should be calculated only once in a pay period if the employee receives more than one check.

Setting Up General Accounting and Arrearage Information

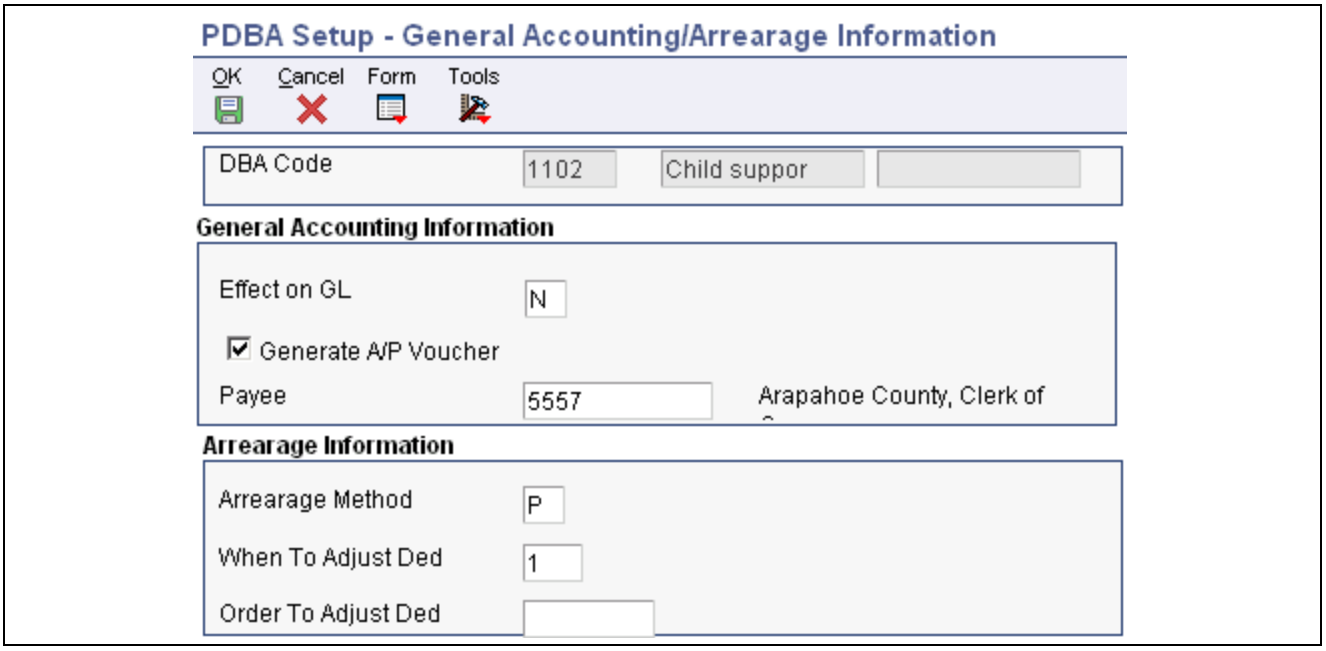
This section discusses how to set up general accounting and arrearage information.

Form Used to Set Up General Accounting and Arrearage Information

Form Name	Form ID	Navigation	Usage
General Accounting/Arrearage Information	W059116D	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a record on the Work With PDBAs form and click Select. Select GA/Arrearage Info. from the Form menu on the Basic DBA Information form.	Set up general accounting and arrearage information

Setting Up General Accounting and Arrearage Information

Access the General Accounting/Arrearage Information form.



General Accounting/Arrearage Information form

Effect on GL

A code indicating whether you want journal entries passed from payroll to the general ledger and the method you want to use. Valid codes are:

N: Pass dollars only to the general ledger.

M: Do not pass dollars or hours to the general ledger. This code allows an accrual to be tracked in employee payroll history and the dollars to be omitted from the general ledger.

Generate A/P Voucher

A code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:

N: No, do not generate a voucher

Y: Yes, generate a voucher

Select this option if you are integrating the Payroll system with the Accounts Payable system and you need to activate vouchering for the DBA.

Payee

The address book number for the supplier who receives the final payment.

In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.

For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.

When you specify a payee, you should also select Generate A/P Voucher. If Generate A/P Voucher is not selected, the system might create an invalid journal entry.

For fund allocations, this is the address book number of the investment program.

Arrearage Method

A code indicating how to adjust deductions when the employee is in a negative pay situation. Values are:

P: Do a partial or full deduction as needed. This is the default.

F: Do a full reduction or none at all.

N: Do not reduce.

Q: Same as code *P*. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

R: Same as code *P*. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

G: Same as code *F*. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

H: Same as code *F*. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

S: Same as code *P*. In addition, place the amount in arrears for the current pay period only but do not apply the limits when collecting the arrearage. Do not write the arrearage balance to history.

T: Same as code *P*. In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

I: Same as code *F.* In addition, place the amount in arrears for the current pay period only, but do not apply the limits when collecting the arrearage. Do not write arrearage balance to history.

J: Same as code *F.* In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

When To Adjust Ded A code that specifies when the system adjusts, or backs an amount out of, deductions. Values are:

0: Adjust deductions marked with *0* before payroll taxes.

1: Adjust deductions marked with *0,* then adjust those marked with *1* before payroll taxes.

2: Adjust payroll taxes before the deductions marked with *2.* (This value is for future use.)

Order To Adjust Ded If an employee's gross pay does not cover deductions, a code in this field tells the system in what order it should satisfy deductions. Valid codes are 0001 through 9999. The system starts with the highest code. For example, 9999 is deducted before 0001.

Setting Up the Basis of Calculation

This section provides an overview of basis of calculation setup and discusses how to set up the basis of calculation.

Understanding Basis of Calculation Setup

You set up a basis of calculation for a DBA to define the base value that the system uses to calculate the DBA during payroll processing. A DBA can be based on pay types, on another DBA, or on a combination of both pay types and DBAs (PDBAs). To define the base value, you must list one or more PDBAs for each DBA that you create.

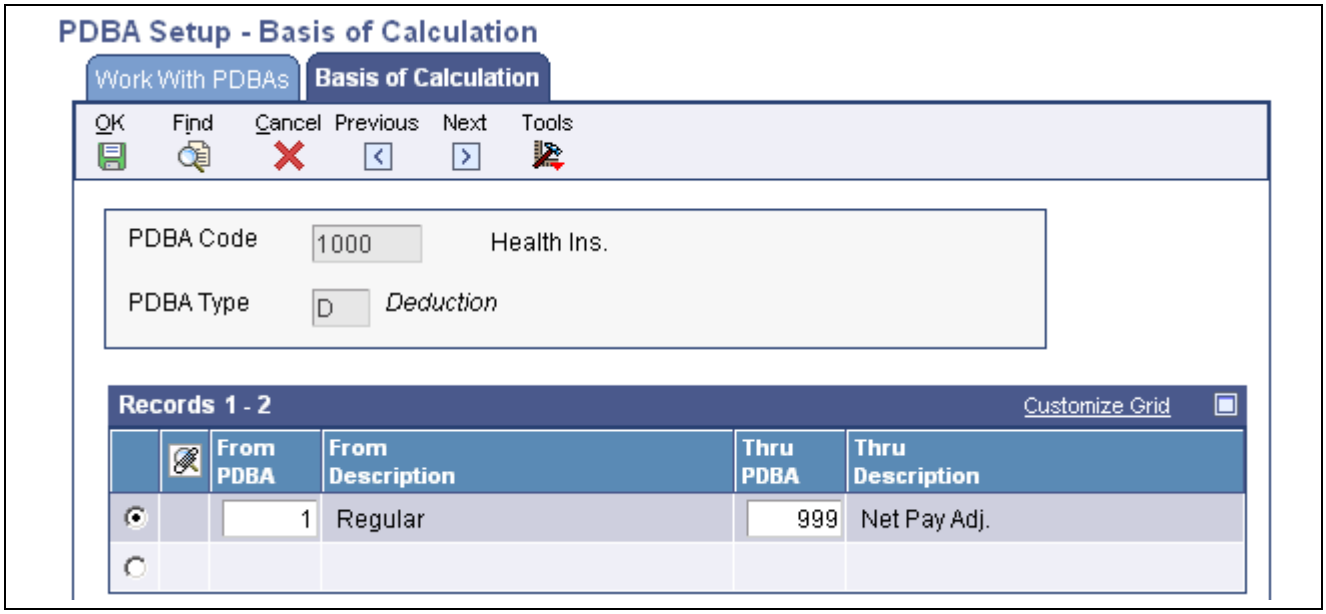
If the Basis of Calculation form contains only one row of values, you cannot delete that row. Every DBA must have a basis of calculation.

Form Used to Set Up the Basis of Calculation

Form Name	Form ID	Navigation	Usage
Basis of Calculation	W059118B	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a record and then select Basis of Calc. from the Row menu on the Work With PDBAs form.	Set up the basis of calculation.

Setting Up the Basis of Calculation

Access the Basis of Calculation form.



Basis of Calculation form

From PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

Thru PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

Note. To include all pay types, enter 1 in the From PDBA field and 999 in the Thru PDBA field.

Adding Text to DBAs

This section discusses how to add text to DBAs.

Form Used to Add Text to DBAs

Form Name	Form ID	Navigation	Usage
Media Object Viewer	N/A	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select the DBA on the Work With PDBAs form and select Attachments from the Row menu.	Add text to DBAs.

Adding Text to DBAs

Access the Media Object Viewer form.

To add text to a DBA: :

1. Click Text on the Media Object Viewer form.
2. Enter the text.
3. Click Save.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Foundation

Setting Up Group Plan DBAs

This section provides an overview of group plan DBA setup, lists prerequisites, and discusses how to:

- Set up group plan DBAs.
- Set processing options for Group Plan DBA Setup (P059101).

Understanding Group Plan DBA Setup

You set up group plan DBAs to designate that deductions, benefits, or accruals apply to groups of employees. You identify each group plan by a user-defined DBA code, such as a union code. You can further define group plans with additional qualifying criteria, such as:

Criteria	Description
Business unit	The plan applies only for work performed at a particular business unit or job location.
Job type	The plan applies only to employees working in a certain job type.
Job step	The plan applies only to employees in a certain job step within a job type.
Date range	The plan applies if the pay period dates fall within the date range that you define. For example, you could use this criterion to establish plans with built-in rate increases that you base on effective dates.

Prerequisite

Set your processing option to specify whether you are setting up single or multiple group plans. Depending on the value that you enter, the system displays either the Revision Multiple Group Plan DBA Setup form or the Revise Single Group Plan DBA Setup form.

Form Used to Set Up Group Plan DBAs

Form Name	Form ID	Navigation	Usage
Revise Single Group Plan DBA Setup	W059101C	Pay/Deductions/Benefits Setup (G05BD4), Group Plan DBA Setup Click Add on the Work With Group Plan DBA Setup form.	Set up group plan DBAs.

Setting Up Group Plan DBAs

Access the Revise Single Group Plan DBA Setup form.

PDBA Code Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Job Type Enter a user defined code that specifies a particular job type. You associate pay and benefit information with a job type when you define jobs on Job Entry and Evaluation (P08001). Certain pay and benefit information that you associate with a job type defaults in the Employee Entry forms when you are adding a new employee to the database.

S C Enter a user defined code (07/DB) that specifies the basis of a deduction, benefit, or accrual. When the system calculates the gross amount for disposable net wages, it does not use the basis of calculation. The gross amount includes all earnings that have a positive effect on the gross and net payment. For wage attachments, values are:

1-8: Garnishment, tax levy, wage assignment (child support and maintenance)

R: Loan, interest

0: Fees

M C Enter a user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

Explanation Alpha Name Enter a description, remark, explanation, name, or address.

A/P Voucher (Y,N) Enter a code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Valid codes are:

N: No, do not generate a voucher.

Y: Yes, generate a voucher.

Gen Vch Enter a value if you are integrating Payroll system with the Accounts Payable system and you need to activate vouchering for the group plan.

Provider/Trustee Enter the address book number for the supplier who receives the final payment.

In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.

For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.

Setting Processing Options for Group Plan DBA Setup (P059101)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

Use this processing option to specify whether you want the system to access the Revise Single Group Plan DBA Setup form or the Revision Multiple Group Plan DBA Setup form. The default value (1) is the multiple revisions form.

1. Choose Revisions Form Use this processing option to specify whether the system should display the Single Revisions form or the Multiple Revisions form. Values are:

Blank: Single Revisions form

1: Multiple Revisions form

Setting Up Tax Status for Deductions

This section provides an overview of tax status setup for deductions and discusses how to set up tax status for deductions.

Understanding Tax Status Setup for Deductions

You set up tax information for a deduction so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the deduction. For example, you might need to specify that a deduction is exempt from federal withholding tax but not from state withholding tax.

In some cases, you might need to indicate that a deduction is exempt from one or more types of taxes. For example, a deduction might be exempt from federal withholding tax but not from state withholding tax.

Important! Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change if the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. If necessary, add the new DBA to your employee DBA instructions, using an appropriate start date.

See Also

PeopleSoft EnterpriseOne U.S. Payroll 8.11 PeopleBook

Form Used to Set Up Tax Status for Deductions

Form Name	Form ID	Navigation	Usage
Tax Exemptions	W05TAXA	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form. Select Tax Exemption from the Form menu on the Basic DBA Information form.	Set up tax status for deductions.

Setting Up Tax Status for Deductions

Access the Tax Exemptions form.

Tax Type 01 Specify up to 15 tax types for which the respective payroll tax is not to be computed for a pay, deduction, or benefit code.

If you enter * in the first element of this list, no taxes are computed.

Setting Up Tax Status for Benefits

This section provides an overview of tax status setup for benefits and discusses how to set up tax status for benefits.

Understanding Tax Status Setup for Benefits

You set up tax information for a benefit so that the system properly calculates any taxes that must be withheld from an employee's pay as a result of the benefit. In some cases, you might need to identify a benefit, such as a company-paid life insurance policy, as a taxable cash benefit.

When you set up a benefit, you must indicate its effect on employees' gross and net pay. You must identify the benefit as:

Benefit	Description
Nontaxable cash benefit	You set up a nontaxable cash benefit when the employer is providing a benefit to the employee that does not affect the employee's gross income. The cash benefit is added to the employee's net income as a net pay adjustment. An example of a nontaxable cash benefit is a moving allowance below the taxable minimum.

Benefit	Description
Nontaxable non-cash benefit	You set up nontaxable non-cash benefits when the employer is providing a benefit to the employee that is not taxed and is not transferable to cash, such as company-paid health insurance. The employee is not taxed for this benefit.
Taxable cash benefit	You set up a taxable cash benefit when the employer is providing a benefit to the employee that is taxed and is in the form of cash. An example of a taxable cash benefit is a reimbursement for moving expenses.
Taxable non-cash benefit	You set up a taxable non-cash benefit when the employer is providing a benefit to the employee that is taxed and is not transferable to cash. The benefit is added to an employee's gross pay, but it has no impact on the employee's net pay other than the tax withheld. An example of a taxable non-cash benefit is the use of a company car.

Important! Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change as the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. Add the new DBA to your group plan and employee level DBAs with an appropriate start date.

Form Used to Set Up Tax Status for Benefits

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click benefit record and then click Add on the Work With PDBAs form.	Set up tax status for benefits.

Setting Up Tax Status for Benefits

Access the Basic DBA Information form.

Effect on Gross/Net Pay Enter a code that specifies the effect a benefit has on gross and net income. Values are:

1: A non-cash benefit that is non-taxable.

The benefit, which is a journal entry only, has no effect on gross or net income.

2: A cash benefit that is taxable.

The system adds the benefit to gross and net income.

3: A non-cash benefit that is taxable.

The system adds the benefit to the taxable gross income, but there is no effect on net income other than the tax that is withheld.

4: A cash benefit that is non-taxable.

There is no effect on gross income, and the system adds the benefit to net income as an adjustment to net pay. In addition, the system adds this type of benefit to gross wages on the payroll register so that gross - deductions = net.

Calculate Even If No Gross Enter an option that specifies whether the system calculates a DBA in the absence of gross pay. Values are:

On: Calculate this DBA when an employee has no gross pay and no PDBA codes exist in the basis of calculation.

Off: Do not calculate this DBA when an employee has no gross pay and no PDBA codes exist in the basis of calculation.

When an employee has no gross pay, the system calculates the DBA when these conditions exist:

- The Calculate Even If No Gross option is turned on.
- The source of calculation is G.
- The method of calculation is $.

The system then records the resulting amount in arrears and performs one of these functions:

- Creates an overpayment for a deduction.
- Calculates it as a benefit or an accrual.

Note. If the PDBA codes exist in the basis of calculation, the system attempts to calculate the DBA, regardless of this setting.

CHAPTER 19

Setting Up Rollover Information for DBAs

This chapter provides an overview of rollover information setup for DBAs and discusses how to:

- Create rollover calculation tables for DBAs.
- Set up rollover information for DBAs.

Understanding Rollover Information Setup for DBAs

This section provides an overview of rollover information setup for DBAs and lists prerequisites.

Rollover Information Setup for DBAs

For most types of DBAs, such as retirement plan benefits and medical plan deductions, the system carries forward year-end balances when you run the standard year-end rollover programs.

For some DBAs, such as those that track vacation and sick time, employees can earn or hold balances that the system must calculate before it can roll over the balance from one year to the next. When you set up these DBAs, you must enter rollover information so that the system can calculate the balance to roll over.

The system rolls over DBAs that have:

- Remaining balances
- Remaining periods
- An inception-to-date limit
- An annual carryover limit
- Deduction amounts due
- Arrearages

You also enter rollover information to specify the table in which the system stores history for the DBA, either the Fiscal and Anniversary Year History table (F06147) or the Employee Transaction History Summary table (F06146).

You can set up vacation and sick DBAs in either of two ways:

- When an employee accrues time that becomes available at a later date, you set up two DBAs.

  The first DBA accrues the time. The second DBA tracks the amount of that accrued time that is available to the employee.
- When an employee may take time as it is earned, you set up a single DBA to track accrued, or available, time.

Either of these scenarios might also involve a limit to the number of hours or days that an employee can carry forward into the following year. When you set up a rollover calculation table to use with DBAs, you can specify a table method of either hours (VR) or days (DR). When you specify DR as the table method, the system calculates vacation or sick accruals in days worked instead of hours worked. You might use this approach when the number of standard hours per week varies based on job types or other criteria.

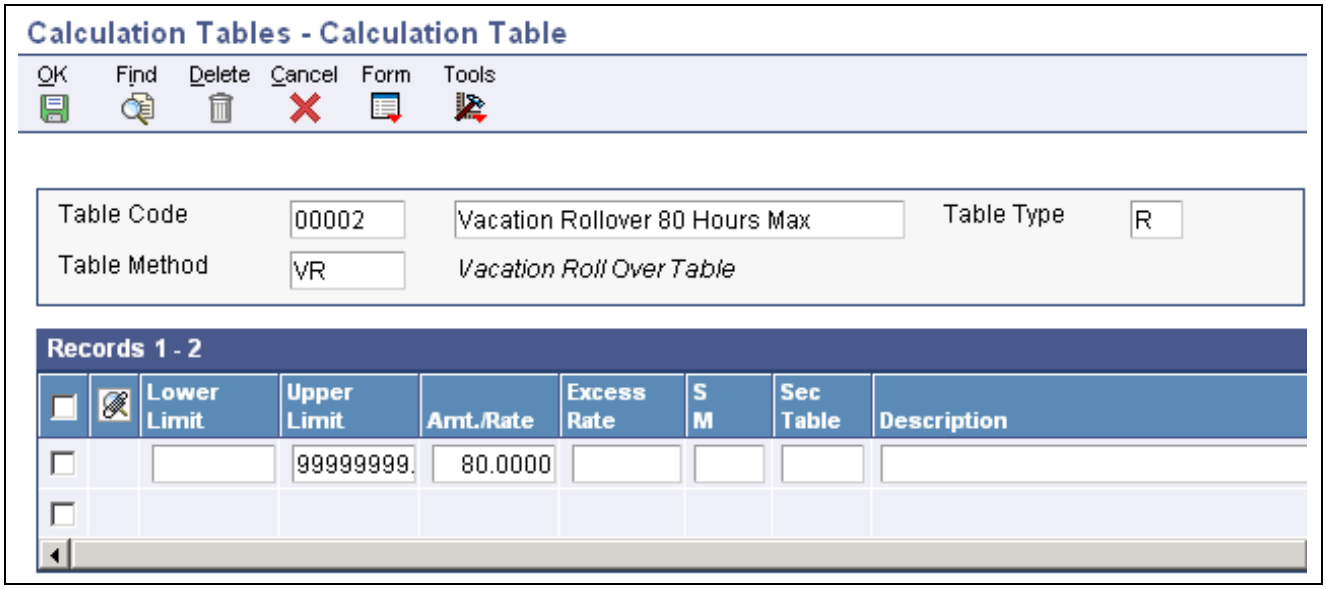
The system also calculates time accrued and time taken in a pay period in which the employee rollover occurs. Time accrued or taken can be rolled over immediately if the time occurred prior to the employee's anniversary date in a payroll that includes the employee's anniversary date.

See *PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook*, "Working with Rollovers".

Example: Limits on Vacation or Sick-Leave Rollover

Your vacation or sick-leave policy might state that employees can carry forward no more than 80 hours from one year to the next.

To administer this policy, you set up a rollover calculation table that allows only 80 hours to roll over into the following year.



Calculation Table form

The upper and lower limits in the rollover calculation table represent an employee's months of service. To include all employees in this table, use 0.00 as the lower limit and 999999.99 as the upper limit.

The table also specifies any limit to the amount of vacation time that the employee can carry over into the next year. This example allows 80 hours to be carried over to the next year. If your organization applies different limits based on the length of service of the employee, you can enter multiple rows in the rollover calculation table to administer this policy.

Note. To calculate vacation or sick-leave accruals in days instead of hours, you can use an alternate table method in the rollover calculation table.

When you use two DBAs to track sick or vacation time, the rollover calculation table is associated with the DBA that tracks available time. The amount of available time might include a beginning balance from a prior year. The system compares the total amount to the limit that is entered in the table. Any amount that is over the limit is not rolled over into the new year.

Alternatively, your organization's vacation or sick-leave policy might state that employees cannot carry forward hours or days from one year to the next. To administer this policy, you use a processing option for the Leave Balance Rollover program (R073910) to specify that the program roll over only the current accrual.

Example: Vacation Rollover for Time Not Immediately Available

Your vacation policy might state:

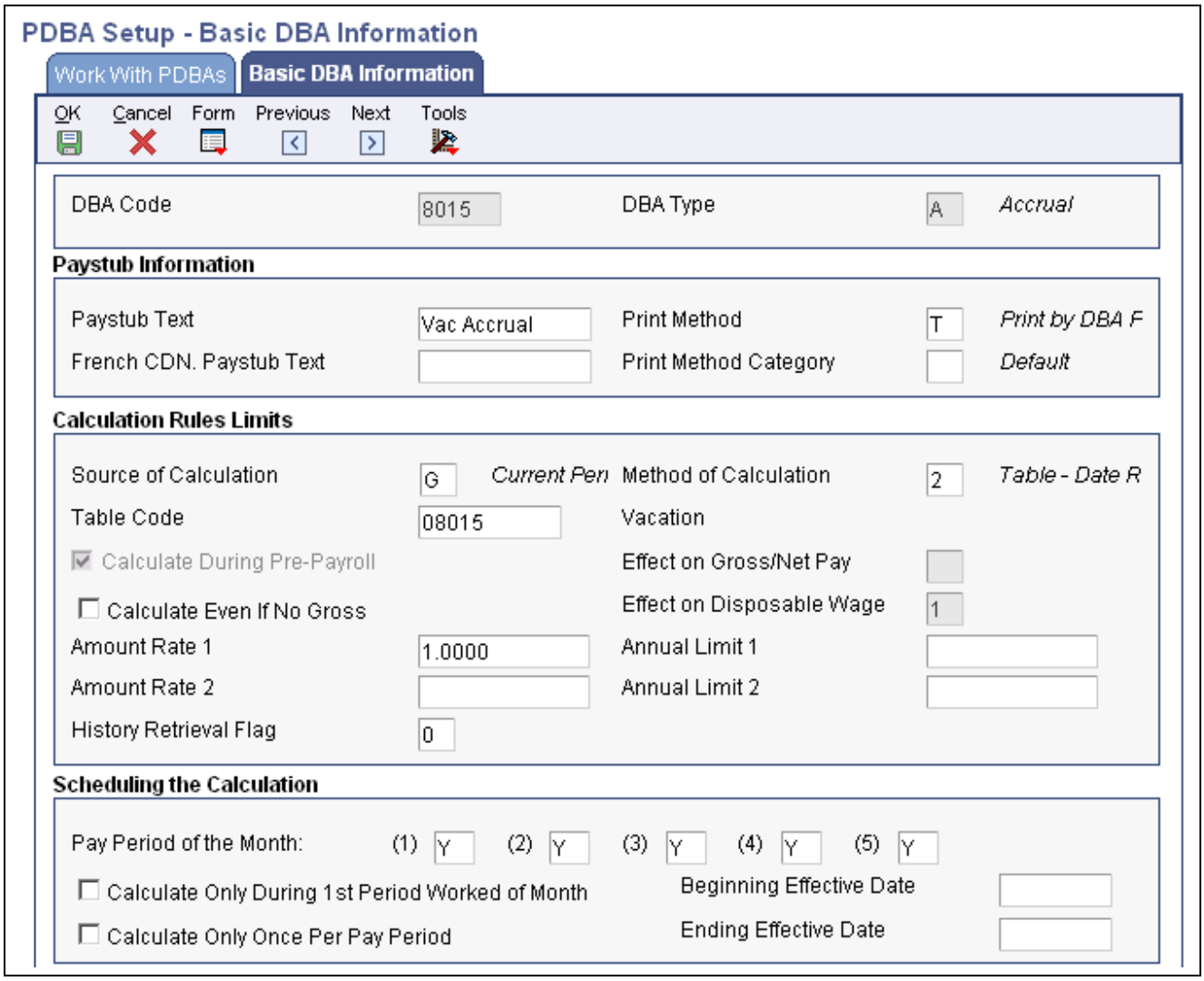
- Employees accrue vacation time at the rate of four to ten hours per month, based on years of employment.
- Employees may take vacation time in the calendar year following the year in which it was earned.

Note. To calculate vacation or sick leave accruals in days instead of hours, you can use an alternate table method in the rollover calculation table.

To administer this vacation policy, you would set up:

- A pay type (such as 815, Vacation Pay) that tracks the vacation time that an employee takes.
- An accrual (such as 8015, Vacation) that tracks the vacation time that an employee earns.

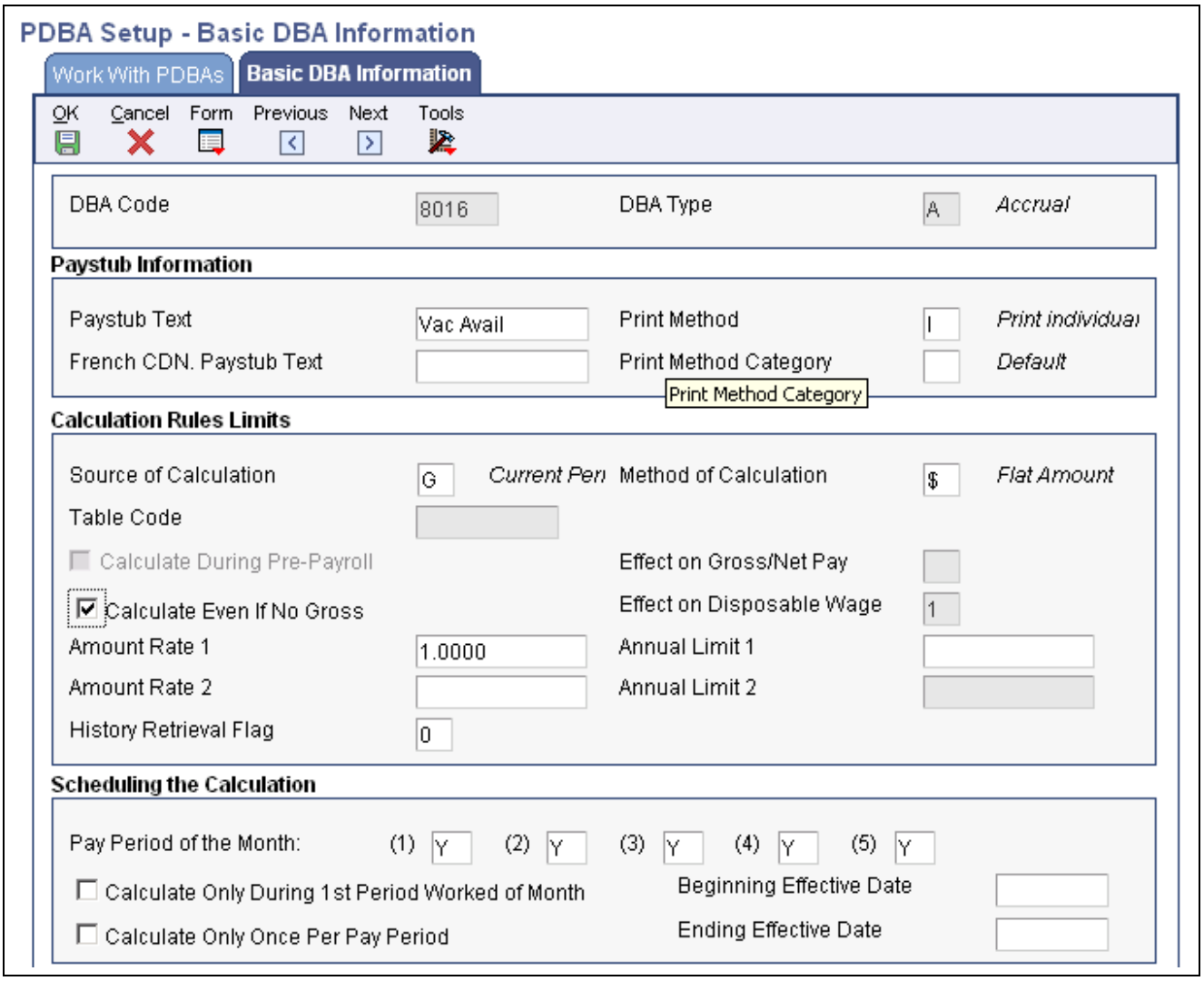
  The accrued time rolls over to a second DBA that tracks the available vacation time. Accrued time is not available until it rolls over.



Basic DBA Information form

An accrual (such as 8016, Vacation Available) that tracks the vacation time that is available to the employee.

You can use the accrual rollover table associated with this second accrual to establish the limit on the number of hours that can roll over into the following year.



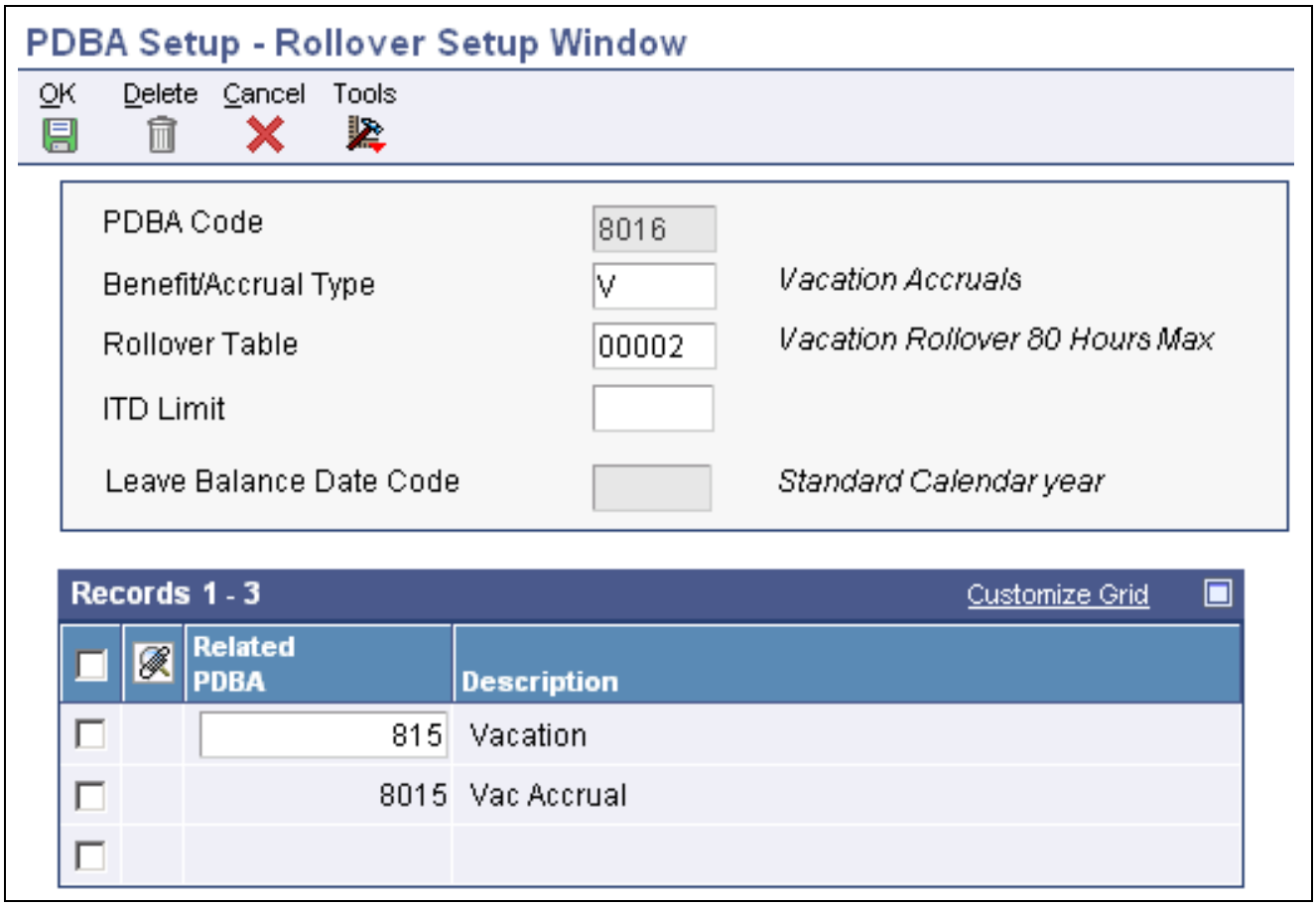
Basic DBA Information form

When you set up accrual 8016, Vacation Available, you would enter this rollover information:

- In the Benefit/Accrual Type field, enter *V* (Vacation Pay).
- In the Rollover Table field, enter the table code of the rollover table that you just created so that only the specified amount rolls over.

Note. If you specify a limit in the ITD Limit field, the system ignores any table code that you might have entered in the Rollover Table field. When you specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified. For more information about using the ITD Limit field, see Example: Vacation Rollover with an Inception-To-Date Limit in the Human Capital Management Foundation Guide.

- In the Related PDBA field, enter the number of the pay type used for vacation pay.
- In the next Related PDBA field, enter the DBA number of the accrual that represents accrued but not yet available hours.



Rollover Setup Window form

When you run the rollover program, the system calculates the balance to roll over by adding the accumulated accrual amount and available balances, subtracting the vacation time that has been taken, and limiting the carryover amount, if you entered a rollover table, so that it does not exceed the amount entered in the rollover calculation table.

You cannot enter any information on the Rollover Setup Window for accrual 8015. The Rollover Setup Window is only maintained for the available accrual, 8016.

Example: Vacation Rollover for Time Immediately Available

Your vacation policy might state:

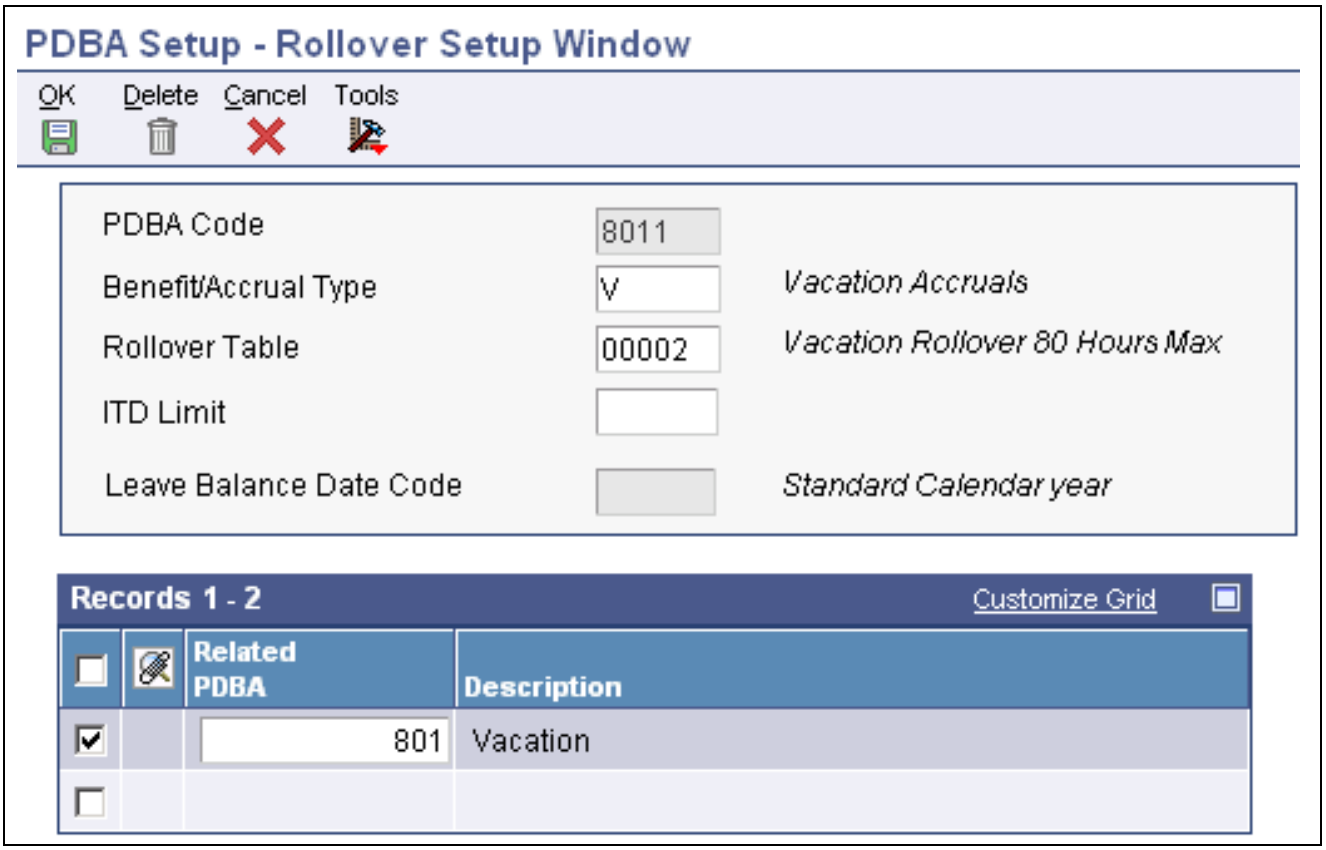
- Employees may take vacation time as it is earned.
- Employees accrue vacation time at the rate of four to ten hours per month, based on years of employment.
- Employees cannot roll over more than 80 hours to the next year.

Note. To calculate vacation or sick leave accruals in days instead of hours, you can use an alternate table method in the rollover calculation table.

To administer this vacation policy, you would set up:

- A pay type (such as 801, Vacation Pay) that tracks the vacation time that an employee takes
- An accrual (such as 8011, Vacation) that tracks the vacation time that an employee earns

When you set up accrual 8011, you would set up this rollover information:



Rollover Setup Window form

- In the Benefit/Accrual Type field, enter *V* (Vacation Pay).
- In the Rollover Table field, enter the table code of the rollover table that you just created so that only the specified amount rolls over.

Note. If you specify a limit in the ITD Limit field, the system ignores any table code that you might have entered in the Rollover Table field. When you specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified. For more information about using the ITD Limit field, see Example: Vacation Rollover with an Inception-To-Date Limit in the Human Capital Management Foundation Guide.

- In the Related PDBA field, enter the number of the pay type used for vacation pay (*801*).
- In the next Related PDBA field, enter pay type 801 as the pay type that the system uses to calculate the balance for accrual 8011.

When you run the rollover program, the system calculates the balance to roll over by subtracting the vacation time that has been taken from the vacation time earned, and limiting the carryover amount so that it does not exceed the amount entered in the rollover calculation table.

Example: Vacation Rollover with an Inception-To-Date Limit

Your vacation policy might state:

- Employees can take vacation time as it is earned.

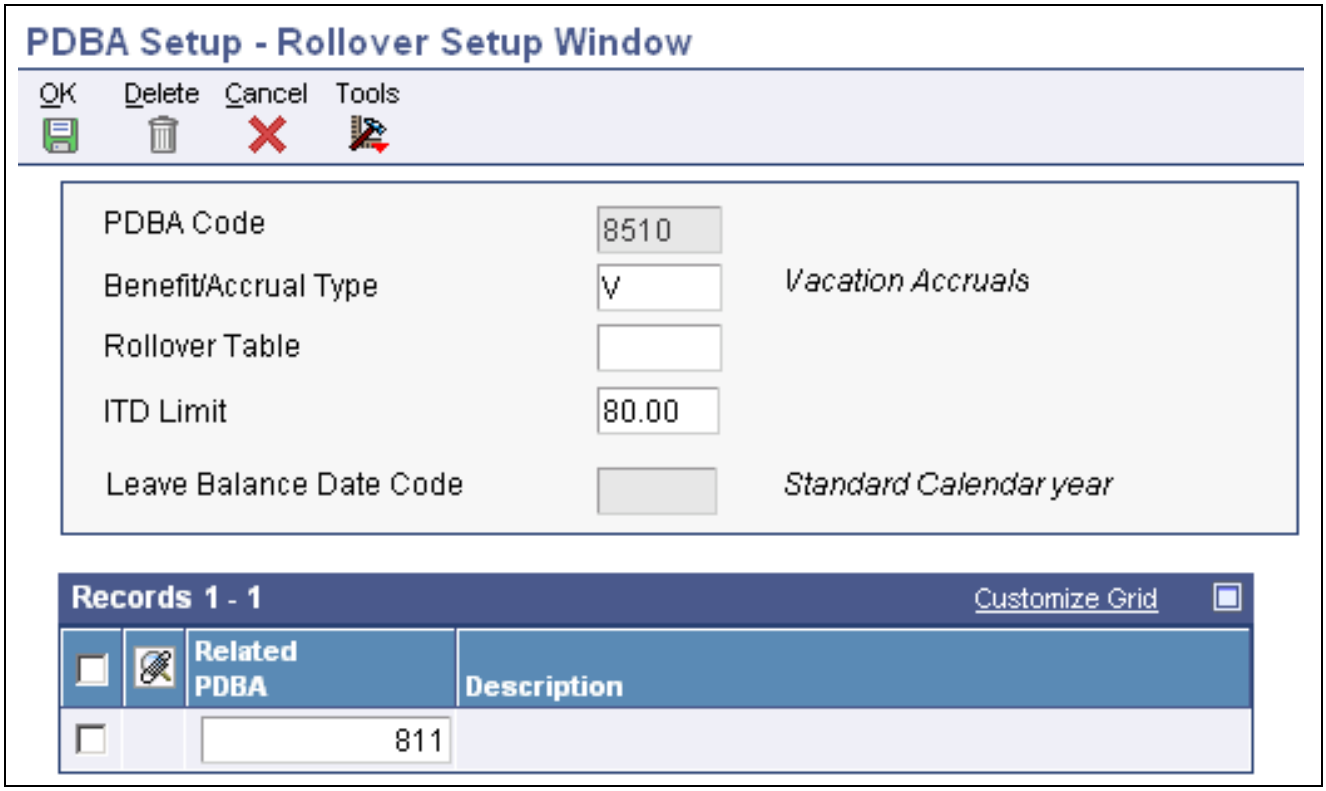
- Employees accrue vacation time at the rate of six hours per pay period, and your organization processes semi-monthly payrolls.
- The Inception-To-Date (ITD) limit is 80 hours, that is, employees cannot have more than 80 hours available at any given time.

Note. To calculate vacation or sick leave accruals in days instead of hours, you can use an alternate table method in the rollover calculation table.

To administer this vacation policy, you would set up:

- A pay type (such as 821, Vacation) that tracks the vacation time that an employee takes
- An accrual (such as 8510, Vac Accrual) with an ITD limit of 80 that tracks both the vacation time that an employee earns and the vacation time that the employee has available

When you set up DBA 8510, you would set up this rollover information:



Rollover Setup Window form

- In the Benefit/Accrual Type field, enter *V* (Vacation Pay).
- In the ITD Limit field, enter 80.

Note. If you enter the table code of a rollover table in the Rollover Table field and specify a limit in the ITD Limit field, the system assumes that you roll over amounts only up to the maximum hours that you specified in the ITD Limit field and ignores the table code that you entered.

- In the Related PDBA field, enter the number of the pay type used for vacation pay (*821*).

When you process a payroll cycle, the DBA calculation program in pre-payroll uses the associated pay type code to calculate the net balance, that is, the employee's accrued hours for the year minus the taken amount. When the system calculates the employee's accrual for the pay period, it knows that the employee cannot have a balance greater than the ITD limit (80 hours in this example), so it adds only enough hours to reach that limit. You do not need to run the rollover program, because the ITD limit ensures that the employee never has more available hours than the limit amount that you specified.

For example, suppose that, in the middle of the year, an employee has a balance of 78 hours of vacation. The next time you process payroll, the system calculates the employee's regular six-hour accrual. Because the employee has an ITD limit of 80 hours, the program adds only two hours to DBA 8500 (80 - 78 = 2). The remaining 4 hours are lost.

Suppose that this same employee took a vacation before you processed the payroll and charged 30 hours of vacation time to pay type 821. When you process the payroll, the system calculates the vacation time balance (78 - 30 = 48) and the employee's regular six-hour accrual, and then adds the accrual to the balance for a new balance of 54 hours. Every time that you process payroll, the system continues to calculate the full amount of the accrual and add it to the balance up to, but not exceeding the 80-hour ITD limit.

Note. You use the ITD limit in a single-DBA situation, that is, when you set up one DBA that tracks both time earned and time available. You typically do not use the ITD limit in a dual-DBA situation, that is, when you set up both an accrual DBA code and an available DBA code.

Prerequisite

Set up the pay types that you will use to calculate balances for DBAs that require rollover information.

Creating Rollover Calculation Tables for DBAs

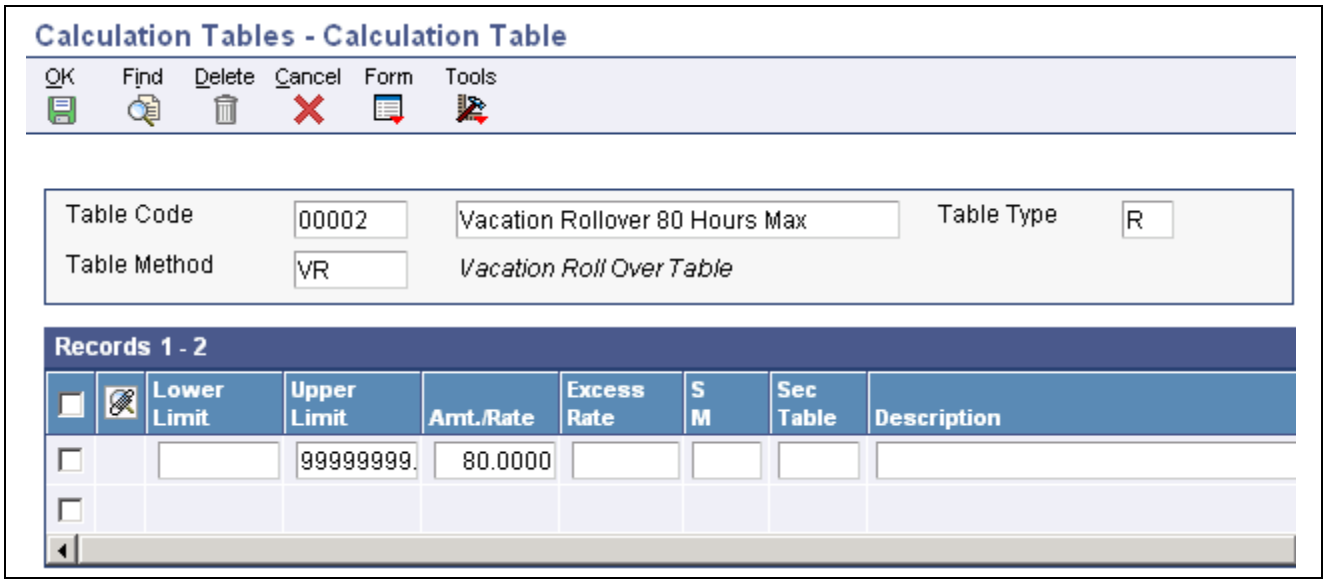
This section discusses how to create rollover calculation tables for DBAs.

Form Used to Create Rollover Calculation Tables for DBAs

Form Name	Form ID	Navigation	Usage
Calculation Table	W059021C	Pay/Deductions/Benefits Setup (G05BD4), Calculation Tables Click Add on the Work With Calculation Tables form.	Create rollover calculation tables for DBAs.

Creating Rollover Calculation Tables for DBAs

Access the Calculation Table form.



Calculation Table form

Table Type Enter a code that defines the purpose of the table. Values are:

D: The system uses the table to calculate DBAs.

R: The system uses the table to determine limits for rolling over sick and vacation accruals.

Table Code Enter a code that specifies to the Payroll system a table to be accessed in the Payroll Generic Tables table (F069026). The values that you enter in this field must be numeric.

Table Method Enter a code that specifies the method in which the DBA is calculated.

Lower Limit Enter the lower or minimum amount to be compared.

Upper Limit Enter the upper or maximum amount to be compared.

Amt./Rate Enter the amount or rate to be used in the calculation of a DBA. The system uses this field when the method of calculation specifies a 1, 2, 3, 4, 5, or 6, and therefore a specific basis table is being retrieved for the ultimate calculation of the transaction.

See Also

Chapter 17, “Setting Up Calculation-Table Information,” page 131

Setting Up Rollover Information for DBAs

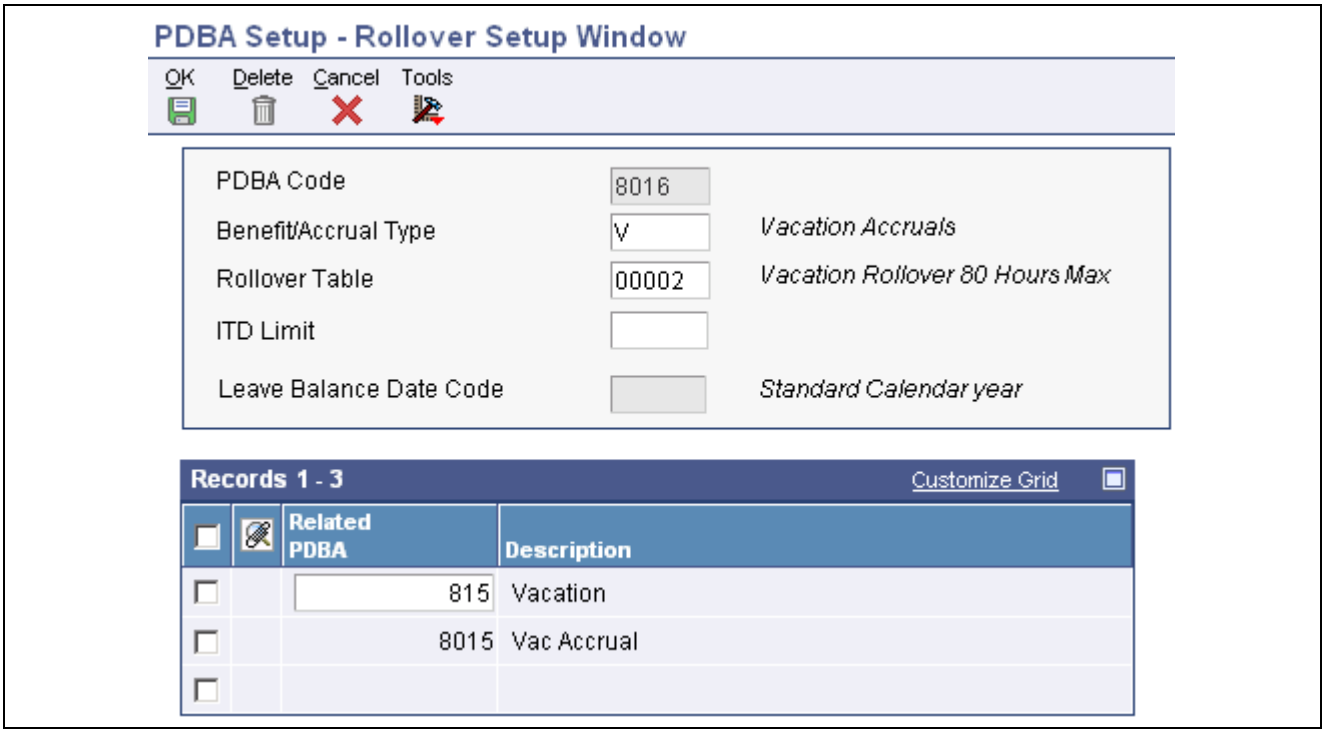
This section discusses how to set up rollover information for DBAs.

Form Used to Set Up Rollover Information for DBAs

Form Name	Form ID	Navigation	Usage
Advanced DBA Information	W059117A	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select Advanced DBA Info from the Row menu on the Work With PDBAs form.	Set up advanced DBA information.
Rollover Setup Window	W07RSWB	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select Rollover Setup from the Row menu on the Work With PDBAs form.	Set up rollover information for DBAs.

Setting Up Rollover Information for DBAs

Access the Advanced DBA Information form.



Rollover Setup Window form

To set up rollover information for DBAs:

Note. When you set up a lost DBA on Basic PDBA Information, you should set up the DBA as a flat amount and set all of the Pay Period of the Month fields to *N* so that the DBA does not calculate. Because lost DBAs should never be used for any calculations, we recommend that you use the numeric transaction codes 9001-9999 to define your lost DBAs.

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1. On the Advanced DBA Information form, complete the Leave Balance Date Code field.

2. Complete the steps for setting up advanced DBA information.
3. On the Work With PDBAs form, select Rollover Setup from the Row menu.
4. On the Rollover Setup Window form, enter the table code for the rollover calculation table that you created to define carryover limits.
5. Complete the Benefit/Accrual Type, Rollover Table, ITD Limit, and Related PDBA fields.
6. Click OK.

   If you complete both the Rollover Table field and the ITD Limit field, the system can only apply one of those limits. A value in the ITD limit overrides any limit defined via the rollover table.

Note. On the Rollover Setup Window form, you cannot relate more than one accrual code to a single available DBA code. But you can relate more than one taken pay type to a single available DBA code.

You do not need to enter additional rollover information for a wage-attachment DBA. Wage-attachment balances are inception-to-date and do not need to be rolled over.

See Also

Chapter 18, “Setting Up Deductions, Benefits, and Accruals ,” Setting Up Basic DBA Information, page 139

Chapter 23, “Setting Up Advanced DBAs,” page 179

CHAPTER 20

Setting Up Limits for Tax-Deferred Compensation Deductions

This chapter provides an overview of tax-deferred compensation limits setup and discusses how to:

- Set up limits for tax-deferred compensation deductions.
- Set up tax-deferred compensation deductions for the U.S.
- Set up taxable fringe benefits for the U.S.

Understanding Tax-Deferred Compensation Limits Setup

This section provides an overview of tax-deferred compensation limits setup and lists prerequisites.

Tax-Deferred Compensation Limits Setup

You set up a tax-deferred compensation deduction when you are deducting an amount from the employee's pay for a compensation program that defers taxes until the funds are distributed or until the funds are removed from the plan. In many cases, the government imposes limits on contributions to tax-deferred compensation plans. Your organization might also impose a limit on contributions to these plans. To simplify the process of administering a tax-deferred compensation plan, you can set up the deduction for the plan so that the system stops taking the deduction as soon as a limit is reached.

Prerequisite

Set up a tax-deferred compensation deduction.

Setting Up Limits for Tax-Deferred Compensation Deductions

This section discusses how to set up limits for tax-deferred compensation deductions.

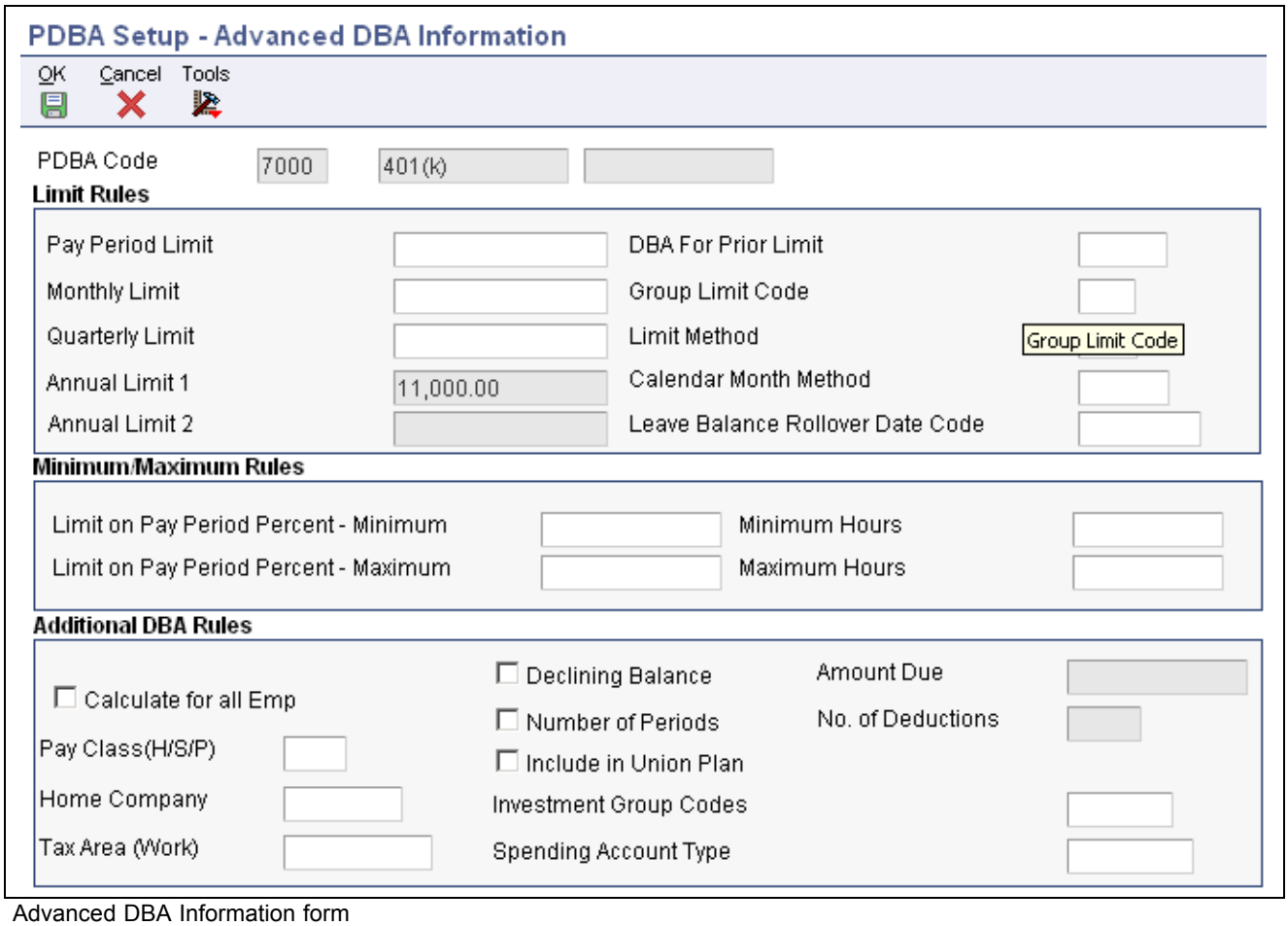
Forms Used to Set Up Limits for Tax-Deferred Compensation Deductions

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a record in the detail area and then click Select.	Set up limits for tax-deferred compensation deductions.
Advanced DBA Information	W059117A	Select Advanced DBA Info. from the Form menu on the Basic DBA Information form.	Set up advanced options for tax-deferred compensation deductions.

Setting Up Limits for Tax-Deferred Compensation Deductions

Access the Basic DBA Information form.

Here is the Advanced DBA Information form, which you use to set up advanced options.



Advanced DBA Information form

Pay Period Limit The maximum amount that can be withheld or accrued in a pay period for a deduction, benefit or accrual. This amount is expressed in dollars for deductions and benefits. For accruals, this amount is expressed in hours.

Monthly Limit The maximum amount that can be withheld or accrued in a month for a deduction, benefit or accrual. This amount is expressed in dollars for deductions and benefits. For accruals, this amount is expressed in hours.

Quarterly Limit The maximum amount that can be withheld or accrued in a calendar quarter for a deduction, benefit or accrual. This amount is expressed in dollars for deductions and benefits. For accruals, this amount is expressed in hours.

DBA For Prior Limit Enter a code that identifies another DBA whose limit must be met first before this DBA calculates. For example; deduction 1400 has an annual limit of $2,000.00.

After this limit is met, deduction 1500 begins calculation and withholding.

The DBA number of the predecessor must be lower than the successor's number.

Group Limit Code Enter a code that is common to all deduction or benefits that share the same limitations, such as pay period currency amount, percentage, monthly, and annual. The system takes these limits from the first deduction encountered in the group and withholds for all deductions until the limit is reached for the aggregate. For example:

Deduction 6400, Group A, Annual Limit = 1000 USD, No Pay Period Limit

Deduction 6430, Group A, No Annual or Pay Period Limit

Deduction 7700, Group A, No Annual or Pay Period Limit

Deduction 9400, Group B, No Annual or Pay Period Limit

Deduction 7550, Group B, No Annual Limit, Pay Period Limit = 50 USD

For this example, the system determines the deductions that are assigned to Group A, and applies a 1000 USD annual limit for all three deductions. The system continues to take the deductions from an employee's paycheck until a total of 1000 USD has been deducted between all entities in Group A for the year. For deductions in Group B, the system deducts no more than 50 USD per pay period between for the two deductions.

Limit Method Enter a code that indicates the history file that the system uses for DBA limits. Values are:

Blank (default): The system applies monthly, quarterly and annual limits to calendar month history.

The system stores fiscal and anniversary history by pay period ending date. The system updates the Calender Month DBA Summary History File (F06145).

1: The system applies monthly, quarterly and annual limits to payroll month history.

Use this method for retirement plans, such as 401(k) or RRSP. The system stores fiscal and anniversary history by check date. The system updates the Employee Transaction History Summary table (F06146).

2: The system applies monthly and quarterly limits to calendar month history and updates the Calender Month DBA Summary History File.

The system applies annual limits to fiscal and anniversary history. Fiscal and anniversary history, by pay period ending date, are saved in the Fiscal and Anniversary Year History table (F06147).

Calendar Month Method Enter a value that determines how transition months are stored for calendar month history. Transition months occur when the pay period crosses into another month. Values are:

Blank: DBAs are prorated to the pay period ending date and the last day of the previous month if timecards exist for both months. This is the default.

1: DBAs are allocated to the pay period ending date.

Limit on Pay Period Percent - Maximum Enter the maximum percentage of pay that the calculated deduction or benefit amount may not exceed. This percentage works in conjunction with the dollar limits of the deduction or benefit, so whichever limit is reached first stops the calculation. For accrual transactions, this field represents an hour's limit.

Limit on Pay Period Percent - Minimum Enter the minimum percentage amount that can be specified for the DBA. The amount of the transaction can never be less than this minimum.

Minimum Hours Enter the minimum number of hours worked or pieces produced in order for a DBA to be calculated. If the number of hours worked or pieces produced is less than this amount, the system assumes zero hours when it calculates the DBA. The system uses this field only if the method of calculation is H or I.

Maximum Hours Enter the maximum number of hours worked or pieces produced that a DBA can be based on. If the actual hours worked or pieces produced are greater than the specified maximum, the system bases the calculation on the maximum. The system uses this field only if the method of calculation is H or I.

(USA) Setting Up Tax-Deferred Compensation Deductions for the U.S.

This section provides an overview of tax-deferred compensation deductions setup for the U.S. and discusses how to set up tax-deferred compensation deductions for the U.S.

Understanding Tax-Deferred Compensation Deductions Setup for the U.S.

You set up a tax-deferred compensation deduction when you are deducting an amount from the employee's pay for compensation programs that defer taxes until the funds are distributed or until the funds are removed from the plan. Section 125 and 401(k) plans are examples of tax-deferred compensation deductions. A tax-deferred compensation deduction is generally a percentage of the employee's gross pay. For example, an employee might contribute 10 percent of gross pay to a retirement plan.

When you set up tax exempt or pre-tax deductions other than 401(k), 403(b), 408(k), 457, 501c, or Section 125 deductions, you can enter the tax types that are exempt.

Important! Do not change taxable status for any DBA in the middle of the year. Previously calculated taxable amounts and taxes do not automatically change as the taxable status changes. You must enter an end date to the current DBA and create a new DBA with the new taxable status. If necessary, add the new DBA to your group plan and employee level DBAs with an appropriate start date.

Forms Used to Set Up Tax-Deferred Compensation Deductions for the U.S.

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up tax-deferred compensation deductions for the U.S.
U.S. Legislative/Regulatory	W059116UB	Select U.S. Leg/Reg from the Form menu on the Basic DBA Information form.	Select a tax-deferred compensation deduction option.

Setting Up Tax-Deferred Compensation Deductions for the U.S.

Access the Basic DBA Information form.

401k

Enter a user defined code that allows Vertex to use current tax laws in various jurisdictions to determine whether a DBA is pretax for a specified tax area.

The 401 option specifies all deferred compensation plans (401k, 403b, 408k, 457, and 501c). The 125 option specifies Section 125 plans. Specifying either of these options eliminates the need to set up tax-exempt status in the system or to create multiple deductions to accommodate pre-tax status in certain states.

For Canadian applications, these options are available:

- RPP (Registered Pension Plans).
- RRSP (Registered Retirement Savings Plans).
- UN (Union Dues).

For the United States and Canada, the GTL option specifies the Fringe Benefit for Group Term Life.

125

Enter a user defined code that allows Vertex to use current tax laws in various jurisdictions to determine whether a DBA is pretax for a specified tax area.

The 401 option specifies all deferred compensation plans (401k, 403b, 408k, 457, and 501c). The 125 option specifies Section 125 plans. Specifying either of these options eliminates the need to set up tax-exempt status in the system or to create multiple deductions to accommodate pre-tax status in certain states.

For Canadian applications, these options are available:

- RPP (Registered Pension Plans).
- RRSP (Registered Retirement Savings Plans).

• UN (Union Dues).

For the United States and Canada, the GTL option specifies the Fringe Benefit for Group Term Life.

None of the above

Enter a user defined code that allows Vertex to use current tax laws in various jurisdictions to determine whether a DBA is pretax for a specified tax area.

The 401 option specifies all deferred compensation plans (401k, 403b, 408k, 457, and 501c). The 125 option specifies Section 125 plans. Specifying either of these options eliminates the need to set up tax-exempt status in the system or to create multiple deductions to accommodate pre-tax status in certain states.

For Canadian applications, these options are available:

• RPP (Registered Pension Plans).

• RRSP (Registered Retirement Savings Plans).

• UN (Union Dues).

For the United States and Canada, the GTL option specifies the Fringe Benefit for Group Term Life.

(USA) Setting Up Taxable Fringe Benefits for the U.S.

This section provides an overview of taxable fringe benefit setup for the U.S. and discusses how to set up taxable fringe benefits for the U.S.

Understanding Taxable Fringe Benefit Setup for the U.S.

You set up a taxable fringe benefit DBA when you want Quantum for Payroll Tax to calculate appropriate taxes for a benefit such as Group Term Life Insurance. For example, the taxable fringe benefit function in your PeopleSoft software provides Group Term Life Insurance amounts to Quantum for Payroll Tax, and then retrieves the taxable or subject amounts for each tax. Subject amounts are wages that are included in the subject gross but are not included in the adjusted current gross.

You can use the PDBA Setup program (P059116) to create a new DBA for a taxable fringe benefit. After you create the DBA, you choose the Group Term Life option (GTL) on the U.S. Legislative/Regulatory form that is available from the Row menu. For the United States and Canada, GTL represents the fringe benefit for Group Term Life. In this example, gross pay equals 1000 and the fringe benefit for Group Term Life equals 20:

Tax	The Rule	Taxable Gross	Subject Gross	Adjusted Current gross
Federal Withholding	Withholding not required but must be reported	1000	1020	1020
Social Security /Medicare	Must be withheld	1020	1020	1020
FUTA	Exempt	1000	1000	1000

Subject amounts are wages that are included in the subject gross but not in the adjusted current gross. Taxable amounts are wages that are included in the subject gross and in the adjusted current gross. Exempt amounts are wages that are not included in the subject gross or the adjusted current gross.

The Quantum for Payroll Tax system calculates tax only on amounts that are taxable. Only taxable amounts are included in adjusted current gross.

Federal Withholding and FUTA display the gross pay. To account for the fringe benefit for Group Term Life, the Quantum for Payroll Tax system adjusts gross pay to 1020 for Social Security and Medicare. A taxable gross of 1020 is stored in the PeopleSoft system.

Note. Depending on your organizational requirements, when you use the GTL function, you might need to add the GTL benefit amounts back for year-end processing. For State, Local, SCI, and County taxes, you need to determine whether Vertex classifies GTL as Subject. You can then set up the DBA to track by tax area and refer to the year-end special handling instructions to add back to wages for W2 reporting.

Setting Up Taxable Fringe Benefits for the U.S.

This section discusses how to set up taxable fringe benefits for the U.S.

Forms Used to Set Up Taxable Fringe Benefits for the U.S.

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select the Benefit option and click Add on the Work With PDBAs form.	Set up taxable fringe benefits for the U.S.
U.S. Legislative/Regulatory	W059116UB	Select U.S. Leg/Reg from the Form menu on the Basic DBA Information form.	Select a tax-deferred compensation deduction option.

Setting Up Taxable Fringe Benefits for the U.S.

Access the Basic DBA Information form.

Effect on Gross/Net Pay Enter a code that specifies the effect a benefit has on gross and net income. Values are:

1: A non-cash benefit that is non-taxable.

The benefit, which is a journal entry only, has no effect on gross or net income.

2: A cash benefit that is taxable.

The system adds the benefit to gross and net income.

3: A non-cash benefit that is taxable.

The system adds the benefit to the taxable gross income, but there is no effect on net income other than the tax that is withheld.

4: A cash benefit that is non-taxable.

There is no effect on gross income, and the system adds the benefit to net income as an adjustment to net pay. In addition, the system adds this type of benefit to gross wages on the payroll register so that gross - deductions = net.

GTL

Enter a user defined code that allows Vertex to use current tax laws in various jurisdictions to determine whether a DBA is pretax for a specified tax area.

The 401 option specifies all deferred compensation plans (401k, 403b, 408k, 457, and 501c). The 125 option specifies Section 125 plans. Specifying either of these options eliminates the need to set up tax-exempt status in the system or to create multiple deductions to accommodate pre-tax status in certain states.

For Canadian applications, these options are available:

- RPP (Registered Pension Plans)
- RRSP (Registered Retirement Savings Plans)
- UN (Union Dues)

For the United States and Canada, the GTL option specifies the Fringe Benefit for Group Term Life.

CHAPTER 21

Setting Up Category Codes for DBAs

This chapter provides an overview of category code setup for DBAs and discusses how to set up category codes for DBAs.

Understanding Category Code Setup for DBAs

You set up category codes for DBAs as a way to group DBAs for reporting purposes that might be necessary for your organization. You use category codes to track and store information about DBAs that is not tracked and stored by other fields in the DBA setup. You can use category codes 1 through 10 for these purposes.

See Also

Chapter 18, "Setting Up Deductions, Benefits, and Accruals ," Setting Up Basic DBA Information, page 139

Setting Up Category Codes for DBAs

This section discusses how to set up category codes for DBAs.

Form Used to Set Up Category Codes for DBAs

Form Name	Form ID	Navigation	Usage
Category Codes Revisions	W059116C	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a PDBA type and click Add on the Work With PDBAs form. Select Category Codes from the Form menu on the Basic DBA Information form.	Set up category codes for DBAs.

Setting Up Category Codes for DBAs

Access the Category Codes Revisions form.

Category Code 1 Enter a Payroll system category code for Deductions, Benefits and Accruals.

You may define the use and description of this code to fit the needs of your organization.

CHAPTER 22

Setting Up a DBA Based on Another DBA

This chapter provides and overview of DBA setup based on another DBA and discusses how to set up a DBA based on another DBA.

Understanding DBA Setup Based on Another DBA

You set up a DBA based on another DBA to use a value that has already been calculated (from the based-on DBA) to calculate the DBA that you are setting up. For example, you set up an employer match benefit for a retirement plan that is based on a retirement plan deduction that has already been set up to deduct a certain amount from an employee's pay.

If DBAs are based on other DBAs, you must assign numbers to those transactions accordingly. The system calculates DBAs in numeric order, from low to high. For example, if your company matches an employee's contribution to a retirement plan based on payroll deductions, the DBA code for the employee's payroll deduction must be the lower number of the two so that the system calculates it before calculating the matching DBA.

Setting Up a DBA Based on Another DBA

This section discusses how to set up a DBA based on another DBA.

Form Used to Set Up a DBA Based on Another DBA

Form Name	Form ID	Navigation	Usage
Basis of Calculation	W059118B	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Select a PDBA type and click Add on the Work With PDBAs form. Select Basis of Calc. from the Form menu on the Basic DBA Information form.	Set up a DBA based on another DBA.

Setting Up a DBA Based on Another DBA

Access the Basis of Calculation form.

From PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

Thru PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

CHAPTER 23

Setting Up Advanced DBAs

This chapter provides and overview of advanced DBA setup and discusses how to:

- Set up advanced deductions.
- Set up a deduction DBA to adjust negative pay.
- Set up a deduction DBA for overpayment.
- Set up a DBA to calculate if no gross pay.

Understanding Advanced DBA Setup

You can set up many different types of DBAs. These tasks are examples of some advanced DBAs that you might set up for your company. These tasks do not include every possible scenario, but represent some typical situations in which you need a DBA to perform a specialized function.

Some organizations grant employees loans, or cash advances, from their future earnings. For example, on the 10th of the month, an employee might request a 100.00 advance. If you grant the employee the advance, you need to deduct 100.00 from the payment that the employee receives on the 15th of the month. You can set up an advance deduction to deduct the cash advance from the employee's payment.

You can set up several types of DBAs to manage situations in which an employee's net pay is less than zero. The Payroll system does not print payments for amounts that are less than zero. For example, some employees, such as commissioned sales people, might have a pay period in which they have no gross earnings, or they do not have enough gross earnings to pay for all of their deductions. To track employees' pay and deductions in these instances, you can set up a deduction that adjusts negative net pay, or you can set up an overpayment deduction that allows you to take the missed deductions in future pay periods, when the employee has enough earnings to pay for them. You can also set up a DBA to calculate even in pay periods when an employee has no gross earnings.

Setting Up Advance Deductions

You set up an advance deduction for an employee to pay back a dollar amount advanced by the employer against an employee's earnings. An advance deduction DBA allows you to set up a declining balance that is active until the amount due equals zero.

This section discusses how to set up advance deductions.

Forms Used to Set Up Advance Deductions

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Add on the Work With PDBAs form.	Set up basic DBA information.
Advanced DBA Information	W059117A	Select Advanced DBA Info from the Form menu on the Basic DBA Information form.	Set up advance deductions.

Setting Up Advance Deductions

Access the Basic DBA Information form.

Amount Due Enter the balance or amount due on an open invoice or voucher.

In the Address Book Master table (F0101), this is a memo amount that the system uses to determine whether a particular order exceeds a credit limit. See the documentation for the Order Processing system.

Declining Balance Enter an option that indicates whether you want the system to use the amount due at the DBA, group, or employee level to determine whether to use the specified deduction in a payroll cycle.

When you turn on this option, the system continues deducting the amount in the Amount Due field until the amount is zero. When you turn on this option, you must also enter a value in the Amount Due field; otherwise, the system considers the deduction to be cleared or inactive.

If you do not turn on this option, the amount due will not be used with the specified deduction.

For advance deductions, you must turn on this option.

No. of Deductions Enter the number of periods for which a deduction or benefit should be taken. The system automatically decreases this number by one for each period taken.

You must enter a value in this field if you automate the Number of Periods field.

Number of Periods Enter an option that indicates whether the system uses the Number of Periods field to determine whether to include the DBA in the payroll cycle. If you turn on this option, then also enter the number of periods in No. of Deductions field. If you do not enter a value in the No. of Deductions field, the system considers the DBA inactive.

Use this option only when you set up a DBA that is not a wage attachment deduction. When you set up a wage attachment DBA, leave this option turned off and use the Employee Wage Attachment Entry form to enter the number of periods for which the deduction is taken.

For EnterpriseOne, to continue the DBA only until the amount due is zero, turn on the Number of Periods option. If you do not turn on the Number of Periods option, the system ignores this function.

Calculate for all Emp Enter a code that specifies whether the DBA is required. Values are:

Y: The DBA is required.

N: The DBA is not required.

For advance deductions, this field should be set to *N* (No). When you enter *Y* (Yes), the system automatically processes the DBA for all qualifying employees. When this field is set to *Y,* you reduce the information that you must maintain for DBAs that you set up for plans or employees. Information is reduced because you do not need to define the DBA at any level other than the DBA setup level. To define qualifying employees, complete these fields on the Advanced DBA Information form:

- Employee Pay Class - (SALY)
- Tax Area - (TARA)
- Home Company - (HMCO)

When you leave any of these fields blank, the system includes all employees.

Note. The system also uses Tax Area (TARA) and Home Company (HMCO) fields as screening criteria for DBAs that are not required. If either of these two fields contains a value, and the Calculate for All Employees option is turned on, the system uses the tax areas and home companies to qualify employees for the DBA.

Setting Up a Deduction DBA to Adjust Negative Pay

This section provides an overview of deduction DBA setup to adjust negative pay and discusses how to set up a deduction DBA to adjust negative pay.

Understanding Deduction DBA Setup to Adjust Negative Pay

If an employee's gross pay does not cover the amounts to be deducted, the system adjusts deduction amounts to increase the net pay to zero. The system does not allow negative net pay situations. You can set up deductions to control this adjustment process. Depending on the deduction's arrearage rule, one of these occurs:

- The system adjusts the deduction either partially or for the full amount.
- The system puts the adjusted amount in arrears and makes the adjustment the next time that the employee is paid.
- The system puts the adjusted amount in arrears and makes the adjustment each time the employee is paid within the same pay period but does not carry any remaining balance forward into the next pay period.

The system adjusts negative pay in different ways, depending on the arrearage method that you use: Xe Arrearage methods:adjusting negative pay

Method	Description
P, blank, F	When all or part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system: • Reduces the deduction. • Attempts to collect the amount each time the employee is paid during the current pay period. • Attempts to collect the amounts in a future pay period. That is, the DBA is placed in arrears. Amounts not taken appear on the Deductions Not Taken report, which the system generates during pre-payroll processing.
Q, R, G, H	When all or some part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system: • Reduces the deduction. • Attempts to collect the amount each time the employee is paid during the current pay period. • Attempts to collect the amounts in a future pay period. That is, the DBA is placed in arrears. Amounts not taken appear on the Deduction Arrearage report, which the system generates during pre-payroll processing.
S, T, I, J	When all or some part of the deduction cannot be taken and you have set up the DBA with one of these arrearage methods, the system: • Reduces the deduction. • Attempts to collect the amount each time the employee is paid during the current pay period. • Does *not* hold the amounts over to collect them in a future pay period. That is, the DBA is placed in arrears for the current pay period only. Amounts not taken appear on the Deduction Arrearage report, which the system generates during pre-payroll processing.

Note. The system does not create journal entries for adjusted amounts and arrearages until the deduction is actually withheld. The system posts only the actual amounts deducted as journal entries.

Example: Payroll Calculations to Adjust Negative Pay

The When to Adjust Deductions field and the Order to Adjust Deductions field allow you to determine the sequence that the system uses to deduct the DBAs:

Gross Deductions	DBA Code
Union	#3000
Health	#1000
Savings	#2000
401(k)	#7000
Advance	#9000
Taxes	Blank
Negative Net Pay	Blank

Gross Deductions	DBA Code
Union	#3000
Health	#1000
Savings	#2000
401(k)	#7000
Advance	#9000
Taxes	Blank
Negative Net Pay	Blank

Gross Deductions	DBA Code
Union	#3000
Health	#1000
Savings	#2000
401(k)	#7000
Advance	#9000
Taxes	Blank
Negative Net Pay	Blank

Gross Deductions	DBA Code
Union	#3000
Health	#1000

Gross Deductions	DBA Code
Savings	#2000
RRSP	#7700
Advance	#9000
Taxes	Blank
Negative Net Pay	Blank

The system adjusts the DBAs in this order if the When to Adjust Deductions field is *0* (default) and the Order to Adjust Deductions field is blank:

Gross Deductions	DBA Code	DBA Type
1st	#9000	Advance
2nd	#7000	401(k)
3rd	#3000	Union
4th	#2000	Savings
5th	#1000	Health
Last	Taxes	Blank

Gross Deductions	DBA Code	DBA Type
1st	#9000	Advance
2nd	#7700	RRSP
3rd	#3000	Union
4th	#2000	Savings
5th	#1000	Health
Last	Taxes	Blank

When net pay goes below zero or minimum pay, the system adjusts deductions in a high to low order, from DBA code 9999 to DBA code 1000. For example, DBA #8611 would be adjusted before #5322. You can override the order by using the When to Adjust Deductions and Order to Adjust Deductions fields.

These two fields allow you to control how the deductions are adjusted. You can group deductions into three groups so that one group is adjusted before the other two. You can also assign priority numbers within each group.

In this example, you want the Savings and 401(k) or RRSP adjusted (not deducted) before the Advance, Union dues, and Health. Therefore, assign Savings and 401(k) or RRSP a value of *0* in the When to Adjust Deductions field. Assign Advance, Union dues, and Health a value of *1*.

This example illustrates the sequence of adjustments that the system will use to bring the payment balance to zero:

Gross Deductions	DBA Code	When to Adjust Deductions
Union	#3000	1
Health	#1000	1
Savings	#2000	0
401 (k)	#7000	0
Advance	#9000	1
Taxes	Blank	Blank
Negative Net Pay	Blank	Blank
1st	#7000 (0)	401 (k)
2nd	#2000 (0)	Savings
3rd	#9000 (1)	Advance
4th	#3000 (1)	Union
5th	#1000 (1)	Health
6th	Blank	Taxes

Gross Deduction	DBA Code	When to Adjust Deductions
Union	#3000	1
Health	#1000	1
Savings	#2000	0
RRSP	#7000	0
Advance	#9000	1
Taxes	Blank	Blank
Negative Net Pay	Blank	Blank
1st	#7000 (0)	RRSP
2nd	#2000 (0)	Savings
3rd	#9000 (1)	Advance
4th	#3000 (1)	Union

Gross Deduction	DBA Code	When to Adjust Deductions
5th	#1000 (1)	Health
6th	Blank	Taxes

Company policy might be to deduct the advance from the employee's pay before taxes are deducted. The government will make up any tax inequity with this employee at year-end, but the company might not be able to retrieve the advance amount if the company no longer employs the individual. Enter *2* in the When to Adjust Deductions field for the Advance. The sequence of adjustments follows:

Gross Deduction	DBA Code	DBA Type
1st	#7000 (0)	401(k)
2nd	#2000 (0)	Savings
3rd	#3000 (1)	Union
4th	#1000 (1)	Health
5th	Blank	Taxes
6th	#9000 (2)	Advance
Blank	Blank	Blank
1st	#7700 (0)	RRSP
2nd	#2000 (0)	Savings
3rd	#3000 (1)	Union
4th	#1000 (1)	Health
5th	Blank	Taxes
6th	#9000 (2)	Advance

This example illustrates how the codes in the When To Adjust and Order to Adjust fields would work for one employee. When you set up your DBAs, you must consider how these codes impact all employees using these deductions.

Forms Used to Set Up a Deduction DBA to Adjust Negative Pay

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction then click Add on the Work With PDBAs form.	Set up basic DBA information.
General Accounting/Arrearage Information	W059116D	Select GA/Arrearage Info from the Form menu on the Basic DBA Information form.	Set up arrearage information.
Basis of Calculation	W059118B	Select Basis of Calc. from the Form menu on the Basic DBA Information form.	Set up basis of calculation information.

Setting Up a Deduction DBA to Adjust Negative Pay

Access the Basic DBA Information form.

Arrearage Method Enter a code indicating how to adjust deductions when the employee is in a negative pay situation. Values are:

P: Do a partial or full deduction as needed. This is the default.

F: Do a full reduction or none at all.

N: Do not reduce.

Q: Same as code P. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

R: Same as code P. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

G: Same as code F. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

H: Same as code F. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

S: Same as code P. In addition, place the amount in arrears for the current pay period only but do not apply the limits when collecting the arrearage. Do not write the arrearage balance to history.

T: Same as code P. In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

I: Same as code F. In addition, place the amount in arrears for the current pay period only, but do not apply the limits when collecting the arrearage. Do not write arrearage balance to history.

J: Same as code F. In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

When To Adjust Ded Enter a code that specifies when the system adjusts, or backs an amount out of, deductions. Values are:

0: Adjust deductions marked with 0 before payroll taxes.

1: Adjust deductions marked with 0, then adjust those marked with 1 before payroll taxes.

2: Adjust payroll taxes before the deductions marked with 2. (This value is for future use.)

Order To Adjust Ded Enter a value that specifies the order in which deductions are taken when an employee's gross pay does not cover deductions. Values are 0001 through 9999. The system starts with the highest code. For example, 9999 is deducted before 0001.

From PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the beginning number in the range that is the basis of the calculation.

Thru PDBA Enter the number and description of the PDBA that you want the system to use to calculate the corresponding PDBA. This number is the ending number in the range that is the basis of the calculation.

Setting Up a Deduction DBA for Overpayment

This section provides an overview of deduction DBA setup for overpayment, lists prerequisites, and discusses how to set up a deduction DBA for overpayment.

Understanding Deduction DBA Setup for Overpayment

The system cannot write a payment for a negative amount. Therefore, when an employee's net pay drops below zero and stays below zero, even after all adjustments have been made, the system creates an overpayment. The overpayment amount is the amount needed to bring net pay back to zero. The system treats this amount like an advance to the employee and subtracts the amount from the employee's future pay until the overpayment is repaid.

The system uses a DBA to collect the overpayment. Whenever the system creates an overpayment for an employee, it assigns the DBA to the employee's DBA instructions and displays the amount on the payroll register. We ship the Payroll system with DBA 9997 as the DBA for overpayments. You can set up a different DBA number for overpayments if you want to use 9997 for other purposes.

Prerequisite

Before you complete the tasks in this section:

- Verify that the overpayment processing option on the payroll workbench is set to DBA 9997.
- Assign an account number for DBA 9997 (or the DBA that you want to use for overpayments) in the credit liabilities table in your AAIs to avoid accounting errors. If you use a DBA code other than 9997, you need to set the overpayment processing option on the payroll workbench to the DBA code that you are using.

Form Used to Set Up a Deduction DBA for Overpayment

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up a deduction DBA for overpayment.

Setting Up a Deduction DBA for Overpayment

Access the Basic DBA Information form.

DBA Type Enter a code that specifies the type of payroll entry. Values are:

P: Time Cards (earnings)

D: Deductions withheld

B: Benefit (both cash and noncash)

A: Time accrual, such as sick and vacation time

Note. These values can be changed only by PeopleSoft.

When you enter * in this field, the system displays all four types of PDBAs.

Paystub Text Enter the text that you want the system to print on the employee's paystub. If you are using the Time and Labor system, the system does not create payments. However, this field is required to complete the form. Generally, you enter a description of the PDBA.

Setting Up a DBA to Calculate If No Gross Pay

This section provides an overview of DBA setup to calculate if no gross pay and discusses how to set up a DBA to calculate if no gross pay.

Understanding DBA Setup to Calculate If No Gross Pay

You can set up the system to calculate a DBA to calculate even if no gross pay exists. For example, you can set up a DBA to calculate a benefit when an employee is on a leave of absence.

You might also set up the system to calculate a deduction and place the amount in arrears to be withheld the next payroll cycle. The deduction is included on the Deduction Arrearage report during pre-payroll processing.

Forms Used to Set Up a DBA to Calculate If No Gross Pay

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), chooe PDBA Setup Click Deduction or Benefit and then click Add on the Work With PDBAs form.	Set up a DBA to calculate if no gross pay.
General Accounting/Arrearage Information	W059116D	Select GA/Arrearage Info. from the Form menu on the Basic DBA Information form.	Enter arrearage values.

Setting Up a DBA to Calculate If No Gross Pay

Access the Basic DBA Information form.

Method of Calculation Enter a user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

The method values are pre set by PeopleSoft. If you use methods 0 - 6, 8, 9, or G, you must also enter a value in the Table Code field.

For wage attachments use one of these methods:

C: Wage assignment (child support and maintenance).

G: Garnishment.

K: Loan.

L: Tax levy.

A: Fees.

%: Interest.

Arrearage Method A code indicating how to adjust deductions when the employee is in a negative pay situation. Values are:

P: Do a partial or full deduction as needed. This is the default.

F: Do a full reduction or none at all.

N: Do not reduce.

Q: Same as code P. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

R: Same as code P. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

G: Same as code F. In addition, place the amount in arrears, but do not apply the limits when collecting the arrearage. Write the arrearage balance to history.

H: Same as code F. In addition, place the amount in arrears and apply the limits when collecting the arrearage. Write the arrearage balance to history.

S: Same as code P. In addition, place the amount in arrears for the current pay period only but do not apply the limits when collecting the arrearage. Do not write the arrearage balance to history.

T: Same as code P. In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

I: Same as code F. In addition, place the amount in arrears for the current pay period only, but do not apply the limits when collecting the arrearage. Do not write arrearage balance to history.

J: Same as code F. In addition, place the amount in arrears for the current pay period only and apply the limits when collecting the arrearage. Do not write arrearage balance to history.

CHAPTER 24

Setting Up Deductions for Wage Attachments

This chapter provides an overview of deductions for wage attachments setup and discusses how to:

- Set up garnishment deductions.
- Set up fee deductions.
- Set up tax levy deductions.
- Set up wage assignment deductions.

Understanding Deductions for Wage Attachments Setup

Before you can enter wage attachment information for employees, you must set up a deduction for each type of wage attachment. Setting up a deduction for a wage attachment is similar to setting up any other kind of deduction. Therefore, only the unique considerations for each type of wage attachment deduction are discussed here.

Wage attachment payments are deducted from an employee's disposable wage (disposable earnings). An employee's disposable wage is the amount that remains after all payments that are required by law have been deducted from the employee's gross wages.

These required payments include:

- Federal income tax.
- Social Security tax.
- Medicare tax.
- State income tax.
- State unemployment insurance.
- State disability insurance.
- State employee retirement systems.
- Local and county taxes.
- Any other applicable state requirements.

Special considerations for a wage attachment deduction include:

Consideration	Explanation
Effect on disposable wage	For a wage attachment that is required by law, you should indicate that the attachment is a mandatory deduction when you specify its effect on disposable wage.
Calculation once per pay period	Typically, you set up the system to calculate a wage attachment deduction only once per pay period. Therefore, if an employee receives a payment (such as a bonus) in addition to a regular payment, the wage attachment payment is deducted only from the regular payment.
Accounts Payable integration	If your Payroll system is integrated with the PeopleSoft EnterpriseOne Accounts Payable system, you can set up a wage attachment DBA to generate vouchers.
Declining balances	When you set up a wage attachment deduction, set the Declining Balance field to *N* (No). The system uses the method of calculation to calculate the declining balance.
Amount due	Because wage attachment balances typically vary by employee, you should not enter an amount due for a wage attachment DBA. Instead, you enter the amount due when you assign wage attachments to individual employees.
Negative pay situations	You can set up loan deductions to adjust or be placed in arrears in a negative-pay situation. When an employee does not earn enough in a pay period to pay the deduction, the system can place the deduction in arrears.

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already past due.

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge fees for administering garnishments.

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes.

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from an employee's earnings.

Setting Up Garnishment Deductions

This section provides an overview of garnishment deduction setup, lists prerequisites, and discusses how to set up garnishment deductions.

Understanding Garnishment Deduction Setup

You set up a garnishment deduction to deduct court-ordered payments resulting from nonpayment of personal debts or overdue child support. The debts on which these imposed payments are based are already overdue. Because each deduction must match the court orders, you might need to set up separate deductions for different employees.

When you set up a garnishment deduction, you can use a garnishment table to calculate the amount to withhold, or you can set up the deduction without a table, and use the wage attachment method to calculate the amount to withhold.

Prerequisite

Set up the tables that the system uses to calculate garnishments.

See *PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook*, "Setting Up Tables for Wage Attachments," Setting Up Garnishment Tables.

Form Used to Set Up Garnishment Deductions

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up garnishment deductions.

Setting Up Garnishment Deductions

Access the Basic DBA Information form.

To set up a garnishment deduction:

1. On the Basic DBA Information form, enter a numeric code from *1* to *7* in the Source of Calculation field.
2. Enter *G* in the Method of Calculation field.
3. Enter the attachment table number for your garnishment tables in the Table Code field.

   If you do not want to use a table to calculate the garnishment amount, enter *NOTBL* in this field. If you do not attach a garnishment table to the DBA, the system uses the method and amount information that you enter using the Employee Wage Attachments Review program (P07107) to calculate the garnishment.
4. Complete the steps for setting up essential DBA information.

Setting Up Fee Deductions

This section provides an overview of fee deduction setup and discusses how to set up fee deductions.

Understanding Fee Deduction Setup

In some cases, you might need to associate fees with a wage attachment. For example, your organization might charge employees administrative fees for maintaining garnishments.

You set up deductions for fees, and you base those deductions on the deductions for which you are collecting the fees. Fees do not apply to tax levies.

A fee deduction must have a higher DBA number than the deduction on which it is based. For example, you can base fee deduction 1120 on garnishment deduction 1104. You can base a fee deduction on only one deduction. Therefore, even when you charge the same fee for garnishments as for wage assignments, you must set up two fee deductions. Base one fee deduction on the garnishment deduction, and base the other fee deduction on the wage assignment deduction. You specify the based-on deduction number in the basis of calculation for the fee deduction.

When you define a wage attachment for an employee, you assign the fee deduction number to the associated wage attachment.

Forms Used to Set Up Fee Deductions

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up fee deductions.
Basis of Calculation	W059118B	Select Basis of Calc. from the Form menu on the Basic DBA Information form.	

Setting Up Fee Deductions

Access the Basic DBA Information form.

To set up a fee deduction:

1. On the Basic DBA Information form, enter *0* (zero) or *R* in the Source of Calculation field.
2. Enter *$* or *%* in the Method of Calculation field.
3. Complete the steps for setting up essential DBA information.
4. Select Basis of Calc. from the Form menu.
5. On the Basis of Calculation form, complete the From PDBA and Thru PDBA fields for the wage attachment deduction for which you are collecting the fee.
6. Click OK.

Setting Up Tax Levy Deductions

You set up a tax levy deduction to deduct court-ordered payments for back taxes that the employee owes. You set up a tax levy deduction in the same way that you set up any other type of deduction.

This section lists prerequisites and discusses how to set up tax levy deductions.

Prerequisite

Set up exemption tables.

See *PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook*, "Setting Up Tables for Wage Attachments," Setting Up Exemption Tables.

Forms Used to Set Up Tax Levy Deductions

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up tax levy deductions.
Advanced DBA Information	W059117A	Select Advanced DBA Info from the Form menu on the Basic DBA Information form.	Complete advanced information.

Setting Up Tax Levy Deductions

Access the Basic DBA Information form.

Source of Calculation Enter a user defined code (07/DB) that specifies the basis of a deduction, benefit, or accrual. When the system calculates the gross amount for disposable net wages, it does not use the basis of calculation. The gross amount includes all earnings that have a positive effect on the gross and net payment. For wage attachments use one of these codes:

1-8: Garnishment, tax levy, wage assignment (child support and maintenance).

R: Loan, interest.

0: Fees.

Method of Calculation Enter a user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

The method values are pre set by PeopleSoft. If you use methods 0 - 6, 8, 9, or G, you must also enter a value in the Table Code field.

For wage attachments use one of these methods:

C: Wage assignment (child support and maintenance).

G: Garnishment.

K: Loan.

L: Tax levy.

A: Fees.

%: Interest.

Declining Balance Enter an option that indicates whether you want the system to use the amount due at the DBA, group, or employee level to determine whether to use the specified deduction in a payroll cycle.

When you turn on this option, the system continues deducting the amount in the Amount Due field until the amount is zero. When you turn on this option, you must also enter a value in the Amount Due field; otherwise, the system considers the deduction to be cleared or inactive.

If you do not turn on this option, the amount due will not be used with the specified deduction.

For advance deductions, you must turn on this option.

Setting Up a Wage Assignment Deduction

This section provides an overview of wage assignment deduction setup and discusses how to set up wage assignment deductions.

Understanding Wage Assignment Deduction Setup

You set up a wage assignment deduction to deduct ongoing debts, including child support and maintenance, from employees' earnings.

The courts typically rule that child support has priority over other types of wage attachments. This situation means that if an employee did not earn enough in a pay period to pay for all deductions, the child support deduction should be the last deduction to be adjusted.

To give the child support deduction first priority, assign it a lower DBA number than the numbers that you enter for other deductions. During payroll-cycle processing, the system adjusts (backs out) deductions in numerical order, beginning with the highest-numbered deduction. For example, deduction 1001 would be adjusted (backed out) before 1000.

You set up a wage assignment deduction in the same way that you set up any other type of deduction.

Form Used to Set Up a Wage Assignment Deduction

Form Name	Form ID	Navigation	Usage
Basic DBA Information	W059116E	Pay/Deductions/Benefits Setup (G05BD4), PDBA Setup Click Deduction and then click Add on the Work With PDBAs form.	Set up wage assignment deductions.

Setting Up a Wage Assignment Deduction

Access the Basic DBA Information form.

To set up a wage assignment deduction: :

1. On Basic DBA Information, enter a numeric code from *1* to *8* in the Source of Calculation field.
2. Enter *C* in the Method of Calculation field.
3. Complete the steps for setting up essential DBA information.

CHAPTER 25

Reviewing the Basis of Calculation Hierarchy

This chapter provides an overview of basis of calculation hierarchy and discusses how to review the basis of calculation hierarchy.

Understanding the Basis of Calculation Hierarchy

You must enter a basis of calculation for any DBA that you set up. You can enter a pay type, another DBA, or a combination of PDBAs as the basis of calculation for a DBA.

To easily review the basis of calculation for multiple DBAs, review the basis of calculation hierarchy. This hierarchy graphically depicts the reporting relationships between PDBAs, even those DBAs that are based on multiple DBAs. For example, a typical hierarchy for retirement savings plan DBAs shows:

- The employer match DBA is based on the employee contribution DBA.
- The employee contribution DBA is based on pay types 1 through 999.

Reviewing the Basis of Calculation Hierarchy

This section discusses how to review the basis of calculation hierarchy.

Form Used to Review the Basis of Calculation Hierarchy

Form Name	Form ID	Navigation	Usage
Basis of Calculation Hierarchy	W059036A	Pay/Deductions/Benefits Setup (G05BD4), Basis of Calculations Hierarchy	Review the basis of calculation hierarchy.

Reviewing the Basis of Calculation Hierarchy

Access the Basis of Calculation Hierarchy form.

DBA Code Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

CHAPTER 26

Running DBA Reports

This chapter provides an overview of DBA reports and discusses how to:

- Run the Pay Types and DBA Codes Reports (R059116PD).
- Run the DBA Basis of Calculation Report (R05903P).
- Run the Calculation Tables Report (R059026P).
- Run the Group Plan Instructions Report (R059106).
- Run the Table Method Explanations Reports (R059027).

Understanding DBA Reports

On PDBA Reports Choice Interface, the system displays a list of six report options from which you can choose. Two reports, Pay Types and DBA Codes, contain multiple sections. When you choose either report, the system automatically displays additional section options. The system displays only selected sections on the report.

When you choose a report, you can click Submit to run the default report version or, to work with a version, you can click Maintain Versions. When you click Maintain Versions, the system displays the Batch Versions program (P98305) where you can perform any of these functions for a program version:

- Copy
- Add
- Delete
- Set processing option values

Running the Pay Types and DBA Codes Reports (R059116PD)

This section provides an overview of the Pay Types and DBA Codes Reports (R059116PD) and discusses how to run the Pay Types and DBA Codes Reports.

Understanding the Pay Types and DBA Codes Reports

Because the Pay Types and PDBA reports share the same business view, they are combined into a single report, making maintenance easier. The two reports are now sections within the report. On PDBA Reports Choice Interface, when you choose either Pay Types or DBA Codes, the system displays additional options for the report. After you choose from the options and click Submit, the system runs the PDBA Reports program (R059116PD) and automatically includes the specified variables.

You can run the Pay Types report to view all of the setup information that was entered for each pay type. You can view the information by pay type code. To ensure that you have entered all the necessary pay types and associated information, you typically run this report after you define pay types and DBAs.

Because the payroll system calculates DBAs in order from the lowest to highest number DBA code, and backs out DBAs in the event of insufficient earnings from the highest to lowest number DBA code, this report can help you verify that you have assigned DBA codes that are appropriate to the priority of the deduction, benefit, or accrual.

Running the Pay Types and DBA Codes Reports

Select Pay/Deductions/Benefits Setup (G05BD4), PDBA Reports.

Running the DBA Basis of Calculation Report (R05903P)

This section provides an overview of the Basis of Calculation Report (R05903P) and discusses how to run the Basis of Calculation Report (R05903P).

Understanding the Basis of Calculation Report.

The DBA Basis of Calculation report (R05903P) displays a list of basis of calculations tables. Each deduction, benefit, and accrual has a defined basis of calculation. The system uses the basis of calculation to define the base value when calculating a DBA. A DBA can be based on pay types, other DBAs, or a combination of both Pay Types and DBAs. For example, if you want an employee stock purchase plan deduction to be based on all of an employee's gross wages, the basis of calculation would be pay types 001 through 999. If you want a 401k employer match benefit to be based on the employee's 401k contribution amount, the basis of calculation would be the DBA code associated with the employee 401k deduction.

To review the Basis of Calculation that was defined for each DBA, you should use the DBA Basis of Calculation report after you set up your DBAs.

Running the DBA Basis of Calculation Report

Select Pay/Deductions/Benefits Setup (G05BD4), PDBA Reports.

Running the Calculation Tables Report (R059026P)

This section provides an overview of the Calculation Tables Report (R059026P) and discusses how to run the Calculation Tables Report (R059026P).

Understanding the Calculation Tables Report

You set up calculations tables to define the parameters for calculating DBAs. After you set up your calculation tables, you can review the Calculation Tables Report (R059026P) to verify that the information that you entered on the calculation tables is accurate. Some DBAs, such as deductions or benefits for life insurance premiums and time off accruals, are calculated from information that varies for each employee. Variable information might include age, date of hire, and salary. The system uses calculation tables to calculate the amount of the DBA using these variables. After calculation tables are defined, they are attached to the appropriate DBAs.

To ensure the accuracy of the calculation tables, you can run the calculation tables report and review the information.

Running the Calculation Tables Report

Select Pay/Deductions/Benefits Setup (G05BD4), PDBA Reports.

Running the Group Plan Instructions Report (R059106)

This section provides an overview of the Group Plan Instructions Report (R059106) and discusses how to run the Group Plan Instructions Report (R059106).

Understanding the Group Plan Instructions Report

Group Plans simplify the assignment of DBAs to employees by automatically defining the same DBA instructions for each member of a group. You run the Group Plans Report to review all the DBAs you have associated with a particular group. To ensure that you have associated the correct DBAs with each group, such as unions, you can review this report before assigning employees to groups.

Running the Group Plan Instructions Report

Select Pay/Deductions/Benefits Setup (G05BD4), PDBA Reports.

Running the Table Method Explanations Report (R059027)

This section provides an overview of the Table Method Explanations Report (R059027) and discusses how to run the Table Method Explanations Report (R059027).

Understanding the Table Method Explanations Report

The Table Method Explanations Report (R059027) displays a listing of each table method code followed by the description of the table method. Table Methods are used in defining calculation tables. Table methods work with the table code that is defined on the DBA and the calculation table to determine how to calculate the amount of the DBA.

When you are defining calculation tables and DBAs that use calculation tables, you can use the Table Method Explanations Report to review all the table methods and the function that each table performs.

Running the Table Method Explanations Report

Select Pay/Deductions/Benefits Setup (G05BD4), PDBA Reports.

CHAPTER 27

Adding Employee Records One at a Time

This section provides overviews of employee information, employee records and hiring, and address book information entry, and discusses how to:

- Enter basic employee information.
- Enter address book information.
- Enter employee personal information.
- Enter organizational assignment information.
- Enter basic compensation information.
- Enter country-specific information for employees.
- Enter employee history information.
- Enter tax withholding and override information.
- Updating position and requisition information.

Understanding Employee Information

This section lists prerequisites and discusses employee information.

Prerequisites

Before you complete the tasks in this section:

- Review the processing options for each programs in this series of tasks. They define how much information you must enter. For example, processing options for organizational assignments define whether the Job Information table (F08001) supplies default job information when you add or change employee information.
- In the Address Book system, review the processing options for the Fixed Asset Constants program (P001012) to ensure that the tax ID is set to appear.

Employee Information

You add an employee record to the database when you hire an employee who is new to the organization. When you add an employee record, the system stores information in these tables:

- Employee Master Information (F060116)
- Employee Master Additional Information File (F060120)
- Employee Master - International Data (F060117)

- Employee Master - International Data Tag (F060117A)
- Employee Jobs (F060118)
- Address Book Master (F0101)

Note. When you add a new employee record to the database, you complete a series of forms. As you complete each form, the next form appears. You can use the Back button to return to a previous form, where you can review or change information before saving the employee's record. The system saves the new record only after you complete the entire sequence of forms.

When you add a new employee record to the database, the record is immediately available for reporting and payroll processing.

Understanding Employee Records and Hiring

This section discusses employee record creation and employee hiring.

Employee Record Creation

Before you can analyze and report on employee information, you must create a record for each employee. This record contains personal, company, job, tax, and pay information about the employee. You also need to enter certain employee information so that employees can receive their payments.

After you create a record of employee information, you can:

- Make changes, corrections, or updates.
- Review the information as necessary.
- Process a timecard for the employee.
- Enroll the employee in benefits.
- Process the employee in a payroll.
- Terminate the employee.
- Rehire the employee.

To simplify the process of managing employee information, you can set up your system for employee self-service. Employee self-service enables employees to update certain information in their employee records, such as addresses and emergency contacts.

Hiring Employees

When you hire an employee, you must add an employee record to the Employee Master Information table (F060116) that contains personal, company, job, and pay information for the employee. The information in the employee record can be used to analyze and report on your employees and to meet government reporting requirements. You can add employee records to the database using either of two methods:

- Adding employee records one at a time
- Adding multiple employee records

This table describes the similarities and differences between the methods:

Method	Comparison
Adding employee records one at a time	This method displays a series of forms that you need to complete to hire an employee. This method is preferable if you hire individuals with very diverse employee information so that hiring in groups is not applicable. You can add new employee and terminated employee (rehire) records to table F060116.
Adding multiple employee records	This method uses the Employee Quick Hire program (P060116Q). It saves data entry time because you add records in groups based on similar job information. You can add new employee, terminated employee (rehire), and applicant records to table F060116.

Understanding Address Book Information Entry

The system automatically enters an *E* (employee) for the Search Type. If you need to search for a subcontractor, you must manually enter an *S*.

Entering Basic Employee Information

Basic employee information includes general identification information about the employee. You need this information to include the employee in payroll processing.

This section discusses how to enter basis employee information.

Form Used to Enter Basic Employee Information

Form Name	Form ID	Navigation	Usage
Employee	W0801EMPA	Employee Management (G05BE1), Employee Information Click Add on the Work With Employee Information form.	Enter basic employee information.

Setting Processing Options for Employee Master (P0801)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to define the defaults for the Security Business Unit, Tax Area (Residence), and Tax Area (Work) fields.

1. Security Business Unit Use this processing option to define whether the system updates the Address Book record for the employee with the security business unit that you enter on the Employee form (P0801EMP).

2. Tax Area Use this processing option to specify whether the Tax Area (Residence) and Tax Area (Work) fields are required fields when you add or change an employee record. The PeopleSoft Payroll system uses the tax area fields to calculate payroll taxes for employees. Values are:

1: Tax area fields are not required. Choose this option only if you are not using the PeopleSoft Payroll system to process payroll for employees.

0: Tax area fields are required. If you are using the PeopleSoft Payroll system, choose this option.

Versions

Use these processing options to define the versions that the system uses for Organizational Assignment, Basic Compensation, and Address Book Revision forms.

1. Organizational Assignment Version Use this processing option to define the version of the program that you want to use when you add or change information on the Organizational Assignment form (P0801ORG). If you leave this field blank, the system enters the default version, ZJDE0001.

A version is a set of user-defined specifications. When you define a version for Organizational Assignment, you can set processing options that control the type of job information that you want the system to default onto the Organizational Assignment form (P0801ORG) when you add or change an employee record.

2. Basic Compensation Version Use this processing option to define the version of the program that you want to use when you add or change information on the Basic Compensation form (P0801CMP). If you leave this field blank, the system enters the default version, ZJDE0001.

A version is a set of user-defined specifications. When you define a version for Basic Compensation, you can set processing options that control information that the system needs when you have activated the salary change workflow process.

3. Address Book Version Use this processing option to specify the version of the Address Book program (P01012) that the system uses when you add or change information on the Address Book Revision form. If you leave this processing option blank, the system uses the default version, ZJDE0002.

A program version is a set of user-defined specifications. When you define a version of the Address Book program, you can set processing options that

control how the application functions. For example, you can specify whether the form displays the Tax ID field.

Termination

Use these processing options to define default codes that are supplied to various records when an employee is terminated.

1. Candidate Req Status Use this processing option to define the UDC (system 08, type CN) for the candidate requisition status that you use to indicate that an employee record is no longer attached to a requisition. This candidate requisition status must have DET entered in the special handling code field. When you terminate an employee, the system uses the code that you define in this processing option to update the candidate requisition status for all of the requisitions that the employee filled.

2. Requisition Status Use this processing option only if you have set up your system options (P05001S) to automatically create a new requisition when an employee is terminated. Use this processing option to define the UDC (system 08, type RS)

for the requisition status that you want to assign to the new requisition. If you leave this processing option blank, the system will not create a new requisition when you terminate an employee.

3. Organizational Structure Type Use this processing option to define the UDC (system 01, type TS) for the organizational structure type that you use to indicate the parent/child relationship between terminated employees and their supervisors. The system uses the termination date to update the parent/child relationship. If you leave this processing option blank, the system will not update the parent/child relationship between the terminated employee and the supervisor.

4. Applicant Status Use this processing option to define the UDC (system 08, type AS) for the applicant status that you want to assign to terminated employees who will be returned to the applicant pool for future hiring considerations. If you leave this field blank, the system does not assign an applicant status to the terminated employee.

Canadian Tax

Use these processing options to specify tax values for various Canadian taxing authorities.

1. Canadian Tax Credit/ADD Use this processing option to specify whether the system automatically includes the net Canadian federal tax credit and the net Quebec tax credit when you add a new employee. The amounts that the system includes come from the Net Canadian and Quebec Tax Credit forms. Values are:

0: The system does not include tax credits.

1: The system Includes tax credits.

2. Canadian Tax Credit/Change Use this processing option to specify whether the system automatically includes the net Canadian federal tax credit and the net Quebec tax credit when you change an employee record. The amounts that the system includes come from the Net Canadian and Quebec Tax Credit forms. Values are:

0: The system does not include tax credits.

1: The system Includes tax credits.

3. Net Canadian Federal Tax Credits Use this processing option to specify the dollar amount that the system automatically includes for area residence tax information. For federal taxes, find the net amount claimed on your TD1 (Personal Tax Credit Return) and enter that value here.

4. Net Canadian Quebec Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Quebec) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

5. Net Canadian Alberta Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Alberta) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

6. Net Canadian British Columbia Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (British Columbia) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

7. Net Canadian Manitoba Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Manitoba) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

8. Net Canadian New Brunswick Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (New Brunswick) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

9. Net Canadian Newfoundland Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Newfoundland) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

10. Net Canadian Northwest Territory Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Northwest Territory) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

11. Net Canadian Nova Scotia Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Nova Scotia) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

12. Net Canadian Ontario Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Ontario) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

13. Net Canadian Prince Edward Island Tax Credit Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Prince Edward Island) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

14. Net Canadian Saskatchewan Tax Credit

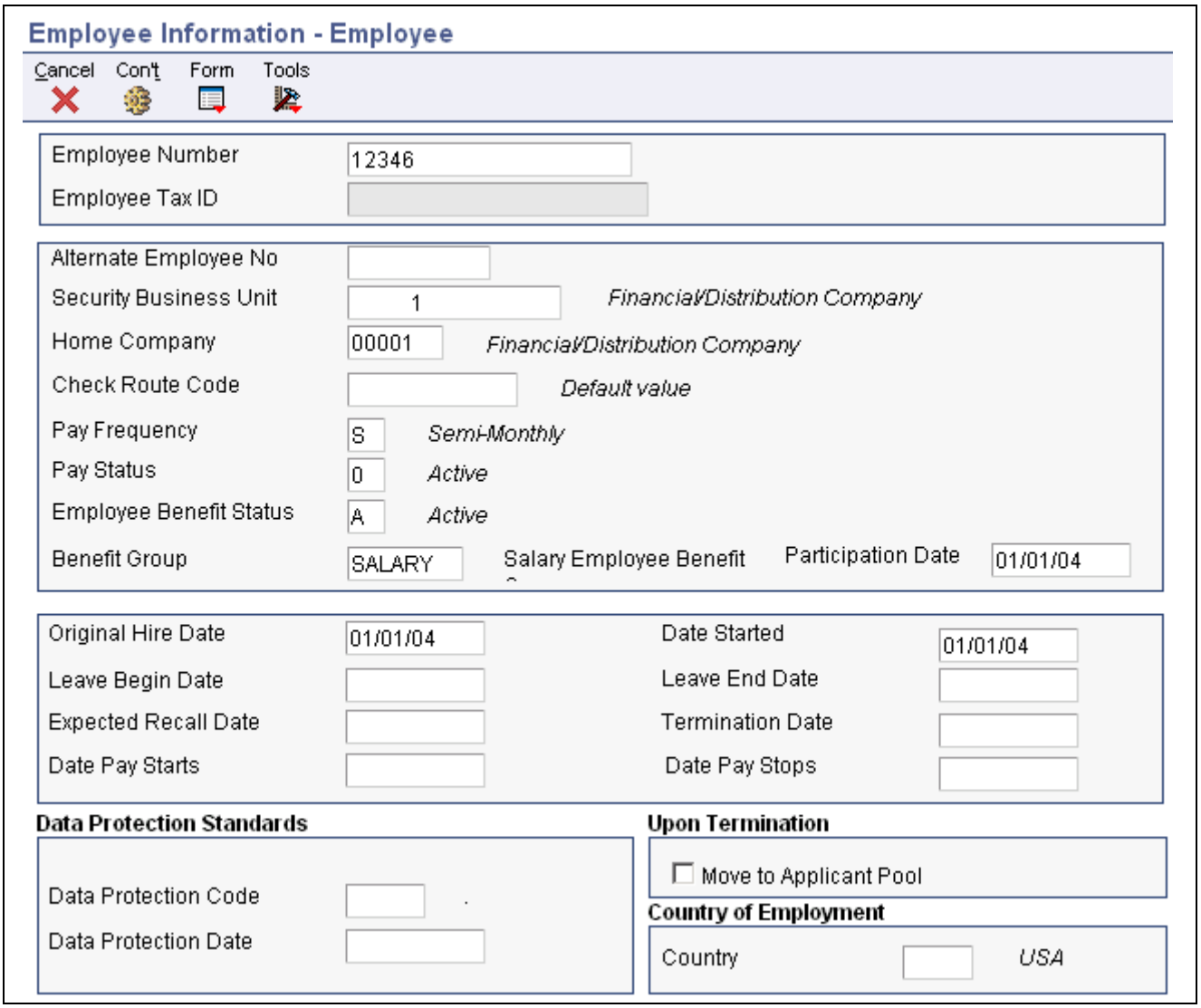
Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Saskatchewan) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

15. Net Canadian Yukon Territory Tax Credit

Use this processing option to specify the net claim amount. The net claim amount applies to federal taxes. This amount comes from the TD1 form (Personal Tax Credit Return). For provincial (Yukon Territory) taxes, the net claim amount comes from the MR-19-V form (Exemptions and Deductions).

Entering Basic Employee Information

Access the Employee form .



Employee form

Employee Identification

Enter an employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Security Business Unit Enter a business unit number that secures the employee's record from unauthorized access. Any user not authorized to access this business unit cannot access this employee's record.

Home Company Enter the company number where the employee records generally reside.

Pay Frequency Enter a user defined code (07/PF) that indicates how often an employee is paid. Values are:

B: Biweekly

W: Weekly

S: Semimonthly

M: Monthly

A: Annually

C: European Annualized

The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.

Pay Status Enter the code used to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run. Also refer to these data items:

- EST: Employment Status
- TRS: Change Reason

Original Hire Date Enter the date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by the data in the Date Started (DST) field.

Date Started Enter the date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.

For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.

Country Enter a value that determines the country for which the system displays country-specific forms and fields. For example, for an employee whose country code is CA (Canada), the system displays the National and Fiscal Data form for Canada, where you can enter information that applies to Canadian employees only, such as national occupational classification. For employees whose country code is US (United States), the system displays the National and Fiscal data form for the United States.

You must enter a value in this field. Blank is not a valid value.

Employee Benefit Status Enter a user defined code (System 06, Type EA) that specifies an employee status, such as new hire or rehire. The system uses this value as it searches

and tests for benefits eligibility. An * indicates that the guidelines refer to all employee statuses that are not otherwise specified.

Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.

Benefit Group Enter the benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.

Participation Date Enter the date the employee began participating in the company deferred income or stock option plan. This date must be later than the Date Started date.

Alternate Employee No Enter an alternate employee number, typically the number from the employee tracking system that your organization used prior to converting to the PeopleSoft system.

To search using this number, preface the number with a slash (*/*).

Check Route Code Enter a user defined code (System 07, Type CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

Data Protection Code Enter additional text that further describes or clarifies an element.

Data Protection Date Enter a code used to identify the terms for beginning and ending enrollment dates.

Move to Applicant Pool Enter a code that you use to indicate whether a terminated employee should be moved into the applicant pool. When you move an employee to the applicant pool, the system changes the employee search type to applicant (*A*). If you do not move the employee to the applicant pool, the system changes the employee search type to terminated (*X*).

If the applicant table does not exist, the system always changes the employee search type to terminated (*X*).

Country Enter a value that specifies the country for which the system displays country-specific forms and fields. For example, for an employee whose country code is CA (Canada), the system displays the National and Fiscal Data form for Canada, where you can enter information that applies to Canadian employees only, such as national occupational classification. For employees whose country code is US (United States), the system displays the National and Fiscal data form for the United States.

You must enter a value in this field. Blank is not a valid value.

Note. After you enter basic employee information, you must enter address book information.

Entering Employee Personal Information

This section provides and overview of employee personal information entry and discusses how to enter employee personal information.

Understanding Employee Personal Information Entry

After you complete the Address form, you must enter employee personal information.

Personal information includes items such as marital status, gender, and birth date. Use this information to track employee-specific information for reporting and analysis.

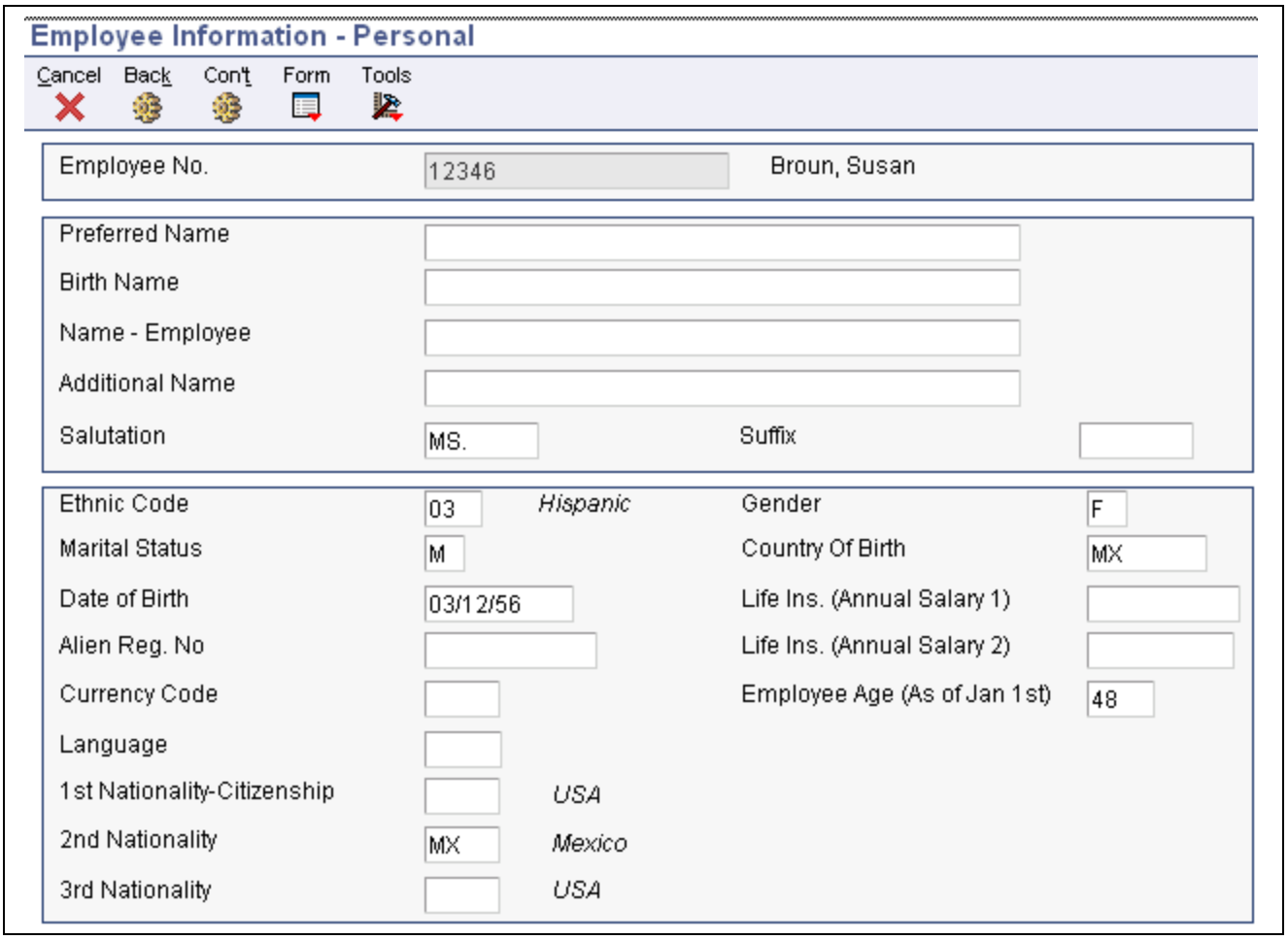
When you need to update employee personal information that has already been entered, you can use the Employee Information program (P0801) on the Employee Management menu (G05BE1) to choose an employee, choose Personal from the Row menu, and enter changes. If your organization uses PeopleSoft self-service software, employees can also enter their own changes.

Forms Used to Enter Employee Personal Information

Form Name	Form ID	Navigation	Usage
Personal	W0801EMPD	Employee Management (G05BE1), Employee Information (P0801) Select Personal from the Row menu.	Enter employee personal information.

Entering Employee Personal Information

Access the Personal form.



Personal form

After you enter basic employee information, you must enter personal information. The system displays the appropriate form automatically.

Ethnic Code Enter a user defined code (System 07, Type M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that PeopleSoft provides are hard-coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.

The system does not display the Ethnic Code field for Canadian employees.

Gender Enter a value that specifies the employee gender. Values are:

M: Male

F: Female

Date of Birth Enter the employee's date of birth.

Preferred Name Enter the preferred name of the employee. For instance, an employee might have the legal name of Catherine but might be known as Cathy.

Birth Name	Enter the surname that a female employee had at birth. This information is used for all government reports.
Name - Employee	Enter a value in this 50-character alphabetical field for the extended name for an employee. You can use this field on certain designated reports in place of the normal 40-character name.
Additional Name	Enter a value to store an optional middle name(s), a previous married name, or an alias associated with the employee.
Salutation	Enter the salutation code is used to identify the proper title for a given employee. Some examples are Mr., Ms., Dr., and so on.
Suffix	Enter the suffix code is used to identify the credentials for a given employee. Some examples are Phd, MD, CPA, and so on.
Marital Status	Enter a user defined code (System 06, Type MS) that specifies the employees' federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.
Life Ins. (Annual Salary 1)	Enter a value to calculate deductions, benefits, and accruals (DBAs) for an employee's life insurance premium. Any table method that begins with an I (Insurance) uses this field.
Life Ins. (Annual Salary 2)	Enter a value to calculate deductions, benefits, and accruals (DBAs) for a spouse's life insurance premium. Any table method that begins with an F uses this field.
Country Of Birth	Enter a user defined code (system 00, type CN) that identifies a country. The country code has no effect on currency conversion. The Address Book system uses the country code for data selection and address formatting.
Alien Reg. No	Enter the alien registration number for employees who have more than one ID. For instance, if you have a foreign employee who is working under a green card, you could record that number in this field.
Currency Code	Enter a code that identifies the currency of a transaction.
Employee Age (As of Jan 1st)	Enter the age of the employee as of a certain date (for example, January 1st) for a given year. You can manually update this field or the system can update this field when you run the Update Employee Master Age report (R083495).
Language	Enter a user defined code (system 01, type LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in your user preferences.
1st Nationality-Citizenship	Enter additional text that further describes or clarifies an element.
2nd Nationality	Enter additional text that further describes or clarifies an element.
3rd Nationality	Enter additional text that further describes or clarifies an element.

Entering Organizational Assignment Information

This section provides an overview of organizational assignment information entry and discusses how to:

- Set processing options for Employee Organizational Assignments (P0801ORG).
- Enter organizational assignment information.

Understanding Organizational Assignment Information Entry

After you complete the Personal form, you must enter organizational assignment information.

Organizational assignment information includes detailed information about the employee's work assignment, such as job type, job step, home business unit, performance appraisal types and dates, and employee competency levels.

When you want to review job history for values on this form, first place your cursor in the desired field and then choose the Job Hist. Tracking menu option. To review history for other values on this form that you might be tracking, place your cursor in the desired field and then choose the History Tracking menu option. To track historical information, you must first set up the values that you want to track.

Performance Appraisals and Organizational Information

If you are using the Performance Appraisal module in the Human Resources system to create employee appraisals, the system automatically updates the Last Review Type and Last Review Date fields on the Organizational Assignment form when an appraisal is completed. You can then review the employee's appraisal directly from the Organizational Assignment form using the Performance Appraisal menu option.

For example, if a dispute arose about the level of an employee's salary, a human resource administrator could easily review the employee's record, and also access the employee's performance appraisal directly, to ensure that all necessary information is taken into account.

If no appraisals have been created for the employee, the Performance Appraisal option is disabled.

You can also review current and historical performance appraisals that were completed by a specified supervisor. On the Work With Organizational Assignments form, you choose an employee who is assigned to the specified supervisor, and then choose the Performance Appraisal menu option. You can choose any employee who is associated with that supervisor, regardless of whether that employee has a completed performance appraisal.

For example, human resource administrators might need to verify whether a supervisor has completed all of the performance appraisals for the department. Using this option, you can review all completed appraisals, or all appraisals that have not yet been completed by a specified supervisor.

Form Used to Enter Organizational Assignment Information

Form Name	Form ID	Navigation	Usage
Organizational Assignment	W0801ORGA	Employee Management (G05BE1), Organizational Assignment (P0801ORG). On the Work With Organizational Assignments form, select the employee for which you want to enter organizational assignment information and then click Select.	Enter organizational assignment information.

Setting Processing Options for Employee Organizational Assignments (P0801ORG)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to determine what default job-related information the system uses to fill in the employee master information record when you add or change the job type for an employee.

The program uses default information from the Job Information table (F08001) and the Business Unit / Job ID. X-Ref table (F08005), depending on which combination of processing options is set.

The Job Information Add and Job Type Change processing options use data in the F08001 table unless the Business Unit/Job ID Information processing options are set to 1 (default). When the Business Unit/Job ID Information Add and Business Unit/Job ID Information Change processing options are set to 1 and there is a matching business unit / job type record in the F08005 table, the union code, benefit group, and workers compensation information comes from the F08005 table. All other data comes from the F08001 table. If there is no matching business unit/job type record in the F08005 table, all data comes from the F08001 table.

The Job Category Add and Job Category Change processing options use data in the F08001 table if a matching job type/step record exists in that table. If no matching record exists, no data is used and no data is retrieved for the Job Information Add and Job Type Change processing options.

The Job Default Window processing options specify the setting that the system uses to automatically provide information from the F08001 table for the Job Default Window (P08JD). The system displays the Job Default Window only when you are entering a new employee into the system.

The Business Unit/Job ID Information Add and Business Unit/Job ID Information Change processing options use data in the F08005 table. If the Job Information Add and Job Type Change processing options are set to 1 and a matching record does not exist in the F08005 table, the system uses data from the F08001 table.

1. Job Information Add

Use this processing option to determine whether the system enters default job information into the employee record when you specify a job type for a new employee.

The application will default pay frequency, union code, EEO job category code, pay class, pay grade, overtime exempt, pay grade step, benefit group, workers compensation, and subclass. (Note: Only union code and EEO job category display on the Organizational Assignment form. The rest of the information is used throughout the Employee Master table.) Values are:

0: Do not use default data.

1: Use default data.

2. Job Information Change

Use this processing option to determine whether job information defaults into the employee record when you change a job type for an existing employee.

The application will default pay frequency, union code, EEO job category code, pay class, pay grade, overtime exempt, pay grade step, benefit group, workers compensation, and sub class. (Note: Only union code and EEO job category display on the Organizational Assignment form. The rest of the information is used throughout the Employee Master table.) Values are:

0: Do not use default data.

1: Use default data.

3. Job Default Window

Use this processing option to specify which of the radio buttons, in the job Default Window, will be selected when first entering the window. Values are:

0: To specify the button, *always* use default job information

1: To specify the button, *only* use defaults to overwrite blank values'

4. Job Category Add

Use this processing option to determine whether job category codes default into the employee record when you specify a job type for a new employee.

The application will check F08001 to see if the user-selected job type/step exists. If it does, the application will use any payroll category codes (10 in all) associated with the job type/step in the Employee/Job Category Codes form. Values are:

0: Do not use default data.

1: Use default data.

5. Job Category Change

Use this processing option to determine whether job category codes default into the employee record when you change a job type for an existing employee.

The application will check F08001 to see if the user-selected job type/step exists. If it does, the application will use any payroll Category Codes (10 in all) associated with the job type/step in the Employee/Job Category Codes form. Values are:

0: Do not use default data.

1: Use default data.

6. Business Unit/Job ID Information

Use this processing option to determine whether the business unit/job information cross-reference defaults into the employee record when you specify a job type for a new employee.

The application will use the union code, workers compensation, and benefit group from the F08005 table. (Note: Only union code appears on this application. The remaining two are used in the Employee Master table.) Values are:

0: Do not use default data.

1: Use default data.

7. Business Unit/Job ID Information

Use this processing option to determine whether the business unit/job information cross-reference defaults into the employee record when you change a job type for an existing employee.

The application will use the union code, workers compensation, and benefit group from the F08005 table. Values are:

0: Do not use default data.

1: Use default data.

Note. Only union code appears on this application. The remaining two are used in the Employee Master table.

Versions

Use these processing options to specify the program version that the system uses for Resource Competency Information (P05100), Competencies Gap Analysis (P08008), and Employee Performance Appraisals (P087712). If a custom version does not exist and you do not enter the version number, the system uses the default version of each program.

1. Resource Competency Information Version

Use this processing option to specify the version of the Resource Competency Information program (P05100) that the system uses. If you leave this processing option blank, the system uses the default version, ZJDE0002.

A program version is a set of user-defined specifications. When you define a version of the Resource Competency Information program, you can use a processing option to specify the Competency Update Event Code.

2. Gap Analysis Version

Use this processing option to specify the version of the Competencies Gap Analysis program (P08008) that the system uses. If you leave this processing option blank, the system uses the default version, ZJDE0003.

A program version is a set of user-defined specifications. When you define a version of the Competencies Gap Analysis program, you can set processing options to specify the audience and a default version of the Job Competencies In An Organization program (P08006).

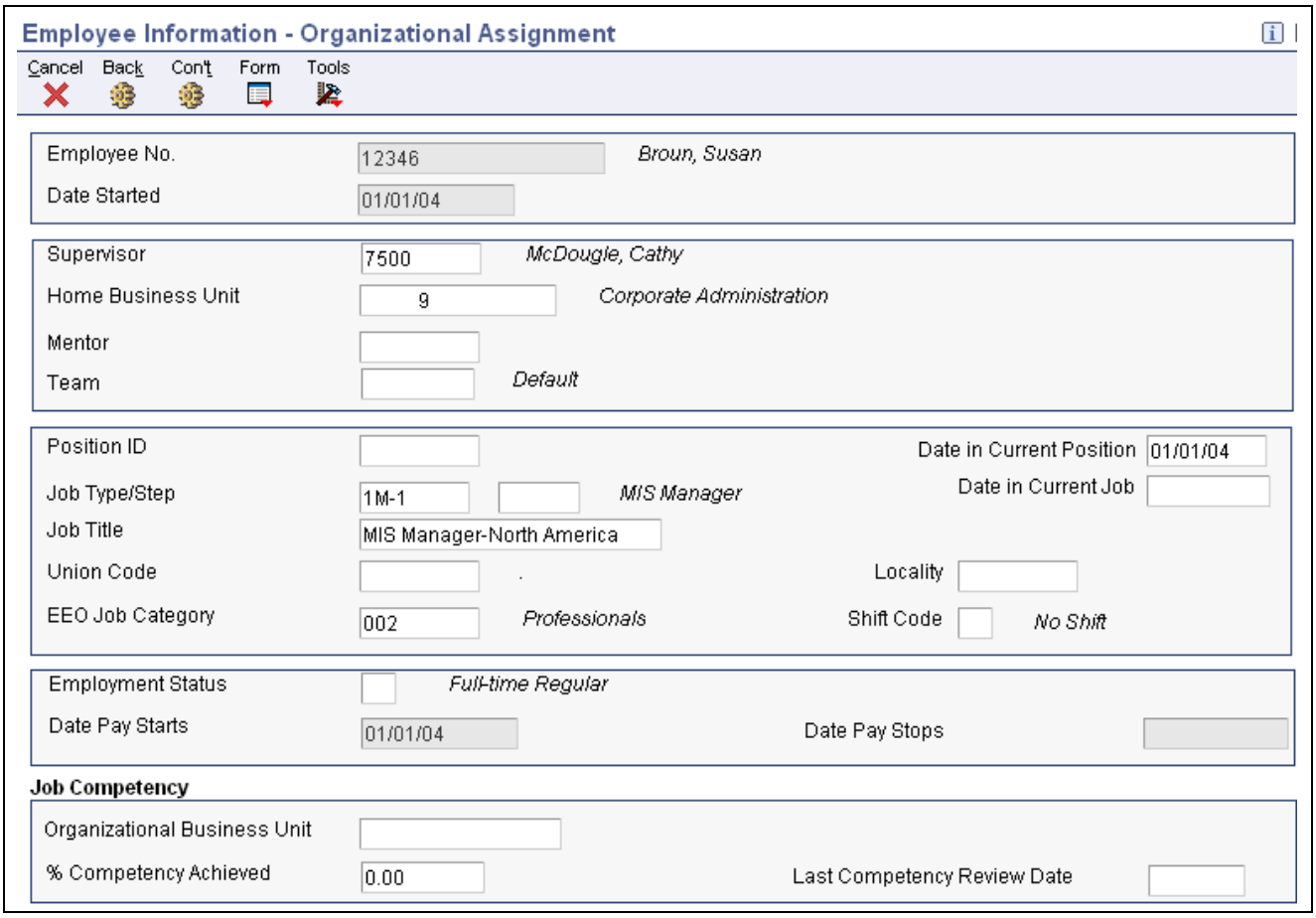
3. Performance Appraisal Version

Use this processing option to specify the version of the Employee Performance Appraisals program (P087712) that the system uses. If you leave this processing option blank, the system uses the default version, ZJDE0006.

A program version is a set of user-defined specifications. When you define a program version of the Employee Performance Appraisals program, you can set processing options that control various aspects of the program.

Entering Organizational Assignment Information

Access the Organizational Assignment form.



Organizational Assignment form

Supervisor Enter the address book number of the supervisor.

Mentor Enter a number that identifies an entry in the Address Book system. Use this number to identify mentors.

Team Enter a code that identifies a team.

Position ID Enter a code that you use for budgetary (position) control purposes. The position ID consists of:

- Position (position code and its description).
- Fiscal year.
- Home business unit.

For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005-2006, for home business unit 41.

You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.

Locality Enter a user defined code (system 07, type SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.

EEO Job Category Enter a user defined code (system 07, type J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by the PeopleSoft EnterpriseOne system. You can add codes if needed.

Date in Current Position Enter the date the employee started the current position.

Date in Current Job Enter the date when an employee started working in this job.

Employment Status Enter a user defined code (07/ES) that specifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample values include:

Blank: Full-time regular.

1: Full-time temporary

2: Part-time temporary

3: Part-time regular

4: Seasonal

5: Casual

Date Pay Starts Enter the date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.

You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).

Organizational Business Unit Enter a business unit that is included in the organizational structure for job competencies. You use organizational business units to assign job competency information to levels within your organizational structure. This business unit is independent of an employee's home business unit and security business unit.

% Competency Achieved Enter a number that indicates how an employee is progressing in relation to the required competency level for a particular job.

The system calculates this value by first calculating the value for the Employee Competency Percent of Required field (EEPCTRQD) for all employee competencies that are related to a job competency for a particular job. The system then multiplies these percentages by their respective weighting factor and adds them together to determine the total job competency percent achieved.

Last Competency Review Date Enter the date on which the last job competency review took place.

Perf. Appraisal Level Enter a code that specifies the level of proficiency at which a supervisor rates a person or asset for a particular competency type and competency code.

Last Review Type Enter a code that identifies the type of the last salary or wage review for which the score for the employee performance appraisal was updated. This is a user defined code (system 06, type RV).

Last Review Date Enter the date that the employee's last performance appraisal was completed.

Next Review Type Enter a user defined code (system 06, type RV) that specifies the type of performance review to be completed for the next review period.

Next Review Date Enter the date on which the employee is scheduled for the next performance or salary review. This field is for information only. It is not used by any programs or processes in the system.

Job Title Enter a title associated with an employee's job.

Shift Code Enter a user defined code (system 00, type SH) that identifies daily work shifts.

In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.

For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Date Pay Stops Enter the date when an employee should no longer be included in a payroll cycle or the date when an employee stops participating in the company's benefit plans.

You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.

This date may also be the date that a deduction, benefit, or accrual instruction stops.

Note. If you set the processing options for the Employee Organizational Assignment program (P0801ORG) to use default job information from the Job Information table (F08001), the system displays the Job Default Window form.

If the Job Default Window form appears, review the information on this form, make any necessary changes, and then click OK.

See Also

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Working with Employee Competencies," Assigning Competencies to Employees

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Working With Performance Appraisals"

Chapter 37, "Understanding Employee History and Turnover," page 361

Entering Basic Compensation Information

This section provides an overview of basic compensation information entry and discusses how to:

- Set processing options for Basic Compensation (P0801CMP).
- Enter basic compensation information.

Understanding Basic Compensation Information Entry

After you complete the Organizational Assignment form, you must enter compensation information.

Basic compensation information includes pay information, such as salary, hourly rate, pay class, and pay grade.

When you want to update compensation information that has already been entered, you can choose the Basic Compensation program (P0801CMP) from the Employee Management menu (G05BE1), locate the employee whose record you need to change, and then choose Basic Compensation from the Row menu.

When you want to review job history for values on this form, first place your cursor in the desired field and then choose the Job Hist. Tracking menu option. To review history for other values on this form that you might be tracking, place your cursor in the desired field and then choose the History Tracking menu option. To track historical information, you must first set up the values that you want to track.

Form Used to Enter Basic Compensation Information

Form Name	Form ID	Navigation	Usage
Basic Compensation	W0801CMPA	Employee Management (G05BE1), Employee Information	Enter basic compensation information.

Setting Processing Options for Basic Compensation (P0801CMP)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use these processing options to specify whether the system sends a Workflow message when a salary change exceeds the specified amount or percentage. When the threshold is exceeded, the system activates the Employee Salary Change Approval process (EEMAST1) in Workflow. The system updates the new salary change only after the Workflow request is approved.

1. Workflow - Salary Threshold

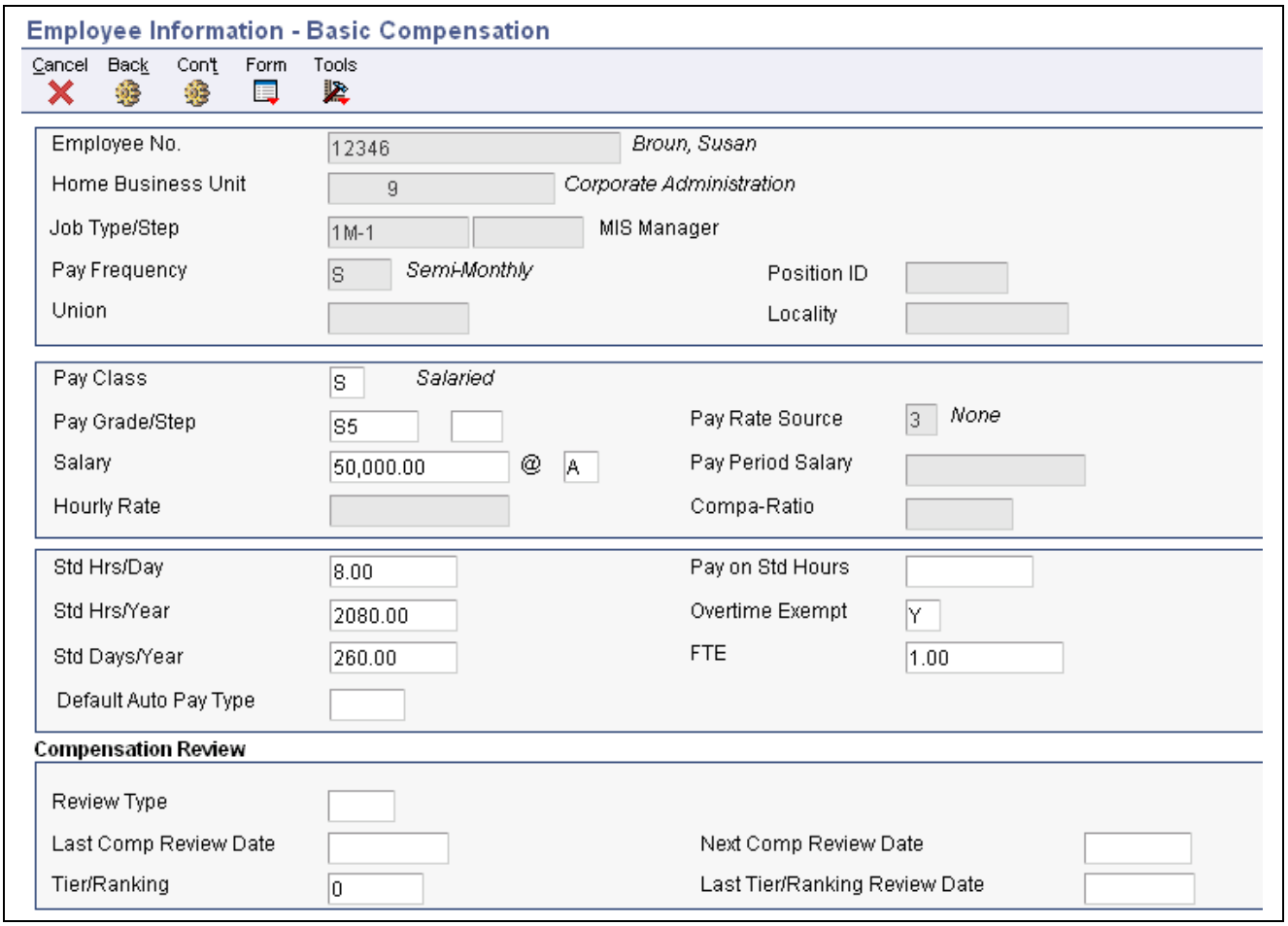
Use this processing option to specify an amount that, if the salary is increased by the amount entered or increased by more than the amount entered, then the system initiates the Employee Salary Change Approval Process (EEMAST1) workflow. The system sends an approval message to the workflow recipient, and the salary is updated after the change is approved.

2. Workflow - Salary Percent Change Threshold

Use this processing option to specify the percentage of salary increase at which the system starts the Change Approval Workflow Process (EEMAST1). When the salary is increased to or beyond the percent entered, the system starts the workflow process. The system sends an approval message to the workflow recipient and the salary is updated only after the change is approved.

Entering Basic Compensation Information

Access the Basic Compensation form.



Basic Compensation form

After you enter organizational assignment information, you must enter compensation information. The system displays the appropriate form automatically.

Salary Enter the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.

Hourly Rate Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.

In the Employee Master table, this number is the employee's base hourly rate. In the Union Rates table, it is the straight time rate.

Note. If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.

Std Hrs/Day Enter the number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day

that you defined in the payroll company constants (company options, in PeopleSoft EnterpriseOne).

For example, if, in the payroll company constants (company options), you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter *7* in this field for those employees.

Pay on Std Hours Enter the standard number of hours that you want to pay an hourly employee for in each payroll, regardless of whether the employee works more or less hours. If you leave this field blank, the system bases it on time entry only.

Std Hrs/Year Enter the number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay-rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate).

When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses this sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period:

1. Employee entry forms (this field).
2. Pay Grade Step table (hours per day multiplied by days per year).
3. Payroll company constants for the employee's company.
4. Payroll company constants for the default company (company 00000).
5. Data dictionary.
6. System default value of 2080 standard hours per year.

When you enter a value in this field, the value that you enter overrides the default value from the Pay Grade Step table.

Std Days/Year Enter the number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year.

When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.

Default Auto Pay Type Enter a code that specifies the default pay type to be used in the generation of autopay in those instances where the system does not use the employee labor distribution instructions.

If nothing is entered in this field, then pay type 001 will be used.

FTE Enter the full-time equivalent (FTE) amount. This figure is the portion of a full-time worker that an employee represents within the business unit. For example, an employee who works 20 hours per week would represent .50 (1/2 FTE). This number cannot be greater than 1 for any employee.

Pay Class Enter a code that specifies how an employee is paid. Values are:

H: Hourly

S: Salaried

P: Piecework

Pay Grade/Step Enter a code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.

To set up pay grades, use Pay Grades by Class (P082001).

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

To review pay history information, click in one of this field and then select Pay Hist. Tracking from the Form menu.

Overtime Exempt Enter a code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Values are:

Y: The employee fits the rules and does not have to be paid for working overtime.

N: The employee does not fit the rules and is to be paid for working overtime.

Review Type Enter a code that indicates the last compensation review type.

Last Comp Review Date Enter the date the last compensation review was given.

Next Comp Review Date Enter the date on which the employee is scheduled for the next compensation review.

Tier/Ranking Enter a value that allows a supervisor to either rank employees individually or group them into tiers. When employees are ranked, each employee is assigned a unique number. When employees are grouped into tiers, several employees can have a common number. For example, a supervisor can assign a tier of 1 through 3 to 12 employees. Each employee can be assigned to tier 1, 2, or 3.

Last Tier/Ranking Review Date Enter the date the Tier/Rank was last updated.

To review pay history information, click in the Pay Grade of Grad Step field and then select Pay Hist. Tracking from the Form menu.

Selecting the Pay Hist. Tracking option displays the Pay History Window form. The Pay History Window form uses information from the Employee Master Information table (F060116) and the Employee Jobs History File table (F060119).

To review HR history information, click in any field except Job Type/Step and then select History Tracking from the Form menu.

Choosing the History Tracking options displays the History Window form. The History Window form uses information from Employee Master Information table (F060116) and the HR History table (F08042). The data that the system displays, which is based on the menu choices of Job Hist. Tracking and History Tracking, might be different, depending on whether the system option for history tracking is enabled.

Entering Country-Specific Information for Employees

This section provides an overview of country-specific information entry for employees and discusses how to enter country-specific information for employees.

Understanding Country-Specific Information Entry for Employees

After you complete the Basic Compensation form, you must enter country-specific information.

The system uses the value that you entered in the Country field on the Employee form to determine if a country-specific form appears next.

When you enter country-specific information, the system displays fields for only the information that applies to the country code that you entered for the employee. Many of these fields are user-defined fields that you can customize to meet the specific needs of your organization.

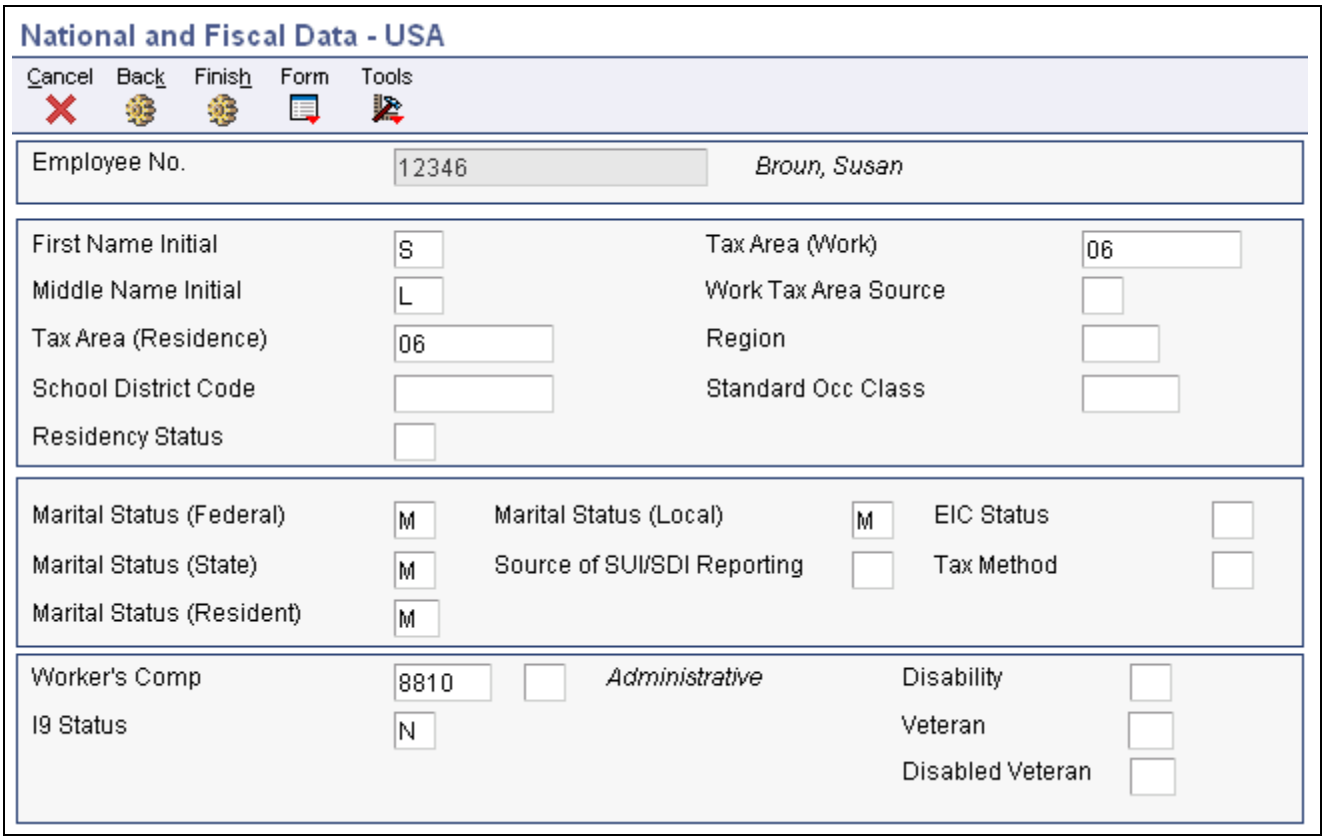
Country-specific information includes information that is required only in the country in which the employee works.

Form Used to Enter Country-Specific Information for Employees

Form Name	Form ID	Navigation	Usage
National and Fiscal Data - USA	W0801USA	The system automatically displays the National and Fiscal Data - USA form after the previous task, if applicable.	Enter country-specific information for employees.

Entering Country-Specific Information for Employees

Access the National and Fiscal Data - USA form.



National and Fiscal Data - USA form

After you enter basic compensation information, you must enter country-specific information. The system displays the appropriate form automatically.

Note. If you use the GeoCoder, the system uses the employee address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit as the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field.

See Chapter 29, "Assigning Tax Area Information Using the GeoCoder," page 267.

First Name Initial Enter the first letter of the employee's first (given) name. This is primarily used to facilitate certain statutory reporting requirements.

Middle Name Initial Enter the first letter of the individual's middle name. This is primarily used to facilitate certain statutory reporting requirements.

Tax Area (Work) Enter a code that identifies a geographical location and the tax authorities for an employee work site, including employee and employer statutory requirements. In the Vertex payroll tax calculation software, the tax area code is synonymous with GeoCode. To determine the values your location, refer to the documentation for the tax calculation software that you are using.

Tax Area (Residence) Enter a code that identifies both the geographical location and the tax authorities for the employee's residence. Authorities include employee and employer statutory requirements. This code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode File for values for your locations.

School District Code Enter a user-defined code from the user defined code table (UDC). The UDC (system 06, type SD) specifies the school district tax for taxation purposes. Vertex automatically calculates the school district tax. This feature is primarily used by the public sector.

Work Tax Area Source Enter a code that the system uses to determine the source for obtaining the tax area code for the employee's work location.

N: Use time entry, job master, employee labor rules or employee master to determine Tax Area.

E: Always use the Work Tax Area from the employee master on time record.

When blank the system assumes N.

Marital Status (Federal) Enter a UDC (system 06, type MS) that specifies the employees' federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

Marital Status (State) Enter the employee's work state marital status code as retrieved from the state W-4. This code is used in the computation of all state payroll taxes associated with the state in which the employee performed work.

If you leave this field blank, the Federal status is used.

When you enter information for employees in Missouri, you must enter *A, H, J,* or *S* in the Marital Status (State) field. If you enter any other codes in this field for employees in Missouri, the system processes information as if the fields were populated with *S.*

Marital Status (Local) Enter the employee's Local marital status code as retrieved from the locality's W-4.

This code is used in the computation of all local (city, county) payroll taxes associated with the state in which the employee performed work.

If you leave this field blank, the Federal status is used.

Marital Status (Resident) Enter a UDC (system 06, type MS) that specifies the marital status code for the state of residence. It is used for tax computations. This code is related to specific VERTEX system codes (see the VERTEX Tax Manual for their explanation). Also, two special codes have been provided: one designates single for Federal and married for State, and the other designates married for Federal and single for State.

When you enter information for employees in Missouri, you must enter *A, H, J,* or *S* in the Marital Status (Resident) field. If you enter any other codes in this field for employees in Missouri, the system processes information as if the fields were populated with *S.*

Source of SUI/SDI Reporting Enter the work tax area that is used for SUI reporting.

You can specify that the system use either the resident state or the work state, regardless of where the employee worked. FUI is calculated in the same state where SUI is calculated. Weeks Worked are the number of weeks the employee worked in the taxed state. Values are:

N: Use the work tax area in the time entry record to determine SUI. This is the default value.

R: Always use residence tax area from Employee Master table even if the time entry record is different.

W: Always use work tax area from Employee Master table even if the time entry record is different.

EIC Status

Enter a code that specifies whether the employee qualifies for the earned income credit and elects for the employer to give him or her the advance. Values are:

N: The employee does not qualify (default).

Y: The employee qualifies and the employee is single/head of household.

M: The employee qualifies and is married without spouse filing certificate.

B: The employee qualifies and his or her spouse also qualifies.

Tax Method

Enter a code that specifies the tax method that the Vertex payroll-tax calculation system uses to calculate certain taxes. The codes are defined in a UDC table (system 07, type TM).

This code can also determine the form that the employee receives for year-end tax reporting. For example, when you enter *C*, a contract employee receives IRS Form 1099-M rather than IRS Form W-2. If a form is not specified in Description 2, the system generates IRS Form W-2.

For employees who are paid multiple times within one pay period, the system should review previous payments within the same pay period and then adjust tax amounts. To specify this function, enter *S.*

If a tax method exists for an employee in addition to the normal tax method that is set up in the Employee Master Information table (F060116), the system can use the alternative tax method to interactively process interim payments. To specify this function, enter *Z.*

Some values, such as *S* and *Z,* might require additional setup in the UDC table.

Worker's Comp

Enter a UDC (system 00, type W) that represents a workers' compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers' compensation insurance reports.

S C

Enter a code that specifies any special circumstances associated with the workers compensation insurance (WCI) code, resulting in multiple rates for the same WCI code due to location or risk, for example. The subclass should remain blank if multiple rates do not exist. Default codes are:

Blank: There are no special circumstances associated with this code.

F: There are special circumstances associated with this code.

I9 Status

Enter a code indicating the method used to verify that this employee is eligible to work in the United States. Values are:

Y: I9 form on file

P: Passport used for verification

L: Driver's license and Social Security card

V: Visa (worker's permit)

B: Birth certificate

N: Waiting for verification

Disability

Enter a code indicating whether this employee has a mental or physical disability. Values are:

Y: Yes, this employee has a mental or physical disability.

N: No, this employee does not have a mental or physical disability.

U: Unknown.

Disabled Veteran

Enter a code indicating whether this employee is a disabled veteran. Values are:

Y: Yes, this employee is a disabled veteran.

N: No, this employee is not a disabled veteran.

This field is used to generate the Veterans Employee (VETS-100) report.

Veteran

Enter a code that indicates the veteran status of the employee for EEO reporting purposes. Values are:

N: No, this employee is not a veteran.

Y: Yes, this employee is an Other and Newly Separated veteran, as defined by the U.S. Department of Labor.

V: This employee is a Vietnam veteran.

O: This employee is a veteran, classified as Other, as defined by the U.S. Department of Labor.

S: This employee is a veteran, classified as a Newly Separated, as defined by the U.S. Department of Labor.

W: This employee is a Vietnam veteran, classified as a Other, as defined by the U.S. Department of Labor.

S: This employee is a Vietnam veteran, classified as a Newly Separated, as defined by the U.S. Department of Labor.

Z: This employee is a Vietnam veteran, classified as a Other and Newly Separated, as defined by the U.S. Department of Labor.

Residency Status

Enter a value that identifies out-of-state employees for whom an employer must withhold tax for the state of residence. Values are:

N (Default): The system uses the employee residence state to calculate taxes. Because the work state has a reciprocal agreement with the employee state of residence, the system uses the employee residence state from the Employee Master Information table (F060116).

W: The system uses only the work state to calculate taxes.

Region

Enter a region within a state. This field is intended for use in preparation of unemployment reports for some states.

Standard Occ Class

Enter a code that identifies occupational titles and their definitions.

These codes are used in one or more states in the preparation of unemployment reports.

Entering Employee History Information

This section provides an overview of employee history information entry and discusses how to enter employee history information.

Understanding Employee History Information Entry

After you complete the preceding form, you can enter employee history information. You enter this information only if your system is set up to track employee history.

You can set up your system to track employee history when you enter a record for a new employee or change existing employee information. You specify the data items for which you want to track history. Then, each time you change the information in those data items, the system updates the HR History table (F08042).

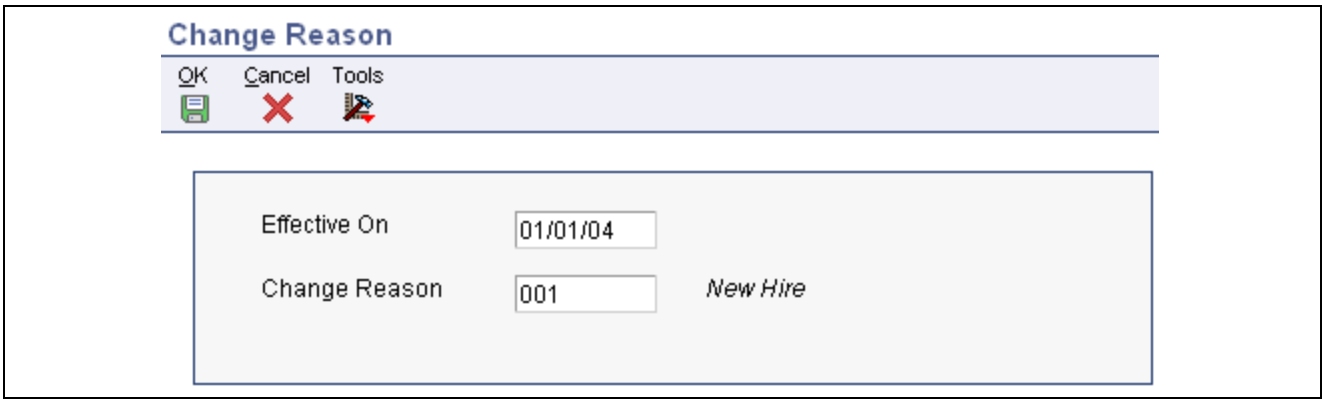
When you need to access the History Window form after the initial hiring process, you can choose the Employee Information program (P0801) from the Employee Management menu (G05BE1), and then choose an employee record. Then, from the Employee form, you can choose History Tracking from the Form menu.

Forms Used to Enter Employee History Information

Form Name	Form ID	Navigation	Usage
Change Reason	W08EFTA	N/A	Enter employee history information.

Entering Employee History Information

Access the Change Reason form.



Change Reason form

After you enter country-specific information, you must enter employee history information. The system displays the appropriate form automatically.

Effective On Enter the effective date that you want to record all the changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes that you make to the Employee Master table take effect immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the Date Started as the effective date.

Change Reason Enter a Change Reason UDC (system 06, type T) that indicates the reason an employee's record changed. For example, you can enter the reason you are recommending a salary or rate change.

If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

Note. Depending on your country of preference, the system might provide an employee tax form.

Entering Tax Withholding and Override Information

This section provides an overview of tax withholding and override information entry and discusses how to enter tax withholding and override information.

Understanding Tax Withholding and Override Information Entry

After you complete the Change Reason form, you can enter tax withholding and override information for a new employee or change existing employee information.

When you need to change tax withholding and override information that has already been entered, you can choose Employee Tax Overrides - USA from the Employee Management menu (G05BE1).

You enter tax withholding and override information to indicate the number and type of exemptions that employees claim on their withholding allowance forms. Quantum for Payroll Tax, the tax calculation system that integrates with the EnterpriseOne Payroll system, uses this information to calculate employees' taxes each pay period. The system provides the tax area and tax type for federal income tax (tax type A) with no exemptions and no override withholding amount. If the employee has any exemptions, you must enter the number of exemptions. The system uses the number of federal exemptions to calculate all taxes unless you enter separate override records for state and local taxes.

Quantum for Payroll Tax currently supports percentage or flat amount overrides of federal and state tax calculations for non-supplemental pay. These flat or percentage amount overrides can be taken in addition to the taxes that the system calculates or they can replace the tax amounts that the system would calculate.

When an employee receives supplemental pay along with non-supplemental pay in the same payment, and that employee has tax amount overrides, the system uses the tax overrides when calculating the tax amount to be withheld from the employee's non-supplemental pay and uses the federal supplemental tables to calculate tax for supplemental pay. However, when an employee who has tax override amounts receives a payment containing only supplemental pay, the system disregards the federal tax overrides and taxes the employee using the applicable federal supplemental pay tax rates supplied by Quantum for Payroll Tax. These examples illustrate the differences in tax results when an employee receives supplemental pay and has tax overrides. Please note that the numbers in these examples are for illustration purposes only, and are not intended to reflect actual tax amounts as defined by governmental taxation authorities.

Example 1

Employee A has no tax overrides and receives regular gross pay of 2307.33 USD. The resulting tax amount for the payment is 475.33 USD. This example is used to illustrate what the tax amount might be for an employee with no tax overrides and no supplemental pay. If you compare the amounts in this example to those in these examples, you can see how tax overrides and supplemental pay can affect tax results.

Example 2

Employee A has an additional tax override for 10 USD. The employee receives regular gross pay of 2307.33. The resulting tax amount for the payment is 485.33 USD, which includes the 475.33 USD which is associated with the regular pay, along with the additional 10 USD entered as an override. In this example, the tax override amount is used to calculate the final tax amount.

Example 3

Employee A has no tax overrides and receives regular gross pay of 2307.33 USD along with 250 USD of supplemental pay on the same payment. The resulting tax amount is 544.08 USD, which includes the 475.33 USD associated with the regular pay, along with 68.75 USD, which is the tax amount associated with the supplemental pay.

Example 4

Employee A has an additional tax override for 10 USD. The employee receives regular gross pay of 2307.33 USD along with 250 USD of supplemental pay on the same payment. The resulting tax amount is 554.08 USD, which includes the 475.33 USD associated with the regular pay, the 10 USD tax override, and the 68.75 USD associated with the supplemental pay.

Example 5

Employee A has an additional tax override of 10 USD. The employee receives supplemental pay of 250 USD. The resulting tax amount for the payment is 68.75 USD. In this example, the additional tax override of 10 USD is ignored because the supplemental pay is generated as a single payment.

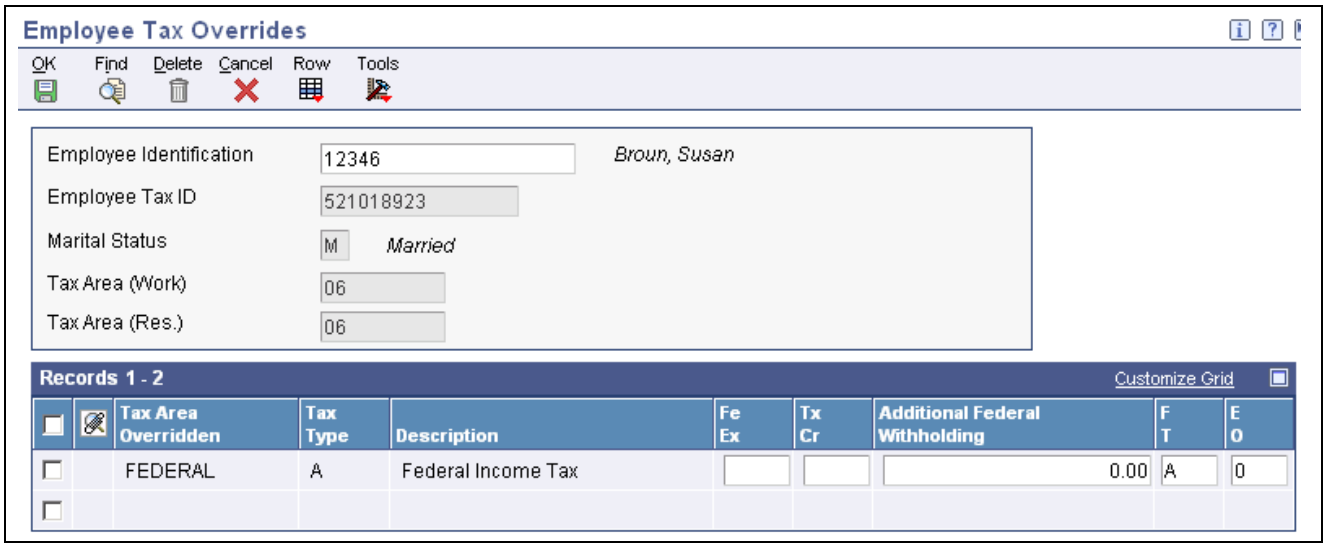
Important! If you enter a flat dollar override of 0 (zero) for the Federal A tax, Statutory Exempt appears on the employee's year-end tax forms. To prevent the system from calculating federal income taxes without indicating that the employee is exempt from tax, enter 99 for the employee's number of exemptions.

Form Used to Enter Tax Withholding and Override Information

Form Name	Form ID	Navigation	Usage
Employee Tax Overrides,	W060120B	Employee Management (GH05BE1), Employee Tax Overrides - USA	Enter tax withholding and override information.

Entering Tax Withholding and Override Information

Access the Employee Tax Overrides form.



Employee Tax Overrides form

The first record in the detail area is the Federal A tax type. Use it to specify tax exemptions and overrides for federal income tax. The system uses exemptions that you enter into this record for all state and local authorities for which there is no specific entry lower in the detail area. However, the override amounts do not carry forward.

Employee No

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Fe Ex

Enter a number that specifies the total exemptions an employee claims on the federal IRS Form W-4 tax withholding form. If you leave this field blank, the system uses zero exemptions. Unless you enter separate numbers for state and local tax areas, the system also uses the number of federal exemptions to calculate state and local taxes. Special conditions exist for these tax jurisdictions:

Arizona: 8 (0%), 9 (10%), 10 (18%), 11 (21%), 12 (23%), 13 (29%), 14 (34%), 15 (percentage based on annual gross). The number of exemptions is indicated first, followed by the tax percentage.

Arkansas: 16 or fewer exemptions, use the low income tax table; 17 or more exemptions, use the regular tax table.

For the specific payroll tax requirements for Arizona and Arkansas, refer to the Quantum documentation.

Additional Federal Withholding

Enter an additional amount to be withheld over and above the calculated withholding.

This could represent a flat withholding amount in situations in which the employee elects to completely bypass the calculated amount. The authority to which each element relates is determined by the tier code of the tax authority. Whether the amount is to be an additional amount or a flat withholding is specified in the employee's master file record.

F T

Enter a code that represents the method in which the additional tax is calculated. The code that you enter in this field indicates the function that is performed by the value that you enter in the Additional Federal Withholding field. Values are:

%: A percentage that replaces the tax rate from the tax table.

A: An amount that is added to the tax computed from the tax table.

F: An amount that replaces the tax computed from the tax table.

X: An additional amount added to the standard exemption amount and deducted (exempt) from the annualized gross pay to determine taxable pay.

Y: An amount that overrides the standard exemption amount and is subtracted from the annualized gross pay prior to the tax calculations.

E O Enter a value to override the 125 cash option at the company level. Enter a *1* in this field to indicate that the employee is taking a cash option. This field can only be used with SUI and SDI taxes (G, H, I, and J).

Tax Area Overridden Enter a code identifying a geographical location and the tax authorities therein.

Authorities include both employee and employer statutory requirements.

Refer to the Quantum for Payroll Tax System's Master GEO Code List for values for your locations. This tax area code is used for overriding all tax types at the Employee Master level.

Tax Type Enter a code that specifies the type of payroll tax being processed. This is a UDC (system 0, type /TX). To set up state minimum wage amounts, you must enter MW in this field. To do so, you must first add MW to the UDC table. However, you should not change the codes and definitions that PeopleSoft provides with the software.

Tx Cr Enter a code that specifies the withholding table that the system uses for the state of New Jersey. Values are:

0: Table selection is based on filing status.

1: Table A.

2: Table B.

3: Table C.

4: Table D.

5: Table E.

If secondary credits are used in any other state, enter one of these values with the appropriate state tax area and *F* for the tax type.

If you set system options to track requisition information, the system displays the Employee Assignment form. Use the Employee Assignment form to update position and requisition information when you add an employee or change an employee job.

Updating Position and Requisition Information

This section provides an overview of position and requisition information updates and discusses how to:

- Set processing options for Employee Master (P0801).
- (USA) Set processing options for Employee Master (P0801).

- Update position and requisition information.

Understanding Position and Requisition Information Updates

When your system options are set to display the Employee Assignment form, the Employee Assignment form appears after the Employee Tax Overrides form. You enter the employee's home business unit, job type, or position ID so that the system updates requisition activity and headcount automatically. This is important for forecasting and budgeting.

Form Used to Update Position and Requisition Information

Form Name	Form ID	Navigation	Usage
Employee Assignment	W08EAC	Periodic Processing (G05B20), Employee Assignment	Update position and requisition information.

Updating Position and Requisition Information

Access the Employee Assignment form.

Effective Date Enter the date that the current status of a candidate requisition became active.

Requisition No. to be Filled Enter the number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.

Filled Requisition Status Enter the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from UDC table 08/CN.

You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:

CAN: Any candidate code.

DET: Any code indicating that the position is detached or no longer filled.

FIL: Any code indicating that the position has been filled.

REJ: Rejected.

TMP: Temporarily filled.

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

Requisition No. to Detach Enter an approved and unfilled requisition number that the system uses for verification when you enter requisition activity. When you enter a number in this field, the system compares the business unit and position ID associated with the requisition to the business unit and position ID on this form.

If the values in these fields match, the system updates the requisition to 'Filled' and places the employee number in the Last Filled By field on Requisition Entry.

If the values in these fields do not match, the system displays a warning message. You can either correct the discrepancy or press Enter again to have the system accept the employee activity.

The system verifies the value in this field only if you enter a number in it and the Requisition Information (F08102) table exists on your system.

Detached Requisition Status

Enter the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from the UDC table (system 08, type CN).

You can group candidate requisition status codes based on the hard-coded Special Handling Code values in the table. These hard-coded values are:

CAN: Any candidate code.

DET: Any code indicating that the position is detached or no longer filled.

FIL: Any code indicating that the position has been filled.

REJ: Rejected.

TMP: Temporarily filled.

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

Note. If the employee fills a requisition with a new position assignment, the system automatically fills the requisition and updates the Requisition Information table (F08102). If the position change opens a requisition, the system updates the Requisition Activity table (F08105) and the Employee Master Information table (F060116).

CHAPTER 28

Adding Employee Records Using Employee Quick Hire

This chapter provides overviews of Employee Quick Hire (P060116Q), new employee information tasks, and the relationship between Quick Hire and the new hire employee setup, and discusses how to:

- Set up default information for employee records.
- Add employee records for applicants, rehires, and new hires.
- Run the Process Pending Employees report (F060116).
- Revise new employee records.
- Purge pending employee information.

Understanding Employee Quick Hire

You can use Employee Quick Hire (P060116Q) to add multiple employee records when you hire groups of individuals that have common job information. Using Employee Quick Hire reduces typing errors and data entry time. You can define the common job information as default information that the system supplies for each employee record that you add. You must also set your processing options to define certain default information and processes related to Employee Quick Hire.

Employee Quick Hire offers a robust capability to track various types of user-defined information. Thirty category code fields are available for tracking address book codes that can be assigned to addresses in your Address Book system. Twenty category codes are available for tracking Payroll system issues. Ten category codes are available that can be used to specify employee eligibility for participation in various user defined plans or activities.

Understanding New Employee Information Tasks

When you hire a new employee into an organization, you need to perform many tasks to prepare for the new employee and to ensure that any preliminary employment activities are completed. These tasks might vary depending on the employee's location and job duties. For example, an administrative assistant might need to have a telephone, computer, network sign-on, ID badge, parking sticker, and building key to start working. A hospital nurse might need to have an ID badge, parking sticker, and locker assignment, and to have completed a blood test and attended safety orientation prior to starting work. Most new employee setup tasks require management approval, and these approvals were accomplished by routing a paper approval form.

The new hire employee setup program automates and streamlines the initiation of these tasks by sending email messages through workflow to the individuals responsible for completing these tasks.

When you add employee records using Employee Quick Hire (P060116Q), you can set an Employee Quick Hire processing option to specify whether the new employee information updates the Employee Master Information (F060116), Address Book Master (F0101), Requisition Activity (F08105), and Applicant Master (F08401) tables as you complete the process. Or you can set the processing option to store the new employee information in the Unedited Quick Hire Transaction File table (F060116Z). Storing the information in this table allows you to review and revise the information before running the Process Pending Employees report (R060116P) to update the other tables.

If the Employee Quick Hire processing option is set to update the F060116Z table, you must complete one or more of these tasks after you add the employee records:

- Running the Process Pending Employees report
- Revising new employee records
- Purging pending employee information

The Process Pending Employees report updates the F060116 and F0101 tables after you review and revise the new employee records.

You can add, change, or delete the new employee records from the F060116Z table. Revising new employee records is mandatory if you find errors in the R060116P report. You must correct the errors and rerun the report to update the Employee Master and Address Book Master tables with the new employee information.

After you update the F060116 and F0101 tables with batches of new employee records, you may need to purge the information from the F060116Z table to free up space in the table. Purging the table deletes the pending employee records so that you can continue to add new employee records. You can run this process if you are experiencing performance problems with Employee Quick Hire or if you want to avoid scrolling through many processed employee records to view the records that you want to find.

Understanding the Relationship Between Quick Hire and New Hire Employee Setup

The Employee Quick Hire program (P060116Q) integrates with the Employee Setup Workbench program (P08710) by automatically generating the setup record and initiating a workflow process. For the two programs to integrate, you must set your processing options appropriately on Employee Quick Hire. These steps are performed when you integrate the Employee Quick Hire program with the Employee Setup Workbench program to initiate the new hire setup Workflow process:

1. When an employee record is added to the Employee Master Information table (F060116) through Employee Quick Hire, the system automatically creates the new Hire Employee setup record.
2. The system automatically sends an email message to the employee's supervisor, requesting the supervisor to identify the setup tasks necessary for the employee.

   The system determines which supervisor to email based on the entry in the Supervisor field in the Employee Quick Hire program. If the new hire option is activated the supervisor field is required.
3. Using Manager Self-Service, the new employee's manager the Employee Setup Workbench program to enter the setup tasks that are necessary for the employee.

   The setup tasks can also be supplied automatically based on the employee's job type. In Quick Hire job type is required when the new hire option is activated.

4. When the tasks are identified for the new employee and the employee setup record is approved, the system initiates the new hire setup Workflow process, which send an email message to the individuals in your organization who are responsible for completing the necessary tasks.

   For example, if the manager indicates that the new employee needs a network signon, security badge, and building key, the workflow process sends email to the IT Manager, Security Manager, and Facilities Manager, respectively.

You can customize the new hire setup Workflow process to meet the needs of your organization. Processing options for the Employee Setup Workbench program allow you to easily customize the process. For example, your organization might choose to require approval at the process level or at the task level. Or, you might choose to escalate certain tasks if the designated individuals do not complete the tasks in an appropriate time frame.

Setting Up Default Information for Employee Records

This section provides an overview of default information setup for employee records and discusses how to set up default information for employee records.

Understanding Default Information Setup for Employee Records

Before you add employee records for individuals with similar job information, you set up the job information as default information to reduce data entry time. Then when you add employee records, Employee Quick Hire supplies the default information. For example, if you are hiring 50 production employees for the same business unit who have the same supervisor, you set up the Job Type, Business Unit, and Supervisor fields as default information.

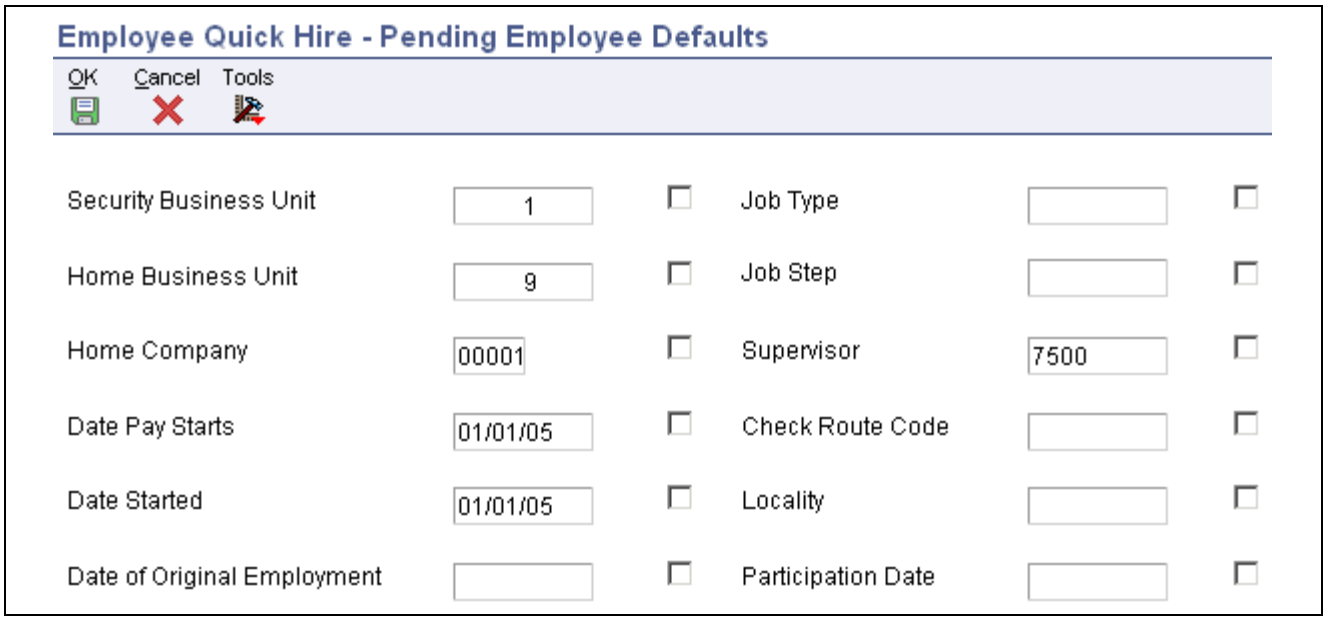
You can change the default information for each group of employees for whom you are going to enter records.

Form Used to Set Up Default Information for Employee Records

Form Name	Form ID	Navigation	Usage
Pending Employee Defaults	W060116QB	Employee Quick Hire (G05BE11), Employee Quick Hire Select Defaults from the Form menu on the Employee Quick Hire form.	Set up default information for employee records.

Setting Up Default Information for Employee Records

Access the Pending Employee Defaults form.



Pending Employee Defaults form

Security Business Unit Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Home Company Enter the company number where the employee records generally reside.

Date Pay Starts Enter the date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.

You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).

Date Started Enter the first day the employee started working at your company. If you do not enter a date, the system uses the value in the Original Hire Date field.

Date of Original Employment Enter the date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by the data in the Date Started (DST) field.

Supervisor Enter the address book number of the supervisor.

Check Route Code Enter a UDC (system 07, type CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

Locality Enter a UDC (system 07, type SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.

Participation Date Enter the date the employee began participating in the company deferred income or stock option plan. This date must be later than the Date Started date.

Selecting the option next to each field that you completed and clicking OK activates the field and allows the system to recognize the field as a default value.

If you activate a blank field, the system overwrites the field for each record that is entered in the Employee Quick Hire form.

Adding Employee Records for Applicants, Rehires, and New Hires

This section provides an overview of employee record addition for applicants, rehires, and new hires, lists prerequisites, and discusses how to:

- Set processing options for Employee Quick Hire.
- Add employee records for applicants.
- Add employee records for rehires.
- Add employee records for new hires.

Understanding Employee Record Addition for Applicants, Rehires, and New Hires

Add employee records after you set up default information for employee records.

After you offer employment to individuals who have common job information, you can use Employee Quick Hire (P060116Q) to add multiple employee records to the Employee Master Information table (F060116) with minimal data entry. You can add employee records for applicants, rehires, and new hires.

To add employee records for applicants, you select the applicants from the Applicant Master table (F08401). Employee Quick Hire automatically copies the applicant's information to the Employee Quick Hire form.

You can add employee records for rehires or groups of terminated employees. When you select the record in Employee Quick Hire, the system searches the individual's information in the Employee Master Information table for a termination date with the associated Tax ID, Employee Number, or Alternate Number. When the system finds the search criteria it copies the information from the record to the Employee Quick Hire form.

The system also searches for a duplicate employee number. This process prevents the system from duplicating employees and employee numbers in the database.

To add employee records for new hires, you enter employee information in the required fields on the Employee Quick Hire form. The default information and processing options that you already defined minimize the number of fields that you need to enter. Also, if your processing options are set appropriately, a new hire record is created automatically in the Employee Setup Workbench program (P08710) for self-service.

These scenarios are examples of situations in which you might use Employee Quick Hire:

- Your company has acquired another company and you need to enter the newly acquired employees into PeopleSoft EnterpriseOne. Using Employee Quick Hire, you can enter the new employees in groups based on their supervisor. You might decide to specify the start date, supervisor, business unit, home company, and locality as default information.

- Your company uses seasonal employees and rehires many of the same employees each year. Using Employee Quick Hire, you can select the employees that are eligible for rehire from the terminated employee database and activate their employee records. In addition, you might choose to specify the pay start date and the supervisor as default information.

When you add employee records with Employee Quick Hire, you can set an Employee Quick Hire processing option to specify whether the new employee information updates the Employee Master Information, Address Book Master (F0101), Requisition Activity (F08105), and Applicant Master (F08401) tables as you complete the process. Or you can set the processing option to store the new employee information in the Unedited Quick Hire Transaction File table (F060116Z). Storing the information in this table allows you to review and revise the employee records before running the Process Pending Employees program (R060116P) to update the tables.

Setting the processing option to directly update the Employee Master Information and other tables updates the HR History table (F08042). Setting the processing option to use the Unedited Quick Hire Transaction File table does not update the HR History table until you run the Process Pending Employees program.

You can also set a processing option to activate the new hire process. This process automatically updates the Address Book table and the Employee Setup Master table (F08710).

You can set processing options to automatically supply various types of information that will reduce the time required to use the Employee Quick Hire process. For example, you can set a processing option so that the system supplies all the job information related to a specific job type when you enter the job type on Employee Quick Hire.

You can also set an Employee Quick Hire processing option so that the system copies the applicant's supplemental data to the new employee record. If you do this, you also need to set the Transfer Supplemental Data processing option in the XJDE0001 version of Applicant Entry (P08401).

Prerequisites

Before you complete the tasks in this section:

- Set up default information for every new group of individuals that you hire with similar job information.

  See Chapter 28, "Adding Employee Records Using Employee Quick Hire ," Setting Up Default Information for Employee Records , page 243.

- If you need to initiate the employee setup process after you add employee records, set the processing option for Employee Quick Hire on the Action tab to activate the new hire process.
- If you want the system to automatically supply a range of information for job type, job category codes, business unit, or supplemental data, set the applicable processing options for Employee Quick Hire on the Defaults and Versions tabs.

Forms Used to Add Employee Records for Applicants, Rehires, and New Hires

Form Name	Form ID	Navigation	Usage
Employee Quick Hire	W060116QA	Employee Quick Hire (G05BE11), Employee Quick Hire	Select records. Add employee records for new hires
Work With Applicants	W08401B	Employee Quick Hire (G05BE11), Employee Quick Hire Select Applicants from the Form menu on the Employee Quick Hire form.	Add employee records for applicants.
Work With Employee Information	W0801A	Employee Quick Hire menu (G05BE11), choose Employee Quick Hire Select Rehire from the Form menu on the Employee Quick Hire form.	Add employee records for rehires.

Setting Processing Options for Employee Quick Hire (P060116Q)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify the defaults that are applied during employee quick hire.

1. Security Business Unit Use this processing option to specify whether the system automatically supplies the security business unit from the Address Book table (F0101). Values are:

0 or blank: Do not supply the security business unit (default).

1: Supply the security business unit.

If you complete the Security Business Unit field on Pending Employee Defaults (W060116QB), and this processing option is set to *1,* then the system uses the value from the Pending Employee Defaults form when you add an employee record.

If you enter *0,* then you must manually enter the security business unit when you add an employee record.

2. Tax Areas Use this processing option to specify whether the Residence Tax Area and Work Tax Area fields are required when you add or change an employee record. The EnterpriseOne Payroll system uses the tax area fields to calculate payroll taxes for employees. Values are:

1: Tax area fields are not required. Enter this value only if you are not using the EnterpriseOne Payroll system to process payroll for employees.

0: Tax area fields are required. Enter this value if you are using the PeopleSoft EnterpriseOne Payroll system. Blank means the same as *0*.

3. Job information Use this processing option to specify whether the system automatically supplies the Employee Quick Hire form (W060116QA) with certain job information when you complete the Job Type field. The system retrieves information in these job information fields from the Job Information table (F08001): Pay Type, Pay Frequency, WCI Code (Workers Comp Insurance Code), SC (Sub Class-Workers Comp), Benefit Group, and Union Code. Values are:

1: Supply job information.

0: Do not supply job information.

4. Job Category Codes Use this processing option to specify whether the system automatically supplies values for job category codes. Values are:

1: Supply default job category codes.

0: Do not supply default job category codes.

5. Emergency Contact Type Use this processing option to specify the UDC for a contact type in the Address Book Who's Who table (F0111). The contact name and phone number entered on the Quick Hire form (W060116QA) update the Employee Master and Address Book tables with the type of contact you specify. If you leave this processing option blank, the system uses E (emergency contact) as the default.

6. Business Unit/Job ID Cross Reference Use this processing option to specify whether the system automatically supplies values for the business unit/job ID information for the new employee. Values are:

1: Use default business unit/job ID information.

0: Do not use default business unit/job ID information.

7. Home Phone Number Type Use this processing option to specify the UDC for a home phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of home phone number you specified with the code.

8. Work Phone Number Type Use this processing option to specify the UDC for a work phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of work phone number you specified with the code.

Versions

These processing options specify the versions that are used during employee quick hire.

1. Applicant Information Version Use this processing option to specify the program version that the system uses for transferring applicant information. If the applicant records that you are adding include supplemental data, you can specify a program version that

the system uses to transfer the supplemental data along with the applicant information to the new employee records. If you leave this processing option blank, the system uses the default version, ZJDE0001, which does not transfer supplemental data.

Note. For the system to transfer an applicant's supplemental data, you must also set a processing option to transfer supplemental data in the processing options for the Applicant Entry program (P08401).

2. Address Book MBF Version

Use this processing option to specify the version that the system uses for the Address Book Master Business Function (MBF). If you are using interoperability transactions, you might want to specify a version that updates the Address Book table (F0101). If you leave this processing option blank, the system uses the default version, ZJDE0001.

Note. If you specify an Address Book MBF version, you must also set a processing option to indicate the interoperability outbound transaction in the processing options for the Address Book Master Business Function (P0100041).

3. Address Book Search Form 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.

Action

These processing options specify whether to update the master files and whether to activate the new hire process during employee quick hire.

1. Update Master Files

Use this processing option to specify the tables that the system updates when you use Employee Quick Hire to add employee records. When you enter *0* (Blank), the system updates only the Unedited Quick Hire Transaction File table (F060116Z). When you enter *1,* the system also updates these tables in addition to the F060116Z table:

- Employee Master Information (F060116)
- Employee Master Additional Information (F060120)
- Employee Master International (F060117/F060117A)
- Requisition Activity (F08105)
- Applicant Master (F08401)
- Address Book (F0101)
- HR History (F08042)

Values are:

0: Update only the Unedited Quick Hire Transaction File table.

1: Update all of the linked tables.

If you set the processing option to *0,* you can review and revise the employee information before the system updates the databases. After you review and revise information, you need to run the Process Pending Employees program (R060116P) to update the databases.

2. New Hire

Use this processing option to specify whether to activate the new hire process. Values are:

1: Activate the new hire process.

0: Do not activate the new hire process.

When the new hire process is activated (the processing option is set to *1*), these fields are required:

- Alpha Name
- Supervisor
- Start Date (Effective Date)
- Job Type and Step

In addition, these will occur:

1. For each record added to the Unedited Quick Hire Transaction table (F060116Z), an address book record is added to the Address Book table (F0101). The address book records are added with a search type of N.
2. For each record added to the Unedited Quick Hire Transaction table (F060116Z), a record is added to the Employee Setup Master table (F08710).
3. Workflow notifies the supervisor with an email.

Adding Employee Records for Applicants

Access the Work With Applicants form.

When you use Employee Quick Hire to add employee records for applicants, the system copies applicant information from the Applicant Master table (F08401) and Address Book Master table (F0101) to the Employee Quick Hire form. The system also supplies values from the Pending Employee Defaults form.

If your processing options for the Employee Quick Hire program (P060116Q) are set to update the Unedited Quick Hire Transaction File table (F060116Z), review the employee information and, if correct, proceed to the task for working with new employee information to update the Employee Master Information (F060116), Applicant Master, Address Book Master, and Requisition Activity (F08105) tables.

Note. If you use the GeoCoder, the system uses the employee address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit to determine the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see Assigning Tax Area Information Using the GeoCoder in the Human Capital Management Guide for additional information.

Adding Employee Records for Rehires

Access the Work With Employee Information form.

Adding Employee Records for New Hires

Access the Employee Quick Hire form.

Note. On the Employee Quick Hire form, if the New Hire processing option is set to enable the Employee Setup Workbench program (P08710), complete the Employee Number, Supervisor, Date Started, Job Typ, and Job Step fields.

If the New Hire processing option is not set to enable the Employee Setup Workbench program, complete the required (gray) fields that are not supplied by default values.

Employee Number Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Supervisor Enter the address book number of the supervisor.

Date Started Enter a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

Job Typ Enter a UDC (system 07, type G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.

Alpha Name Enter the text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Employee Tax ID Enter a number that indicates the tax ID. In the United States, the tax ID is the social security number. In Canada, it is the social insurance number. If you add employee information for a non-US or non-Canadian company, you can leave this field blank. However, if the international code is set to Y and the default company is non-Canadian and non-United States, you can enter a 16-character number for the tax ID.

The system does not permit duplicate tax ID numbers. Also, the number cannot include dashes. For example, if a social security number of nn-nn-nnnn is used, the number should be entered as follows: 123456789.

Pay Freq Enter a UDC (system 07, type PF) that indicates how often an employee is paid. Values are:

B: Biweekly

W: Weekly

S: Semimonthly

M: Monthly

A: Annually

C: European Annualized

The system uses the value in the Description-2 field on UDCs to calculate the amount per pay period for a salaried employee.

Pay Cl Enter a code that specifies how an employee is paid. Values are:

H: Hourly

S: Salaried

P: Piecework

Annual Salary

Enter the amount that an employee is paid in one year, assuming that the employee is paid every pay period of the year.

For WorldSoftware:

For the employee's primary job, the system stores the annual salary in the Employee Master Information table (F060116) and the Employee Jobs table (F060118). For secondary jobs, the system stores the annual salary only in the Employee Jobs table (F060118).

Depending on how the value that is entered in the Display Salary (Annual/Effective) field in the HR History Constants table (F08040), this field displays:

- Annual salary. For salaried employees who are not linked with a contract calendar, the user enters the amount or the system retrieves the amount from the Pay Grade/Salary Range Table (F082001). For employees who are linked with a contract calendar, the system calculates this amount using this formula: [(current salary − salary paid before change) ÷ number of periods to pay] × pay frequency.
- Effective salary. For employees whose jobs are linked with a contract calendar, the system recalculates the effective salary when you enter a mid-calendar salary adjustment. After you enter a mid-calendar adjustment, the effective salary equals the salary that is paid to the employee from the time of the adjustment through the end of the contract. The system calculates this amount using this formula: (annual salary ÷ pay frequency) × periods to pay.

Hourly Rate

Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.

In the Employee Master table, this number is the employee's base hourly rate.

In the Union Rates table, it is the straight time rate.

Note. If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.

Security Business Unit

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Co

Enter the company number where the employee records generally reside.

Country of Employment Enter a value from the UDC table (system 00, type CN) that indicates the country in which the employee resides.

EEO Job Enter a UDC (system 07, type J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by the PeopleSoft EnterpriseOne system. You can add codes if needed.

Ethnic Code Enter a UDC (system 07, type M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that PeopleSoft provides are hardcoded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.

Gender Enter a value that specifies the employee's gender. Values are:

M: Male

F: Female

Res. Tax Area Enter a code that identifies both the geographical location and the tax authorities for the employee's residence. Authorities include employee and employer statutory requirements. This code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode File for values for your locations.

Work Tax Area Enter a code that identifies a geographical location and the tax authorities for an employee work site, including employee and employer statutory requirements. In the Vertex payroll tax calculation software, the tax area code is synonymous with GeoCode. To determine the values for your location, refer to the documentation for the tax calculation software that you are using.

Original Hire Date Enter the date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by the data in the Date Started (DST) field.

Date Started Enter a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

Date Pay Starts Enter the date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.

You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).

S h Enter a UDC (system 00, type SH) that identifies daily work shifts.

In payroll systems, you can use a shift code to add a percentage or amount to the hourly rate on a timecard.

For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an

employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default value.

Loc Enter a UDC (system 07, type SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.

Emp St Enter a UDC (system 07, type ES) that specifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. Sample values include:

Blank: Full-time regular.

1: Full-time temporary

2: Part-time temporary

3: Part-time regular

4: Seasonal

5: Casual

R C Enter a code that identifies whether the employee is to be handled through the Recharge processing option for the Payroll Journal Entry program. Values are:

1: Payroll Processing Only

2: Payroll and Recharge Processing

3: Recharge Processing Only

After a timecard has been added, you cannot change its record type.

Part. Date Enter the date the employee began participating in the company deferred income or stock option plan. This date must be later than the Date Started date.

B S Enter a UDC (system 06, type EA) that specifies an employee status, such as new hire or rehire. The system uses this value as it searches and tests for benefits eligibility. An * indicates that the guidelines refer to all employee statuses that are not otherwise specified.

Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.

Pay Grade Enter a code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.

To set up pay grades, use Pay Grades by Class (P082001).

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update:

- Salary
- Hourly Rate

- Hours per day
- Hours per year
- Days per year

Grade Step

Enter a code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

F L

Enter a code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Values are:

Y: Yes, the employee fits the rules and does not have to be paid for working overtime.

N: No, the employee does not fit the rules and is to be paid for working overtime.

WCI Code

Enter a UDC (system 00, type W) that represents a workers' compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers' compensation insurance reports.

Benefit Group

Enter the benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.

S C

Enter a code that specifies any special circumstances associated with the workers compensation insurance (WCI) code, resulting in multiple rates for the same WCI code due to location or risk, for example. The subclass should remain blank if multiple rates do not exist. Default codes are:

Blank: There are no special circumstances associated with this code.

F: There are special circumstances associated with this code.

I9

Enter a code indicating the method used to verify that this employee is eligible to work in the United States. Values are:

Y: I9 form on file.

P: Passport used for verification.

L: Driver's license and Social Security card.

V: Visa (worker's permit).

B: Birth certificate.

N: Waiting for verification.

MS TX Enter a UDC (system 06, type MS) that specifies the employees' federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

MS Res State Enter a UDC (system 06, type MS) that specifies the marital status code for the state of residence. It is used for tax computations. This code is related to specific VERTEX system codes (see the VERTEX Tax Manual for their explanation). Also, two special codes have been provided: one designates single for Federal and married for State, and the other designates married for Federal and single for State.

MS State Tax Enter the employee's Work state marital status code as retrieved from the state W-4. This code is used in the computation of all state payroll taxes associated with the state in which the employee performed work.

If you leave this field blank, the Federal status is used.

Pay St Enter the code used to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run. Also refer to these data items:

- EST: Employment Status
- TRS: Change Reason

R S Enter a value that identifies out-of-state employees for whom an employer must withhold tax for the state of residence. Values are:

N (Default): The system uses the employee residence state to calculate taxes.

Because the work state has a reciprocal agreement with the employee state of residence, the system uses the employee residence state from the Employee Master Information table (F060116).

W: The system uses only the work state to calculate taxes.

T S Enter a value that specifies the source for obtaining the tax area code for the employee's work location.

N: Use time entry, job master, employee labor rules or employee master to determine Tax Area.

E: Always use the Work Tax Area from the employee master on time record.

When blank the system assumes *N*.

SUI/SDI Rpt Enter a value that specifies the work tax area that is used for SUI reporting.

You can specify that the system use either the resident state or the work state, regardless of where the employee worked. FUI is calculated in the same state where SUI is calculated. Weeks Worked are the number of weeks the employee worked in the taxed state. Values are:

N: Use the work tax area in the time entry record to determine SUI. This is the default value.

R: Always use residence tax area from Employee Master table even if the time entry record is different.

W: Always use work tax area from Employee Master table even if the time entry record is different.

T M

Enter a code that specifies the tax method that the Vertex payroll-tax calculation system uses to calculate certain taxes. The codes are defined in a UDC table (system 07, type TM).

This code can also determine the form that the employee receives for year-end tax reporting. For example, when you enter C, a contract employee receives IRS Form 1099-M rather than IRS Form W-2. If a form is not specified in Description 2, the system generates IRS Form W-2.

For employees who are paid multiple times within one pay period, the system should review previous payments within the same pay period and then adjust tax amounts. To specify this function, enter *S.*

If a tax method exists for an employee in addition to the normal tax method that is set up in the Employee Master Information table (F060116), the system can use the alternative tax method to interactively process interim payments. To specify this function, enter *Z.*

Some values, such as *S* and *Z,* might require additional setup in the UDC table.

Stat. Code

Enter a code that allows you to override supplemental taxes for federal and state taxes and to add additional local residence taxes. Values are:

F: Override the federal supplemental tax for this employee.

S: Override the state supplemental tax for this employee.

R: Add additional local residence tax.

When you override supplemental taxes, you must leave the Tax Area and Tax Type fields blank.

Lc St

Enter the employee's Local marital status code as retrieved from the locality's W-4.

This code is used in the computation of all local (city, county) payroll taxes associated with the state in which the employee performed work.

If you leave this field blank, the Federal status is used.

Vet

Enter a code that indicates the veteran status of the employee for EEO reporting purposes. Values are:

N: No, this employee is not a veteran.

Y: Yes, this employee is a veteran.

V: This employee is a Vietnam veteran.

O: This employee is a veteran, classified as Other, as defined by the U.S. Department of Labor.

Dis Vet

Enter a code indicating whether this employee is a disabled veteran. Values are:

Y: Yes, this employee is a disabled veteran.

N: No, this employee is not a disabled veteran.

This field is used to generate the Veterans Employee (VETS-100) report.

Disb Enter a code indicating whether this employee has a mental or physical disability. Values are:

Y: Yes, this employee has a mental or physical disability.

N: No, this employee does not have a mental or physical disability.

U: Unknown

Birth Date Enter the employee's date of birth.

ST Enter a UDC (system 00, type S) that specifies the state or province. This code is usually a postal service abbreviation.

County Enter the name of a county, parish, or other political district that is necessary for the address or for tax purposes.

Prefix Phone-Work Enter the first segment of a telephone number. In the United States, the prefix is the three-digit area code.

Phone Number-Work Enter a number without the prefix or special characters, such as hyphens or periods, that makes up the telephone number for an entity. You can use any applicable telephone number format for a country. This field is used in conjunction with the Prefix field (AR1), where you enter the first segment of the telephone number, which is called the area code in the United States.

When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.

Prefix Phone-Home Enter the prefix for telephone number 3. The default format for the Phone Prefix data dictionary item is set to the United States prefix (area code). This format is three characters enclosed in parentheses. For example, (303). If you require an alternate format to accommodate a non-United States prefix, you must change the data display rules in the data dictionary.

Phone Number-Home Enter the telephone number has been established in free form to allow incorporation of extension numbers and local telephone oddities. For example, Laramie, Wyoming could be expressed as 21-5223; and Singapore could be expressed as 011-65-469-8382. If all phone numbers are to follow a consistent format, you may specify an edit code in the data dictionary for the phone number (e.g., ___-____).

Note. In using the phone search capability of the Address Book, you must spell the search in the same manner that you recorded the phone numbers.

Salu Enter a code for the salutation that is used to identify the proper title for a given employee. Some examples of salutations are Mr., Ms., Dr., and so on.

Suff Enter the suffix code is used to identify the credentials for a given employee. Some examples are Phd, MD, CPA, and so on.

Contact Name Enter the alpha name of the contact.

Contact Prefix Enter the prefix for telephone number 4. The default format for the Phone Prefix data dictionary item is set to the United States prefix (area code). This format is three characters enclosed in parentheses. For example, (303). If you require an alternate format to accommodate a non-United States prefix, you must change the data display rules in the data dictionary.

Contact Phone Number Enter the telephone number has been established in free form to allow incorporation of extension numbers and local telephone oddities. For example, Laramie, Wyoming could be expressed as 21-5223; and Singapore could be expressed as 011-65-469-8382. If all phone numbers are to follow a consistent format, you may specify an edit code in the data dictionary for the phone number (e.g., ___-____).

Note. When using the phone search capability of the Address Book, you must spell the search in the same manner that you recorded the phone numbers.

Check Route Code Enter a UDC (system 07, type CR) that specifies the check routing or mail-stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery.

P C Enter a code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to *N*. To repeat this test, enter *P* in this field.

If you leave this field blank, the system uses the default value of *P*.

If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Prenote Flag field to *N*.

You cannot use this field for Canadian employees.

Req No. Enter the number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.

Candidate Req. Status Enter the current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from UDC table 08/CN.

You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:

CAN: Any candidate code.

DET: Any code indicating that the position is detached or no longer filled.

FIL: Any code indicating that the position has been filled.

REJ: Rejected

TMP: Temporarily filled.

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

E M Enter an option that indicates whether this address number represents an employee.

Values are:

On: The address number represents an employee

Off: The address number does not represent an employee

This code is for information only. It has no predetermined use in the Address Book system.

Remark 1 (Email) Enter a 40-character field that you can use to enter text.

Days/ Year Enter the number of workdays in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year.

When you set up the human resources constants (System Options, in OneWorld) and you use the pay grade step table as the default source for the pay rate,the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.

AB Cat 01 Enter one of thirty reporting codes that you can assign to an address in the Address Book system. Use these codes to group address book records for reports, mailings, and so on. Category codes are user defined (system 01, types 01 through 30). Examples of category codes include:

Category code 01: Location or Branch

Category code 02: Salesperson

Category code 03: Product

Category code 04: Credit officer

P/R 001 Enter a category code that defines payroll system needs. You can define the use and description of this code to fit your organization. For example, you can set up a category code for information such as Division, Supervisor, Branch office, Health insurance plan, Stock plan, and so on.

Note. When setting up category codes in the Workforce Management system, you should coordinate information with the payroll department to insure that information is not duplicated or overwritten.

Elig 1 Enter a code to specify an employee's eligibility for or participation in various user defined plans or programs. For example, these codes can be used to designate:

- Voluntary Accidental Death/Dismemberment Insurance (Y/N).
- Overtime Call Up (Y/N).
- Profit Sharing (Y/N).
- Political Action Committee (Y/N)
- Coffee Fund (Y/N).
- U.S. Citizen (Y/N).

These fields are examples of multiple, similar fields that are user defined. You can use up to 30 Category Code - Address book fields that can be assigned to addresses in the Address Book system for tracking purposes. You can use up to 20 Category Codes - Payroll fields for Payroll tracking needs. You can also use up to ten Eligibility Codes to specify employee eligibility for participation in various user defined plans or programs. For example, you might want to track employee eligibility for programs such as overtime call-up, profit sharing, political action committees, or an office coffee fund.

Note. If you use the GeoCoder, the system uses the employee's address information to determine the GeoCode for the Tax Area (Residence) field, and uses the GeoCode from the employee's home business unit to determine the GeoCode for the Tax Area (Work) field. The system automatically populates these fields if there is only one possible GeoCode available for the field. If you are using the GeoCoder to interactively assign tax area information and the fields remain blank, or if you use the batch GeoCoder, see Assigning Tax Area Information Using the GeoCoder in the Human Capital Management Foundation Guide for additional information.

Running the Process Pending Employees Report

This section provides an overview of the Process Pending Employees report (R060116P) and discusses how to:

- Set processing options for Process Pending Employees.
- Run the Process Pending Employees Report.

Understanding the Process Pending Employees Report

The Process Pending Employees report (R060116P) updates the Employee Master Information table (F060116) and the Address Book Master table (F0101).

The R060116P report generates an error report in all cases. If the system finds errors or incomplete employee records, error messages are printed and the databases are not updated with the new employee information. If no errors are found, the report indicates that none occurred. This report compares all new information to the data in the F060116 file before any of the new information is transferred.

If you receive error messages, you can use the Employee Work File Revisions program (P060116P) to correct employee records and then rerun the report to update the F060116 and F0101 tables with the new employee records. The system processes each record individually. The system records a completed status for each record when updates to the F060116 and F0101 tables are successful.

Setting Processing Options for Process Pending Employees (R060116P)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify the values that the system automatically provides and values that must be supplied by entering a UDC code.

1. Security Business Unit Use this processing option to specify whether the system automatically supplies the security business unit from the Address Book table (F0101). Values are:

0 or blank: Do not supply the security business unit (default).

1: Supply the security business unit.

If you complete the Security Business Unit field on Pending Employee Defaults (W060116QB), and this processing option is set to *1,* then the system uses the value from the Pending Employee Defaults form when you add an employee record.

If you enter *0,* then you must manually enter the security business unit when you add an employee record.

2. Tax Areas Use this processing option to specify whether the Residence Tax Area and Work Tax Area fields are required when you add or change an employee record. The EnterpriseOne Payroll system uses the tax area fields to calculate payroll taxes for employees. Values are:

1: Tax area fields are not required. Enter this value only if you are not using the EnterpriseOne Payroll system to process payroll for employees.

0: Tax area fields are required. Enter this value if you are using the PeopleSoft EnterpriseOne Payroll system. Blank means the same as *0.*

3. Job Information Use this processing option to specify whether the system automatically supplies the Employee Quick Hire form (W060116QA) with certain job information when you complete the Job Type field. The system retrieves information in these job information fields from the Job Information table (F08001): Pay Type, Pay Frequency, WCI Code (Workers Comp Insurance Code), SC (Sub Class-Workers Comp), Benefit Group, and Union Code. Values are:

1: Supply job information.

0: Do not supply job information.

4. Job Category Codes Use this processing option to specify whether the system automatically supplies values for job category codes. Values are:

1: Supply default job category codes.

0: Do not supply default job category codes.

5. Country Code Use this processing option to specify the country code.

6. Contact Type Use this processing option to specify the UDC for a contact type in the Address Book Who's Who table (F0111). The contact name and phone number entered on the Quick Hire form (W060116QA) update the Employee Master and Address Book tables with the type of contact you specify. If you leave this processing option blank, the system uses E (emergency contact) as the default.

7. Home Phone Type Use this processing option to specify the UDC for a home phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of home phone number you specified with the code.

8. Work Phone Type Use this processing option to specify the UDC for a work phone type in the Contact Phone table (F0115). The phone number entered on the Quick Hire form (W060116QA), updates the Employee Master and Address Book tables as the type of work phone number you specified with the code.

9. Business Unit/Job ID Cross Reference Use this processing option to specify whether the system automatically supplies values for the business unit/job ID information for the new employee. Values are:

1: Use default business unit/job ID information.

0: Do not use default business unit/job ID information.

Versions

Use these processing options to specify program versions that you want the Process Pending Employees program to use.

1. Applicant Information Use this processing option to specify the program version that the system uses for transferring applicant information. If the applicant records that you are adding include supplemental data, you can specify a program version that the system uses to transfer the supplemental data along with the applicant information to the new employee records. If you leave this processing option blank, the system uses the default version, ZJDE0001, which does not transfer supplemental data.

Note. For the system to transfer an applicant's supplemental data, you must also set a processing option to transfer supplemental data in the processing options for the Applicant Entry program (P08401).

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2. Address Book MBF Use this processing option to specify the version that the system uses for the Address Book Master Business Function (MBF). If you are using interoperability transactions, you might want to specify a version that updates the Address Book table (F0101). If you leave this processing option blank, the system uses the default version, ZJDE0001.

Note. If you specify an Address Book MBF version, you must also set a processing option to indicate the interoperability outbound transaction in the processing options for the Address Book Master Business Function (P0100041).

Actions

Use these processing options to specify to specify whether you want to run this report in final mode so that master files are updated and processed records are deleted.

1. Update Master Files Use this processing option to specify the tables that the system updates when you use Employee Quick Hire to add employee records. When you enter *0* (Blank), the system updates only the Unedited Quick Hire Transaction File table (F060116Z). When you enter *1,* the system also updates these tables in addition to the F060116Z table:

- Employee Master Information (F060116)
- Requisition Activity (F08105)

- Applicant Master (F08401)
- Address Book (F0101)
- HR History (F08042)

Values are:

0: Update only the Unedited Quick Hire Transaction File table.

1: Update all of the linked tables.

If you set the processing option to 0, you can review and revise the employee information before the system updates the databases. After you review and revise information, you need to run the Process Pending Employees program (R060116P) to update the databases.

2. Purge Processed Records Use this processing option to allow the system to delete records automatically after they have been successfully updated in the master tables. If you do not have the records deleted automatically, you can delete them later by running the Purge Pending Employees program (P060116PP). Values are:

1: Delete successfully processed records.

0: Do not delete processed records.

Running the Process Pending Employees Report

Select Employee Quick Hire (G05BE11), Process Pending Employees.

Revising New Employee Records

This section provides an overview of new employee record revision and discusses how to revise new employee records.

Understanding New Employee Record Revision

To ensure accuracy of your new employee records, you can add, change, or delete records from the Unedited Quick Hire Transaction File table (F060116Z) before or after running the Process Pending Employees report (R060116P).

If you need to correct errors that display in the Process Pending Employees report (R060116P), you can use the Employee Work File Revisions program (P060116P) to make changes that the system saves in the Unedited Quick Hire Transaction File (F060116Z).

You need to correct the errors and then rerun the report to update the Employee Master Information (F060116) and Address Book Master (F0101) tables. The system saves your entire batch of records in the Employee Master Information and Address Book Master tables only when the report runs successfully.

Form Used to Revise New Employee Records

Form Name	Form ID	Navigation	Usage
Work With Pending Employees	W060116PA	Employee Quick Hire (G05BE11), Employee Work File Revisions	Revise new employee records.

Revising New Employee Records

Access the Employee Work File Revisions form.

User ID Enter the source of the transaction. This can be a user ID, a workstation, the address of an external system, a node on a network, and so on. This field helps identify both the transaction and its point of origin.

Transaction Number Enter the number that an Electronic Data Interchange (EDI) transmitter assigns to a transaction. In a non-EDI environment, you can assign any number that is meaningful to you to identify a transaction within a batch. It can be the same as a PeopleSoft EnterpriseOne document number.

All Enter an option that indicates whether a record has been successfully processed. Depending on the application, the system updates the EDSP field in a table with one of these values:

1 (or *Y*): The record has been successfully processed.

Blank (or *N*): The record has not been processed.

Unprocessed An option that indicates whether a record has been successfully processed. Depending on the application, the system updates the EDSP field in a table with one of these values:

1 (or *Y*): The record has been successfully processed.

Blank (or *N*): The record has not been processed.

Purging Pending Employee Information

This section provides an overview of pending employee information purges and discusses how to purge pending employee information.

Understanding Pending Employee Information Purges

After you update the Employee Master Information (F060116) and Address Book Master (F0101) tables with batches of new employee records, you need to purge the information from the Unedited Quick Hire Transaction File table (F060116Z) occasionally to free up space in the table. Purging the table removes the information so that you can continue to add new employee records. You can run this process if you are experiencing performance problems with Employee Quick Hire or if you want to avoid scrolling through many processed employee records to view the ones for which you are looking.

Purging Pending Employee Information

Select Employee Quick Hire (G05BE11), Purge Pending Employees.

CHAPTER 29

Assigning Tax Area Information Using the GeoCoder

This chapter provides an overview of tax area information assignment using the GeoCoder and discusses how to assign tax area information using the GeoCoder.

Understanding Tax Area Information Assignment Using the GeoCoder

This section provides an overview of tax area information assignment using the GeoCoder and lists prerequisites.

Tax Area Information Assignment Using the GeoCoder

To calculate employee payroll taxes correctly, each employee is assigned a tax area, also known as a GeoCode, for their work location and their residence. You can use the GeoCoder to automatically assign a GeoCode to each employee work tax area and residence tax area. You can also use the GeoCoder to assign a GeoCode to the payroll tax area for each business unit in your organization automatically.

The GeoCoder uses the employee address, city, state, province (if applicable), and postal code to determine which GeoCode to use for the employee's residence tax area. The GeoCoder uses the GeoCode that is assigned to the employee home business unit to populate the employee work tax area. You can set up the GeoCoder to assign tax area information interactively, or you can process batch versions of the GeoCoder to assign tax area information to groups of employees or business units simultaneously.

A Vertex compression capability can also be used in combination with the GeoCoder to improve the ability of the system to recognize many city names that contain abbreviated words and phonetic misspellings. You activate this feature by choosing the Quantum City Compression option in the Quantum Sales and Use Tax Constants program (P7306).

If you assign tax areas using batch processes, to ensure that the correct GeoCode is used for each employee's work tax area, you should run the Cost Center Tax Area Processing program (R079052) before you process the GeoCoder Employee Batch Processing program (R070103). The R079052 program assigns a GeoCode to each cost center, or business unit, using the address, city, state, and postal code for each cost center. The system then uses this GeoCode value for the employee work tax area when you run the R070103 program. You might want to run each of these programs before each payroll cycle to ensure that all employee payroll history is updated to the correct tax area.

You can also use the GeoCoder to assign tax area information when an employee's address is changed using self-service.

Note. You must use Quantum for Payroll Taxes to calculate employee payroll taxes and to use the GeoCoder.

Prerequisites

Before you complete the tasks in this section:

- Activate the GeoCoder for the Human Resource Management system.

  See Chapter 9, “Setting Up Tax Information,” Setting Up the GeoCoder, page 78.

- Verify that the Tax Area processing option on the Defaults Tab for the Employee Master program (P0801) is set to allow the tax area fields to be left blank during employee entry.

  See Chapter 27, “Adding Employee Records One at a Time,” Setting Processing Options for Employee Master (P0801) , page 207.

- Enter employees into the system.

  See Chapter 27, “Adding Employee Records One at a Time,” page 205.

Assigning Tax Areas Interactively

This section provides an overview of interactive tax area assignment and discusses how to assign tax areas interactively.

Understanding Interactive Tax Area Assignment

You can interactively assign tax areas to employee records and to business unit records using the GeoCoder. When you assign employee tax areas interactively, the GeoCoder assigns the correct work and residence tax area information to the employee at the time that you enter the employee’s information into the system. Similarly, when you enter or update business unit constants, the GeoCoder assigns a tax area to the business unit.

The GeoCoder uses the employee address information to determine the correct GeoCode for the residence tax area. Similarly, the GeoCoder uses the address information associated with a business unit to assign the correct GeoCode to the Tax Area - Payroll field in the business unit constants. The GeoCode from the employee’s home business unit is used to populate the employee’s work tax area.

If only one possible tax area exists, given the address information, the system automatically populates the Tax Area (Work) and Tax Area (Residence) fields during employee entry. When assigning tax area information to business units, the system automatically updates the Tax Area - Payroll field. If multiple tax area codes exist that might be valid for the employee or business unit, the system displays the possible choices when you click the visual assist on any of the tax area fields.

You can use the GeoCoder interactively to assign employee tax areas when you enter employee records one at a time or when you enter groups of employees using Employee Quick Hire (P060116Q).

See Also

Chapter 27, “Adding Employee Records One at a Time,” page 205

Chapter 28, “Adding Employee Records Using Employee Quick Hire ,” page 241

Chapter 4, “Setting Up System Options,” Setting Up Business-Unit Constants, page 30

Form Used to Assign Tax Areas Interactively

Form Name	Form ID	Navigation	Usage
Retrieve GeoCode	W05005A	Employee Management (G05BE1), Employee Information Click the Search button for the Tax Area (Work) or Tax Area (Residence) fields during the employee entry process or when you change an employee's address information. Alternatively, click the Search button for the Tax Area - Payroll field during entry or maintenance of business unit constants.	Assign tax areas interactively.

Assigning Tax Areas Interactively

Access the Retrieve GeoCode form.

Note. Before you access this form, you must enter all of the employee or business unit address information, including city, county, state, province (if applicable), postal code, and country code. If this information is incomplete when you access this form, the system cannot retrieve the correct GeoCodes.

State Enter the description for the state code. If you extract address book data from the J.D. Edwards Address Book system, the description originates in the UDC 00/S.

County Enter the name of a county, parish, or other political district that is necessary for the address or for tax purposes.

Zip Code Enter the United States ZIP code or the postal code that specifies where a letter is to be routed. Attach this code to the address for delivery in other countries. This code is used as the low end value when doing Postal Code Transaction range processing.

Assigning Tax Areas Using Batch Processes

This section provides an overview of tax area assignment using batch processes and discusses how to:

- Run batch processes to assign tax areas.
- Set processing options for cost center tax area processing (R079052).
- Set processing options for GeoCoder employee batch processing (R070130).

Understanding Tax Area Assignment Using Batch Processes

You can assign tax area information for employees and business units using batch versions of GeoCoder programs. When you assign tax areas using the batch process, you do not have to enter tax area information at the time that you enter employee or business unit records into the system. After you enter business unit records into the system, you can run the Cost Center Tax Area Processing program (R079052) to assign tax areas to each business unit. Similarly, after you enter employee records into the system, you can run the GeoCoder Employee Batch Processing program (R070103) to assign work and residence tax areas to the employee.

This program automatically enters values for work and resident tax areas for each employee in the system. Or, depending on how you set the processing options, the program enters values for only the resident tax area. The GeoCoder Employee Batch Processing program enters values for the resident tax area using the employee address information, and enters values for the work tax area with the GeoCode from the Business Unit Constants for the employee home business unit. Because the program uses tax area information from the business unit to update the employee work tax area, you should update business unit tax area information before updating employee tax area information.

If multiple GeoCodes exist that are valid for an employee or business unit tax area, the system produces an exception report that lists all of the valid GeoCodes for the specified employee or business unit. You then choose the correct GeoCode and manually enter it in the employee or business unit record.

Running Batch Processes to Assign Tax Areas

Use one of these navigations:

- Select Employee Management (G05BE1), Cost Center Tax Area Processing to update business unit tax areas.
- Select Employee Management menu (G05BE1), GeoCoder Employee Batch Processing to update employee tax areas.

Setting Processing Options for Cost Center Tax Area Processing (R079052)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use this processing option to select the processing mode for this program.

Update Business Unit (Required)

Use this option to specify the processing mode for Cost Center Tax Area Processing (R079052). You can run this report in proof mode to produce a report without updating the Business Unit Master table, or you can run this report in final mode to produce a report and update the Business Unit Master table. Values are:

Blank: Proof Mode - Print report only.

1: Final Mode - Print report and update table.

Setting Processing Options for GeoCoder Employee Batch Processing (R070103)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use these processing options to specify the processing mode for this program, the type of number that is required for employee identification, and the tax areas that the system automatically assigns.

1. Update Tax Area in Employee Master (Required)

Use this option to determine the processing mode for the GeoCoder Employee Batch Processing program (R070103). You can run this program in proof mode and print a report only, or you can run this program in final mode and produce a report and update the tax areas in the Employee Master table. Values are:

Blank: Proof Mode - Print report only.

1: Final Mode - Print report and update table.

Blank:

2. Employee Type (Required)

Use this option to indicate which number is used as the employee's identification number. Values are:

Blank or *A:* Address Number (Default)

S: Social Security Number

O: Other Third Party Number

3. Validate Tax Area (Required)

Use this option to determine which tax areas the GeoCoder automatically assigns, and which fields the program updates in the Employee Master table when the program is run in final mode. You can assign GeoCodes to the employee's work and resident tax areas, and update both fields in the Employee Master table, or you can assign a GeoCode to the resident tax area only, and update only the resident tax area in the Employee Master table. Values are:

Blank: Resident and Work Tax Areas

1: Resident Tax Area Only

CHAPTER 30

Entering Additional Employee Information

This chapter provides an overview of additional employee information entry and discusses how to:

- Enter payroll information for employees.
- Enter additional benefits information for employees.
- Enter user-defined information for employees.

Understanding Additional Employee Information Entry

You can use the Human Capital Management Foundation system to track detailed information about your employees. Use this information to analyze and report on your employees and to meet government reporting requirements. Additional employee information includes user-defined information, such as information that is unique to your organization or your industry.

See Also

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Understanding Compensation Management"

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Working with Compensation Management"

Entering Payroll Information for Employees

This section provides an overview of payroll information entry for employees and discusses how to enter payroll information entry for employees.

Understanding Payroll Information Entry for Employees

You must enter payroll information for employees before you can process a payroll for them. You enter payroll information to identify information that the system needs in order to calculate an employee's pay. This information includes items such as:

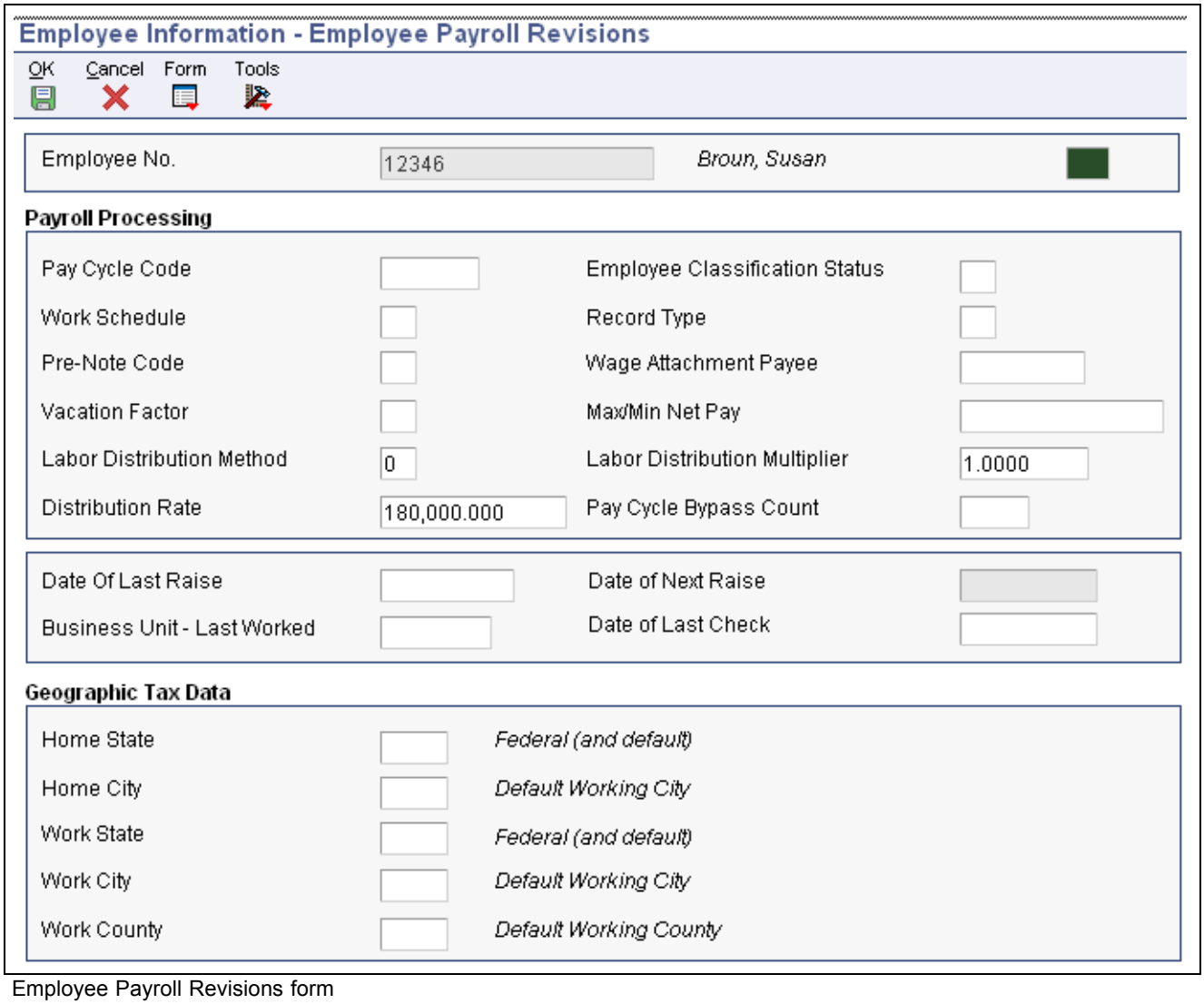
- Geographic information
- Labor distribution information
- Wage attachment payees
- Pay cycle code

Form Used to Enter Payroll Information for Employees

Form Name	Form ID	Navigation	Usage
Employee Payroll Revisions	W0801PRLA	Employee Management (G05BE1), Employee Information Select an employee record and then select Payroll from the Row menu on the Work With Employee Information form.	Enter payroll information entry for employees.

Entering Payroll Information for Employees

Access the Employee Payroll Revisions form.



Employee Payroll Revisions form

Employee Identification Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Pay Cycle Code Enter a code that identifies the values for a master payroll cycle.

Employee Classification Status Enter an employee classification that determines the type of employee to the system. It identifies them as an independent contractor, a regular employee, or a Step Progression employee. Values are:

Y: Independent Contractor

N: Regular Employee

S: Employee using Step Progression

Home State Enter the employee's home state for tax reporting purposes. This code designates the state in which the employee resides.

Note. For W-2 reporting, use the numeric value equivalent of the designated state. For example: 06 - Colorado, 05 - California. Otherwise, the system produces undesirable report results. If you leave this field blank, the system uses the value in the Tax Area (Resident) field on Pay and Tax Information as the employee's resident (base) state.

Home City Enter the location or city where the employee resides.

Work State Enter the employee's work state for tax reporting purposes. This code indicates the state in which the employee normally works. The system uses this code to compute state income tax withholding. You can override this code during time entry, if necessary.

Labor Distribution Method Enter a value that controls whether the labor costs include a flat burden for payroll taxes and benefits. Values are:

0: The flat burden factor is always 1.0000, so the resulting amount for the flat burden is zero.

1: The flat burden factor is always greater than 1.0000, so the labor costs include a flat burden.

Labor Distribution Multiplier Enter a multiplier to load direct labor costs with burden. For example, a factor of 1.32 would load every dollar of labor cost with 32 cents worth of burden.

Distribution Rate Enter a number that specifies the rate that the system uses to bill for labor services. This rate is often referred to as the billing or recharge rate. The system charges the resulting amount, based on this rate, to the primary distribution account for the timecard. The system also enters an offset to an account that is derived from automatic accounting instructions. This rate does not affect employee payroll.

To allow billing rates in time entry, the employee record type must be set to 2 (payroll and recharge processing) or 3 (recharge processing only) with the Employee Payroll program (P0801PRL).

Work Schedule Enter a user defined code to designate intra-pay period work schedules. This code can be used for reporting and to select employees to be included in a payroll run. For example:

A: Monday through Friday

B: Saturday through Wednesday

C: Monday through Thursday (4 x 10 hrs)

Record Type Enter a code that identifies whether the employee is to be handled through the Recharge processing option for the Payroll Journal Entry program. Values are:

1: Payroll Processing Only

2: Payroll and Recharge Processing

3: Recharge Processing Only

After a timecard has been added, you cannot change its record type.

Pre-Note Code Enter a code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to *N*. To repeat this test, enter *P* in this field.

If you leave this field blank, the system uses the default value of *P*.

If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Prenote Flag field to *N*.

You cannot use this field for Canadian employees.

Wage Attachment Payee Enter the address book number for the supplier who receives the final payment.

In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.

For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.

Vacation Factor Enter a value in this field represents the number of pay periods that this check is to cover. This is used by the Payroll system to direct the Vertex payroll tax program to treat the pay as a vacation advance. The computed taxes are automatically averaged over the number of pay periods. See the Vertex system manual for an explanation of the method of calculating tax on vacation advances.

Max/Min Net Pay Enter the lowest amount to be generated as a check, bank advice, or payslip. The system does not allow zero amount checks if you have specified a minimum check amount. You can leave this field blank. Generally, this field's value will specify the minimum amount that must be paid to the employee.

Pay Cycle Bypass Count Enter the number of pay cycles (paychecks) that the system bypasses. You normally specify this number during the interim check process for short term absences such as vacations and jury duty. The system prints a normal paycheck for an employee only when this number is zero.

For Flexible Spending Accounts Auto Deposit Instructions Only: To bypass the auto deposit feature and write a manual check, you can use this field

	to specify the number of pay cycles that you want to bypass. Reasons for bypassing pay cycles might include an employee's involvement in jury duty, vacation, or leave of absence.
Date of Next Raise	Enter the date that the hourly or annual pay rate for the employee increases. The new rate goes into effect after a payroll cycle completes with a pay period end date on or after the date of the next raise.
Business Unit - Last Worked	Enter the last business unit (job) number associated with this employee. This field is used for distribution of paychecks and in the generation of journal entries. When you process a payroll cycle that includes the employee, the system automatically updates this field.

Entering Additional Benefits Information for Employees

This section provides an overview of additional benefits information entry for employees, lists prerequisites, and discusses how to enter additional benefits information for employees.

Understanding Additional Benefits Information Entry for Employees

Additional benefits information includes information related to:

- Benefits eligibility
- Nondiscrimination testing (NDT)
- Benefits participation

To track additional eligibility information that is specific to your organization, you can enter eligibility codes. Eligibility codes are one-digit codes that you can use to track any type of additional eligibility information that your organization needs.

If your organization offers retirement pension plans as part of its employee benefit package, the government in some countries requires that you perform nondiscrimination testing. You use nondiscrimination testing to demonstrate that your organization's highly compensated employees do not take unfair advantage of retirement pension contributions.

To specify whether employees are participating in certain benefit plans, you enter participation information.

Prerequisite

Set up eligibility codes in UDC 05/YB.

Form Used to Enter Additional Benefits Information forEmployees

Form Name	Form ID	Navigation	Usage
Eligibility, NDT, and Participation	W0801ELIA	Employee Management (G05BE1), Employee Information Select an employee record and then select Eligibility/NDT from the Row menu on the Work With Employee Information form.	Enter additional benefits information for employees.

Entering Additional Benefits Information for Employees

Access the Eligibility, NDT, and Participation form.

Employee No Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Eligibility Code 001 Enter a code to specify an employee's eligibility for or participation in various user defined plans or programs. For example, these codes can be used to designate:

- Voluntary Accidental Death/Dismemberment Insurance (Y/N)
- Overtime Call Up (Y/N)
- Profit Sharing (Y/N)
- Political Action Committee (Y/N)
- Coffee Fund (Y/N)
- U.S. Citizen (Y/N)

Pension Enter a code that specifies whether the employee is eligible to participate in the company's retirement plan. When you process W-2 information for employees, the code that you enter in this field determines whether the system places an X, indicating employee eligibility, in the Retirement plan box of the employee's W-2 form.

Oregon Insurance Enter a code to specify whether an employee is participating in the Oregon Industrial Insurance program. The Oregon SUI continuation report reads this field to determine what is to be entered into the appropriate box on the tax return.

Note. This data item is no longer required, as of January 1, 1996.

Entering User-Defined Information for Employees

This section provides an overview of user-defined benefits information entry for employees and discusses how to:

- Enter user-defined benefits information for employees.

- Enter user-defined dates.

Understanding User-Defined Information Entry for Employees

After you add an employee record, you can enter additional information for the employee that is unique to your organization or industry. For example, you might need to track the date that employees' driver's licenses expire.

Your software includes user-defined category codes and user-defined dates that facilitate tracking this information. You define these codes and dates when you set up your system. You can use this information for reporting and analysis purposes. For example, you can set up geographic data codes that you use to prepare unemployment reports.

When you define category codes and dates, you enter a name (label) for the information that you want to track. For example, you might enter driver's license expiration date for user-defined date field 1.

When you enter employee information, you attach a value from a category code or a date to the employee.

Forms Used to Enter User-Defined Information for Employees

Form Name	Form ID	Navigation	Usage
User Defined Category Codes 11 - 20 or Employee/Job Category Codes 01 - 10	W0801ORGB	Employee Management (G05BE1), Employee Information or Organizational Assignment Select an employee record and then select the applicable user-defined category-codes option from the Row menu on the Work With Employee Information form or the Work With Organizational Assignments form.	Enter user-defined benefits information for employees.
User Defined Dates 11 - 20 or Employee/Job User Defined Dates 01 - 10	W0801EMPC	Employee Management (G05BE1), Employee Information or Organizational Assignment Select an employee record and then select the applicable user-defined dates option from the Row menu on the Work With Employee Information form or the Work With Organizational Assignments form.	Enter user-defined dates.

Entering User-Defined Information for Employees

Access the Employee/Job Category Codes 01 - 10 or User Defined Category Codes 11 - 20 form.

Note. You use the Work With Employee Information form to access category codes 11 through 20. You use the Work With Organizational Assignment form to access category codes 1 through 10. Category codes 1 through 4 are reserved for Time Entry information.

Entering User-Defined Dates

Access the User Defined Dates 11 - 20 or Employee/Job User Defined Dates 01 - 10 form.

Note. You use the Work With Employee Information form to access user defined dates 11 through 20. You use the Work With Organizational Assignments form to access user defined dates 1 through 10.

CHAPTER 31

Entering Employee Instructions

After you enter employee information, you can enter instructions that apply to your employees, based on the needs of your company and employees. The information that you enter provides instructions to the system and your department about how to process individual employees or groups of employees for reporting or payment purposes.

This chapter provides an overview of split time and discusses how to:

- Enter employee deduction, benefit, and accrual instructions.
- Enter labor distribution instructions.
- Enter automatic deposit instructions.
- Create prenote transaction records.

Understanding Split Time

In addition to labor distribution instructions, we offer a Split Time feature that automatically allocates time entry charges to various accounts during time entry. Split Time is activated in the processing options for the Time Entry MBF Processing Options program (P050002A). When the Split Time feature is activated, it sets up a hierarchy for the system to search to find the appropriate account number as follows:

- The system first searches for labor distribution instructions at the employee level. If it finds them, it picks up the percentage or number of hours set up, as well as the account number assigned to each amount.

  If the labor distribution instructions are using the hours method instead of the percentage method, the system will prorate the hours to determine the amount of the split. The system applies these amounts to all pay types entered on the Time Entry Revisions form regardless of the pay type set up in the labor distribution instructions.
- If no labor distribution instructions are set up, the system searches the Position Control specifications and selects the allocation, if any.
- If no labor distribution instructions are set up and no account allocations are defined in the Employee Master program (P0801) specifications, the system proceeds to the automatic accounting instructions and uses the account information defined there.

The Split Time feature was designed for clients who want to avoid setting up numerous automatic accounting instructions. It is intended for those employees who typically charge their time to more than one area. All pay types are split according to the instructions that the system finds. Split Time and labor distribution instructions were not designed to work together. When Split Time is activated, the system includes labor distributions in the hierarchy when searching for the account numbers used to allocate labor charges. When Split Time is not activated, the labor distribution instructions must be manually copied during time entry for non-autopay employees.

When Split Time is activated and the employee also has labor distribution instructions, every pay type entered on the timecard is split according to the labor distribution instructions that are set up for the employee. Therefore, if pay type 1 is set up to be split between two accounts on the labor distribution instructions, then the time is split between the accounts selected on labor distribution instructions.

Examples: Activating Split Time

These are examples of how the system allocates labor charges among accounts based on labor distribution instructions or the Split Time feature.

Example 1: Labor distribution instructions set up at the employee level using the percentage method. Split Time is activated.

Pay Code	Description	Hours or Percent	Account #
1	Regular	60	9.8115
1	Regular	40	9.8118

On the Time Entry Revisions form, when 40 hours is entered for pay code 801, the system automatically supplies this allocation because the Split Time feature is activated:

Pay Code	Description	Hours	Account #
801	Vacation	24	9.8115
801	Vacation	16	9.8118

For any pay code entered (including pay code 1) on the Time Entry Revisions form, the system supplies the hours and account number from the labor distribution instructions. The system does not supply the pay code or change the pay code that was entered.

When time is entered you must copy the labor distribution instructions for the employee from the Form menu if the Split Time processing option is not activated. The time is then allocated according to the labor distribution instructions. Only the pay type set up on the labor distribution instructions is allocated on the Time Entry Revisions form.

Example 2: Labor distribution instructions are set up at the employee level using the percentage method. Split Time is not activated.

On the Time Entry Revisions form, when 40 hours is added for pay code 801, the system does not allocate time charged to pay code 801 because the labor distribution instructions were set up to allocate charges to pay code 1 and the Split Time feature is not activated:

Pay Code	Description	Hours	Account #
801	Vacation	40	9.8118

When you add 40 hours for pay code 801 on the Time Entry Revisions form and then select copy labor distribution instructions, the system will prompt you for the number of hours to charge and allocate those hours of regular pay based on the labor distribution instructions:

Pay Code	Description	Hours	Account #
1	Regular	24	9.8115
1	Regular	16	9.8118
801	Vacation	40	9.8118

The vacation pay code is not split because the labor distribution instructions specified only regular pay (pay code 1).

These are suggestions for using the labor distribution instructions and the Split Time feature:

- Use Split Time when you want every pay code split according to either labor distribution instructions or position control.
- Enter a batch of timecards with the Split Time feature activated, and then deactivate Split Time and enter additional timecards.

See Also

PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook, "Defining Position Budgets"

Entering Employee Deduction, Benefit, and Accrual Instructions

This section provides an overview of employee deductions, benefits, and accruals instructions entry and discusses how to enter employee deductions, benefits, and accruals instructions.

Understanding Employee Deduction, Benefit, and Accrual Instructions Entry

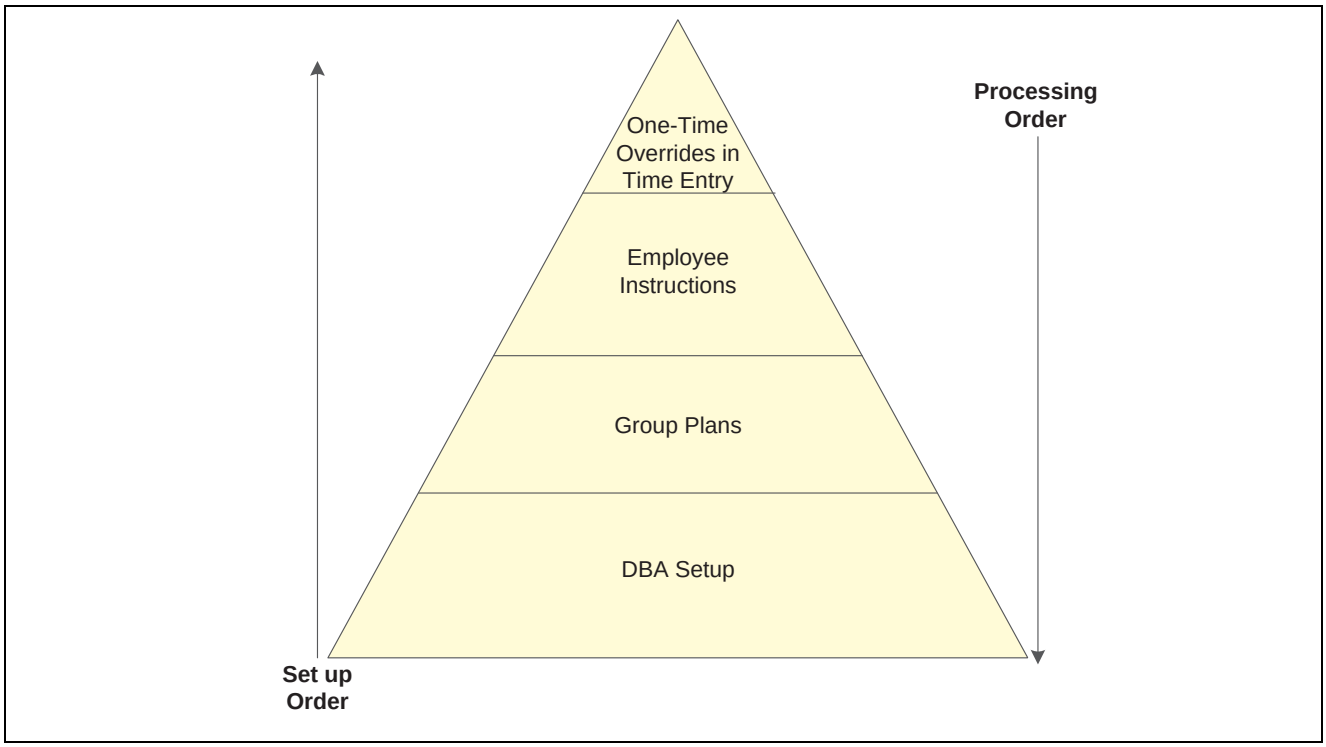
After you set up your deductions, benefits, and accruals (DBAs), you enter DBA instructions to assign DBAs to employees. You can enter DBAs at these levels:

- One-time DBA override in Time Entry
- Employee DBA instructions
- Group DBAs
- DBA setup

After you assign DBAs, the system calculates them during the payroll cycle in the same search sequence.

You enter DBA instructions at the employee level to define and maintain DBAs unique to an individual employee. A DBA assigned at the employee level overrides DBA amounts or rates that are defined at the group or DBA setup level, unless the DBA is a table method DBA.

To help you understand how to assign DBAs, this graphic illustrates the order in which the system manages DBA setup and DBA calculations:



Order of DBA setup and calculations

This table illustrates the order in which the system handles DBA setup and DBA calculations:

Process	Order
DBA setup	When you set up DBAs, you first set up general DBAs that apply to the majority of your employees. Then you set up DBAs that apply to specific groups of employees or specific employees. Finally, you can apply one-time DBA overrides for specific employees for any one pay period.
DBA calculations	During the payroll-cycle processing, the system first calculates one-time DBA overrides. If there are no DBA overrides, then the system searches for DBAs that apply to the individual employee or employee groups. If no employee-specific DBAs or group plan DBAs exist, the system calculates any general DBAs.

The information that you enter with the Employee DBA Instructions program (P050181) represents the third level of DBA assignment, the employee level.

When you assign DBA instructions at the employee level, you can complete:

- Exceptions by employee for a group of DBAs.
- Overrides for DBA amounts, dates, and limitations.
- Start and stop dates for a DBA.
- DBAs to calculate only when an employee works in a specified assignment.

Note. You can also view expired or cleared DBA transactions.

To simplify the management of DBAs among employees, you can use benefit groups to avoid entering identical lists of DBAs for each employee. The system refers to groups of DBAs as group plans. Group plans are defined by union codes or group codes. The system automatically assigns group plans to the employee when you are hiring an employee and enter a Union Code in the Employee Organizational Assignments program (P0801ORG).

You can use the EE DBA Review program (P05087) to review existing DBAs assigned to an employee before adding more DBAs. You can also review the DBA itself before assigning it to an employee.

Although you can use this form to assign all DBAs for an employee, maintaining the lists requires considerable effort. For this reason, we recommend that you assign the majority of an employee's DBAs in a group plan and that you use DBAs for an individual employee only for exceptions to the group plans.

You can override a DBA in a group plan on P050181, as well as add DBAs to an employee record.

If you are using the HR-Benefits module, the system automatically assigns DBA codes to an employee record when you enroll the employee in benefit plans. The DBA codes for these benefit plans appear on P050181.

Note. If you want a DBA to calculate only when an employee works in a specified assignment, you enter an assignment number for that DBA on P050181. When calculating the DBA, the system uses all timecards associated with that assignment as the basis of calculation for the DBA. For example, if the employee works 40 hours during the pay period, but only 20 hours were worked in the specified assignment, the system uses all pay associated with the 20 hours worked in the assignment as the basis of calculation for the DBA.

If you want to set up DBAs that use other DBAs as the basis of calculation to calculate only when an employee works in a specified assignment, you would only enter the assignment number on the initial DBA. For example, you want DBA 4999 and DBA 5000 to calculate for an employee only when they work in a specified assignment, and DBA 5000 is based on DBA 4999. You would only enter the assignment number DBA 4999 on P050181. The system would use all pay associated with the specified assignment number as the basis of calculation for DBA 4999, and would use DBA 4999 as the basis of calculation for DBA 5000.

See Also

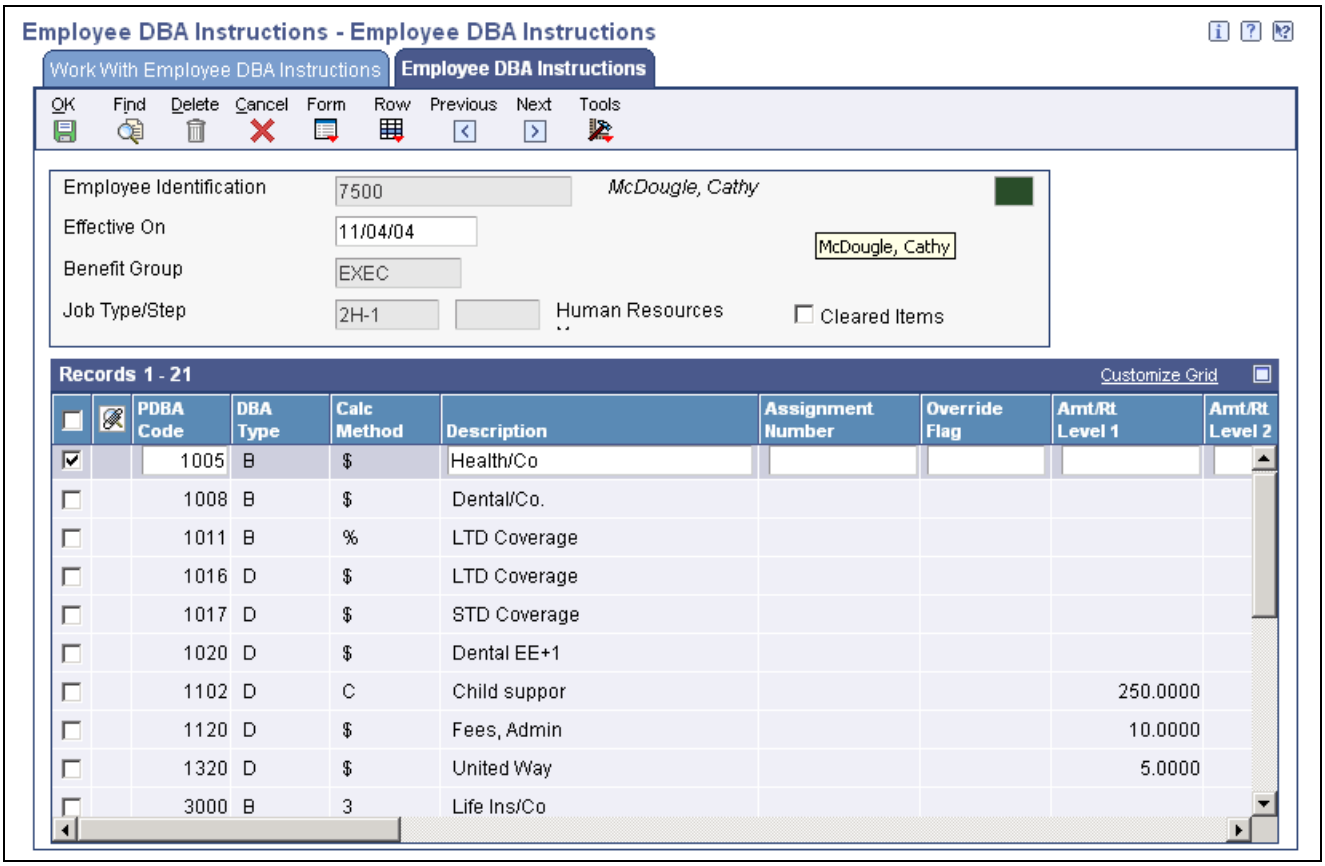
Chapter 18, "Setting Up Deductions, Benefits, and Accruals ," page 137

Forms Used to Enter Employee Deduction, Benefit, and Accrual Instructions

Form Name	Form ID	Navigation	Usage
Work With Employee DBA Instructions	W050181A	Employee Management (G05BE1), Employee DBA Instructions	Select records.
Employee DBA Instructions	W050181C	Employee Management (G05BE1), Employee DBA Instructions Select a record and then click Select on the Work With Employee DBA Instructions form.	Enter employee deductions, benefits, and accruals instructions.
Work With Employee DBA Review	W05087A	Select EE DBA Review from the Form menu on the Employee DBA Instructions form.	Review employee DBA instructions.
PDBA Search & Select	W05PDBASA	Click the Search button for the PDBA Code field on the Work With Employee DBA Instructions form.	Review deductions, benefits, and accruals before assigning DBA instructions.
Pay Type Recap	W05PDBASA	Select PDBA Recap from the Row menu on the PDBA Search & Select form.	Review pay type information.

Entering Employee Deduction, Benefit, and Accrual Instructions

Access the Employee DBA Instructions form.



Employee DBA Instructions form

Employee Identification Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Effective On Enter a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

Active Enter a value for the employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

Terminated Enter a value for the employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

All Enter a value for the employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

PDBA Code Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Amt/Rt Level 1 Enter a value that specifies a percentage, a monetary amount, or an hourly rate, depending on where it is used. Values are:

1: For a deduction, benefit, or accrual, the meaning of this value depends on the method of calculation. The method determines whether the deduction is a flat monetary amount, a percentage, or a multiplication rate. Table method DBAs, depending on which table method they use, can either use this amount in the calculation or ignore it. If there are exceptions to the table calculation, you can override the table code in the detail area, set up a flat monetary DBA amount, or override the amount with a one-time override for a timecard.

2: For a pay type, amounts entered in this field override the hourly rate.

Amt/Rt Level 2

Enter the second amount or rate associated with a deduction, benefit, or accrual. Because many DBA types require multiple tiers, two levels of Amount (Rate) exist. The system uses the first level, Amount (Rate) 1, until the annual limit is reached. Then, the second level, Amount (Rate) 2, begins the next time the employee is paid. Amount (Rate) 2 continues until the second annual limit is reached.

This field works in conjunction with the annual limit fields. The rate you enter in this field supersedes any other table rate for an employee, except for one-time overrides during time entry.

Pay Start Date

Enter the date an instruction starts, for example, the date the system should start a deduction.

The start date must be less than or equal to the timecard date. To start a DBA at the beginning of a pay cycle, make the start date equal to the first day of the pay cycle. For example, if the pay cycle runs from 10/01 to 10/15, start the DBA on 10/01.

If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.

For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.

For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.

Pay Stop Date

Enter the stop date must be less than the timecard date. To stop a DBA before the next pay cycle, make the stop date one day prior to the first day of the next pay cycle. For example, if the pay cycle runs from 10/01 through 10/15, set the DBA stop date as 9/30.

If both the start and stop dates are within the pay period from and through dates, even if the stop date is not less than the timecard date, the system will not calculate the DBA.

For a flat amount DBA, the system calculates the full DBA for any timecard that falls within the DBA start and stop dates.

For DBAs that calculate from a basis amount, such as a percentage rate DBA, the system includes only those timecards that fall within the DBA start and stop dates in the basis of calculation.

Voucher Flag

Enter a code used to determine whether the system should generate a voucher for the DBA, tax, or wage attachment during the final update phase of the payroll processing cycle. Values are:

N: No, do not generate a voucher

Y: Yes, generate a voucher

Payee No Enter the address book number for the supplier who receives the final payment.

In Benefits administration, this is the address book number of the company that issues the plan and receives premium payments for it.

For wage attachments, payee is the address book number of the agency, company, individual, or court that is to receive the payment of the check.

DBA Type Enter a code that specifies the type of payroll entry. Values are:

P: Time Cards (earnings).

D: Deductions withheld.

B: Benefit (both cash and noncash).

A: Time accrual, such as sick and vacation time.

Note. These values can be changed only by PeopleSoft.

When you enter * in this field, the system displays all four types of PDBAs.

Calc Method Enter a user defined code (07/DM) that specifies the method that the system uses to perform certain calculations. For example, the system uses a method of calculation to calculate deductions, benefits, and accruals (DBAs) and workers' compensation insurance.

Explanation - Remark Enter the remark that initially appears in this field comes from the Paystub Text field on the Basic DBA Information form. You can override this remark with information that is specific to the employee's DBA instructions.

Assignment Number Enter a number that identifies a task that is used for resource scheduling. The task number is generated by the system.

Override Flag Enter *Yes* or *No,* indicating whether the system treats the Amount/Rate field as a zero amount override. You use this field primarily when an employee is part of a group plan yet does not receive a particular benefit in that plan.

Group Code Enter a code that is common to all deduction or benefits that share the same limitations, such as pay period currency amount, percentage, monthly, and annual. The system takes these limits from the first deduction encountered in the group and withholds for all deductions until the limit is reached for the aggregate. Example:

- Deduction 6400, Group A, Annual Limit = 1000 USD, No Pay Period Limit
- Deduction 6430, Group A, No Annual or Pay Period Limit
- Deduction 7700, Group A, No Annual or Pay Period Limit
- Deduction 9400, Group B, No Annual or Pay Period Limit
- Deduction 7550, Group B, No Annual Limit, Pay Period Limit = 50 USD

For this example, the system determines the deductions that are assigned to Group A, and applies a 1000 USD annual limit for all three deductions. The system continues to take the deductions from an employee's paycheck until a total of 1000 USD has been deducted between all entities in Group A for the

year. For deductions in Group B, the system deducts no more than 50 USD per pay period between for the two deductions.

Table Code Enter the table used if the calculation requires table values.

Amount Due Enter the balance or amount due on an open invoice or voucher.

In the Address Book Master table (F0101), this is a memo amount that the system uses to determine whether a particular order exceeds a credit limit. See the documentation for the Order Processing system.

Prior DBA Enter a code that identifies another DBA whose limit must be met first before this DBA calculates. For example; deduction 1400 has an annual limit of $2,000.00.

After this limit is met, deduction 1500 begins calculation and withholding.

The DBA number of the predecessor must be lower than the successor's number.

Ded Per 1 Enter a ode designating the pay period in which the system calculates the DBA/auto deposit. Values are:

Y: Take the DBA/auto deposit during the current period.

N: Do not take the DBA/auto deposit during the current period.

**:* Take the DBA/auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.

Blank: Continue to look for a code at the lower level. The system searches for DBA/auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA/auto deposit in that period.

M: Applies only to benefits based on gross hours or dollars. An M in the fifth field only tells the system to calculate the benefit during the special timecard post. An M implies a Yes for a weekly withholding frequency.

Nbr Per Enter the number of periods for which a deduction or benefit should be taken. The system automatically decreases this number by one for each period taken.

You must enter a value in this field if you automate the Number of Periods field.

Limit $ Pay Period Enter the maximum amount that can be withheld or accrued in a pay period for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

Limit Monthly Enter the maximum amount that can be withheld or accrued in a month for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

Limit $ Quarterly Enter the maximum amount that can be withheld or accrued in a quarter for a deduction or benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

Limit $ A/L1 Enter the maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

For the Payroll system, this field can represent either an initial annual limitation or a final limitation in a year:

- If the Annual (Level 1) field is not blank, this amount represents the first level of the yearly limitation. The value in Annual (Level 2) represents the final limitation.
- If an annual limit is specified on a DBA calculation table, the annual limit from the table will take precedence over annual limits defined at the master DBA or employee levels.

Limit $ A/L2 Enter the maximum amount that can be withheld or accrued in a year for a deduction or a benefit. This amount is expressed in dollars. This amount refers to the gross pay/amount field.

Note. This field represents the second level annual limitation. It is used when there is an initial limitation and a corresponding rate, which is followed up by a new rate and a final limitation. This field cannot be used independently. There must always be a value in the Annual (Level 1) field.

Limit % Period Enter the maximum percentage of pay that the calculated deduction or benefit amount may not exceed. This percentage works in conjunction with the dollar limits of the deduction or benefit, so whichever limit is reached first stops the calculation. For accrual transactions, this field represents an hour's limit.

Cleared Items Enter a value that specifies whether cleared deductions appear on the form. To display cleared items, click the Cleared Items check box.

The system categorizes deductions as cleared when:

- The through date of the deduction is older than the system date.
- The Declining Balance flag for the deduction is turned on and the amount due is 0.
- The Use Number of Periods flag is turned on and the number of periods is 0.

Related Task

This table lists related tasks:

Task	Description
Deleting a DBA Instruction	When you need to remove a DBA instruction from an employee record, use caution to avoid deleting a DBA that has already accumulated history information. After a DBA has been active and amounts have been withheld from an employee's compensation, removing the DBA could result in errors on year-end forms. When deleting a DBA instruction, if the DBA has history information, the system displays a warning message indicating that history information exists. If you receive this message, cancel the deletion procedure.

See Also

PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook, "Entering Wage Attachments for Employees"

Entering Labor Distribution Instructions

This section provides an overview of labor distribution instructions entry and discusses how to:

- Set processing options for labor distribution instructions.
- Enter labor distribution instructions.

Understanding Labor Distribution Instructions Entry

You enter labor distribution instructions for individual employees to automate the process of distributing an employee's work time to multiple general ledger accounts. You can enter labor distribution instructions for hourly and salaried employees.

Labor distribution instructions simplify time entry. If you enter distribution instructions for an employee who is not set up for autopay, you can obtain the instructions when you enter timecards manually. The system uses the labor distribution instructions that you enter when it creates timecards for autopay employees.

These examples are practical applications of labor distribution instructions:

- If an employee always spends 80% of the time processing payroll and 20% managing other staff, then you can allocate the time 80% to G/L account Regular Pay and 20% to G/L account Regular Pay-Managers using labor distribution instructions.
- If an employee spends five hours per week performing administrative duties and 35 hours performing regular salaried duties, you can allocate the amount to two different G/L accounts.
- In the previous example, you can specify the start and stop dates of the instructions.

  These dates control when the labor distribution instructions can be used. If you entered a timecard on a different date, the instructions would not apply, and you could not copy them in time entry.
- If you are entering a batch of timecards for employees whose time needs to be allocated identically, you can assign labor distribution instructions to one employee in the batch and then copy the instructions to all of the other employees in the batch.

  An example of this would be a hospital setting where a group of general nurses works on a unit part of the time and also works in the HR Department in Occupational Health evaluating employee on-the-job injuries the rest of the time.
- When an employee works for a business unit or company other than the home company, you can override the position ID so that budget allocations reflect the position ID of the business unit or company where the employee performed work.

  This feature is useful in the public sector and in organizations in which budget tracking by position is critical to maintain or justify the appropriate workforce.

You use labor distribution instructions to:

- Distribute time to multiple general ledger accounts.
- Distribute time by either percentage or number of hours.
- Set effective dates for distributions.
- Create a template for time entry.
- Define job type information when the employee has more than one job.
- Override position ID and AAI accounts for an employee.

Form Used to Enter Labor Distribution Instructions

Form Name	Form ID	Navigation	Usage
Labor Distribution Instructions	W050151A	Employee Management (G05BE1), Employee Labor Distribution. On the Work With Labor Distribution Instructions form, click Add.	Enter labor distribution instructions.

Setting Processing Options for Labor Distribution Instructions (P050151)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

This processing option specifies how the system determines the appropriate source for the Worker's Compensation Code.

1. Worker's Compensation Code Use this processing option to specify the default Worker's Compensation Code for Employee Labor Distribution. Values are:

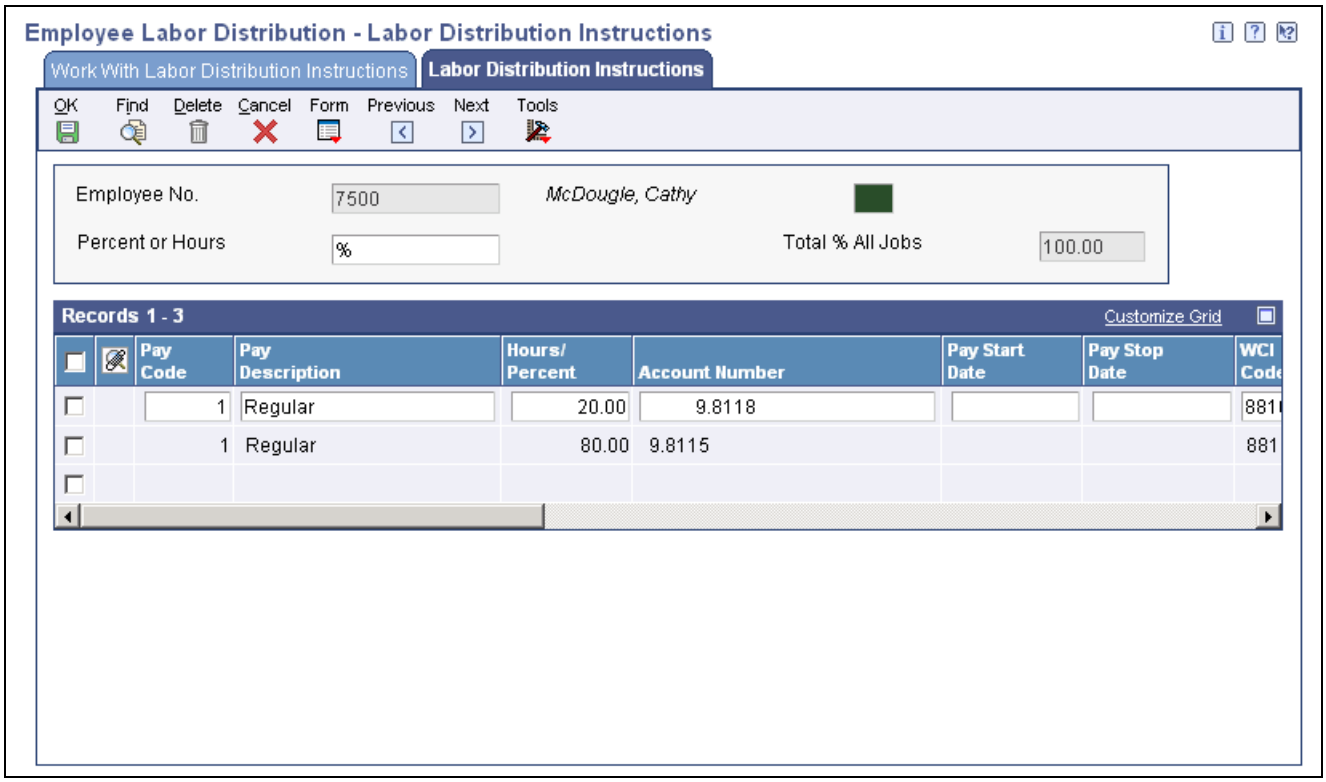
1: The Worker's Compensation Code is from the Employee Master file regardless of the Employee Labor Distribution entry.

2: The Worker's Compensation Code is from the Employee Master file only if the Employee Labor Distribution field is blank.

3: The Worker's Compensation Code is from the Data Dictionary only if the Employee Labor Distribution field is blank. (Default)

Entering Labor Distribution Instructions

Access the Labor Distribution Instructions form.



Labor Distribution Instructions form

Employee Identification Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Percent or Hours Enter a value that specifies how the system creates or applies labor distribution employee time. You can enter this value in the Labor Distribution Instructions program (P050151). Values are:

H: The system adds a specified number of hours to the employee time. For example, if you want to charge 20 hours of employee time in every pay period to a specified account, you enter 20 in the hours/percent field.

%: The system apportions the total hours entered to specified accounts based on the percentages entered in the hours/percent field. For example, if you always want 30% of employee time charged to a specified account, and the remaining 70% of the time to a different account, you enter in 30 in the hours/percent field in the first row, and 70 in the hours/percent field in the second row. The Totals must equal 100%.

Pay Code Enter a code that defines the type of pay, deduction, benefit, or accrual.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Hours/ Percent Enter the number of hours associated with each transaction.

Account Number Enter a value that identifies an account in the general ledger. Use one of these formats to enter account numbers:

- Standard account number (business unit.object.subsidiary or flex format).

- Third G/L number (maximum of 25 digits).
- Account ID number. The number is eight digits long.
- Speed code, which is a two-character code that you concatenate to the AAI item SP. You can then enter the code instead of an account number.

The first character of the account number indicates its format. You define the account format in the General Accounting constants.

Pay Start Date

Enter the date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.

Note. You can use this field only if the method you are using is based on hours. You can set a range of pay period ending dates during which a particular labor distribution instruction is effective. Leave these fields blank for any standard, continuous distribution instructions.

Pay Stop Date

Enter the date when an employee should no longer be included in a payroll cycle or the date when an employee stops participating in the company's benefit plans.

Note. You can use this field only if the method you are using is based on hours. You can set a range of pay period ending dates during which a particular labor distribution instruction is effective. Leave these fields blank for any standard, continuous distribution instructions.

WCI Code

Enter a user defined code (00/W) that represents a workers' compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers' compensation insurance reports.

WCI Class

Enter a code that specifies any special circumstances associated with the workers compensation insurance (WCI) code, resulting in multiple rates for the same WCI code due to location or risk, for example. The subclass should remain blank if multiple rates do not exist. Default codes are:

Blank:

There are no special circumstances associated with this code.

F: There are special circumstances associated with this code.

Hourly Rate

Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table.

In the Employee Master table, this number is the employee's base hourly rate.

In the Union Rates table, it is the straight time rate.

Note. If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits.

Billing Rate

Enter a number that specifies the rate that the system uses to bill for labor services. This rate is often referred to as the billing or recharge rate. The system charges the resulting amount, based on this rate, to the primary

distribution account for the timecard. The system also enters an offset to an account that is derived from automatic accounting instructions. This rate does not affect employee payroll.

To allow billing rates in time entry, the employee record type must be set to 2 (payroll and recharge processing) or 3 (recharge processing only) with the Employee Payroll program (P0801PRL).

Burden Rate Enter an hourly rate to be used when charging 'burden' associated with the actual billing (recharge) amounts.

Entering Automatic Deposit Instructions

This section provides an overview of automatic deposit instructions entry, lists prerequisites, and discusses how to:

- Set processing options for auto deposit instructions.
- Enter automatic deposit instructions.

Understanding Automatic Deposit Instructions Entry

You enter automatic deposit instructions for any employee who wants all or part of each payment deposited directly in a bank account. When you enter automatic deposit instructions, the system creates a prenote record that is sent to the bank for verification. The prenote information can be created during the first payroll cycle in which the employee is processed after the automatic deposit instructions are entered into the system, or you can create prenote transactions outside of the payroll cycle.

Using automatic deposit instructions, you can:

- Set up a combination of automatic deposit, check, or cash payments.
- Set up multiple bank accounts for an employee.
- Start and stop automatic deposits by period.
- Start and stop automatic deposits by date.
- Set up a remainder code to automatically process any money remaining when an employee chooses different ways to distribute a payment.

See Also

Chapter 31, "Entering Employee Instructions," Creating prenote Transaction Records, page 302

Prerequisite

Set up the processing options that provide the originating bank number, service class code, and standard entry class.

Form Used to Enter Automatic Deposit Instructions

Form Name	Form ID	Navigation	Usage
Automatic Bank Deposit Instructions	W055011D	Auto Deposit Information (G05AD), Auto Deposit Instructions for Employee Select an employee and click Select on the Work With Automatic Bank Deposit Instructions form.	Enter automatic deposit instructions.

Setting Processing Options for Auto Deposit Instructions (P055011)

These processing options specify information codes and formatting that is required so that financial institutions can exchange automatic deposit information accurately.

Bank Info.

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Originating Financial Organization No. Use this processing option to specify the originating financial organization number.

2. Service Class Code Use this processing option to specify the service class code

3. Standard Entry Class Use this processing option to specify the standard entry class.

4. Off Set Begin Deposit Date Use this processing option to specify whether to offset the begin deposit date.

0: Do not default the Begin Deposit Date.

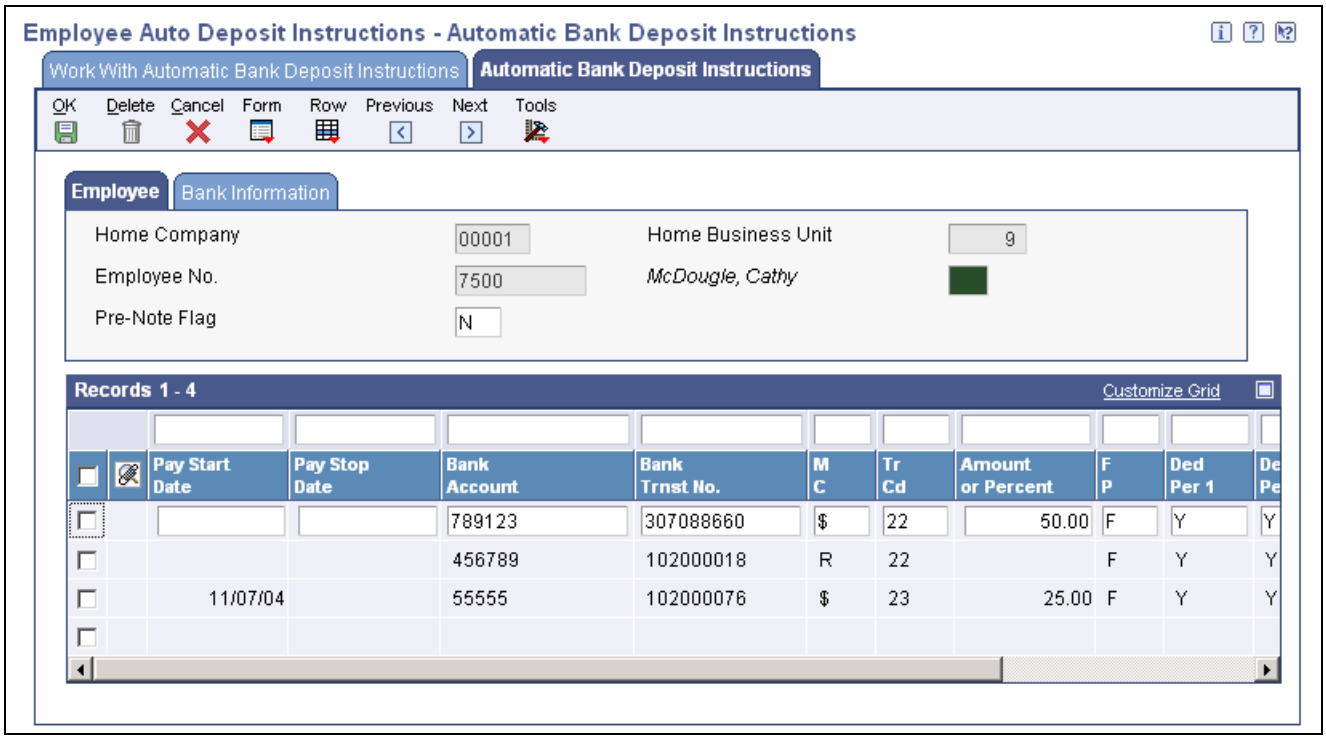
1: Default the Begin Deposit Date.

5. Off Set Begin Deposit Date Use this processing option to specify the number of offset days that the system uses for the pay start date.

Enter the number of days offset for the Pay Start Date.

Entering Automatic Deposit Instructions

Access the Automatic Bank Deposit Instructions form.



Automatic Bank Deposit Instructions form

Employee Identification

Enter the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Pre Note

Enter a code used to distinguish various types of debit and credit nondollar prenotification transactions that must precede the first actual automated paperless transaction with dollars for an employee.

Demand Account Credits are:

23: Prenotification of Credit Authorization

24: Prenotification of Credit/Mailed Authorization Savings Account Credits

33: Prenotification of Credit Authorization

34: Prenotification of Credit/Mailed Authorization Debits are not currently handled by this Payroll system.

Automatic prenoting is only done one time. Therefore, if your bank requires multiple prenote cycles, you can manually set the transaction code (TCOD) for this record to a prenote code and leave it that way for as long as necessary.

Bank Account

Enter the employee's unique account number at the financial institution. The number is obtained from the MICR line of a voided check or a deposit slip from the employee's account. You must include dash cue symbols in the field.

However, they are recorded in a translated mode as a hyphen (-). Account numbers can also be obtained from other sources, such as passbooks or debit cards. When transcribing information, left justify and enter only numbers (0 through 9), alphabetic (A through Z), and hyphens (-). If less than 17 characters are required, leave the unused spaces blank. Spaces left within the depositor's account number will be ignored when the paperless entry is

prepared. For example, 0123 4 56789 will appear as 0123456789 in the entry record, and 0123-4 56789 will appear as 0123-456789.

If you change this number, the system automatically prenotes the employee's auto deposit record again.

The Financial Organization Account Number (FOA#) is used as the company's unique bank account number rather than the employee's unique bank account number in these files:

- F06560 - Bank Reconciliation - Issue Table
- F06561 - Bank Reconciliation - Paid Table

Bank Trnst No.

Enter the bank transit number for the employee's financial institution. Banks might refer to this number as the ABA or payment routing number. This number can be obtained from the employee's check or deposit slip. It is located between the MICR colons (:) at the bottom of the check.

For U.S. banks, this number contains 9 digits. If this number does not contain nine digits, you must contact the employee's financial institution to obtain the correct number.

For Canadian banks, this number contains 8 digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.

If you change this number for an employee, the system creates a prenote for the employee's next auto deposit.

M C

Enter an employee can in a variety of ways split up net pay. This code specifies the method(s) in which a segment is to be computed:

$: A specific amount is to be deposited.

%: A percentage of net pay is to be deposited.

C: A specific amount is to be generated as a payroll check.

P: A specific amount is to be generated as cash.

R: The remainder of the net pay, after % and/or specific amount segments are processed, is to be deposited in the bank.

Q: The remainder of the net pay, after % and/or specific amount segments are processed, is to be generated as cash.

D: The remainder of the net pay, after % and/or specific amount segments are processed, is to be generated as a payroll check.

Note. A remainder record is required and only one method can be specified (R, Q, or D).

Tr Cd

Enter a code used to distinguish various types of bank accounts, for example, checking, savings, or credit union. Currently these codes have been assigned:

Demand account credits are:

20: Reserved

21: Credit entry to return automated deposit

22: Automated Deposit

Savings Account credits are:

30: Reserved

31: Credit entry to return automated deposit

32: Automated Deposit

Demand account debits are:

25: Reserved

26: Debit entry to return automated payment

27: Automated Payment

Savings account debits are:

35: Reserved

36: Debit entry to return automated payment

37: Automated Payment

Note. If you leave this field blank, the system uses the default value of 22.

Amount or Percent

Enter the actual gross pay amount for an employee. This amount is to be distinguished from the distributed gross pay amount used for labor distribution. See data item DPAY.

When using Work Order Time Entry, this field is used to record miscellaneous pay for an employee, (for example, piece rate bonus).

Pay Start Date

Enter the date that an employee may begin participating in the company's benefit plans or may be included in payroll processing.

You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year).

Pay Stop Date

Enter the date when an employee should no longer be included in a payroll cycle or the date when an employee stops participating in the company's benefit plans.

You can use this date for terminated employees, seasonal employees, or employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT.

This date may also be the date that a deduction, benefit, or accrual instruction stops.

prenote Flag

Enter a code that lets you test the deposit instructions for one pay period before actually processing a deposit. Adding an employee to this form automatically activates this person in the automated deposit system. The system prenotes this employee in the next applicable payroll run to test the auto deposit instructions you have set up before actually depositing a check. In the prenote test, the system creates a no-dollar entry for this employee and sends it to the employee's bank account. In addition, the employee receives a check for this amount. After the test, the system changes this field to *N*. To repeat this test, enter *P* in this field.

If you leave this field blank, the system uses the default value of *P*.

If you change an employee's automatic deposit instructions, the system creates a prenote. If you do not want a prenote, you must change the value in the Prenote Flag field to *N*.

You cannot use this field for Canadian employees.

Originating Bank

Enter the transit routing number used to identify the financial organization to which the deposit tape is being sent for processing. Obtain this code from the bank at which your company's payroll account is maintained.

This bank serves as a clearing house for your employee automatic deposits. Using the Individuals Financial Organization No (IFO#) and Financial Organization Account Number (FOA#), this bank uses electronic funds transfers (EFT) to route each employee deposit to a financial institution.

SCC

Enter the code that identifies the general classification of dollar entries to be exchanged. This standard is used to facilitate transmission of data between organizations. Automated Clearing House (ACH) entries required for payroll deposits use these service class codes:

200: ACH entries mixed debit and credits.

220: ACH credits only (batch format).

225: ACH debits only (batch format).

At the time of this writing only the use of class 200 is recommended.

SEC

Enter a code that permits various kinds of paperless entries to be distinguished. These entry classes have been defined:

SIA: Single item authorization; and

PPD: Pre-arranged payments and deposits.

At the time of this writing only PPD is recommended for the entry class.

F P

Enter the code that applies only to method code $ (see BDM). If there is not enough net pay remaining to process the amount specified in the amount/percentage field, these values apply:

F: The full amount cannot be generated. The segment is ignored.

P: A partial amount can be generated for the bank and account specified for the segment.

If you leave this field blank, the system uses *F* as the default value.

Ded Per 1

Enter a code designating the pay period in which the system calculates the DBA/auto deposit. Values are:

Y: Take the DBA/auto deposit during the current period.

N: Do not take the DBA/auto deposit during the current period.

**:* Take the DBA/auto deposit only during the first pay period of each month that the employee works based on the ending date of this month's pay period.

Blank: Continue to look for a code at the lower level. The system searches for DBA/auto deposit rules first at the employee level, then at the group level, and finally at the DBA master level. If the field is blank at all levels, the system does not calculate the DBA/auto deposit in that period.

M: Applies only to benefits based on gross hours or dollars. An M in the fifth field only tells the system to calculate the benefit during the special timecard post. An M implies a Yes for a weekly withholding frequency.

Creating prenote Transaction Records

This section provides an overview of prenote transaction records, list prerequisites, and discusses how to:

- Set processing options for Auto-Deposit prenote Bank File (R055011).
- Run the Auto-Deposit prenote Bank File process.

Understanding prenote Transaction Records

When employees decide to have their payroll payments automatically deposited in their bank accounts, they must provide information about the bank accounts to their employer. The employer must verify that the bank information is accurate before payments are actually deposited into those accounts. The process of verifying employee bank information is called pre-noting.

Pre-noting is a method of electronically testing the accuracy of an automatic deposit bank account before transferring actual funds to the account. If there are problems with the bank account information, the bank provides feedback to the employer to notify them of any errors. Typically, new accounts are prenoted during the first payroll cycle in which the employee is processed after they have submitted their bank account information. During the payroll cycle that the bank information is prenoted, the employee receives an actual paycheck rather than an automatic deposit.

The prenote process consists of these steps:

1. Employees provide bank account information to the payroll department.
2. The bank information is entered into the system.
3. The bank information is typically sent electronically to a regional clearing house association facility.
4. The clearing house facility consolidates all transactions for daily routing to all member banks.
5. Member banks receive and verify that the auto deposit instructions submitted via the clearing house facility are accurate. If errors are discovered, the originator of the test is notified of the problem for correction and retesting.

Note. This prenote cycle typically requires ten days from the time the clearing house facility receives the transaction.

The Auto Deposit prenote Bank File program (R055011) allows you to generate prenote transactions as soon as you enter automatic deposit instructions into the system. Generating the prenote transaction before the employee is paid expedites the verification process and increases the probability that employees receive their first payment via an automatic deposit rather than a live check. Expediting the verification process reduces the number of live checks that an organization must distribute.

For example, if you hire an employee who is not scheduled to begin working for your organization for several weeks, you can process the employee's prenote transaction before they begin working. By completing the prenote process ahead of time, the employee's first payment can be generated as an automatic deposit rather than a live check.

When you create the prenote transaction using the prenote Trigger program, the system assigns a start date to the employee's automatic deposit information. This start date is determined by adding the number of days that you enter in the processing options for the Auto Deposit Instructions program (P055011) to the system date. We recommend using a value of 10 days or more to ensure that the prenote process is completed before funds are deposited into the accounts. If the employee is paid before the start date that is associated with their automatic deposit instructions, the employee will receive a live check rather than an automatic deposit.

In addition to pre-noting new automatic deposit instructions, you must also prenote bank information when an employee changes existing automatic deposit instructions. The system uses the value in the prenote Flag and Transaction Code fields on the Automatic Bank Deposit Instructions form to determine which records to include in the prenote process. If the prenote Flag field is set to P, all automatic deposit instructions for the employee are included in the prenote process. If the prenote Flag field is set to N, only automatic deposit records with a value of 23, 28, 33, or 38 in the Transaction Code field are included in the prenote process.

Note. If an employee changes the amount that they want deposited into a bank account, the system does not change the value in the Transaction Code field to a prenote value. The system only changes this value if the bank account information changes.

After you enter or change automatic deposit instructions for employees, you must generate the prenote file to send to the clearing house facility. If your organization has multiple business units that use unique bank information, you can create separate clearing house facility files for each business unit. To do this, you must set up automatic deposit tape file information for each business unit.

See Also

PeopleSoft EnterpriseOne Human Capital Management Self Service 8.11 PeopleBook, "Employee Self Service," Entering Automatic Deposit Information

Chapter 4, "Setting Up System Options," Setting Up Business-Unit Constants, page 30

Prerequisites

Before you complete the tasks in this section:

- Set the company options for Company 00000 to determine how the system creates automatic deposit bank tapes.

  See Chapter 4, "Setting Up System Options," Setting Up Company Options, page 24.

- Set up debit account information for each entity in your organization for which you create automatic deposit and prenote files.

  See *PeopleSoft EnterpriseOne Payroll 8.11 PeopleBook*, "Setting Up Payroll Cycle Information," Setting Up Debit Account Information for Automatic Deposits.

- Create an export folder for the clearing house facility file. Contact your system administrator for assistance.

Setting Processing Options for Auto-Deposit prenote Bank File (R055011)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Company Options

These processing options are used to determine the processing information that is included in the prenote transaction file.

1. Enter Effective Deposit Date

Use this processing option to specify the date on which funds are to be deposited into an employee's bank account. If you leave this option blank, the system date is used.

Note. If you enter an offset number in the Offset Effective Deposit Date processing option, the system adds the number of days that you enter in that processing option to the date that you enter in this field to determine the effective deposit date. If you leave this field blank and enter an offset number, the system adds the number of days tat you enter in that processing option to the system date to determine the effective deposit date.

---

2. Off Set Effective Deposit Date

Use this processing option with the offset formula to determine the date on which funds should be deposited into an employee's bank account. If you enter a number in this field, the system adds that number of days to the date in the Effective Deposit Date processing option to determine the deposit date for the funds. If that processing option is left blank, the offset days are added to the system date to determine the deposit date. For example, if you enter 1 in this field and you leave the Enter Effective Deposit Date processing option blank, the deposit date that the system uses is the system date + 1. If you leave this option blank or enter 0, the date that you enter in the Enter Effective Deposit Date processing option is used.

Note. This feature works only if the date in the Enter Effective Deposit Date processing option is entered using MMDDYY format, as required by the clearing house facility.

---

3. Enter Trace Number (7 pos.)

Use this processing option to specify the trace number, which is assigned by the ODFI, and is used for the creation of automatic deposit and prenote transaction records. This number, which can be up to 15 characters in length, is used in conjunction with the batch number, transmission date, and file ID modifier to identify records within a file.

Optional Items

These processing options are used to define optional information that the system includes in the prenote transaction file.

1. Enter Tape Processor's Name if different from Company Name. If left blank, it will default to Company Name.

Use this processing option to identify the name of the ACH operator or sender. Typically, this is the name of your company or the entity for which you are creating an automatic deposit or prenote transaction file.

2. Descriptive Date

Use this processing option to specify the date description that you want to appear to the receiver of the automatic deposit or prenote transaction file. This 6-character code is used for descriptive purposes only and does not control the timing of fund deposits. Examples of possible entries for this processing option are 011305, 01 05, JAN 13, or JAN 05.

Note. If you are using the Offset Descriptive Days processing option, you must enter this date using the MMDDYY format.

3. Off Set Descriptive Date

Use this optional processing option if you want the offset date formula to determine the date for the descriptive date. If you enter a number in this field, the system adds this number to the date that is entered in the Descriptive Date processing option. For example, if you enter 2 in this field, the actual descriptive date that is used in the prenote transaction file is the date that is entered in the Descriptive Date processing option + 2. If you leave this option blank or if you enter 0, the date in the Descriptive Date processing option is used.

Note. To use this feature, the date in the Descriptive Date processing option must be entered using the MMDDYY format.

4. Reference Code for Auto Deposits

Use this processing option to identify user-defined information that is specific to your organization. This processing option is optional.

5. Company Entry Description (10 pos.)

Use this processing option to specify a 10-character description of the purpose of the file that you are sending. This code is used for information purposes only and does not affect the processing or calculation of automatic deposit or prenote transaction records. Examples of codes that you might use are REG SALARY, BONUS PAY, or HOLIDAY.

6. Enter if prenote is to be run in update or proof mode.

Use this processing option to determine the mode of processing when running the prenote transaction program. When you run this process in proof mode, the system creates a report to display the changes that will be made. When you run this process in update mode, the system updates the F060116 and F065016 tables, changing the prenote flag and adding the Auto Deposit Start Date. Values are:

0: Proof Mode

1: Update Mode

Running the Auto-Deposit prenote Bank File Process

Select Auto Deposit Information menu (G05AD), Auto Deposit prenote Bank File.

CHAPTER 32

Revising Employee Information

This chapter provides overviews of employee information revision and termination using Workflow and discusses how to:

- Correct employee information.
- Process future changes.
- Process mass changes.
- Update employee master records.
- Enter leave-of-absence information.
- Terminate employees.
- Approve terminations.
- Work with the supplemental database.

Understanding Employee Information Revision

After you add an employee record to the database, you can update the employee's information as necessary. For example, when an employee gets married, you might need to change the employee's marital tax status. When an employee receives a promotion, you typically update the employee's salary, job type, and pay grade.

You have many options for changing an employee's salary. One option is using Workflow. Workflow is an electronic message delivery system that streamlines the process of getting an approval for a salary change. Workflow automates tasks, such as notifying a manager that a salary change is waiting for approval, using an email based flow across a network.

You can enter employee changes that take effect either immediately or on a future date. You can also enter changes that apply to a group of employees.

When an employee arranges to be absent from work for an extended period of time, such as to care for a newborn, you can enter leave-of-absence information for the employee.

When an employee stops working for your organization, you need to terminate the employee. You can do this manually or with the help of Workflow.

Understanding Termination Using Workflow

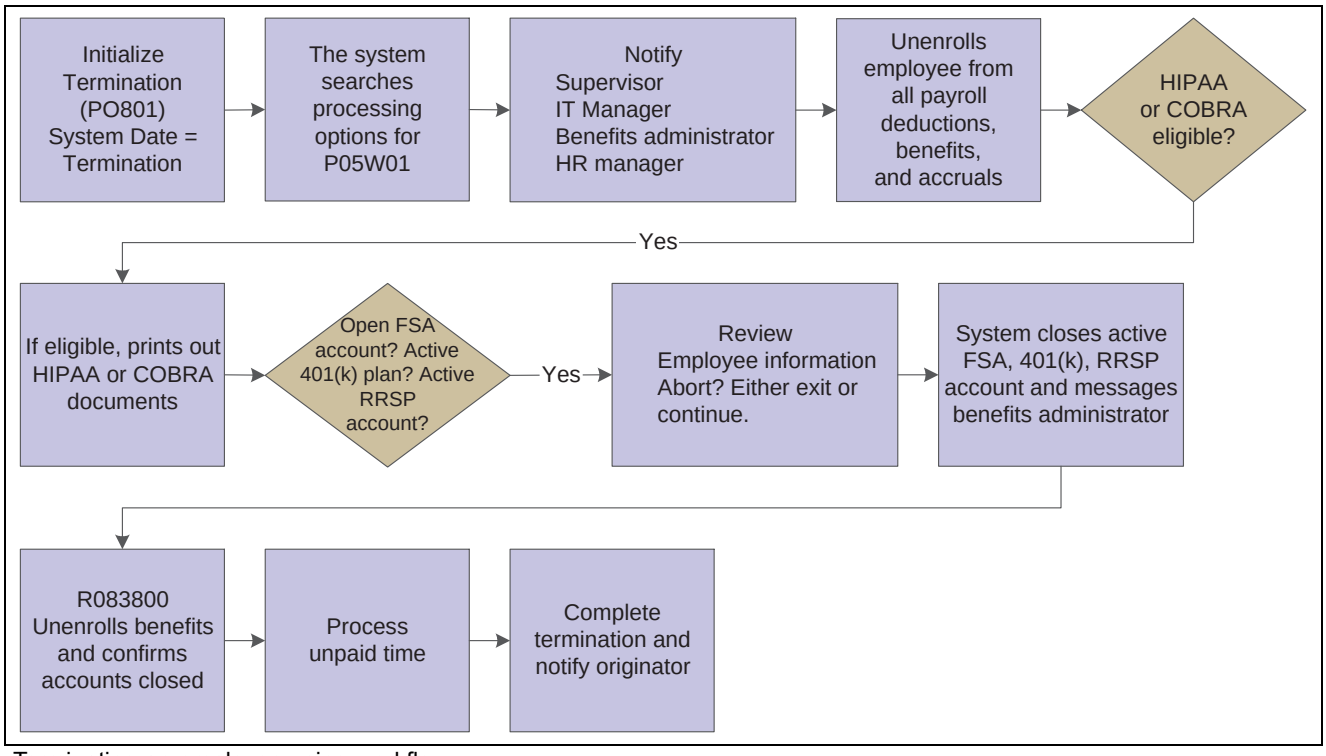
Using PeopleSoft Workflow Tools (Workflow) expedites the termination process and reduces some of the miscommunication that can occur during the termination process. In a typical termination process, payroll staff must manually calculate any benefits, such as vacation or sick accrual, due the employee. This requires accurate data from the benefits department. Timely and accurate communication among the Benefits, Human Resources, and Payroll departments is necessary to ensure that the final payment due the employee is precise.

If you use Workflow to help terminate an employee, after you initiate the termination, Workflow completes the subsequent administrative tasks associated with terminations. Most tasks are dependent on how your system is set up. For example, Workflow electronically notifies either one person or a group of people on a distribution list about a termination, if you define your notification process appropriately.

After you initiate the termination, Workflow completes these processes:

- Notifies the appropriate parties
- Reviews timecards and benefits information
- Sends approval message to originator
- Processes the payment
- Completes the termination

This graphic presents the process that Workflow completes after you initiate a termination:



Terminating an employee using workflow

Notification of the Appropriate Parties

Workflow notifies a person or a group of people, as defined during set up, about a termination.

Workflow might notify these people about a termination:

- The employee's immediate supervisors
- The IT manager
- The HR manager (to set up an exit interview)

Review of the Timecards and Benefits Information

Depending on which of these items the system administrator set in the HRM Termination Workflow Processing Options program (P05W01), Workflow searches for certain employee information and completes these processes:

Information	Process
Pays vacation accrual	Pays out vacation and holiday accruals through time entry.
Pays sick accrual	Pays out sick accruals through time entry.
Sends time entry notifications	Sends the time entry records to the originator or the designated person. The time entry records might contain unpaid time.
Sends batch enrollment	Sends Batch Enrollment that removes enrollment of the employee from all DBAs. A batch enrollment report confirms all actions. A message with the program attached is sent to the person being notified. The person must manually run the program from there.

Workflow sends the Work With Enrollment With Eligibility form to the benefits administrator confirming all the employee's benefits before the termination. If the employee has active retirement savings or government authorized spending accounts, Workflow informs the benefits administrator that these employee's retirement savings or government authorized spending accounts are closing and then closes the account automatically using Batch Enrollment (R083800).

Batch Enrollment also disengages the employee's other benefits, deductions, and accruals. A Batch Enrollment report is created confirming all the actions and is sent to the benefits administrator.

Workflow also searches for an employee declining balance owed. If a declining balance is owed, the system creates a record in the Deduction/Benefit/Accrual Ledger File table (F0609) so that the balance is deducted from the employee's last paycheck.

Approval of the Termination

If you are a supervisor or a manager who is responsible for approving terminations, you can approve a termination after receiving a termination message in your Workflow queue.

If Workflow is set up to pay sick time, vacation, or holiday accruals, or if the employee has unpaid time and unprocessed checks, Workflow sends a message to the originator's Workflow queue. When opening the Time Entry Workflow icon, the originator is prompted to review the employee's time entry record. The originator can approve or abort the termination process, or skip to time entry to review and adjust the employee's timecard.

Processing the Payment

After Workflow receives the originator's approval, the system sends the employee timecard to payroll to create a payment for the employee. If a payroll lockout occurs, the system puts the process on hold, sends a message to the originator, and creates the payment after the payroll concludes.

Note. The system does not update the Employee Master Information table (F060116) until the time entry record is approved. If no time entry record needs to be approved, the system updates the Employee Master Information table during the payroll process.

Completion of the Termination

After Workflow processes a payment, if you have the Send Completion Messages processing option set correctly in the HRM Termination Workflow Processing Options program (P05W01), the system sends a message to the originator confirming the termination.

Correcting Employee Information

This section provides an overview of employee information correction and discusses how to correct employee information.

Understanding Employee Information Correction

You can review employee information and update it as necessary. For example, when an employee receives a promotion, you typically update the employee's salary, job type, and pay grade.

If you are tracking employee history and turnover information, the system creates a history record every time you change employee information. After correcting employee information, you typically remove the incorrect entries from the employee's history and turnover records.

Form Used to Correct Employee Information

Form Name	Form ID	Navigation	Usage
Work With Employee Information	W0801A	Employee Management (G05BE1), Employee Information	Correct employee information.

Correcting Employee Information

Access the Work With Employee Information form.

Home Company Enter the company number where the employee records generally reside.

Active Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

Terminated Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

All Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

Effective On Enter an effective date that you want to record all the changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes that you make to the Employee Master table take effect immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the Date Started as the effective date.

Change Reason Enter a user defined code (06/T) that indicates the reason an employee's record changed. For example, you can enter the reason you are recommending a salary or rate change.

Note. If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.

See Also

Chapter 38, "Working with Employee History Records," Correcting Employee History, page 368

Processing Future Changes

This section provides an overview of future change processing, lists prerequisites, and discusses how to process future changes.

Understanding Future Change Processing

You can use the Future Data EE Master Revisions program (P06042) to enter future changes for an individual employee that will take effect on a future date. For example, if an employee will change from one business unit to another on a certain date, you can enter the new information prior to the employee actually changing business units.

You can enter future changes only for information that the system stores in the Employee Master Information table (F060116). Changes that affect supervisor and employee relationships are also saved in the Address Organization Structure Master table (F0150) and can be displayed with the Distribution List Control program (P02150). When you set up your system, you can limit the data items (fields) that you allow the update program to change. You can enter changes for a group of employees. For example, you might enter a mass change for all employees whose business unit 32 is changing to business unit 459.

After entering future changes, you must update the F060116 table for your changes to take effect. These options are available for updating changes:

- If you are using the EnterpriseOne Payroll system, you can allow the final update step of the payroll cycle to automatically update changes.
- You can request a batch job to update the changes.

When you update the changes using the batch job, the system does not update any employee records that are included in a current payroll cycle. Such records are called locked records.

Example of the types of future changes that you can enter are:

- Changes to employee information prior to the effective date of the change
- Multiple changes to the same data item with different effective dates

- Changes to employee records that are included in a current payroll cycle (locked records)

The future change process updates one or both of these tables, depending on how your processing options are set up:

- Future Data EE Master Revisions (F06042)
- Employee Master Information (F060116)

Prerequisite

Choose the data items (fields) that you want the update program to change.

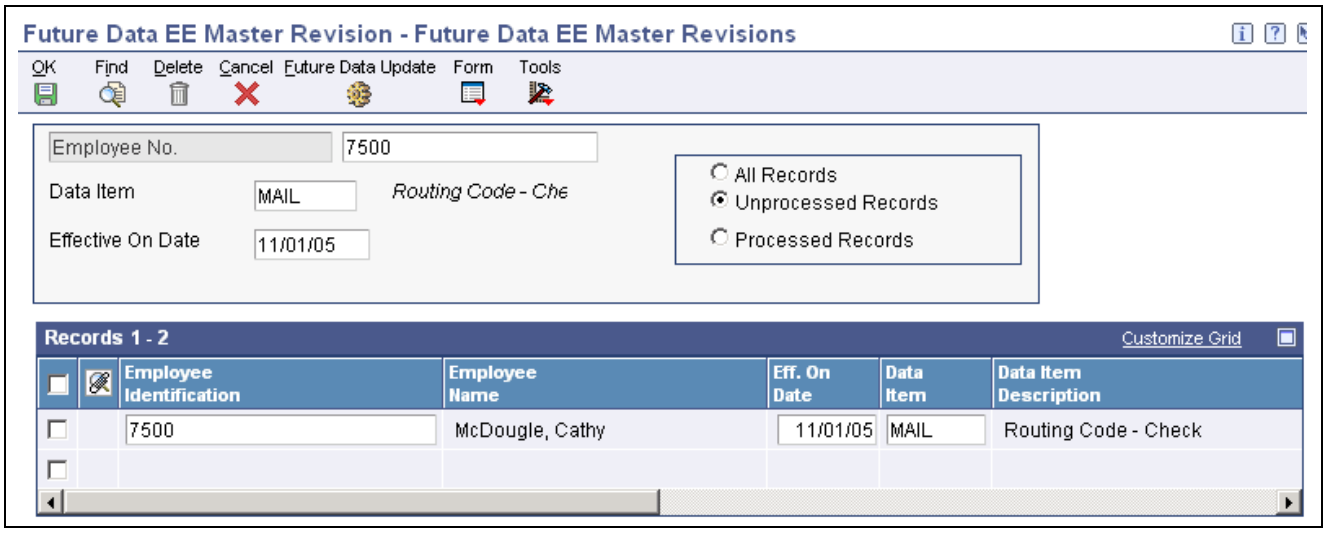
See Chapter 5, "Setting Up Employee Information," Choosing Fields for Future Data Revisions, page 39.

Form Used to Process Future Changes

Form Name	Form ID	Navigation	Usage
Future Data EE Master Revisions	W06042C	Employee Adv & Technical Operations (G05BE3), Future Data EE Master Revision	Process future changes.

Processing Future Changes

Access the Future Data EE Master Revisions form.



Future Data EE Master Revisions form

Unprocessed Records Enter an option that specifies whether the system displays unprocessed records, processed records, or all records.

Data Item Enter a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

Effective On Date Enter the date that the system updates the HR History table (F08042) with the revised information. The update program identifies the pay period ending

date of the payroll ID being processed to determine whether the future value qualifies for the update.

Future Value Enter a code that indicates selection or a future set of information. The value in this field represents an employee master value to be updated in the future based upon the effective date of the revision.

Chg Rsn Enter a code that indicates one of these:

- Changing an active employee's record.
- Terminating an employee.
- Recommending a change in salary or rate.

This is a user defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

See Also

Chapter 32, "Revising Employee Information," Updating Employee Master Records , page 316

Processing Mass Changes

This section provides an overview of mass change processing, lists prerequisites, and discusses how to:

- Set processing options for Employee Master Mass Changes (R06045A).
- Process mass changes.

Understanding Mass Change Processing

You process mass changes to change similar information for groups of employees at one time. For example, you could process mass changes in either of these situations:

- All employees currently in building 1 are moving to building 2.

  Because you use the check route code to indicate the location of employees, you must reassign the check route code for employees who are currently in building 1.

- Your company is restructuring departments.

  You must change the category code for all employees who are currently in department 10 to department 110.

When you are preparing to enroll employees in benefit plans, the mass change feature provides a convenient method for entering or updating the benefit group assignment for many employees.

When you process mass changes, you complete these procedures:

1. Identify employees in the data selection values.
2. Omit individual employees before the update occurs.
3. Identify the effective date and reason for the change.
4. Use percentages or flat amounts when changing salary or hourly rate.
5. Review both the old and the new data.

6. Override the mass change data and effective date for specific employees.
7. Apply changes immediately or at a later date.

After you enter mass changes, you must update the Employee Master Information table (F060116) for your changes to take effect. Examples of the ways that you can update changes are:

- If you are using the EnterpriseOne Payroll system, you can allow the final update step of the payroll cycle to automatically update changes.
- You can request a batch job to update the changes.

When you update the changes using the batch job, the system does not update any employee records that are included in a current payroll cycle. Such records are called locked records.

If a data item that is changed affects the employee and supervisor relationship, the information is stored in the Employee Master Information and Address Organization Structure Master (F0150) tables. When these relationships are changed, you can view the results in programs such as:

- A/B - Org Structure Browse (P0150)
- Distribution List Control (P02150)

The mass change process updates these tables, depending on how your processing options are set up:

- Future Data EE Master Revisions (F06042)
- Employee Master Information (F060116)
- Address Organization Structure Master (F0150)

Prerequisite

Choose the data items (fields) that you want the update program to change.

See Chapter 5, “Setting Up Employee Information,” Choosing Fields for Future Data Revisions, page 39.

Forms Used to Process Mass Changes

Form Name	Form ID	Navigation	Usage
Employee Master Mass Changes	W06045B	Employee Adv & Technical Operations (G05BE3), Employee Master Mass Changes.	Process mass changes.
Work With Batch Versions - Available Versions	W98305WA	Complete the Method for Numeric Change field on the Employee Master Mass Changes form and click OK.	Select data and data sequence.
Future Data EE Master Revisions	W06042C	Exit the Work With Batch Versions - Available Versions form.	Enter mass changes information.

Setting Processing Options for Employee Master Mass Changes (R06045A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Report

Use this processing option to specify whether you want to update the Future Data EE Master Revisions table (F06042) when you run the report.

1. Update F06042 Proof/Final.

Use this processing option to specify whether you want to update the Future Data Employee Master Revision file (F06042) when you run the report.

Values are:

0: Do not update the file (default).

1: Update the file.

2. Print Report.

Use this processing option to specify whether you want to print the report.

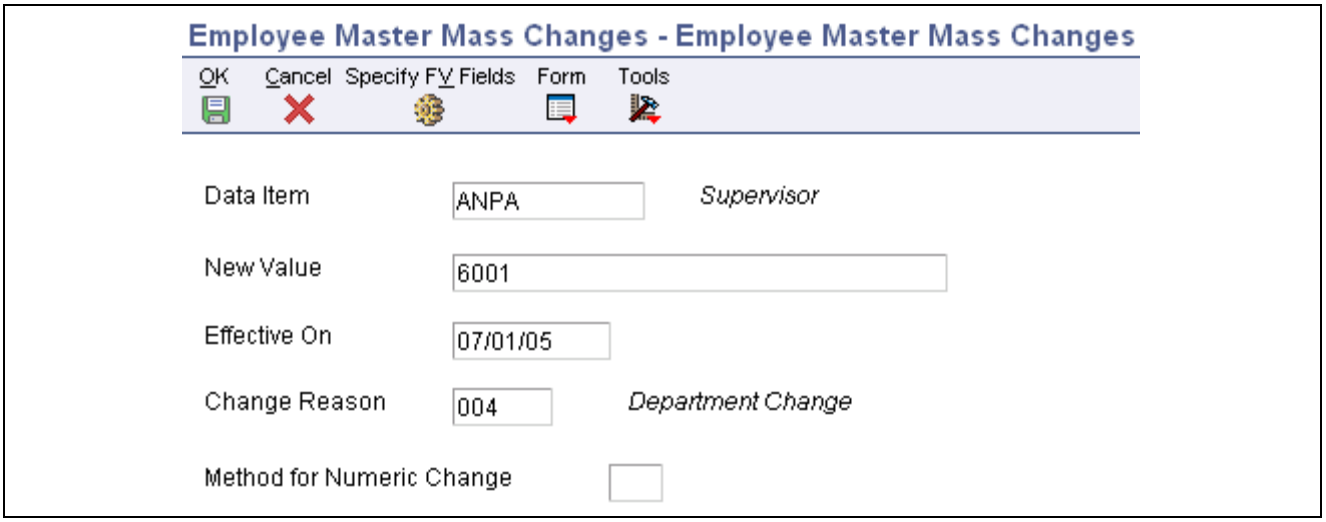
Values are:

0: Do not print the report.

1: Print the report (default).

Processing Mass Changes

Access the Employee Master Mass Changes form.



Employee Master Mass Changes form

Data Item

Enter a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

New Value Enter a code that indicates selection or a future set of information. The value in this field represents an employee master value to be updated in the future based upon the effective date of the revision.

You can use the field assist option to access the user defined code table that is linked to the data item that you entered.

Effective On Enter the date to apply the change to the employee record. This is not the pay period ending date. You must enter a date that updates the employee record before the payroll when the change is to take effect.

Change Reason Enter a code that indicates the reason for one of these:

- Changing an active employee's record.
- Terminating an employee.
- Recommending a change in salary or rate.

This is a user defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

Method for Numeric Change Enter a method that the system uses to calculate the amount of a numeric increase.

When you choose method F (Flat Rate Increase), the final amount is the original amount plus the indicated flat rate increase. When you choose method % (Percentage Increase), the final amount is the original amount multiplied by the indicated percentage plus the original amount. When you leave this field blank the final value is the value entered in the New Value field.

Future Value Enter a code that indicates selection or a future set of information. The value in this field represents an employee master value to be updated in the future based upon the effective date of the revision.

Note. After you enter mass changes, update the record in the Employee Master Information table (F060116).

See Also

Chapter 32, "Revising Employee Information," Updating Employee Master Records , page 316

Updating Employee Master Records

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

- Set processing options for Employee Master Update (R06394).
- Run the Employee Master Update program.

Understanding Employee Master Record Updates

After you enter mass or future changes for one or more employees, you can do one of these:

- Allow the system to update the Employee Master Information table (F060116) during the final update step of the payroll cycle.

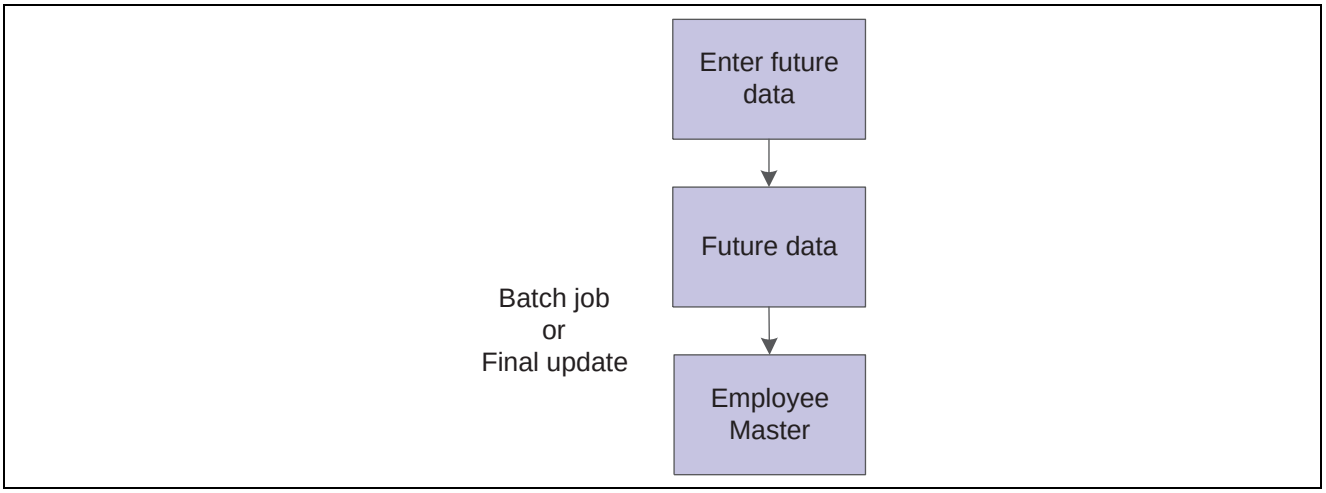
This method applies only if you are using the EnterpriseOne Payroll system.

- Manually submit the Employee Master Update program (R06394) to apply changes to the information in the F060116 table.

When you allow the system to make the changes during the payroll cycle, the system processes future changes only for the employees who are included in the current payroll cycle. When you choose to run the master update, you can choose employees who are included in different payroll cycles. For example, you can choose some employees who are included in the payroll cycle for hourly employees and some employees who are included in the payroll cycle for salaried employees.

Run the update program if you need to control when the update occurs and which records the system updates. You can set the processing options for a specific date. The system updates any records with an effective date on or before that date. You can identify all employees or a specific employee in the data selection values.

This graphic illustrates how the system processes data changes:



Data changes processing

Setting Processing Options for Employee Master Update (R06394)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

Use these processing options to specify the mode in which the report runs and the records that the system displays on the exception report.

1. Pay Period Ending Date Use this processing option to specify the last day of a processing period (pay period, month, quarter, or year).

(Today's Date Will be used if left blank)

2. Process Mode: Use this processing option to specify whether to process future data in proof mode or final mode. Values are:

0: Proof mode

The system prints the requested reports without updating the Employee Master Information table (F060116). Use the report to verify future data changes before you process future data in final mode.

1: Final mode

The system prints the requested reports and updates the database. Use this mode after you have verified future data changes and are ready to update the Employee Master Information table.

3. Exception Report Mode: Use this processing option to specify whether the system prints all records or prints an exception report that displays only records with editing errors that occur when attempting to update the Employee Master Information table (F060116). Values are:

0 or Blank: The system prints an exception report that displays only records with errors. Use this mode to display which records have editing errors and the types of errors. Revise data specifications that correct the errors before you process future data in final mode.

1: The system prints a report that contains all records. Records without an error display No Editing Error in the Editing Error Message column. Records with errors display the error IDs and the error descriptions in the Editing Error Message column.

Running the Employee Master Update Program

Select Employee Adv & Technical Operations menu (G05BE3), Future Data Employee Master Update.

Entering Leave-of-Absence Information

This section provides an overview of leave-of-absence information entry and discusses how to enter leave-of-absence information.

Understanding Leave-of-Absence Information Entry

When an employee arranges to be absent from work for an extended period of time, such as to care for a newborn, you can enter leave-of-absence information for the employee.

You can enter the date on which the leave begins and the date on which the employee plans to return. Entering leave-of-absence information allows you to:

- Keep your employee information current.
- Indicate whether the employee receives payments while on leave.
- Report on inactive employees.

Form Used to Enter Leave-of-Absence Information

Form Name	Form ID	Navigation	Usage
Employee	W0801EMPA	Employee Management (G05BE1), Employee Information Select an employee record and click Select.	Enter leave-of-absence information.

Entering Leave-of-Absence Information

Access the Employee form.

Home Company Enter the company number where the employee records generally reside.

Active Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

Terminated Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

All Enter a value for the Employee Active/Terminated/All Flag. This flag is used for PeopleSoft EnterpriseOne to select and sort employees depending on their status.

Pay Status Enter the code used to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.

See also Employment Status (EST) and Change Reason (TRS).

Leave Begin Date Enter the date on which an employee's paid or unpaid leave of absence begins. Use this date to indicate the leave for the Family and Medical Leave Act.

If you are using Position Control, the system enters a leave of absence as unpaid leave and adjusts the projected year-end calculations accordingly.

Leave End Date Enter the date on which an employee's paid or unpaid leave of absence expires.

If you are using Position Control, the system enters a leave of absence as unpaid leave and adjusts the projected year-end calculations accordingly.

Terminating Employees

This section provides an overview of employee termination, lists prerequisites, and discusses how to:

- Terminate employees.
- Complete requisition information for terminations.

Understanding Employee Termination

A terminated employee is an employee who no longer works for your organization.

Entering termination information allows you to:

- Keep your employee information current.
- Report on terminated employees.
- Prevent the employee from receiving payments (if you are using the EnterpriseOne Payroll system).

You have two options for terminating an employee. You can manually terminate an employee or, if Workflow is enabled, you can simplify the termination process by using Workflow. If your software is set up to track employees and jobs with requisitions, and a separating employee is included on a requisition, the system can automatically include the requisition process in the termination process.

The initial task for terminating an employee is the same for both options. The two options occur with the administrative tasks after you terminate an employee. If you choose to terminate an employee manually, you need to manually perform these tasks that are associated with terminating an employee:

- Contact supervisors and benefits administrators.
- Calculate the employee's unpaid time, vacation, holiday, and sick accruals.

If you use Workflow to terminate an employee, Workflow can automatically notify the appropriate parties of the termination with electronic messages and process any unpaid time and accruals.

Workflow can be set up to complete one or any combination of these administrative tasks automatically after you terminate an employee. For example, Workflow can be set up to pay or not pay for vacation accruals and to notify certain people.

- Notify the HR manager to set up an exit interview.
- Notify the appropriate managers and supervisors of the termination.
- Notify the IT manager of the termination so that technical tasks, such as deleting the employee's email address, are completed.
- Determine whether the employee has unprocessed checks.
- Determine whether the employee has outstanding time.
- Calculate the employee's unpaid sick, holiday, or vacation accruals.
- Calculate declining balances owed.
- Notify the benefits administrator if the employee has an FSA account or a retirement plan that will be closed.
- Send a copy of the Work With Enrollment with Eligibility form and the Batch Enrollment report (R083800) to the benefits administrator.

  The Work With Enrollment with Eligibility form confirms the benefits that the employee has before the termination. The Batch Enrollment report confirms that the program disengaged the employee from payroll deductions, benefits, and accruals as part of the termination process.
- Create a COBRA letter if the employee is eligible for COBRA benefits.
- Create a HIPAA letter if the employee is eligible for HIPAA benefits.
- Create and send a copy of an Employee Report by Data Type report (R080400) to the employee's supervisor if the employee has company property.

Prerequisites

Before you complete the tasks in this section:

- If you use PeopleSoft Workflow Tools (Workflow) to terminate an employee, activate or deactivate certain Workflow subprocesses with HRM Termination Workflow Processing Options (P05W01). These processing options must be accessed through the Application Versions Interactive program (P983051).
- Verify that TERMEMP01 and TERMEMP03 are activated in the Process Master program (P98800). Depending on how you set your processing options for P05W01, you might also need to verify that these optional processes are activated or deactivated: TERMNTFY01, TERMTIME, TERMBEN01, TERMUPDATE, TERMEMP05, TERMNTFY01, TERMABNOT, TERMEMP08.

  See *PeopleSoft EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools*
- If you want to use Workflow to help terminate an employee, verify that Workflow is set up appropriately for your business needs.

Forms Used to Terminate Employees

Form Name	Form ID	Navigation	Usage
Employee	W0801EMPA	Employee Management (G05BE1), Employee Information Select an employee record and click Select.	Terminate employees.
Requisition Information	W08102E	Employee Management (G05BE1), Employee Information	Complete requisition information if the system automatically displays the Requisition Information form.

Terminating Employees

Access the Employee form.

Employee No Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Pay Status Enter the code used to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.

See also Employment Status (EST) and Change Reason (TRS).

Termination Date Enter the date that the employee was terminated, if applicable.

Expected Recall Date Enter the date on which the employee can be recalled for employment, if known.

Employee Benefit Status Enter a user defined code (06/EA) that specifies an employee status, such as new hire or rehire. The system uses this value as it searches and tests for benefits eligibility. An * indicates that the guidelines refer to all employee statuses that are not otherwise specified.

Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.

Move to Applicant Pool Enter a code that you use to indicate whether a terminated employee should be moved into the applicant pool. When you move an employee to the applicant pool, the system changes the employee search type to applicant (A) and adds a record to the Applicant Master (F08401). If you do not move the employee to the applicant pool, the system changes the employee search type to terminated (X).

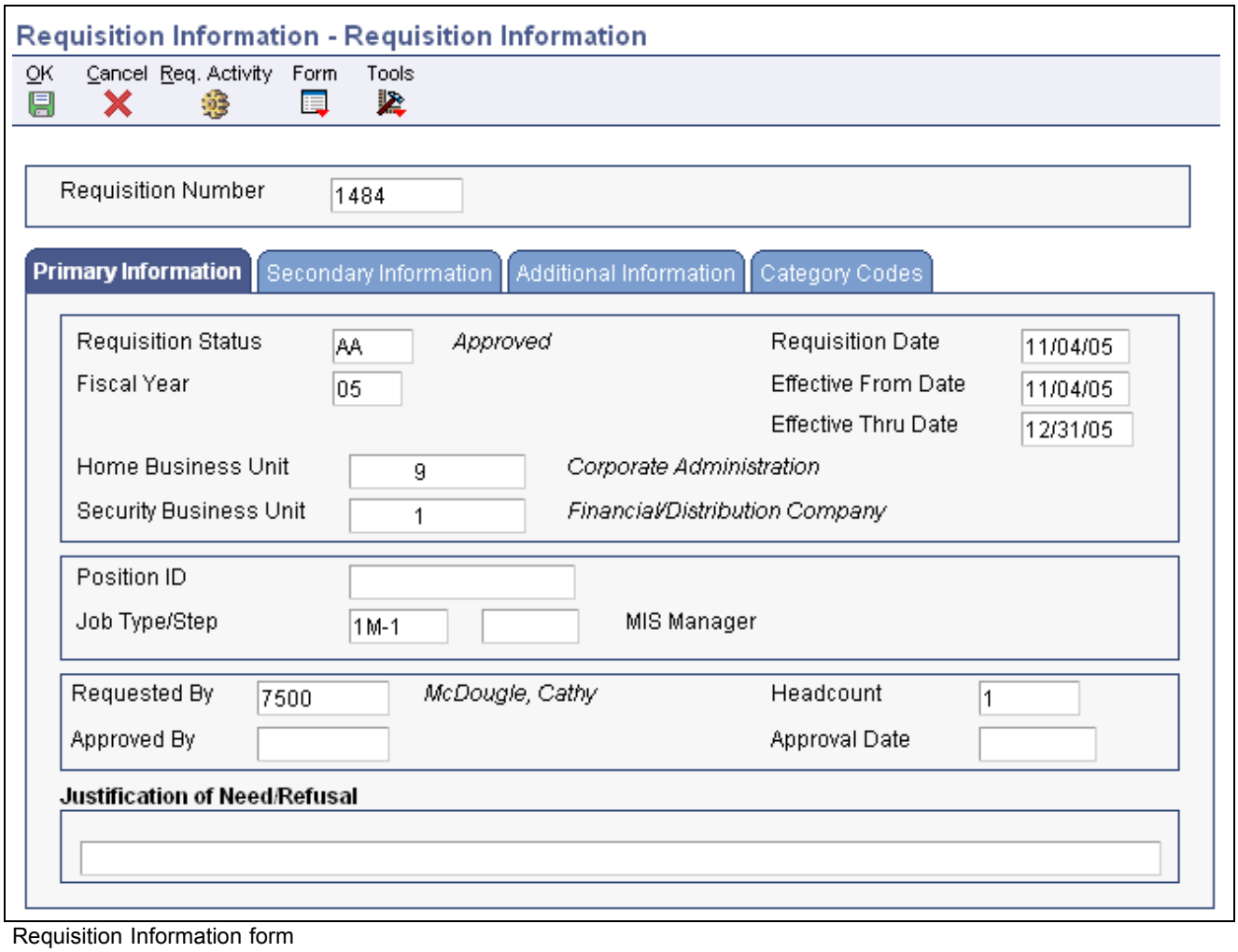
Select this option to allow an employee to become an eligible applicant for your organization after termination.

Note. If you are using Workflow, a small form appears stating that the termination is pending.

If your software is set up to track requisition information, and the employee who is separating from the organization is set up on a requisition, the system automatically displays the Requisition Information program (P08102) so a requisition can be added for the terminated employee's position.

Completing Requisition Information for Terminations

Access the Requisition Information form.



Requisition Information form

Requisition Number Enter the number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.

Requisition Status Enter a code that describes the status of the position associated with the requisition. The system provides several codes that you can use for requisition status purposes. Two of them are hard-coded and should not be changed:

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

You can define requisition status codes in user defined codes table (08/RS). Statuses that indicate that a requisition is approved should begin with the letter A.

If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the requisition status when the appropriate person approves the requisition. This update overwrites any existing value in the field.

Requisition Date Enter the effective date of the requisition. The default value for this field is the system date.

Fiscal Year Enter a four-digit number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Setup form).

Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005, and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 2005 rather than 2006.

Effective From Date Enter the date on which a requisition, a position, or activity within a position takes effect.

Effective Thru Date Enter the date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures.

Security Business Unit Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Position ID Enter a code that you use for budgetary (position) control purposes. The position ID consists of:

- Position (position code and its description).
- Fiscal year.
- Home business unit.

For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005-2006, for home business unit 41.

You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.

Requested By Enter the Address Book number of the person who enters a position requisition. This field is required.

Headcount Enter the number of employees requested, budgeted, or approved for a position or requisition.

Approved By Enter the address book number of the person who approves a requisition.

If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approved by field when the appropriate person approves the requisition. This update overwrites any existing value in the field.

Approval Date Enter the date on which the person with the appropriate authority approves a requisition.

Pay Grade/Step Enter a code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.

To set up pay grades, use Pay Grades by Class (P082001).

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

Grad Step Enter a code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate.

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year

- Days per year

Pay Class(H/S/P) Enter a code that specifies how an employee is paid. Values are:

H: Hourly

S: Salaried

P: Piecework

Overtime Exempt Enter a code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Values are:

Y: The employee fits the rules and does not have to be paid for working overtime.

N: The employee does not fit the rules and is to be paid for working overtime.

Expected Salary Enter the salary you expect to pay the individual filling the requisition.

FTE Enter the number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.

Hours Enter the number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all the full-time equivalents (FTEs). If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches these sources, in the order that they are listed, and uses the value from the first of these sources:

- The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered.
- The number of FTEs multiplied by the standard number of hours per year for Company 0
- A default value that you defined in the data dictionary when you set up your system
- *2080*

Last Filled By Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Filled Date Enter the assignment or hire date for the last person to fill the requisition.

Req Code 01 Enter a code defined by the user for reporting on requisitions. Each category code is tied to a particular set of User Defined Codes in the data dictionary.

Note. If Workflow is set up and activated, the system displays the Workflow Pending Review Notification form.

Approving Terminations

This section provides an overview of termination approval and discusses how to:

- Set processing options for HRM Termination Workflow (P05W01).
- Approve terminations.

Understanding Termination Approval

After Workflow sends notifications and the appropriate parties review the employee timecards and benefits information, the system sends a request to a manager to approve the termination. The manager can review the termination information and then either approve or abort the termination process. The manager might also elect to review or adjust the employee's timecard information before approving the termination.

Forms Used to Approve Terminations

Form Name	Form ID	Navigation	Usage
Work Center	W012503F	Workflow Management (G02), Work Item Manager	Review messages in queue.
Termination Approval	W05W98AA	Click Termination Approval on the Work Center form.	Approve terminations.

Setting Processing Options for HRM Termination Workflow (P05W01)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

EE Termination

Use these processing options to define the defaults that the program will use at each step of the workflow process. The first four options define portions of the communication process. Options five through seven stipulate whether Time Entry, HRM Payroll, and HRM Benefits software is installed. Options eight through ten indicate how the system addresses accrued benefits in the areas of sick time, vacation and holidays.

1. Send Batch Enrollment Use this processing option to specify whether Workflow sends the Batch Enrollment report (R083800) to the designated recipient. Values are:

0: Do not send the Batch Enrollment report to the designated recipient.

1: Send the Batch Enrollment report to the designated recipient.

2. Send Completion messages Use this processing option to specify whether Workflow sends a completion message to the designated recipient(s) when the termination is complete. Values are:

0: Do not send the completion message to the designated recipient.

1: Send the completion message to the designated recipient.

3. Send Enrollment with Eligibility Use this processing option to specify whether Workflow sends the Work With Enrollment With Eligibility form to the designated recipient. This form displays the employee's benefits before the termination. Values are:

0: Do not send Enrollment with Eligibility to the designated recipient.

1: Send Enrollment with Eligibility to the designated recipient.

4. Send time entry notifications Use this processing option to specify whether Workflow sends a notification message to the designated recipient of any unpaid time or unprocessed checks that the employee has as of the termination date. Values are:

0: Do not send the unpaid time message to the designated recipient.

1: Send the unpaid time message to the designated recipient.

5. Time Entry is installed Use this processing option to specify whether the Time Entry system is installed. Values are:

0: The Time Entry system is not installed.

1: The Time Entry system is installed.

6. HRM Payroll Installed? Use this processing option to specify whether the Payroll system is installed.

Values are:

0: The Payroll system is not installed.

1: The Payroll system is installed.

7. HRM Benefits Installed? Use this processing option to specify whether the Benefits module is installed so that Workflow can send the Batch Enrollment report and the Work With Enrollment With Eligibility form as specified in other processing options for termination workflow. Values are:

0: The Benefits module is not installed.

1: The Benefits module is installed.

8. Pay Sick Accrual Use this processing option to specify whether the system pays the terminated employee for any accrued sick time. Values are:

0: The system does not pay the terminated employee for accrued sick time.

1: The system pays the terminated employee for accrued sick time.

9. Pay Vacation Accrual Use this processing option to specify whether the system pays the terminated employee for any accrued vacation time. Values are:

0: The system does not pay the terminated employee for accrued vacation time.

1: The system pays the terminated employee for accrued vacation time.

10. Pay Holiday Accrual Use this processing option to specify whether the system pays the terminated employee for any accrued holiday time. Values are:

0: The system does not pay the terminated employee for accrued holiday time.

1: The system pays the terminated employee for accrued holiday time.

Approving Terminations

Access the Termination Approval form.

Skip To Name Enter the text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Code 1 Enter one of thirty reporting codes that you can assign to an address in the Address Book system. Use these codes to group address book records for reports, mailings, and so on. Category codes are user defined (system 01, types 01 through 30). Examples of category codes include:

- Category code 01: Location or Branch
- Category code 02: Salesperson
- Category code 03: Product
- Category code 04: Credit officer

Unprocessed Checks Enter an option that specifies the type of processing for an event.

Unpaid Time Enter an option that specifies the type of processing for an event.

Unpaid Sick, Vacation, Holiday Accrual Enter an option that specifies the type of processing for an event.

Unpaid DBA's Enter an option that specifies the type of processing for an event.

Payroll Lockout Enter an option that specifies the type of processing for an event.

Payroll Enter an option that specifies the type of processing for an event.

Begin Date Enter an event point for JDE Date.

End Date Enter an event point for JDE Date.

Continue Enter an option that specifies the type of processing for an event.

Abort Enter an option that specifies the type of processing for an event.

If you select Abort, you must also enter comments regarding your action in the text window.

Skip Time Entry Enter an option that specifies the type of processing for an event.

If you select Skip Time Entry, you must also enter comments regarding your action in the text window.

Wait for Payroll Lockout Enter an option that specifies the type of processing for an event.

If you click Wait for Payroll Lockout, the system temporarily stops the termination process until a payroll completes. If you click Continue, the system continues the termination. If you click the Abort option, the Abort form appears. If you click Skip Time Entry, the employee's time entry record appears on the Time Entry Revisions form.

If you click Wait for Payroll Lockout and then click OK, you might want to click the Re-Verify option on the Form menu at a later time to refresh the form and display any status changes. For example, if an employee is in a payroll lockout, you might click this option to verify whether the Pre-Payroll lockout status is still checked.

Effective On	Enter the effective date that you want to record all the changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes that you make to the Employee Master table take effect immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the Date Started as the effective date.
Change Reason	Enter a user defined code (06/T) that indicates the reason an employee's record changed. For example, you can enter the reason you are recommending a salary or rate change. Note: If you are reactivating an employee, you must change the code in this field to a numeric character. The default reason code for new hires is the default value for this data item.
Approve	Enter an option that specifies the type of processing for an event.
Disapprove	Enter an option that specifies the type of processing for an event.

Note. If the Pre-Payroll Lockout field is marked, you might want to continue with the termination process, or wait until the payroll completes.

If you click Continue and then click OK, Workflow continues the termination process and processes a payment.

To review historical information about the current termination process, you can choose Audit Trail from the Form menu and review the information in the Process Audit Trail form.

See Also

Chapter 32, "Revising Employee Information," Understanding Termination Using Workflow, page 308

Working with the Supplemental Database

This section provides an overview of the supplemental database, lists prerequisites, and discusses how to:

- Set processing options for Transfer Supplemental Data on Hire/Termination (P08094).
- Set up cross-reference tables for supplemental data.
- Transfer supplemental data.
- Work with multiskill search.

Understanding the Supplemental Database

You might need to store information about a contact that has no place reserved for it in the standard master tables. We refer to this additional information as supplemental data. Each supplemental database is identified by a code that is specific to a system. For example, for the Address Book system, the supplemental database code is AB. Depending on what kinds of supplemental data you maintain, you can set up more than one database for a system.

If your company is multinational, you can set up a language override code that allows you to write and view supplemental data in an appropriate language.

Supplemental database code information is stored in the Supplemental Database Setup table (F00090).

The Address Book system does not require you to use supplemental data.

Supplemental Data for Human Capital Management

Supplemental data is any type of information that you want to track but for which the system provides no tracking. It can include information about employees, such as their educations or work experiences, or information that is unique to your business requirements, such as information about foreign languages spoken.

You can track supplemental data in these systems:

- Address Book
- General Accounting
- Human Capital
- Payroll
- Asset Management (equipment)
- Fixed Assets
- Work Orders (engineering orders)
- Inventory Management

The way that you set up and maintain supplemental data is the same for all of these systems.

With each of these systems, we provide one or more supplemental databases that can track related types of supplemental data. The Human Capital Management Foundation system contains a supplemental database for each of these:

- Employees (E)
- Jobs (J)
- Applicants (A)
- Requisitions (R)

You can set up any supplemental database so that the information that you enter appears in the language of your choice.

When setting up supplemental data, you define the types of supplemental information that you want to track in each of the supplemental databases. For example, in the job database, you can track job descriptions and requirements. In the employee and applicant databases, you can track job skills, education, and work experience.

To simplify working with supplemental information, you might choose to make some types of supplemental data consistent across multiple databases. For example, if you track job skills for employees, you can also track job skills for applicants. Making these supplemental data types consistent allows you to:

- Simultaneously search for both applicants and employees who have specific job skills.
- Transfer a hired applicant’s supplemental data to the employee database.

You can also transfer supplemental information from one data type to another within the same database. You might need to transfer supplemental data in cases where you change the name of a data type or when you decide to divide the information in one data type into multiple data types.

Example: Setting Up a Code Format Data Type

When you define a code format data type, you specify a code title and, typically, a related date. You can also associate the code title with a user defined code table. This section describes how to set up a code format data type that you could use to track employee training. The data type is associated with a user defined code table that you have already set up.

Define this information:

- Code title - Type (types of training that you track)
- Date from title - Trng Dte (date when training was completed)
- Amount 1 title - Costs (amount of training costs)
- System code - 55 (system code for the user defined code table that you set up for the training type)
- Record type - TG (record type for the user defined code table that you set up for the training type)

Language Override Setup

If your company is multinational, you can use the Supplemental Data Language Override feature to view descriptions for the key fields in the language that you specify. The key fields for which you designate the language override must be the same fields that you designated as key fields when you set up your database. For example, if you designated a key field in the supplemental database setup, you can assign a Spanish language code and enter that key field description information in Spanish. If the Language field in your user profile is set to the same language, the key fields on the data entry form that is provided by the Supplemental Data program (P00092) appear in the language that you specify. You can later view the supplemental database information in Spanish by selecting the Spanish language code.

Cross-Reference Tables Setup for Supplemental Data

To save time and reduce typing errors, you can set up your system to automatically transfer a terminated employee's supplemental data to the applicant database. An example of a terminated employee whose supplemental database you might transfer is a seasonal employee that you terminate at the end of the season and intend to rehire next season.

Transferring supplemental data in this manner makes it easy to maintain consistent data throughout the processes of hiring applicants and terminating employees.

When you set up the cross-reference table, observe these guidelines:

- The format (code or narrative) of each data type that you want to transfer must be the same in both databases.
- For code format data types, the source data type and target data type codes must be the same.
- The user defined code tables that are associated with code format data types must be the same in both databases.

For example, if you have a data type, Prior Employment, in the applicant database that is associated with table 07/G, you can cross-reference it with the data type Prior Employment in the employee database, provided that the data type also uses table 07/G. When you transfer supplemental data for a terminated employee, you can choose to save a copy of the data in the employee database, or delete the information from the employee database and store it only in the applicant database.

Note. You must have the Recruitment Management module to transfer supplemental data for terminated employees.

Supplemental Data Transfer

After defining types of supplemental data, you can transfer data from one data type within a database to another. If you change the data type code for a type of supplemental data, you can use this program to transfer data from the old data type to the new one. For example, if you have a data type S, for skills, that contains employee information, and you need to change its data type code to SK, you can use this program to move employee information from data type S to data type SK.

Transferring supplemental data saves you time and reduces typing errors. You can transfer data by:

- Copying the information, which retains it in one data type and transfers it to another
- Moving the information, which deletes it from one data type and transfers it to another

Working with Multiskill Search

You can search your supplemental database for records that meet criteria that you define. You typically use this type of search when you are looking for a person to fill a vacancy within your organization.

For example, you can search for all employees and applicants who meet these criteria:

- Have an MBA degree
- Speak French
- Are certified public accountants
- Know RPG programming

When you perform the search, the system lists all of the people who meet the multiple criteria. You can enter up to 20 search criteria.

The criteria that you enter can be based on either an AND condition or an OR condition. This means that you can search for people who meet either all of the criteria or some of the criteria. For example, you can search for people who meet these criteria:

- Know C programming, AND have a degree in either computer science or mathematics
- Have an MBA degree from any college OR a BA in business from Harvard

The system processes search criteria in the order in which you list them. When any of the criteria that you specify are based on an OR condition, the order in which you enter the search criteria is important.

Example: Entering Search Criteria

In this example, you are searching for people who know C programming and have a degree in either mathematics or computer science. To locate that group of people, enter these search criteria in the order listed:

C programming

AND

Degree in computer science

OR

C programming

AND

Degree in mathematics

To locate the people who meet the search criteria, the system completes these steps:

1. Locates the people who know C programming. (For demonstration purposes, call this group of people group A.)
2. Searches group A for people who have degrees in computer science. (Call these people group B.)
3. Searches group A for people who have degrees in mathematics. (Call these people group C.)

   The result of the search is the total of the people in groups B and C.

Prerequisite

Verify that the data type in the database you are copying from and the data type in the database you are copying to, are the same.

Forms Used to Work with the Supplemental Database

Form Name	Form ID	Navigation	Usage
Supplemental Data X-Reference	W08094A	Supplemental Data Setup (G05BSD4), Transfer Supplemental Data on Hire.	Set up cross-reference tables for supplemental data.
Supplemental Data Copy/Move	W080840A	Supplemental Data Setup (G05BSD4), Supplemental Data Copy and Move	Transfer supplemental data.
Supplemental Data Multiskill Search	W080250G	Employee Supplemental Data (G05BSDE1), Supplemental Data Multiskill Search.	Work with multiskill search.

Setting Processing Options for Transfer Supplemental Data on Hire/Termination (P08094)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Versions

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter a '1' to transfer supplemental data on hire, enter a '2' to transfer data on terminate.

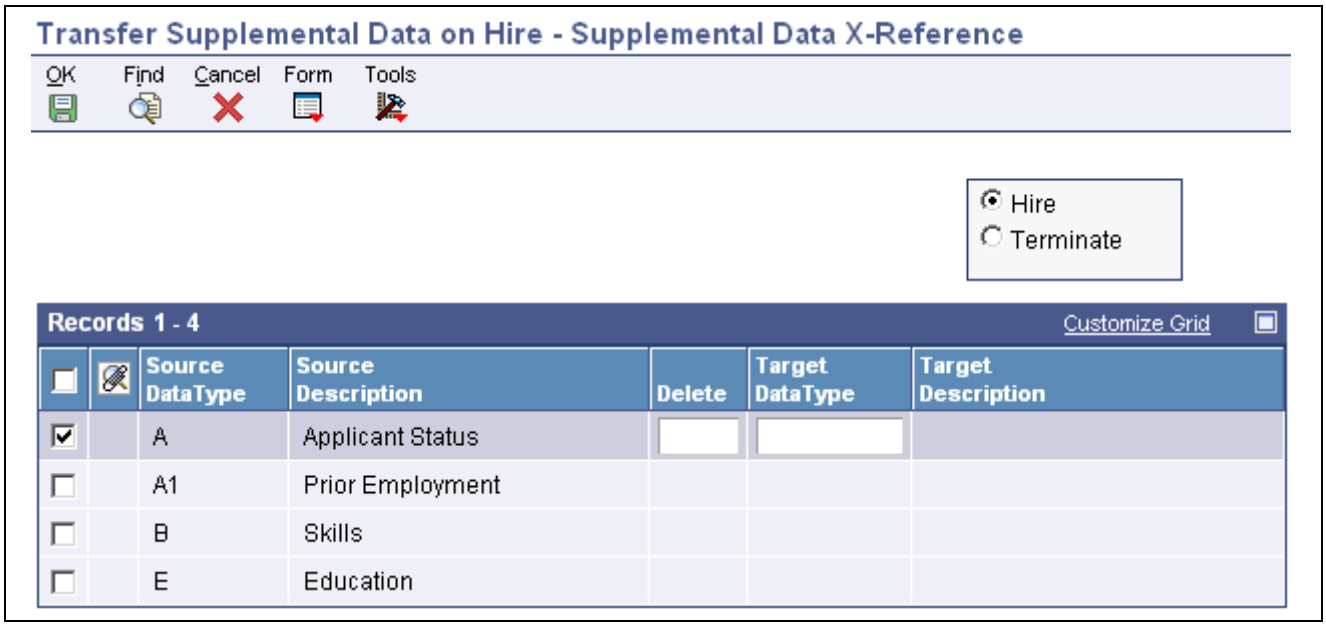
Use this processing option to specify how the system handles supplemental data. Values are:

1: Transfer supplemental data on hire.

2: Transfer data on terminate.

Setting Up Cross-Reference Tables for Supplemental Data

Access the Supplemental Data X-Reference form.



Supplemental Data X-Reference form

Hire Enter the value that specifies the type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases. Values are:

H: When you hire an applicant, transfer applicant profile data to the employee supplemental database.

T: When you terminate an employee, transfer employee profile data to the applicant supplemental database.

Terminate Enter the value that specifies the type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases. Values are:

H: When you hire an applicant, transfer applicant profile data to the employee supplemental database.

T: When you terminate an employee, transfer employee profile data to the applicant supplemental database.

Source DataType Enter a code that you assign to supplemental data so that you can group data by categories. Values include:

A: Approval steps

B: Requisition requirements

C: Interview process

N: Requisition notes

Delete Enter a code that defines whether supplemental data should be deleted from the applicant database when it is moved to the employee database. Values are:

Y: Yes, move the applicant supplemental data to the employee database and delete the data from the applicant database.

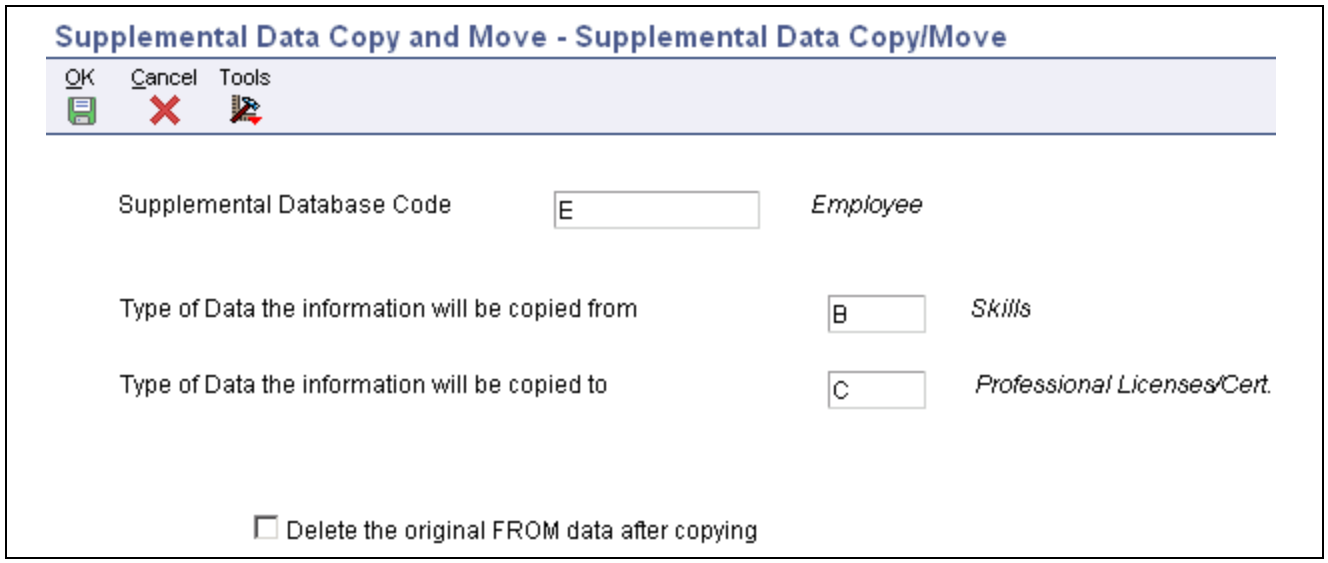
N or Blank: No, do not delete the supplemental data from the applicant database. Instead, make a copy of the supplemental data and move the copy to the employee database.

Target DataType Enter a code you define and use to categorize data within a specific database. The code is often an abbreviation for the data it represents. For example, CC could represent company cars, and EC could represent emergency contacts.

You define these codes using the Define Types of Data screen.

Transferring Supplemental Data

Access the Supplemental Data Copy/Move form.



Supplemental Data Copy/Move form

Supplemental Database Code Enter a user defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills.

Type of Data the information will be copied to Enter a code that you assign to supplemental data so that you can group data by categories. Values include:

A: Approval steps

B: Requisition requirements

C: Interview process

N: Requisition notes

Type of Data the information will be copied from Enter a code that you assign to supplemental data so that you can group data by categories. Values include:

A: Approval steps

B: Requisition requirements

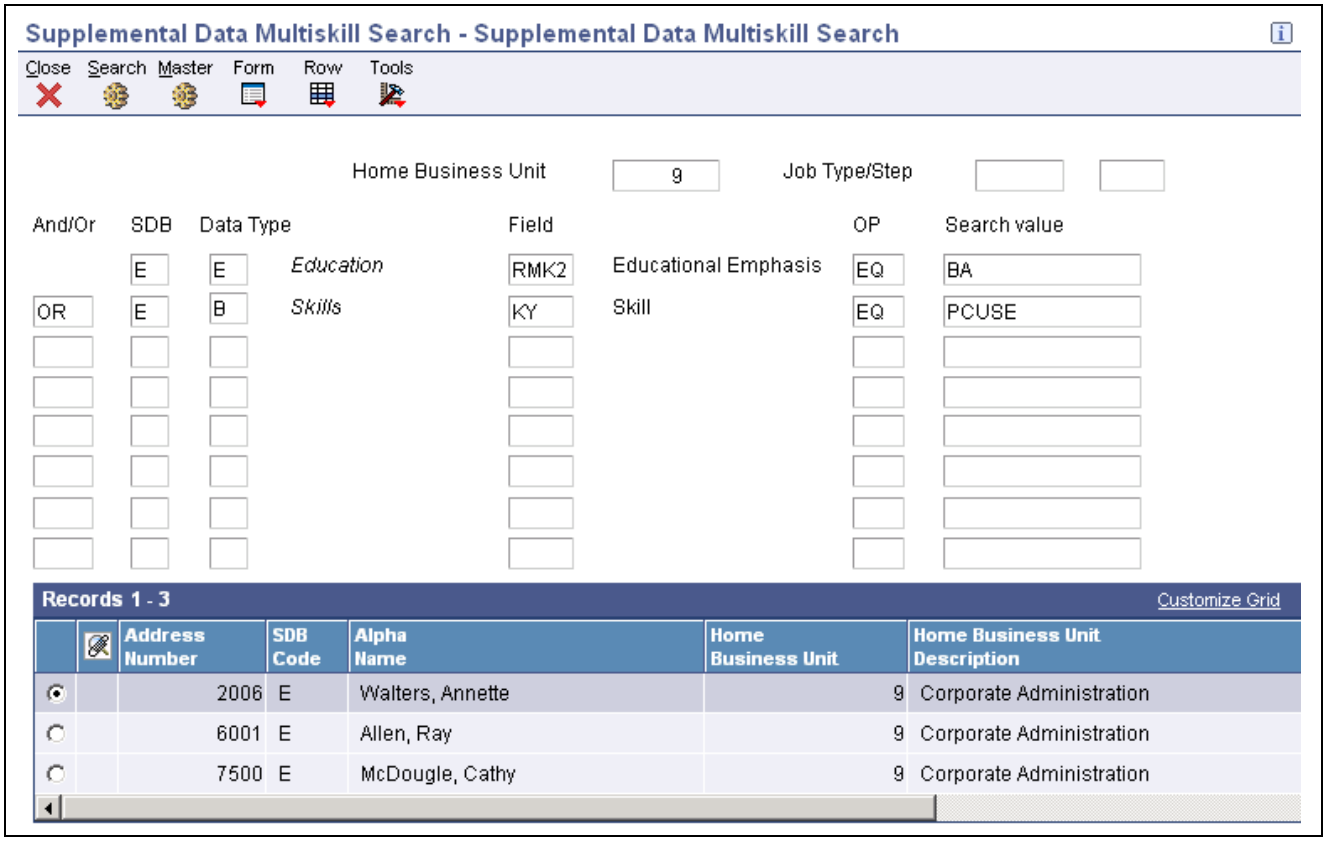
C: Interview process

N: Requisition notes

Delete the original FROM data after copying Enter a value that is used in the Translation Constant File (F8900) to determine whether to translate all menus or just the A's menus.

Working with Multiskill Search

Access the Supplemental Data Multiskill Search form.



Supplemental Data Multiskill Search form

And /Or Enter a code to designate whether the test parameters or criteria are based on an AND condition or an OR condition.

SDB Code Enter a user defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills.

Type Data Enter the type of data from the supplemental database that the system uses in a multiple information search.

Data Item Enter a value that indicates which data item within the data type is to be included in the multiskill search.

Op Enter a code that identifies the operands in Boolean logic. You can specify any of these codes:

EQ: Equal to

LT: Less than

LE: Less than or equal to

GT: Greater than

GE: Greater than or equal to

NE: Not equal to

NL: Not less than

NG: Not greater than

Multiskill Search Data Enter a value that the system uses to search for supplemental employee data. To obtain desired results, enter a search value that is based on the data that you entered in the profile for the selected field.

Note. This value is case-sensitive. For example, suppose that you want to search for the value Active. If the value was originally entered into the database as Active, then you must enter the value into the search field as *Active*. Do not enter ACTIVE or active.

See Also

PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook, "Understanding Supplemental Data"

CHAPTER 33

Creating Parent-Child Relationships

This chapter provides an overview of parent-child relationships and discusses how to create parent-child relationships by employee.

Understanding Parent-Child Relationships

You can define an organizational structure to provide executives and managers with a summary of the reporting relationships in your organization. An organizational structure shows the flow of information in an organization. The organizational structure that you define can vary from business to business, or even from department to department within a business.

You can use an organizational structure to show reporting relationships among employees and supervisors. These relationships are called parent-child relationships.

You can define two types of parent-child relationships:

- A relationship in which an employee address can appear multiple times.
- A relationship in which an employee address can appear only once.

After you define a parent-child relationship, you can periodically review and revise that relationship to reflect staff additions or turnover.

Creating Parent-Child Relationships by Employee

This section provides an overview of parent-child relationships by employee, lists prerequisites, and discusses how to:

- Set processing options for the A/B - Org Structure Browse program (P0150).
- Set processing options for distribution list control (P02150).
- Create parent-child relationships by employee.

Understanding Parent-Child Relationships by Employee

When you define organizational structures, you create hierarchies of relationships between parents and children. For example, a large business might have headquarters in one city and several regional offices that are subsidiaries of the headquarters. You can define an organizational structure in which you set up the regional offices as children, or subsidiary business units, of the headquarters. The regional offices can in turn be parents, or higher-level business units, of local offices. For each office, you can set up an organizational structure by employee, with upper-level managers as parents of mid-level managers, and mid-level managers as parents of employees.

Each employee can have only one immediate supervisor. The system prevents you from entering a manager as a subordinate of an employee.

You use one of these modes to define an organizational structure by employee:

- Enter child positions for a higher-level parent.
- Enter a parent position for subordinate child positions.

After you create parent-child relationships, you can revise these relationships as necessary to reflect changes in the organization. To access the processing options for the A/B - Org Structure Browse program (P0150), you must use Interactive Versions.

Prerequisite

Set up parent-child structure types in user-defined code table 01/TS.

See Chapter 13, "Understanding User Defined Information Setup," Understanding User Defined Codes for Human Capital Management Systems, page 105.

Form Used to Create Parent-Child Relationships by Employee

Form Name	Form ID	Navigation	Usage
Address Parent/Child Revisions	W0150A	Employee Management (G05BE1), Employee/Supervisor Relationships Click Add on the Work With Distribution Lists form.	Create parent-child relationships by employee.

Setting Processing Options for the A/B - Org Structure Browse Program (P0150)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

These processing options specify whether the system displays workflow information for parent-child relationships and controls whether multiple parents in tier relationships can have overlapping effective dates.

1. Workflow Information Use this processing option to specify whether the system displays workflow processing information. Values are:

Blank: Do not display workflow information

1: Display workflow information

2. Tier Descriptions Use this processing option to specify whether a tier structure can be defined based on effective dates for a root parent address. The root parent in a structure is the highest level of a parent-child structure, and it can have no parent. Values are:

Blank: Do not allow a tier structure to be defined.

1: Allow a tier structure to be defined.

Defaults

These processing options specify whether the system automatically provides effective dates and provides the option to select an organization structure from a predefined list in UDC 01/TS.

1. Date Defaults Use this processing option to specify whether the system supplies default dates on the P0150 parent-child revisions form when the beginning and ending effective dates are blank. Values are:

Blank: The system does not supply default dates.

1: The system supplies default dates.

2. Default Organization Structure Type Use this processing option to specify the value that the system enters in the Organizational Structure field when the A/B Org Structure Browse program (P0150) is first run.

Setting Processing Options for Distribution List Control (P02150)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify an organizational structure type and designate the program version number that the system uses.

1. Enter the default Structure Type Use this processing options to specify the default structure type.

2. Enter the Version of Organizational Structure Revisions to call. Use this processing option to specify the version of organizational structure revisions to call. If the field is left blank, the system uses version ZJDE0001.

Creating Parent-Child Relationships by Employee

Access the Address Parent/Child Revisions form.

Parent Number Enter the Address Book number of the primary level in a hierarchy (or reporting) relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.

Structure Type Enter a user-defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). This value identifies the type of distribution list, such as *WFS* for workflow, *ORG* for group, and *EML* for email.

Address Number Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

End Eff Date Enter the date on which the address book record will cease to exist in the structure.

CHAPTER 34

Reviewing Employee Information

This chapter provides an overview of employee information review and discusses how to review employee information.

Understanding Employee Information Review

Reviewing employee information is a necessary task for human resources personnel. The Employee Profile program (P060116) centralizes employee information in a few inquiry-only forms. With the Employee Profile program, you can quickly locate an employee's personal, company, job, and history information.

Employees can review their own information by selecting the Employee Personal Profile option from the Employee Self Service menu. Managers can review this information by accessing Managers Workbench from the Manager Self Service menu.

Reviewing Employee Information

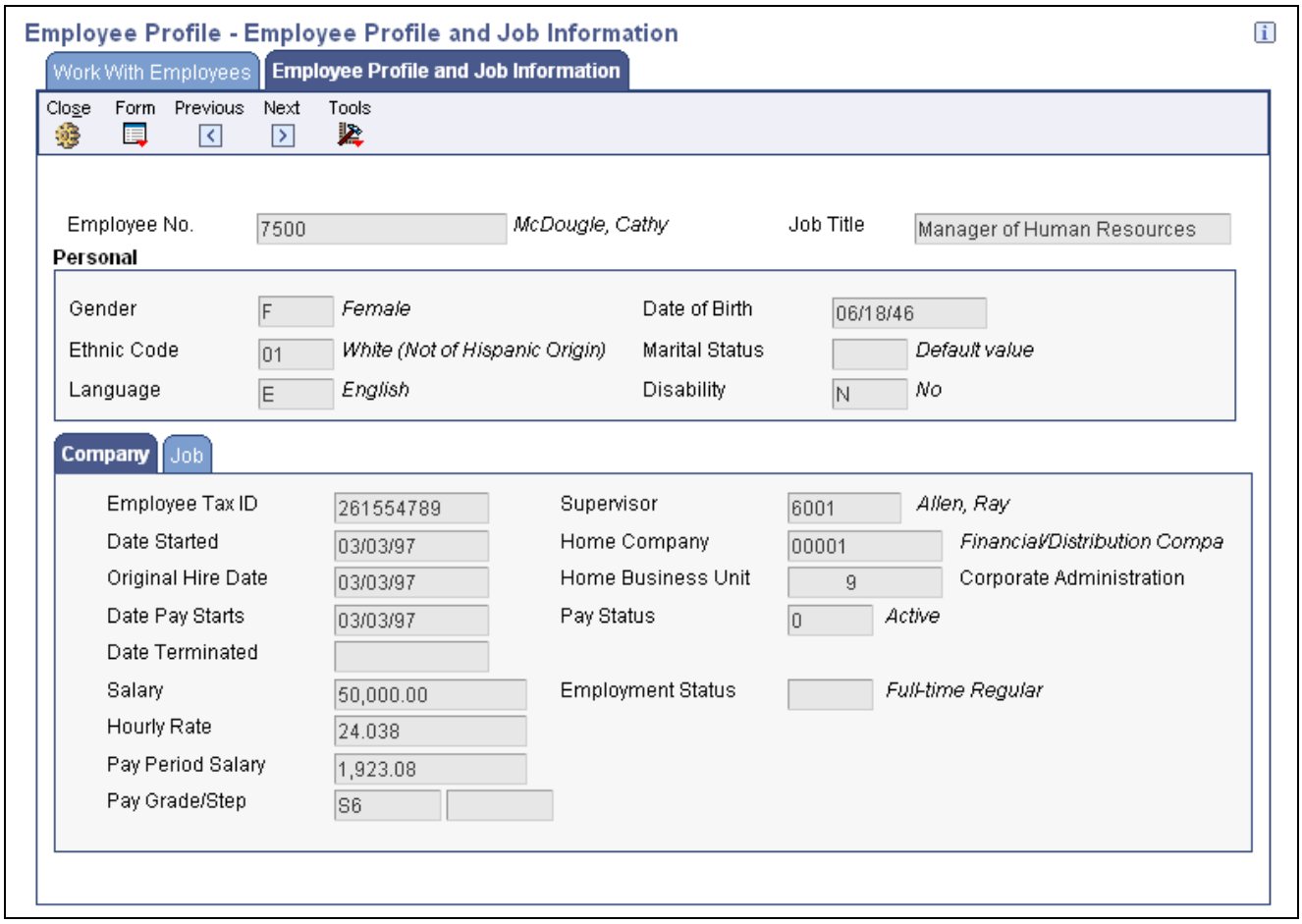
This section discusses how to review employee information.

Forms Used to Review Employee Information

Form Name	Form ID	Navigation	Usage
Employee Profile and Job Information	W060116C	Employee Management (G05BE1), Employee Profile Select an employee record and click Select on the Work With Employees form.	Review employee information
History Window	W050421B	Select History Tracking from the Form menu on the Employee Profile and Job Information form.	Review history information.

Reviewing Employee Information

Access the Employee Profile and Job Information form.



Employee Profile and Job Information form

To review employee information:

1. On the Employee Profile and Job Information form, review employee information under the Personal, Company, and Job tabs.
2. To access history information for any field, select History Tracking from the Form menu.
3. On the History Window form, click Find, and then review history for the data item.

See Also

Appendix B, “PeopleSoft EnterpriseOne Human Capital Management Foundation Reports,” Running the Employee Roster Report , page 421

Appendix B, “PeopleSoft EnterpriseOne Human Capital Management Foundation Reports,” Running the Employee Roster with Rate Report , page 422

CHAPTER 35

Working with Point-in-Time Employee Reports

This chapter provides an overview of point-in-time employee reports and discusses how to prepare data for point-in-time reports.

Understanding Point-in-Time Employee Reports

This section provides an overview of point-in-time employee reports and custom point-in-time report creation and lists prerequisites.

Point-in-Time Employee Reports

As with currently available employee reports, you can run point-in-time employee reports to review changes that have been made to the employee master record. The primary difference is that in the point-in-time report group, you can produce a view of an employee's record (or any group of employee records) as of a specified date. For example, you might need to produce a report to satisfy a governmental inquiry that includes the top 10 salaried employees for each business unit as of a particular date, including each employee's surname, job, position, and mailing address, and the name of the person to whom each employee reported.

The system provides several point-in-time reports. To create your own custom reports, use the Report Director Templates program (P91400) and select the Point-in-Time EE Reporting template. The Report Director Templates program offers an automated approach for creating user-defined reports using the F0601161 table.

Custom Point-in-Time Report Creation

After reviewing the selected data in the F0601161 table, use the Report Director Templates program (P91400) to create custom, point-in-time reports that are required to meet your needs. The Director assists you with report creation by guiding you step-by-step through the design process.

The Report Director Templates program uses templates that contain default criteria. When you select the Point-in-Time EE Reporting template in the Report Director Templates program, the program presents the default criteria through Director forms. You can modify the PeopleSoft EnterpriseOne templates and create your own templates or programs.

The Point-in-Time EE Reporting template provides smart fields that enhance report-writing capabilities and reduce the amount of time required to create a custom report. Smart fields are predesigned components of logic and processing that you can select for a particular field; you do not need to write code to create the desired functions. Available smart fields include:

- Amount Variance.

  Used to include the specific amount between the salary levels of employees that you have selected for a point-in-time version in a new report

- Salary Percent Variance.

Used to include the specific percentage difference between the salary levels for a selected employee group

- Salary Midpoint.

  Used to include the midpoint salary levels for a selected employee group

  You can use the Salary Midpoint smart field to show the midpoint of a pay grade for a specific effective date. You can also create separate report versions and enter them into processing options for point-in-time reports to calculate the midpoint between two salaries.

You can use these smart fields in conjunction with the processing options of the Report Director Templates program to specify the desired functions.

Preparing Data for Point-in-Time Reports

This section provides an overview of data preparation for point-in-time report, lists prerequisites, and discusses how to:

- Verify the integrity of the data in the HR History table.
- Build a new point-in-time employee master table.
- Set processing options for Build/Delete Point in Time Employee Master program (R060116D).
- Review the data selection.
- Set processing options for Point-in-Time Employee Master (P060116D).

Understanding Data Preparation for Point-in-Time Reports

To prepare data for reports, you must verify the integrity of the data in the HR History table (F08042), build a new Point-In-Time Employee Master table (F0601161), and then review your data selection. After these tasks have been completed and any errors have been fixed in employee records, you can run any of the point-in-time reports.

If errors exist in the HR History table, you can run the HR History Data Integrity Check (R08042D) to produce an error report. You must fix errors listed in this report to include the records in a subsequent report. To correct data or add missing data to employee records, you use the Employee History Maintenance program (P050420).

The Build/Delete Point-In-Time Employee Master program (R060116D) creates a new Point-in-Time Employee Master table, based on the existing Employee Master Information table (F060116), that includes two new data fields: the Effective Date field and the Version field. The additional fields allow the table to contain multiple records for employees, covering different points in time. A combination of data from the Employee Master Information table and the HR History table is used to build the point-in-time records.

When employee records for a specific date are not available in the HR History table, the program uses the next earlier date available. If an earlier date is not available, the program provides an exception report that lists the next date available for each record.

Prerequisites

Before you complete the tasks in this section:

- Verify that point-in-time information has been included appropriately in your data.
- Create a new Point-in-Time Employee Master table (F0601161).

Forms Used to Prepare Data for Point-in-Time Reports

Form Name	Form ID	Navigation	Usage
Point in Time Employee Master Review	W060116DB	Point in Time Employee Master (G05B31), Point in Time Employee Master Select a version and click Select on the Work With Point in Time Employee Master form.	Select an employee record.
Revise Point in Time Employee Master	W060116DC	Select an employee record and click Select on the Point in Time Employee Master Review form.	Review data.
Change Reason	W08EFTA	Click OK on the Revise Point in Time Employee Master form.	Enter a date and change reason.

Verifying the Integrity of the HR History Data

Select Point in Time Employee Master (G05B31), HR History Data Integrity Check.

Run the HR History Data Integrity Check program (R08042D) to review all employee records in the HR History table (F08042) to ensure that each record includes an associated effective date. The new table that you build in the next task includes only records that include an effective date.

When selected employee records do not contain all the data needed for point-in-time reporting, the HR History Data Integrity Check automatically generates a report that includes the employee records with missing data.

You use the Employee History Maintenance program (P050420) to enter the missing data listed on the error report. Then you rerun the HR History Data Integrity Check program to ensure that no more errors occurred. When you build a new Point-in-Time Employee Master table (F0601161), the system does not include any records with incomplete data. Only employees who have an original hire date that is equal to or earlier than the date that you select are included in the new table.

Although it optional, verifying the integrity of the data and entering corrections as needed ensures that all applicable data is included in point-in-time reporting.

See Also

Chapter 38, “Working with Employee History Records,” Correcting Employee History, page 368

Building a New Point-in-Time Employee Master Table

Select Point in Time Employee Master (G05B31), Build/Delete Point in Time EE Master.

After you verify the integrity of your employee record data, and before you review your data selection, use the Build/Delete Point-In-Time Employee Master program (R060116D) to create a new Point-in-Time Employee Master table (F0601161) that the system uses to generate point-in-time reports. This table is a mirror image of the Employee Master Information table (F060116) with two additional fields: the Effective Date field and the Version field. These additions allow you to generate multiple employee records for multiple points in time.

When selected employee records are not available for the specified date, the system selects data for the next earlier date. If no earlier data is available, the system automatically generates an exception report that includes the employee records with missing data, the date, and values from the next earlier date. This might occur if:

- Historical records have been archived and no longer exist in the HR History table (F08042).
- Data was not tracked in history before a specified date.
- The HR History table has been purged or initialized.

By resetting a processing option for the Build/Delete Point-in-Time Employee Master program, you can delete data from the R060116D table. Do this to remove point-in-time versions that are no longer useful and to reduce the size of the R060116D table.

Note. This process requires at least one minute per employee record. When working with a large number of employee records, consider this time requirement before you begin.

Setting Processing Options for the Build/Delete Point-in-Time Employee Master Program (R060116D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Parameters

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time that you run a program.

1. Effective Date Use this processing option to specify the effective date.

2. Version Name Use this processing option to specify the version name.

3. Build/Delete Use this processing option to specify whether the system saves or deletes data.

Blank or *0*: Build

1: Delete

Setting Processing Options for Point-in-Time Employee Master (P060116D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Using the Point-in-Time Employee Master program (P060116D), you can:

- View existing batches.
- Create or delete batches.
- Select a batch to view details.

Update

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time that you run a program.

1. Point in Time Employee Master and HR History

Use this processing option to specify the table that the system updates. You can specify whether the system updates any tables, the Point-in-Time Employee Master table (F0601161), or the F0601161 and the HR History table (F08042).

0: No

1: Yes (F0601161)

2: Yes (F0601161 and F08042)

Reviewing the Data Selection

Access the Point in Time Employee Master Review form.

After you build the Point-In-Time Employee Master table (F0601161), and before you generate a point-in-time report, you should review the records that you have selected to ensure that they include the correct group of employee records and the correct data.

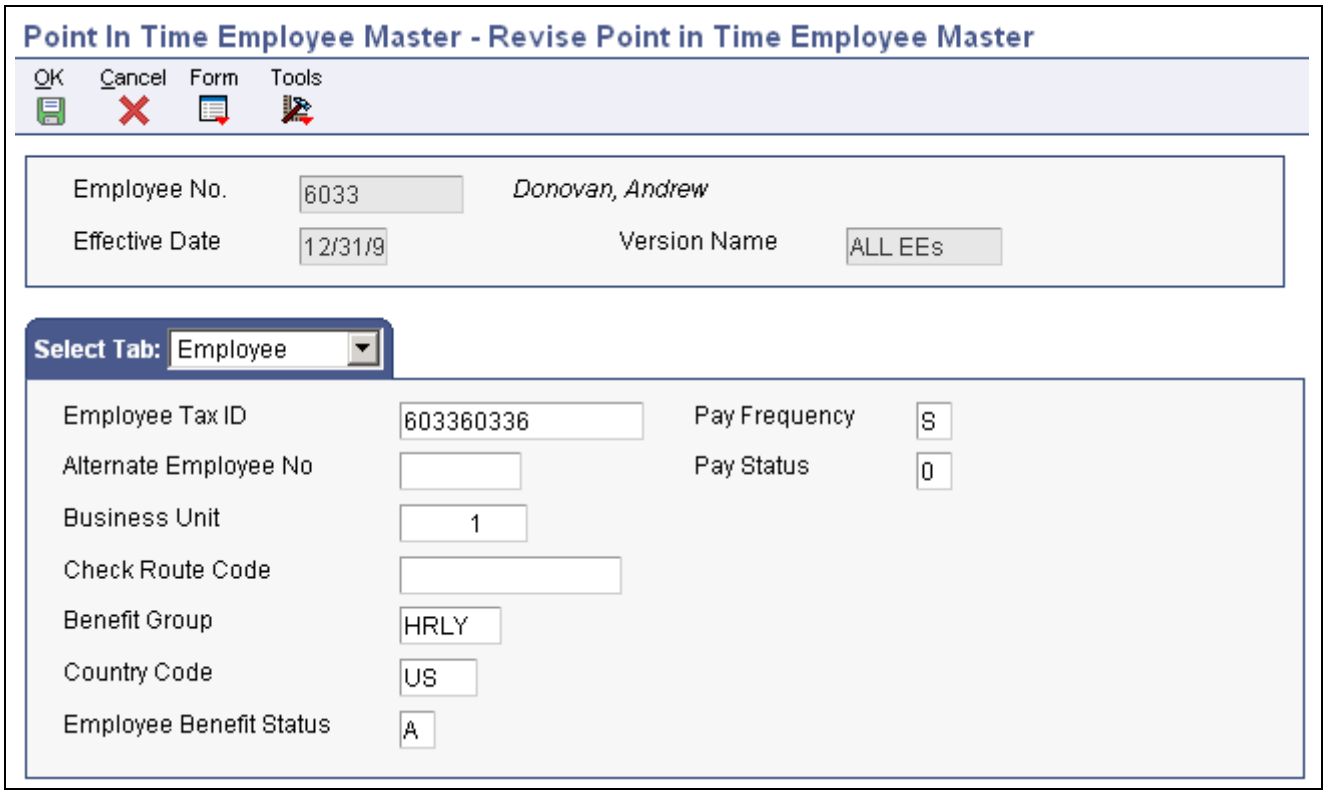
To review the data selection:

1. On the Point in Time Employee Master Review form, to ensure that the desired data has been included, select an individual employee record and click Select.
2. On the Revise Point in Time Employee Master form, review the data on each of the tabs.

   Add or change missing data if necessary so that the record is included in the point-in-time report.
3. When finished reviewing, click OK.
4. On the Change Reason form, enter the date and the reason for the changes that you entered.

   Use Database Correction for the change reason if you do not know the reason that data was wrong or missing, and then click OK.
5. If records were missing or if you discovered inaccurate data in selected records, repeat these tasks before running point-in-time reports:
   - Verify the integrity of the data in the HR History table.
   - Build a new Point-In-Time Employee Master table.
   - Review the data selection.

Here is the Revise Point in Time Employee Master form:



Revise Point in Time Employee Master form

CHAPTER 36

Working with Web Mail Merge

This chapter provides an overview of web mail merge and discusses how to:

- Create employee letters.
- View, edit, and send web mail merge letters.
- Create mass mailing letters.

Understanding Web Mail Merge

This section discusses:

- Web mail merge.
- Letter processing.
- Letter viewing.
- Letter editing and mailing.

Web Mail Merge

When you need to send written information to employees, you can use the mail merge features of the system to efficiently produce letters for small, infrequent mailings such as COBRA and HIPAA notifications, or large, mass mailing projects. For example, you can quickly generate a letter to a group of employees who are included in a new marketing campaign. Or you can generate a mass mailing to all employees to announce a new benefit option. You use the Print Employee Letters program (P08452) to create one letter or a batch of personalized letters. You can use an existing template document, modify a template document, or edit information in individual letters.

You can use workflow processes to produce HTML documents that you can edit in Microsoft Word or other editing programs. The following mail merge letter templates are provided with the system, and you can modify them to meet your business needs:

- HIPAA
- COBRA
- Verification-of-employment letter
- IRS Form W4

To review and revise the generated letters, you use the Web Mail Merge program (P05WEBMM).

You use the Employee Letters - Mass Mailing program (R08451) to prepare to send letters to a large number of people or to preselected groups of people.

You can use the Mail Merge Workbench Setup program (P05WMMWB) to add or change text in the template documents included with the system, to add entirely new template documents, and to delete template documents.

A data structure is required to perform the merge process for the merge fields that are specified in a mail merge template. You can use the Mail Merge Workbench Setup program to create a new data structure for each mail merge template. The Mail Merge Workbench Setup program can validate the template document to determine whether the merge fields match the data items in the linked data structure. You can also use this program to generate a data structure that is based on the merge fields that are contained in a template document.

The generated merge letter can contain one or more individual letters. You can use the Web Mail Merge program (P05WEBMM) to view, edit, print, or send the letters by email. You can also attach the letters to an employee master record. Because the data used to generate the merge letters is stored in the Mail Merge Runtime Web Data table, the letters can be regenerated at a later date.

Letter Processing

When you need to send written information to employees, you can use web mail merge to efficiently produce letters for small, infrequent mailings or large, mass mailing projects. For example, you can quickly generate a letter to a group of employees who are included in a new marketing campaign. Or you can generate a mass mailing to all employees to announce a new benefit plan.

When you create web mail merge letters, you normally begin at an entry point such as a Human Resources or self-service tax form process. For example, you might need to mail HIPAA letters to employees who are leaving the company. In many cases, you generate letters and then immediately mail the letters. Alternatively, for informal letters, you might email letters to the employee work center or an outside address. In some circumstances, web mail merge letters might be created and then processed at a later date for editing and mailing. Each entry point uses a program to create web mail merge letters that is specific to the process. These programs include:

- Employee Letters (P08452).
- Applicant Letters (P08450).
- COBRA Qualifying Events (P089102).
- COBRA Subsequent Qualifying Events (P089101).
- HIPAA Letters (P089101).
- Benefits Statement (P083300).
- Benefit Statement File Creation Mail Merge (R083305).
- Verification of Employment (P05003).
- IRS Form W4 (P053030).

Forms that you access through self-service do not have accompanying user instructions. The web interface provides a simple approach to generate each form. When you use the programs that are specific to each process, the letters that you generate are created and configured by using similar procedures. For example, the process that you use to create employee letters is similar to the process that you use to create applicant letters. To create one letter at a time and select a particular letter template, you use the Print Employee Letters program (P08452).

When you prepare employee letters such as HIPAA or COBRA letters, you first generate one or more web mail merge letters. The system then automatically displays a form in the Web Mail Merge program (P05WEBMM) so that you can display and mail the letters. The form that the system displays is determined by the entry point of the mail merge process. For example, if you are using web mail merge to create a document that should not be edited, the system displays the View Mail Merge Letter form (W05WEBMMI). Likewise, if you are using web mail merge to create a document that might require editing, the system displays the Mail Merge Letter Display form (W05WEBMMA).

After you generate merged letters, you can use Managers Workbench (P08712) to access the Web Mail Merge program (P05WEBMM) and then add or change text in the letters.

Letter Viewing

If you are using a process to create letters that should not be edited, the system automatically displays the View Mail Merge Letter form (W05WEBMMI). You normally use View Mail Merge Letter when you are sending internal mail to the work center. This form uses a text control that displays the letter without an option to enter edits.

Letter Editing and Mailing

If you are using an entry point such as the COBRA process in Human Resources to create letters that might require editing, the system displays the Mail Merge Letter Display form (W05WEBMMA). You can use this form to perform these functions:

- Edit and print a letter.

  You use an HTML option to launch Microsoft Word. In Word, you can edit and resave the document with the .htm extension. You must have your browser security set up to enable you to run ActiveX controls.

- Delete a letter.

  An option on the Form menu enables you to delete the header record from the Web Mail Merge Letter Header table (F05WEBMM), the detail records in the Mail Merge Runtime Web Data table (F980014D), and the .htm file on the server.

- Attach a letter.

  An option on the Form menu enables you to attach all of the letters or individual letters to an employee master information record. Doing so enables you to archive copies of letters that you send to employees.

- Send a letter by email.

  An option on the Form menu enables you to send all letters in a batch to the designated recipient for each letter.

Creating Employee Letters

This section provides an overview of employee letter creation and discusses how to create employee letters.

Understanding Employee Letter Creation

You use the Print Employee Letters program (P08452) to create one letter or a batch of personalized letters. You can use a letter from an existing sample, or you can insert custom information as each letter is printed.

The Print Employee Letters program automates the process of printing letters that you send to people listed in the Employee Master Information table (F060116). You can select employees from a table, specify a form letter, and then print personalized copies for each recipient. You can also sort employee records and select a particular group for which you print letters.

There are two ways to personalize the content of letters that you print for individuals:

- Enter direct changes to a selected form letter just before you print it.
- Use the Mail Merge Workbench Setup program (P05WMMWB) to edit an existing web mail merge letter template.

Other entry point processes such as COBRA and applicant letters use a similar approach for generating, editing, and mailing web mail merge letters. Use the instructions for the Print Employee Letters program as a reference.

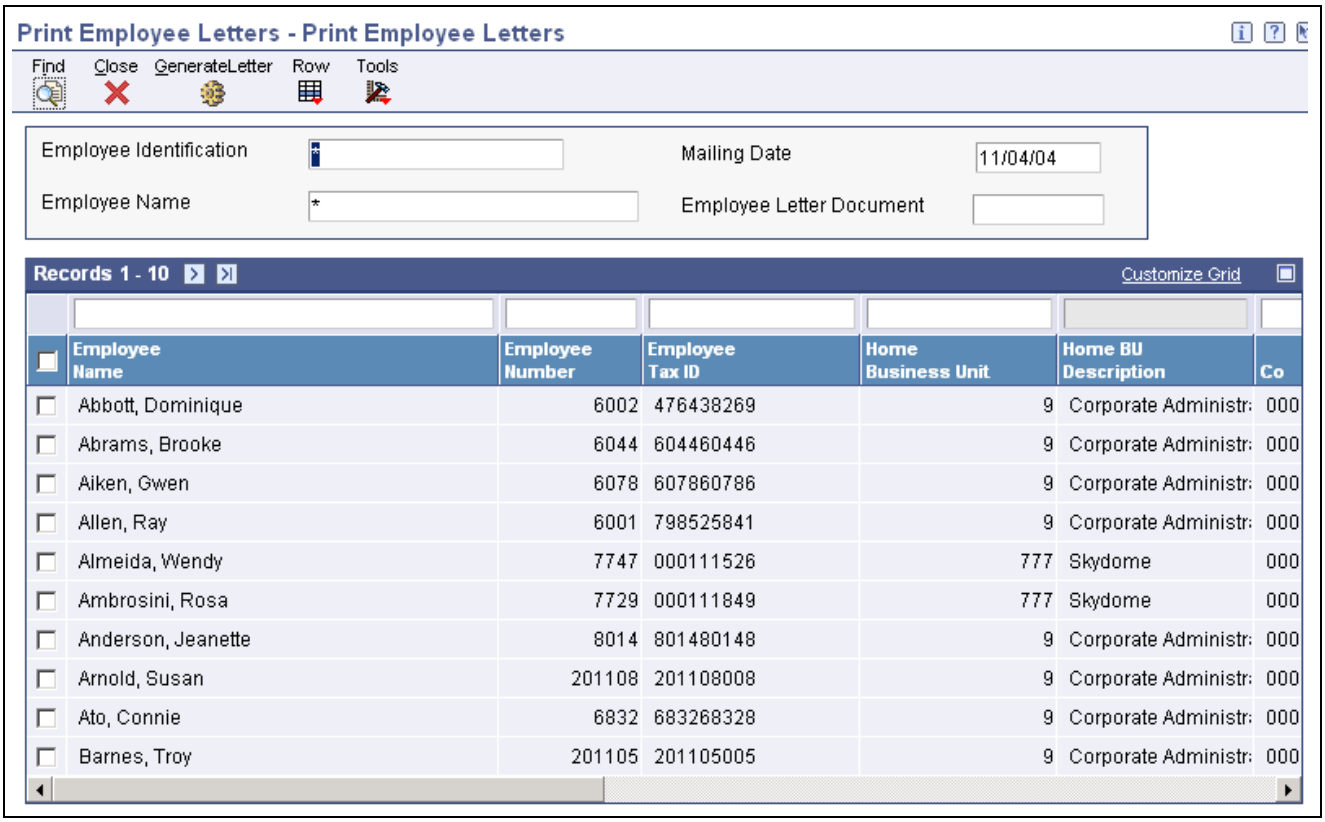
You use the Employee Letters - Mass Mailing program (R08451) to prepare for sending letters to a large number of people or to preselected groups of people.

Forms Used to Create Employee Letters

Form Name	Form ID	Navigation	Usage
Print Employee Letters	W08452A	Employee Management (G05BE1), Print Employee Letters	Create employee letters.
Mail Merge Letter Display	W05WEBMMA	Select Generate Letter from the Row menu on the Print Employee Letters form.	The system generates one or more letters.

Creating Employee Letters

Access the Print Employee Letters form.



Print Employee Letters form

To create an employee letter:

1. On the Print Employee Letters form, click Find to display all employees.
2. To print a date other than the current system date on the letter, complete the Mailing Date field.
3. To select a letter template, complete the Employee Letter Document field.

   The Employee Letter Document field contains a value that identifies which employee letter document is used from the Maintain Mail Merge Documents program (P980014).
4. To create multiple letters, click Find and then select multiple employee records from the table.
5. To create a single letter, complete the Employee Identification field and the Employee Name field, click Find, and then select the employee record.

   The employee identification is the employee number, tax ID, or alternate number, depending on the employee number mode that is set up in the payroll constants for company 00000.

   The Employee Name field names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
6. Select Generate Letter from the Row menu.

   Depending both on the setup options for the mail merge application and on the web mail merge letter template, a Print form might appear.
7. If a Print form appears, click OK.

   The system displays a copy of the letter, including the merged information. You can modify the letter if necessary.

8. On the Mail Merge Letter Display form, select the Printable View option.

   You can use the browser print option to print the letter.

9. To send the letter by email, select E-Mail from the Form menu.

   The system sends the letter to the employee work center.

Viewing, Editing, and Sending Web Mail Merge Letters by Email

This section provides an overview of web mail merge letters and discusses how to view, edit, and send web mail merge letters.

Understanding Web Mail Merge Letters.

After you generate web mail merge letters, you can process them for mailing at a later time. You can also review letters and perform maintenance functions such as updating text. When you are not using a normal entry point for creating and mailing web mail merge letters such as Employee Information, you can use the Managers Workbench program (P08712) to access the Web Mail Merge program (P05WEBMM). On the Work With Web Mail Merge Letters form (W05WEBMME), you can perform any of these functions:

- Edit a letter.

  After opening a letter file, you can select an option that launches Microsoft Word. In Word, edit, and resave the document in with the .htm extension. To perform this function, you must have your browser security set up to allow you to run ActiveX controls.

- Extract a letter

  An option on the Row menu enables you to extract individual letters from a batch .htm letter file that contains multiple web mail merge letters.

- Rebuild a batch .htm letter file.

  An option on the Row menu enables you to regenerate the batch .htm file.

- Remove a document

  This option enables you to delete the .htm file on the server.

- Attach a letter

  An option on the Row menu opens the Employee Master Attachments form (W05WEBMMK) and enables you to attach all of the letters or individual letters to employee master information records. That way, you can archive copies of letters that you send to employees.

- Email a letter

  An option on the Row menu opens the Send Mail Merge Letter form (W05WEBMMJ) so that you can send one or all letters in a batch to designated recipients.

- Delete

  This option enables you to delete the header record from the Web Mail Merge Letter Header table (F05WEBMM), the detail records in the Mail Merge Runtime Web Data table (F980014D), and the .htm file on the server.

Forms Used to View, Edit, and Send Web Mail Merge Letters by Email

Form Name	Form ID	Navigation	Usage
Work With Web Mail Merge Letters	W05WEBMME	Employee Management (G05BMSS1), Managers Workbench Select Employee Letter from the Form menu on the Work With Managers Employees form.	View letters. Attach an individual letter or all letters to Employee Master Information records.
Mail Merge Letter Display	W05WEBMMA	Select a record.	Edit and distribute letters.

Viewing, Editing, and Sending Web Mail Merge Letters

Access the Work With Web Mail Merge Letters form.

To view, edit, and send web mail merge letters:

1. To work with an individual letter, select the .htm letter record and then select Extract from the Row menu.
2. To work with an .htm letter record that contains only one letter, select the .htm letter record and then click Select.
3. On the Mail Merge Letter Display form, select the Edit Letter option to edit the letter.

   This option launches Microsoft Word. To perform this function, you must have your browser security set up to allow you to run ActiveX controls.
4. When you are finished editing the letter, in Microsoft Word, resave the letter as an HTML document. Then close the session of Microsoft Word.

   If you prefer to mail the letter, you can print the letter from Microsoft Word.
5. On the Mail Merge Letter Display form, select E-Mail from the Row menu to send the letter.
6. To ensure the correct recipient, review the Address Number field:

   The system automatically supplies this value from the data structure. If this field is blank, the data structure does not contain the Address Book number of the recipient. To complete this field, clear the Use Sort Key option and then click the Address Number field. Use the visual assist to select *mnAddressNumber* and then click Select.

   If multiple letters exist in the .htm letter file, to select a recipient, clear the Single Letter option. Doing so enables the Record Number field. You can enter a value for the record number, use the visual assist, or use the Previous and Next options.

   If the Single Letter option is disabled, only one merge letter exists in the merge batch.
7. Use the visual assist for the Mail Box field and then select Internal/External Email or another appropriate option.
8. Select Send from the Form menu.

   This option sends the letter. The system displays the Notification form (W05MSGBXA).
9. On the Notification form, click OK.
10. Click Cancel.

11. On the Work With Web Mail Merge Letters form, to attach an individual letter or all letters to Employee Master Information records, select Attach Letter from the Row menu.
12. On Employee Master Attachments, review these fields for accuracy:
    - Address Number

      The system automatically supplies this value from the data structure. If this field is blank, the data structure does not contain the Address Book number of the recipient. To complete this field, clear Use Sort Key and then click the Address Number field. Use the visual assist to select *mnAddressNumber* and then click Select.
    - Attachment File

      This value specifies a directory on a network server where the system stores generated mail merge letters. For example, if the default network server location is //jdeow1/root, you might store generated mail merge letters in a subdirectory called mailmerge. In this case, the value might appear as follows: //jdeow1/root/mailmerge.
    - Single Letter

      This option specifies whether the system sends only the selected letter or all letters in the batch.
    - Record Number

      This is the number that the system assigns to an individual web mail merge letter that resides inside a batch letter .htm file.
    - Use Sort Key

      This option specifies where to find the employee address book number-in the MMSK field of the Mail Merge Runtime Web Data table (F98014D) or in the data structure.
    - Letter Count

      This value specifies the number of letters that the system uses in the web mail merge process. The Web Mail Merge Letters table (F05WEBMM) includes this value and contains the number of linked detail records in the Mail Merge Runtime Web Data table (F980014D).
13. Select Attach Merge Letter.

    If multiple letters exist, click Attach All Letters.

    This option attaches the web mail merge attachment to one or more employee master information records. Do not use the media object window to enter text. The system does not save any text that is entered in this area.

    To verify the attachment, you can use the Employee Master program (P0801) to view the media object attachment.
14. Click OK.

Creating Mass Mailing Letters

This section provides an overview of mass mailing letter creation and discusses how to:

- Set processing options for the Employee Letter - Mass Mailing program (R08451).
- Run the Employee Letter - Mass Mailing program (R08451).

Understanding Mass Mailing Letter Creation

To prepare for mass mailing projects and frequent communication to selected groups of employees, you can use the Employee Letter - Mass Mailing program (R08451). You can create multiple report versions to address specific groups of employees or for repetitive mailing projects. For example, you can send a letter offering a new company benefit to all of the employees who share the same company code.

You can sort employee records to select the group. This selection process uses data from the Employee Master Information table (F060116).

You set processing options to specify which letter template the system uses and the mailing date. The data selection determines which employees receive the letter.

Setting Processing Options for Employee Letter - Mass Mailing (R08451)

These processing options specify the letter template and generation date that the system uses for a mass mailing.

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use this processing option to specify a mail merge document template.

Employee Letter Document Use this processing option to specify the letter template that the system uses when generating employee letters.

Default

Use this processing option to specify the date on which the system creates a mass mailing.

Mailing Date Use this processing option to specify a date that the system uses for generating and printing employee letters. This date also appears as the mailing date that the system prints on each letter. If you leave this field blank, the system uses the current date.

Running the Employee Letter - Mass Mailing Program (R08451)

Select Employee Management (G05BE1), Employee Letters - Mass Mailing.

CHAPTER 37

Understanding Employee History and Turnover

This chapter discusses:

- Employee history and turnover.
- How the system stores employee master history and turnover.
- The importance of the change reason code.
- Where the system stores history and turnover records.

Employee History and Turnover

Within any organization, employees continually change jobs, receive raises and are promoted. You can set up your system to store historical records of employee information. This action means that when you enter or update employee information, the system creates a historical record of the new information. You can also set up your system to store turnover records. Turnover records show employee movement within your organization, such as when an employee changes jobs, as well as movement resulting from new hires and terminations.

You can track employee history and turnover for any of the information stored in the Employee Master Information table (F060116). You can use history and turnover information to:

- Review an employee's job progression.
- Review salary increases given at the same time a job change was made.
- Analyze historical changes to employee information.
- Consider an employee for a promotion.
- Consider an employee for another position.
- Monitor employee movement within your company.

How the System Stores Employee Master History and Turnover

Employee master history includes the history records that the system creates when you change information on the employee entry forms.

To track history and turnover, you must choose the data items (such as home company, tax ID number, and so on) that the system uses to gather data. These data items must exist in the Employee Master table. Whenever you change employee information, the system creates a separate history record for each data item for which you are tracking history.

The history records include:

- The specific change.
- The reason for the change (known as the change reason code).
- The date that the change became effective or the date that the change becomes effective.
- The system date when the change is made.
- The user ID of the person who made the change.
- The program ID that identifies where the change is made.

Importance of the Change Reason Code

When you revise employee information, the system prompts you for a change reason code. If you enter a change reason code, the system creates a turnover record with a history record. If you do not enter a change reason code, the system creates only a history record.

You define change reason codes in user defined code list 06/T. When you define change reason codes, remember that alphabetic codes indicate a negative effect on turnover. For example, you use an alphabetic code to indicate that a person has resigned. Numeric codes indicate either a positive or a neutral effect on turnover. For example, when you hire an applicant from outside of your organization, the change has a positive effect on turnover. When a person changes departments within your organization, the change has a neutral effect on turnover because it negatively affects turnover for the department that the employee leaves and positively affects turnover for the department that the employee enters.

Where the System Stores History and Turnover Records

The system stores history and turnover records in:

- The Employee master history is in the HR History table (F08042).
- The Employee Turnover Analysis table (F08045).

CHAPTER 38

Working with Employee History Records

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

- Review complete history for an employee.
- Review employee history for a specific date.
- Review history for a specific field.
- Correct employee history.
- Purge HR history information.
- Correct turnover records.
- Run history and turnover reports.

Understanding Employee History Records

This section provides an overview of employee history records and lists prerequisites.

Employee History Records

When current employee information changes, such as when an employee receives a raise or changes jobs, you must update the employee's record to reflect the change. You can set up your system options so that the system creates history records for employees whenever you change employee information.

You can review historical information from the date that you began tracking history. This allows you to analyze an employee's qualifications and work record. For example, you can:

- Review an employee's job progression.
- Review salary increases that are given at the same time that a job change was made.
- Analyze historical changes to employee information.
- Analyze an employee's job history to determine whether the employee is ready for a promotion.

You can review an employee's history record for information as it was on a specific date. For example, a supervisor might need to know the annual salary that an employee was earning on January 1, 1995.

When you enter, revise, or review employee information, you can easily access history for a particular field. For example, you can review past changes to an employee's salary or position ID.

If you make a mistake and do not want to maintain the record in history, you can delete the history record from the history table.

Prerequisites

Before you complete the tasks in this section:

- Choose the employee data items for which you want to track history.

  See Chapter 6, "Setting Up Employee History and Turnover Tracking ," Choosing Data for History Tracking Purposes, page 45.

- Verify that the Human Resources options are set up to track employee history.

  See Chapter 4, "Setting Up System Options," page 17.

Reviewing Complete History for an Employee

This section provides an overview of complete history review for an employee and discusses how to review complete history for an employee.

Understanding Complete History Review for an Employee

You can set up your system options so that the system creates history records for employees whenever you change employee information. You might want to review this history to:

- Analyze historical changes to employee information.
- Consider an employee's work record for promotions or raises.
- Consider an employee's work record for another position.

To review the complete history records for an individual, from the oldest entry through the most recent entry, you can use Employee History Inquiry (P050242).

Form Used to Review Complete History for an Employee

Form Name	Form ID	Navigation	Usage
Work With Employee History	W050242C	Employee History (G05BH1), Employee History Inquiry	Review complete history for an employee.

Reviewing Complete History for an Employee

Access the Work With Employee History form.

To review complete history for an employee:

1. On Work With Employee History, complete the Employee Identification field.

   This is the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

2. To narrow your search, complete the *Effective On* field (optional).

This is the future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

3. To narrow your search, complete the Last Changed Only option.

   This code defines whether the form displays only employee history changes made through the date you indicate in the As of Date field. Values are:

   Y: Yes, display only the history changes in effect through the As of Date.

   N: No, display all changes.

   Blank: No, display all changes.

   Note. Since changes are based on the effective date, if two changes were made on the same date, the form shows both changes.

4. Complete the Data Item field in the QBE line if you are tracking history for a specific item.

   This is the code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

5. Select options under both the Selected Data Items and Employees headings, and then click *Find*.
6. To display all employees who are not terminated or in a leave of absence, select the Active option.
7. Select the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached.

   Select the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.

8. Review the information.

Reviewing Employee History for a Specific Date

To review employee history for a specific date, you can use Employee History Snapshot (P05043). For the date that you enter, the system displays history information for the fields for which you are tracking history.

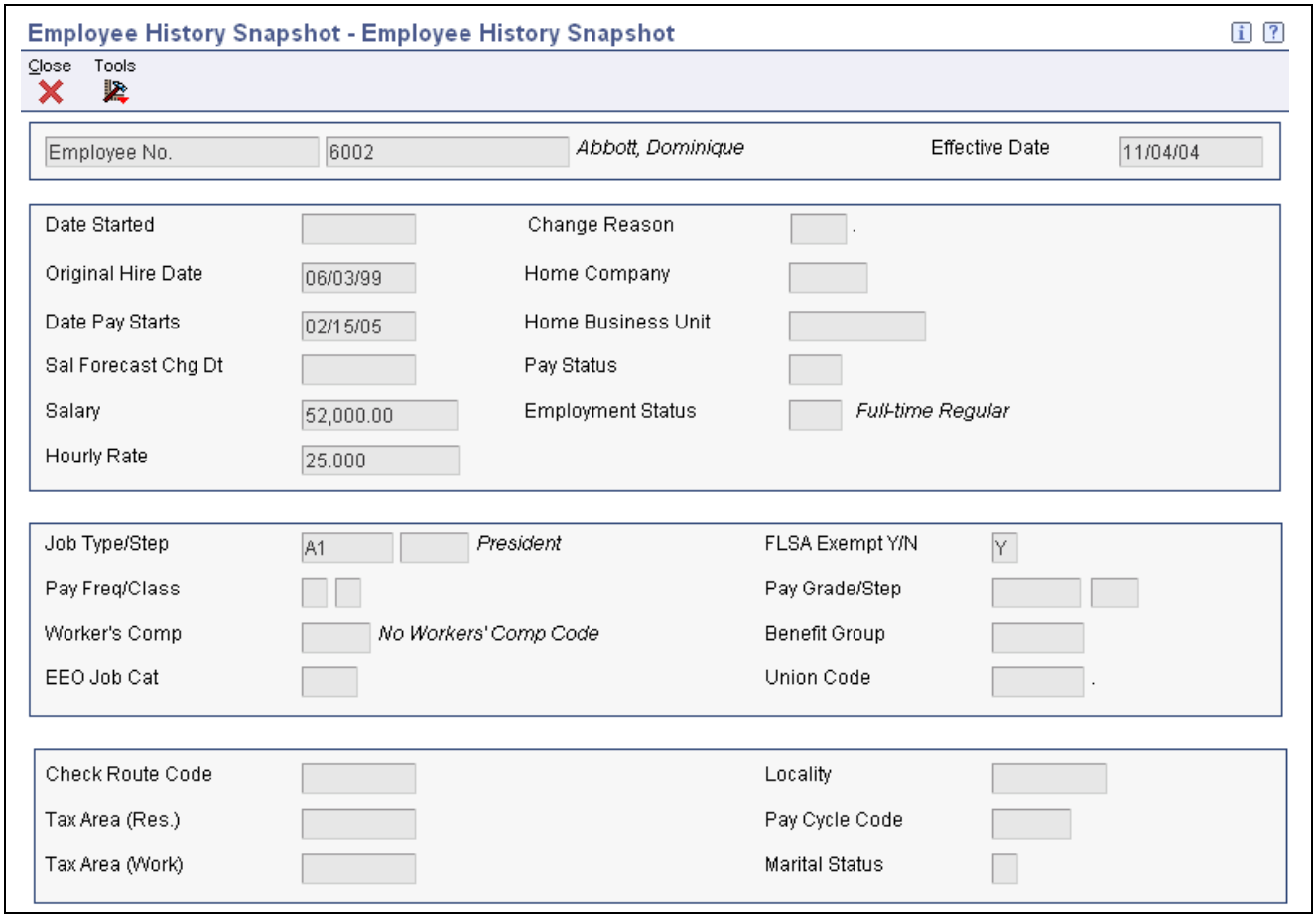
This section discusses how to review employee history for a specific date.

Forms Used to Review Employee History for a Specific Date

Form Name	Form ID	Navigation	Usage
Work With Employee History Snapshot	W05043A	Employee History (G05BH1), Employee History Snapshot	Select a record to review employee history.
Employee History Snapshot	W05043F	Select a record and then click Select on the Work With Employee History Snapshot form.	Review employee history for a specific date.

Reviewing Employee History for a Specific Date

Access the Employee History Snapshot form.



Employee History Snapshot form

To review employee history for a specific date:

1. On Work With Employee History Snapshot, complete the Employee Number and Effective Date fields.

   The employee number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

   The effective date is the future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.
2. Select one of the options in the Employees area and click Find.
3. To view the information for a different date, change the value in the Effective Date field and click Find.
4. Select the record that you want to review, and then click Select.
5. On the Employee History Snapshot form, review the information.

Reviewing History for a Specific Field

This section provides an overview of reviewing history for a specific field and discusses how to review history for a specific field.

Understanding Review of History for a Specific Field

When you enter, revise, or review employee information, you might need to review history for a specific type of information only. For example, when you enter a job change for an employee, you might need to review all of the previous jobs in which the employee has worked.

The HR History - EE History Window program (P050421) provides quick and efficient access to field-specific history for an employee. You can access the HR History - EE History Window from any form that has data items from the Employee Master Information table (F060116). For example, you can access history for a specific field from any of these employee entry forms:

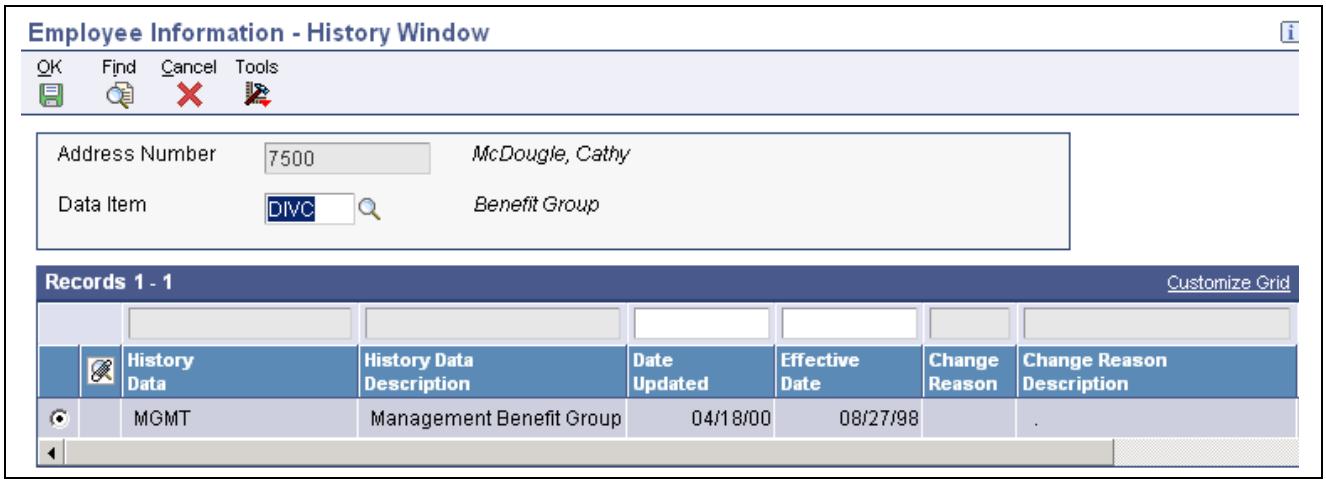
- Employee
- Personal
- Organizational Assignment
- Basic Compensation
- National and Fiscal Data
- User Defined Dates 11-20
- User Defined Category Codes 11-20
- Eligibility, NDT, and Participation
- Employee Payroll Revisions

Forms Used to Review History for a Specific Field

Form Name	Form ID	Navigation	Usage
Work With Employee Information	W0801A	Employee Management (G05BE1), Employee Information	Select a record to review history for a specific field.
History Window	W050421B	Select the field for which you need to review history and then select History Tracking from the Form menu on the Work With Employee Information form.	Review history for a specific field.

Reviewing History for a Specific Field

Access the History Window form.



History Window form

To review history for a specific field:

1. On the Work With Employee Information form, to locate the employee record for which you need to review history, complete either the Home Business Unit or Home Company field.
2. Click Active, Terminated, or All, and then click Find.
3. Select the employee record, and then select the form that contains the information for which you need to review history from the Row menu.
4. On the appropriate form, move the cursor to the field for which you need to review history, and then select History Tracking from the Form menu.
5. On the History Window form, review the information.

Correcting Employee History

This section provides an overview of employee history correction and discusses how to:

- Delete an incorrect history record.
- Correct the change reason or effective date for a history record.

Understanding Employee History Correction

Each time you make an entry in an employee record, the system creates a record in the corresponding history table. If you make a mistake when you enter employee information and then correct the error, you must delete the incorrect record from the corresponding history table to maintain an accurate history trail. When you delete a record in the history table, you do not affect the information in the Employee Master Information table (F060116).

If the only information that you entered incorrectly was the change reason or the effective date, you can correct that information in the history table. You do not need to delete the entire record to correct those two fields.

Correcting the error in the history table allows you to maintain accurate history records. If the history record that you correct has a change reason, you must also correct the corresponding turnover record.

Form Used to Correct Employee History

Form Name	Form ID	Navigation	Usage
Update Employee History	W050420B	EE History/Turnover Adv & Tech Ops (G05BH3), Update Employee History	Delete an incorrect history record. Correct the change reason or effective date for a history record.

Deleting an Incorrect History Record

Access the Update Employee History form.

To delete an incorrect history record:

1. On the Update Employee History form, to locate the record, complete one or both of these fields:
   - Employee Identification

     This is the employee number, TAX ID, or Alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.
   - Data Item

     This is the code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.
2. To narrow your search, select options in both the Selected Data Items and Employees group boxes, and then click Find.
3. To display all employees who are not terminated or in a leave of absence, select the Active option.
4. Select the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.

   Select the Tracked with History option to display all data items that you selected during setup for tracking and which have history records attached.
5. Select the incorrect record and click Delete.

   If the record that you deleted was a duplicate for the same data item on the same date, enter the correct sequence number for the remaining record.
6. Click OK.

Correcting the Change Reason or Effective Date for a History Record

Access the Update Employee History form.

To correct the change reason or effective date for a history record:

1. On the Update Employee History form, to locate the record, complete the Employee Identification and Data Item fields.
2. To narrow your search, select options under both the Selected Data Items and Employees group boxes, and then click Find.
3. To display all employees who are not terminated or in a leave of absence, select the Active option.

4. Select the All option in the Selected Data Items area to display data items that you selected for tracking whether or not they have history records.

   Select the Tracked with History option to display all data items that you selected for tracking during setup and which have history records attached.

5. Enter a value for Eff On and click OK:

   This is the future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

See Also

Chapter 38, "Working with Employee History Records," Correcting Turnover Records , page 371

Purging HR History Information

This section provides an overview of HR history information purges and discusses how to set processing options for Purge HR History (R08042P).

Understanding HR History Information Purges

A system administrator can use this program to remove all historical information from the HR History table (F08042). This procedure is occasionally desirable to reduce the amount of information that the system stores. You can also set a processing option to save the purged information in a separate file.

To save the information, you must designate different environments as the information source and destination. After setting the processing option to save your information, you need to choose the Advanced menu option and check out the data object. Then choose the Properties menu option and designate the source and destination environments. The system saves the information that you are removing from your source environment, normally the production environment, and creates a new HR History table in the destination environment that you choose for your backup location.

Setting Processing Options for Purge HR History (R08042P)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use this processing option to save purged, historical information.

1. Enter a '1' to save the purged records. Use this processing option to specify whether the system saves a copy of the purged records.

If you want to save a copy of the records, the input and output environments for the F08042 file must be different.

Correcting Turnover Records

This section provides an overview of turnover record correction and discusses how to correct turnover records.

Understanding Turnover Record Correction

When employee assignment information changes (such as when an employee changes jobs or moves to a new business unit within your organization), you must update the employee's record to reflect the change. You can set up your system to create turnover records of the information that you change when you update employee records. Turnover records also show employee movement that results from new hires and terminations.

If you enter incorrect employee assignment information, you must reenter the correct information. You should also correct the turnover record so that you can accurately analyze turnover information.

To track turnover for a change, you must enter a change reason and an effective date. The system does not create a turnover record unless you enter a change reason code. You can review turnover records to verify that no duplicate records, incorrect change reason codes, or incorrect effective dates exist.

You can correct only the effective date in the turnover data. If any other information in the turnover record is incorrect, you should delete the entire record. When you correct the information in employee information, the system creates the correct turnover record.

When you enter information for which you are tracking turnover, the system creates a turnover record for each of these data items:

- Home company (HMCO)
- Home business unit (HMCU)
- Job number (JBCD)
- Check route (MAIL)

When you correct turnover, you must correct the turnover records for each of these data items.

To maintain the accuracy of your historical information, you should correct the corresponding employee history record when you correct turnover records.

See Also

Chapter 6, "Setting Up Employee History and Turnover Tracking ," Initializing History and Turnover Tracking, page 45

Form Used to Correct Turnover Records

Form Name	Form ID	Navigation	Usage
Turnover Record Maintenance	W050451A	EE History/Turnover Adv & Tech Ops (G05BH3), Update Employee Turnover	Correct turnover records.

Correcting Turnover Records

Access the Turnover Record Maintenance form.

Data Item

Enter a code that identifies and defines a unit of information. It is an alphanumeric code up to 8 characters long that does not allow blanks or special characters such as %, &, or +. You create new data items using system codes 55-59. You cannot change the alias.

Turnover Data

Enter the value you enter in this field is specific to the data item you enter in the Data Item field.

This field is optional. You can use it to limit the information that appears on the form. If you do not put a code in this field, all turnover information for the data item appears.

If you enter Home Business Unit (data item HMCU) in the Data Item field, enter an individual business unit.

If you enter Home Company (data item HMCO) in the Data Item field, enter a specific company.

If you enter Job ID (data item JBCD) in the Data Item field, enter a job type.

If you enter Check Route Codes (data item MAIL) in the Data Item field, simply enter the correct check route code.

Change Reason

Enter a code that indicates the reason for:

- Changing an active employee's record.
- Terminating an employee.
- Recommending a change in salary or rate.

This is a user defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

+

Enter an option that specifies whether the system displays employee records that add to or reduce employee turnover. Values are:

+:

Displays employee records that add to employee turnover

-:

Displays employee records that reduce turnover

-

Enter an option that specifies whether the system displays employee records that add to or reduce employee turnover. Valid settings are:

+:

Displays employee records that add to employee turnover

-:

0

Enter an option that specifies whether the system displays employee records that have no effect on employee turnover.

Effective Date Enter a future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

See Also

Chapter 38, "Working with Employee History Records," Correcting Employee History, page 368

Working with History and Turnover Reports

This section provides an overview of history and turnover reports and discusses how to:

- Set processing options for Employee History Inquiry (R080423).
- Define turnover columns.

Understanding History and Turnover Reports

You can run history reports to review the most recent changes made to your employee history records. Turnover reporting identifies changes in jobs and terminations. You define the columns that you want to use to analyze turnover. For example, you might want to report on terminations with and without cause. To do this procedure, you can set up a column to compile the specific data types that are associated with termination.

Form Used to Work with History and Turnover Reports

Form Name	Form ID	Navigation	Usage
Define Turnover Report Columns	W08046B	Employee History Setup (G05BH4), Define Turnover Columns Click Add on the Work With Turnover Columns form.	Define turnover report columns.

Setting Processing Options for Employee History Inquiry (R080423)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Narrative

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter a '0' or blank to see just Active employees.

Use this processing option to specify the classification of employees that the system displays. Values are:

0: Display active employees only.

1: Display inactive employees only.

2: Display both active and inactive employees.

2. Enter Beginning Effective On Date.

Use this processing option to specify the beginning effective on date.

3. Enter Ending Effective On Date.

Use this processing option to specify the ending effective on date.

4. Enter the Data Item you wish to view.

Use this processing option to specify the data item that you wish to view.

Blanks will display all data items being tracked.

Defining Turnover Columns

Access the Define Turnover Report Columns form.

Turnover Column Group

Enter the Define Turnover Columns screen allows you to define up to 999 sets of column headings for your turnover analysis reports. You use the Turnover Column Group field to number each set of column headings.

For example, the first group of column headings could be Turnover Column Group 000. To define an additional set of column headings, change the number in this field to 001 and then define as many of the seven available column headings as necessary to meet your needs. If you require additional sets of column headings, increase the number in this field by one and again define the necessary column headings.

Turnover Column

Enter the number of the column that you want to define for your Employee Turnover Analysis reports. There are seven columns, numbered from left to right, available for you to define.

Column Heading 01

Enter a value that, in conjunction with the field directly below it (data item TCH2), allows you to define the title of one of the seven columns available on the Employee Turnover Analysis reports to match one of your change reason codes.

You use this first field to either enter the first word or an abbreviation of the column heading. You can use a maximum of seven characters.

For example, if you want to title a column New Hire, you would use this field for the word New. You would use the field below this one for the word Hire.

On the reports, this column title would look like this:

New Hire

You do not have to define all seven available column headings.

Chg Rsn

Enter a code that indicates the reason for:

- Changing an active employee's record.
- Terminating an employee.

- Recommending a change in salary or rate.

This is a user defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

After defining the turnover columns, you can run your employee turnover report.

CHAPTER 39

Understanding Job Information

This chapter provides an overview of job information

Job Information

You can track detailed information about the jobs within your organization. You can use this information to:

- Track pay and other types of information about jobs.
- Simplify the process of entering employee information.

You define jobs so that you can track pay and detailed information about the jobs within your organization. After you define a job, you can assign it to one or more employees.

You can review job information and the employees who are assigned to a particular job.

Periodically, you might need to update job information. For example, when management negotiates a new contract with a union, you typically need to update the pay rates for the pay grade steps associated with the union members' jobs. When you change information for a job, you can globally apply the changes for all of the employees who are assigned to that job.

CHAPTER 40

Defining Jobs

This chapter provides an overview of job definition and discusses how to:

- Enter job information.
- Enter supplemental data for jobs.

Understanding Job Definition

You define jobs so that you can track pay and other types of information about the jobs within your organization. After you define a job, you can assign it to employees.

To help you determine equitable pay ranges for a job, you can evaluate each job by degrees or points, depending on the evaluation method that you link to each job.

When you define a job, you can track additional information that is unique to your organization or your industry. For example, if a senior consultant job requires fluency in another language, you can track the language skills required for the job.

Job information is stored in the Job Information table (F08001).

Entering Job Information

This section provides an overview of job information entry, lists prerequisites, and discusses how to:

- Set processing options for Job Entry and Evaluation (P08001).
- Enter job information.

Understanding Job Information Entry

You enter job information to identify and define the jobs within your organization. You must define and identify a job before you can enter supplemental data for it. When you enter a new job, you can review an existing job first, and then copy information from it, if applicable.

Initial job information includes information such as:

- Job identifiers
- Job titles
- Reporting information

- Pay information
- Union codes
- Hourly or salary classification

You must set up your processing options for Job Entry and Evaluation to allow a legislative form to appear after you enter job information. The legislative form allows you to enter job information that is specific to your country.

Entering this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee in that job. When you assign a job to an employee, you can have the system automatically assign all the associated job information to the employee. You can override this default job information for individual employees, if necessary.

After entering initial job information, you can evaluate a job to determine a salary for the position. Job evaluation is a method of comparing jobs and establishing equitable salaries for all positions relative to their importance and value to your company. You might evaluate jobs when you add new positions to your company or when you determine a salary increase for all positions in a certain job group to stay competitive with comparative salaries in the industry.

Depending on how your processing options are set up, you can access the job evaluation feature following your entry of job information, or you can access the feature from the menu.

You choose a job evaluation method to evaluate your jobs, and then rate the job using the evaluation factors that you defined for that method. Typical evaluation factors include:

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

For each job, you assign values (degrees or points, depending on your evaluation method) to each of the evaluation factors. The system then automatically calculates the total evaluation degrees or points for the job.

You can use job evaluation information to compare job requirements and compensation with other jobs within your organization and to similar jobs within your industry.

See Also

Chapter 27, “Adding Employee Records One at a Time,” page 205

Chapter 41, “Reviewing Jobs,” Updating Jobs Globally , page 388

Prerequisites

Before you complete the tasks in this section:

- Set up the pay grades and pay grade steps for jobs.

  See Chapter 7, “Setting Up Job Information,” page 49.
- Set up your processing options for Job Entry and Evaluation (P08001) to specify whether the Job Evaluation form and a country-specific legislative form appear after you enter a job.

Forms Used to Enter Job Information

Form Name	Form ID	Navigation	Usage
Work With Job Entry and Evaluation	W08001B	Job Specifications (G05BJ1), Job Entry and Evaluation	Access the Job Entry and Evaluation form.
Job Entry and Evaluation	W08001A	Click Add on the Work With Job Entry and Evaluation form.	Enter job information.

Setting Processing Options for Job Entry and Evaluation (P08001)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Auto Call

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter a '1' to automatically call the Category Code window when adding a job. Default of blank will not call the Window.

Use this processing option to specify whether the system automatically displays the Category Code window when you add a job record. Values are:

Blank: Do not display the window.

1: Display the window.

2. Enter the country whose legislative/regulatory window is to be called when adding a job. A blank will call the form which applies to the country of the default company 00000.

Use this processing option to specify the code (UDC 00/CN) for a country-specific legislative/regulatory window that the system displays when you add a job record. Values are:

Blank: The system displays the form that is linked to the default company 00000.

Enter an appropriate code.

3. Enter a '1' to automatically call the Job Evaluation window when adding a job. Default of blank will not call the Window.

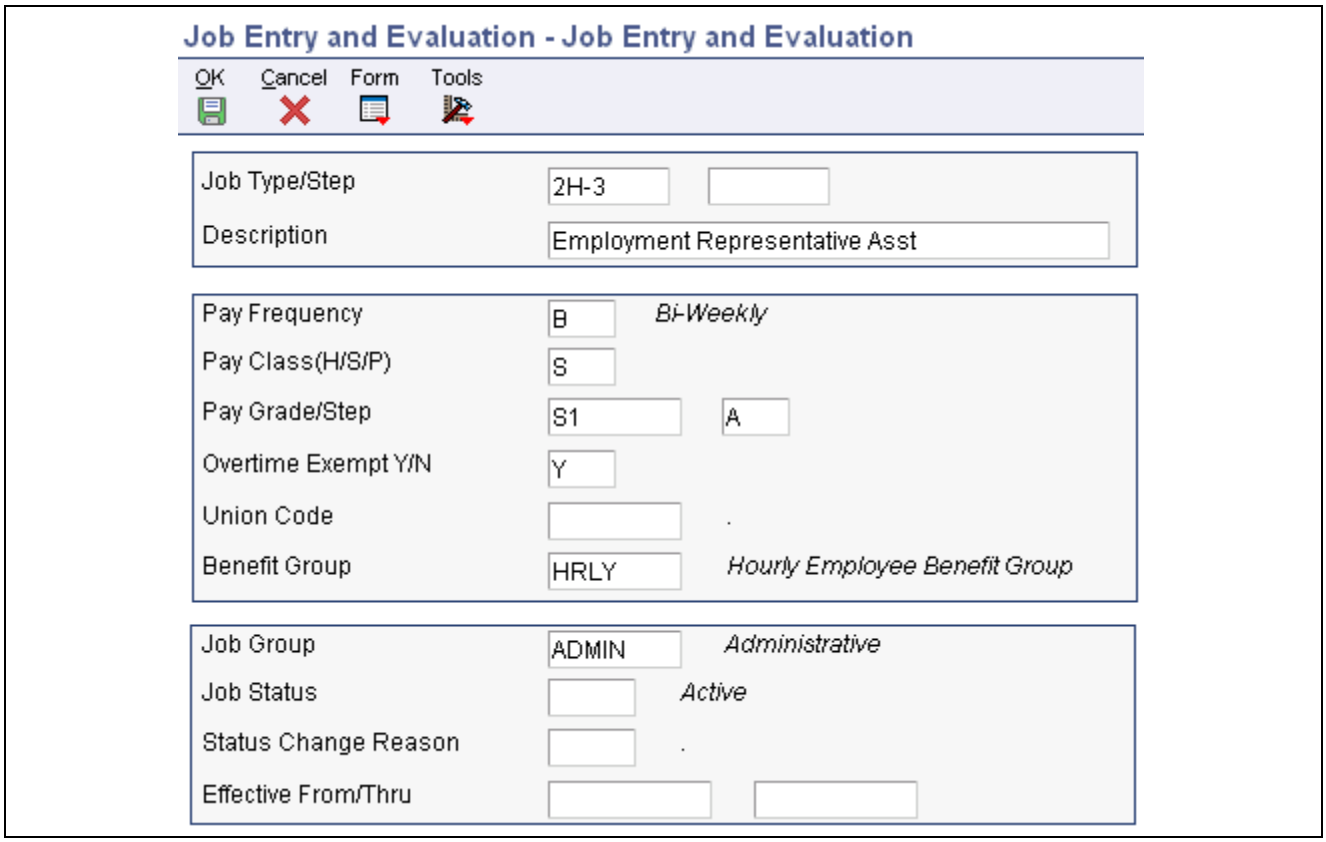
Use this processing option to specify whether the system automatically displays the Job Evaluation window when you add a job record. Values are:

Blank: Do not display the window.

1: Display the window.

Entering Job Information

Access the Job Entry and Evaluation form.



Job Entry and Evaluation form

Important! You must click OK for the system to accept your changes. If you enter job information and perform the next step without clicking OK, your changes are lost.

Overtime Exempt Y/N

Enter a code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Valid codes are:

Y: Yes, the employee fits the rules and does not have to be paid for working overtime.

N: No, the employee does not fit the rules and is to be paid for working overtime.

Pay Frequency

Enter a user defined code (07/PF) that indicates how often an employee is paid. Values are:

B: Biweekly

W: Weekly

S: Semimonthly

M: Monthly

A: Annually

C: European Annualized

The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.

You can leave this field blank and enter a pay frequency at the employee level. A blank value in this field at the job level does not override any value that you enter at the employee level.

Pay Class(H/S/P) Enter a code that specifies how an employee is paid. Valid codes are:

H: Hourly

S: Salaried

P: Piecework

Pay Grade/Step Enter a code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.

To set up pay grades, use Pay Grades by Class (P082001).

If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update these fields:

- Salary
- Hourly Rate
- Hours per day
- Hours per year
- Days per year

Benefit Group Enter the benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization.

Job Group Enter a group of similar jobs that are linked together to form a unit. The jobs might be similar in functions within the organization, job duties, tasks, responsibilities, job evaluation methods, or pay philosophies. Typical job units are clerical or administrative; technical, engineering, scientific, and professional; factory jobs; management; and executive.

Consider dividing groups into separate populations based on the differences between exempt and non-exempt employees, according to the rules and regulations of the Fair Labor Standards Act. For example, consider assigning all your managers to the Managers job group.

A job category defines a specific job, and all related job categories are classified by a job group. You can define job group codes using user defined code table 08/JG.

Job Status Enter a code that indicates whether a job is active or inactive. You can define codes using user defined code table 08/JS.

Status Change Reason Enter a user defined code (system 08, type JC) that explains why a change in status was made.

Effective From/Thru Enter the date on which an address, item, transaction, or table record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent:

- The date on which a change of address becomes effective
- The date on which a lease becomes effective
- The date on which a price becomes effective
- The date on which the currency exchange rate becomes effective
- The date on which a tax rate becomes effective

Related Tasks

This table lists related tasks:

Task	Description
Entering additional job information	You might need to track specific job information that is unique to your organization or your industry. Your software includes category codes and user defined fields that you can customize to track specific information.
Deleting jobs	The system displays a warning message when you attempt to delete a job that has employee records associated with it. When you delete a job ID, you must enter a new job ID for each employee record associated with the deleted job ID.

See Also

Chapter 40, "Defining Jobs," Entering Job Information, page 379

Entering Supplemental Data for Jobs

This section provides an overview of supplemental data entry for jobs and discusses how to enter supplemental data for jobs.

Understanding Supplemental Data Entry for Jobs

Supplemental data is any type of information that you want to track that is not already provided for by the system. You can track supplemental data for these databases:

- Employees
- Jobs
- Applicants
- Requisitions

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

For jobs, typical types of supplemental data might include:

- Job descriptions
- Major responsibilities
- Authority level
- Job reporting relationships
- Education required
- Experience required
- Skills required
- Job progression patterns
- Hazardous materials handling
- Succession candidates

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

Entering Supplemental Data for Jobs

Select Job Supplemental Data menu (G05BSDJ1), Job Supplemental Data Entry.

See Also

Chapter 32, “Revising Employee Information,” Working with the Supplemental Database , page 329

CHAPTER 41

Reviewing Jobs

This chapter provides an overview of job reviewing and discusses how to:

- Review employees by job type and step.
- Update jobs globally.
- Work with obsolete jobs.
- Review jobs with job reports.

Understanding Job Reviewing

After you define and evaluate jobs for your organization, you can review job information to verify that it is correct. To ensure that you entered the correct job for each employee, you can review a list of employees who have been assigned to a particular job.

If your company posts job openings internally, your employees can review job descriptions online to determine whether they qualify for job openings. You can also print job descriptions and post them on company bulletin boards.

After you evaluate your jobs, you can review the evaluations for each job to verify that your evaluations are equitable. For example, you might compare the job evaluations for these jobs to ensure that they received equal evaluation points for accountability:

- Manager of Information Services
- Manager of Documentation
- Manager of Software Development

You can also review the pay ranges for the jobs and pay grades within your organization. You can use this information to verify that these ranges are equitable and appropriate for the job duties and the geographic location where each job is performed.

Understanding Job Reports

To review or compare all the information that you entered for jobs, the system includes a series of reports that you can use to evaluate the jobs in your organization, review the compensation linked to jobs, and review the supplemental data defined for jobs. You can use these reports, for example, to help you determine whether certain jobs are rated at an appropriate level or to identify all jobs that share a particular training requirement.

This section discusses:

- Job evaluation reports.
- Compensation reports.
- Job supplemental data reports.

Job Evaluation Reports

You can use the job evaluation reports to review the information that is assigned to each job in your organization. You can analyze data such as the reporting structure, evaluation components, and evaluation methods that are linked to each job.

Compensation Reports

You can run compensation reports to review and analyze compensation information that is linked to jobs, pay ranges, and employee groups. You can also review upcoming performance reviews to help evaluate compensation expenditures and plan for future economic requirements.

Job Supplemental Data Reports

You can run reports on job supplemental data to review all of the information that you collect for jobs in your organization. You can evaluate information that is a shared requirement for a group of jobs and focus on job categories for which you need to gather additional data.

Reviewing Employees by Job Type and Step

After you define jobs and enter employee information, you can review jobs by employee to verify that you entered the correct job information for each employee. You can also review a list of employees who are in different job types or job steps to determine whether their compa-ratios are equitable.

This section discusses how to review employees by job type and step.

Form Used to Review Employees by Job Type and Step

Form Name	Form ID	Navigation	Usage
Work With Employees by Job Type and Step	W081810A	Job Specifications (G05BJ1), Employees by Job Type and Step	Review employees by job type and step.

Reviewing Employees by Job Type and Step

Access the Work With Employees by Job Type and Step form.

Updating Jobs Globally

This section provides an overview of global job updates, lists prerequisites, and discusses how to:

- Set processing options for Update Job Information to Employee Master (R08801).
- Run the Update Job Information to Employee Master program.

Understanding Global Job Updates

When you change job specifications for one or more jobs in your organization, you can automatically update job information for employees that are assigned to those jobs. For example, if you change the pay grade for the job named Accountant, you do not need to individually change the pay grades for all the accountants in your organization. Instead, you can run a program that globally updates pay grades for employees who are affected by the pay grade change.

When you run the Update Job Information to Employee Master program (R08801), the system updates job information on an employee's record to match the information in the Job Information table and generates a list of employee records that are affected by the update.

You can activate a common setting in the Common Settings for HR Employee Self Service Programs program (P05004) to change the source of the default information for benefit group, workers comp, and sub class for this update process. When you activate the common setting JOBXREF - Default Job Information from F08005, the information for these three fields comes from the Business Unit/ Job Id. X-Ref table (F08005). When JOBXREF is turned off, the information for these three fields comes from the job type.

See Also

Chapter 4, "Setting Up System Options," Setting Up Common Settings for Human Capital Management, page 34

Prerequisite

Make any changes to job information that you want reflected in employee records.

See Chapter 40, "Defining Jobs," Entering Job Information, page 379.

Setting Processing Options for Update Job Information to Employee Master (R08801)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

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Update Options Tab

Use these processing options to select the mode in which you want to run the Update Job Information to Employee Master report, to choose whether category codes from the Job Information table (F08001) will override category codes in the Employee Master Information table (F060116), and to select the change reason and the effective date that will be assigned to any changes made to the Employee Master Information table.

1. Processing Mode Use this processing option to specify whether you want to process the report in proof mode or update mode. Values are:

0: Proof mode.

Use this processing mode to print a report of all changes that will be updated to the Employee Master table when the report is run in update mode. Running this report in proof mode does not update the Employee Master table.

1: Update mode.

Use this processing mode to update the Employee Master table with updated information from the Job Master table and to print a report of all changes made.

Note. After you run this report in update mode, any corrections to updated data in the Employee Master table will need to be done manually. You should run this report in proof mode and verify all information before running in update mode.

---

2. Category Codes

Use this processing option to specify whether the category codes from the Job Master table will override existing category codes in the Employee Master table. Values are:

0: Do not copy category codes from the Job Master table.

Use this option if you do not want to change category code information in the Employee Master table to match category code information in the Job Master table.

1: Copy all category codes from the Job Master table.

Use this option to change all category codes in the Employee Master table to match the category codes in the Job Master table.

3. Change Reason

Use this processing option to identify the reason for any changes made to the Employee Master table. You are required to enter a change reason when processing this report in update mode. All updates to the Employee Master table will be made with the change reason entered here. To enter different change reasons for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. For a list of valid change reasons, see UDC list 06/T.

4. Effective date

Use this processing option to specify the effective date for all updates made to the Employee Master Information table.

To enter different effective dates for different jobs, you must run this report separately for each job by specifying the job in the data selection of this report. If you do not enter an effective date, the system date is used.

Running the Update Job Information to Employee Master Program

Select Job Specifications Adv Operations menu (G05BJ3), Update Job Information to EE Master.

Working with Obsolete Jobs

This section provides overviews of obsolete jobs, the identification of employees assigned to obsolete jobs, and discusses how to:

- Change the status of a job.
- Identify employees assigned to obsolete job IDs.

Understanding Obsolete Jobs

Occasionally, a job that you have defined becomes obsolete. When a job becomes obsolete, you can do one of these:

- Delete the job from the Job Information table.
- Change the status of the job to indicate that it is inactive.

Deleting the job from the Job Information table (F08001) conserves computer disk space and eliminates obsolete information. However, after you delete a job, you cannot use it for review or for historical reporting purposes.

To track historical records of all the jobs within your organization, you can change the status of obsolete jobs rather than delete them. After you change a job status to indicate that it is inactive, you should no longer assign that job to active employees. The inactive job remains in the Job Information table.

After you delete a job from the Job Information table or change a job status to inactive, you must change the employee records of each active employee who is assigned to the deleted or inactive job. When you change these employee records, you manually replace the obsolete job ID with a valid job ID.

To identify the employees assigned to obsolete jobs, you can print the Invalid Job IDs in Employee Master report (R08802).

Understanding the Identification of Employees Assigned to Obsolete Job IDs

Occasionally, a job you have defined becomes obsolete. A job can become obsolete for many reasons, such as:

- Your organization undergoes a restructuring and eliminates one or more jobs.
- You restructure the naming conventions for your jobs.

When a job becomes obsolete, you can delete it from the Job Information table (F08001). Then, for each employee who is assigned to the obsolete job, you must manually replace the obsolete job ID with a valid job ID. To identify the employees who are currently assigned to obsolete jobs, review the Invalid Job IDs in Employee Master report (R08802).

When you replace an obsolete job ID in an employee's record, verify that additional job-related information for the employee, such as the pay frequency, pay class, and pay grade step, are appropriate for the new job.

Form Used to Work With Obsolete Jobs

Form Name	Form ID	Navigation	Usage
Work With Job Entry and Evaluation	W08001B	Job Specifications (G05BJ1), Job Entry and Evaluation	Access the Job Entry and Evaluation form.
Job Entry and Evaluation	W08001A	On the Work With Job Entry and Evaluation form, select the obsolete job and then click Select.	Change the status of a job.

Changing the Status of a Job

Access the Job Entry and Evaluation form.

Job Status Enter a code that indicates whether a job is active or inactive. You can define codes using user defined code table 08/JS.

Identifying Employees Assigned to Obsolete Job IDs

Select Job Specifications Adv Operations (G05BJ3), Invalid Job IDs in EE Master.

CHAPTER 42

Understanding DBA Table Methods

This chapter provides an overview of DBA Table Methods.

DBA Table Methods

Five general, arbitrary categories of DBA table methods are available. The methods are distinguishable by what the DBA method is based on. This table lists the categories and available calculations:

Category	Available Calculations
Salary Amounts: Pay Period Monthly Annual Life Insurance 2nd Life Insurance	For the salary figure, you can perform one of these calculations: • Table amount x Employee rate • Salary x Employee rate x Table amount • Table amount = actual DBA amount • Hours worked x Table amount • Gross earnings x Table amount • Salary x Employee rate Result rounded down x Table amount • Salary x Employee rate Result rounded up x Table amount • Salary x Table amount x Excess rate
Employee Age:	Based on the employee age, you can perform one of these calculations: • Salary x Employee rate x Table amount • Salary x Employee rate Result rounded down x Table amount • Salary x Employee rate Result rounded up x Table amount • Salary x Employee rate Result rounded down / 1000 • Salary x Employee rate Result rounded up / 1000 • Salary x Table amount x Excess rate

Category	Available Calculations
Dates: Leave of Absence Original Hire Participation Start	For each date, you can perform one of these calculations: • Table amount x Employee rate • Table amount x Employee rate (calculates hours only) • Table amount x Hours worked (can optionally calculate Rate x Hours) • Table amount x Hours worked (calculates hours only) • Table amount x Hours worked • Table amount = actual DBA amount • Table amount x Gross earnings • Annual salary x Table amount x Excess rate • Pay-period salary x Table amount x Excess rate • Monthly salary x Table amount x Excess rate • Life insurance salary x Table amount x Excess rate • 2nd life insurance salary x Table amount x Excess rate
Amounts: Hours Gross Amount Flat Dollar	You can perform various calculations against an employee pay rate, hours, and gross wages. These calculations include: • Average hourly rate • Range from the detail area of the table
Miscellaneous: Pay-Period Number Variable Months Excess Life Insurance	You can use various tables, depending on: • Pay-period number for the month • Number of months of history to use as a basis • Group term life insurance premiums

Based on Pay-Period Salary

This table lists based on pay-period salary calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
EA	Pay-Period Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
EB	Employee Age in Years	Employee pay-period salary x the amount or rate associated with the employee x Table amount.	3
ED	Pay-Period Salary	Table amount equals the actual amount of the DBA.	1

Table Method	Lower/Upper Ranges Represent	Calculation	Method
EH	Pay-Period Salary	The number of hours worked by the employee x Table amount or rate.	1
EP	Pay-Period Salary	Employee gross earnings for the current period x Table amount or rate.	1
EQ	Pay-Period Salary	Employee pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
ER	Pay-Period Salary	Employee pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
ES	Employee Age in Years	Employee pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
ET	Employee Age in Years	Employee pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
EY	Employee Age in Years	Employee pay-period salary x the amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate. The system does not calculate a DBA amount.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
EZ	Employee Age in Years	Employee pay-period salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
E%	Employee Age or Pay-Period Salary	Employee pay-period salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Monthly Salary

This table lists based on monthly salary calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
NA	Monthly Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
NB	Employee Age in Years	Employee monthly salary x amount or rate associated with the employee x Table amount.	3
ND	Monthly Salary	Table amount equals the actual amount of the DBA.	1
NH	Monthly Salary	Number of hours worked by the employee x Table amount or rate.	1
NP	Monthly Salary	Employee gross earnings for the current period x Table amount or rate.	1
NQ	Monthly Salary	Employee monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1

Table Method	Lower/Upper Ranges Represent	Calculation	Method
NR	Monthly Salary	Employee monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
NS	Employee Age in Years	Employee monthly salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
NT	Employee Age in Years	Employee monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
NY	Employee Age in Years	Employee monthly salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
NZ	Employee Age in Years	Employee monthly salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
N%	Employee Age or Monthly Salary	Employee monthly salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Annual Salary

This table lists based on annual salary calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
AA	Annual Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
AB	Employee Age in Years	Employee annual salary x amount or rate associated with the employee x Table amount.	3
AD	Annual Salary	Table amount equals the actual amount of the DBA.	1
AH	Annual Salary	Number of hours worked by the employee x Table amount or rate.	1
AP	Annual Salary	Employee gross earnings for the current period x Table amount or rate.	1
AQ	Annual Salary	Employee annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
AR	Annual Salary	Employee annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
AS	Employee Age in Years	Employee annual salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
AT	Employee Age in Years	Employee annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
AY	Employee Age in Years	Employee annual salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
AZ	Employee Age in Years	Employee annual salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
A%	Employee Age or Annual Salary	Employee annual salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Life Insurance Salary

This table lists based on life insurance salary calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
IA	Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
IB	Employee Age in Years	Employee life insurance salary x amount or rate associated with the employee x Table amount.	3
ID	Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
IH	Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
IP	Life Insurance Salary	Employee gross earnings for the current period x Table amount or rate.	1

Table Method	Lower/Upper Ranges Represent	Calculation	Method
IQ	Life Insurance Salary	Employee life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1
IR	Life Insurance Salary	Employee life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
IS	Employee Age in Years	Employee life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
IT	Employee Age in Years	Employee life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
IY	Employee Age in Years	Employee life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9

Table Method	Lower/Upper Ranges Represent	Calculation	Method
IZ	Employee Age in Years	Employee life insurance salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
I%	Employee Age or Life Insurance Salary	Employee life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Second Life Insurance Salary

This table lists based on second life insurance salary calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
FA	2nd Life Insurance Salary	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	1
FB	Employee Age in Years	Employee 2nd life insurance salary x amount or rate associated with the employee x Table amount.	3
FD	2nd Life Insurance Salary	Table amount equals the actual amount of the DBA.	1
FH	2nd Life Insurance Salary	Number of hours worked by the employee x Table amount or rate.	1
FP	2nd Life Insurance Salary	Employee gross earnings for the current period x Table amount or rate.	1
FQ	2nd Life Insurance Salary	Employee 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	1

Table Method	Lower/Upper Ranges Represent	Calculation	Method
FR	2nd Life Insurance Salary	Employee 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	1
FS	Employee Age in Years	Employee 2nd life insurance salary x amount or rate associated with the employee. Result rounded up to the next 1000 x Table amount or rate.	3 or 9
FT	Employee Age in Years	Employee 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 x Table amount or rate.	3 or 9
FY	Employee Age in Years	Employee 2nd life insurance salary x amount or rate associated with the employee. Result rounded down to the next 1000 / 1000. The system does not calculate a DBA amount.	3 or 9
FZ	Employee Age in Years	Employee 2nd life insurance salary x the amount or rate associated with the employee. Result rounded up to the next 1000 / 1000.	3 or 9
F%	Employee Age or 2nd Life Insurance Salary	Employee 2nd life insurance salary x Table amount or rate x Excess rate in the table.	3, 9, or 1

Based on Leave-of-Absence Date

This table lists based on leave-of-absence date calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
LA	Months of Service from Leave of Absence	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
LB	Months of Service from Leave of Absence	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
LH	Months of Service from Leave of Absence	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
LI	Months of Service from Leave of Absence	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
LR	Months of Service from Leave of Absence	Table amount x Number of hours worked equaling the DBA amount.	2
L$	Months of Service from Leave of Absence	Table amount equals the actual amount of the DBA.	2
L%	Months of Service from Leave of Absence	Employee gross earnings x Table rate percentage.	2
L1	Months of Service from Leave of Absence	Employee annual salary x Table amount or rate x Excess rate.	2
L2	Months of Service from Leave of Absence	Employee pay-period salary x Table amount or rate x Excess rate in the table.	2
L3	Months of Service from Leave of Absence	Employee monthly salary x Table amount or rate x Excess rate in the table.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
L4	Months of Service from Leave of Absence	Employee life insurance salary x Table amount or rate x Excess rate in the table.	2
L5	Months of Service from Leave of Absence	Employee 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Original Hire Date

This table lists based on original hire date calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
OA	Months of Service from Original Hire Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
OB	Months of Service from Original Hire Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
OH	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
OI	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
OR	Months of Service from Original Hire Date	Table amount x Number of hours worked equaling the DBA amount.	2
O$	Months of Service from Original Hire Date	Table amount equals the actual amount of the DBA.	2
O%	Months of Service from Original Hire Date	Employee gross earnings x Table rate percentage.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
O1	Months of Service from Original Hire Date	Employee annual salary x Table amount or rate x Excess rate.	2
O2	Months of Service from Original Hire Date	Employee pay-period salary x Table amount or rate x Excess rate in the table.	2
O3	Months of Service from Original Hire Date	Employee monthly salary x Table amount or rate x Excess rate in the table.	2
O4	Months of Service from Original Hire Date	Employee life insurance salary x Table amount or rate x Excess rate in the table.	2
O5	Months of Service from Original Hire Date	Employee 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Participation Date

This table lists based on participation date calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
PA	Months of Service from Participation Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
PB	Months of Service from Participation Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2
PH	Months of Service from Participation Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
PI	Months of Service from Participation Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
PR	Months of Service from Participation Date	Table amount x Number of hours worked equaling the DBA amount.	2
P$	Months of Service from Participation Date	Table amount equals the actual amount of the DBA.	2
P%	Months of Service from Participation Date	Employee gross earnings x Table rate percentage.	2
P1	Months of Service from Participation Date	Employee annual salary x Table amount or rate x Excess rate.	2
P2	Months of Service from Participation Date	Employee pay-period salary x Table amount or rate x Excess rate in the table.	2
P3	Months of Service from Participation Date	Employee monthly salary x Table amount or rate x Excess rate in the table.	2
P4	Months of Service from Participation Date	Employee life insurance salary x Table amount or rate x Excess rate in the table.	2
P5	Months of Service from Participation Date	Employee 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Start Date

This table lists based on start date calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
SA	Months of Service from Start Date	Table amount x amount or rate retrieved from one of the 3 DBA files associated with the employee.	2
SB	Months of Service from Start Date	Table amount x amount or rate associated with the employee. This method generates no dollars, only hours.	2

Table Method	Lower/Upper Ranges Represent	Calculation	Method
SH	Months of Service from Start Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
SI	Months of Service from Start Date	Table amount x Number of hours worked equaling hours to accrue x Employee hourly rate for the DBA amount.	2
SR	Months of Service from Start Date	Table amount x Number of hours worked equaling the DBA amount.	2
S$	Months of Service from Start Date	Table amount equals the actual amount of the DBA.	2
S%	Months of Service from Start Date	Employee gross earnings x Table rate percentage.	2
S1	Months of Service from Start Date	Employee annual salary x Table amount or rate x Excess rate.	2
S2	Months of Service from Start Date	Employee pay-period salary x Table amount or rate x Excess rate in the table.	2
S3	Months of Service from Start Date	Employee monthly salary x Table amount or rate x Excess rate in the table.	2
S4	Months of Service from Start Date	Employee life insurance salary x Table amount or rate x Excess rate in the table.	2
S5	Months of Service from Start Date	Employee 2nd life insurance salary x Table amount or rate x Excess rate in the table.	2

Based on Hours Worked

This table lists based on hours worked calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
HA	Hours Worked	Employee total wages / Employee total hours x Table amount or rate.	4
HD	Inception to Date Hours Worked	Table amount equals the actual amount of the DBA.	4
HP	Inception to Date Hours Worked	Employee hours worked during the current period x Table rate.	4
H1	Hours Worked	Table amount equals the number of hours that the DBA is based on.	4

Based on Gross Amount

This table lists based on gross amount calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
GA	Gross Amount	Amount or rate associated with the employee x Table amount.	8
GD	Gross Amount	Table amount equals the actual amount of the DBA.	8
GH	Gross Amount	Hours worked x Table amount.	8
GP	Gross Amount	Amount of employee gross earnings x Table rate.	8
G%	Gross Amount	Amount of employee gross earnings x Table rate.	3
G@	Gross Amount	Amount of employee gross earnings x Table rate.	8

Based on Flat Dollar Amount

This table lists based on flat dollar amount calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
DD	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, do one of these: Calculate days worked Days worked x Rate in the detail area	4
DH	Hours Worked	If possible, use the amount in the table. If employee worked fewer hours, use Actual hours worked x Rate in the detail area.	4
DL	Employee Age in Years	Table amount equals the actual amount of the DBA.	3 or 9
DP	Pieces Produced	If possible, use amount in table. If employee produced fewer pieces, use Actual pieces produced x Rate in the detail area.	5

Based on Pay-Period Number

This table lists based on pay-period number calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
WD	Pay-Period Number (1-5)	Days worked (based on number of timecard records) x Table amount or rate.	0
WH	Pay-Period Number (1-5)	Hours worked x Table amount or rate.	0
WP	Pay-Period Number (1-5)	Pieces produced x Table amount or rate.	0
W$	Pay-Period Number (1-5)	Table amount equals the actual amount of the DBA.	0
W%	Pay-Period Number (1-5)	Gross earnings x Table amount or rate.	0

Based on Variable Months

This table lists based on variable months calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
MH	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table x Table rate.	6
MI	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table rounded up to the next whole hour x Table rate.	6
MJ	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated hours worked for the number of months specified in the table rounded down to the next whole hour x Table rate.	6
MP	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated gross earnings for the number of months specified x Table rate.	6
MR	Variable Months	The table is a one-line entry indicating how many months back to look at history. Accumulated pieces produced for the number of months specified x Table rate.	6

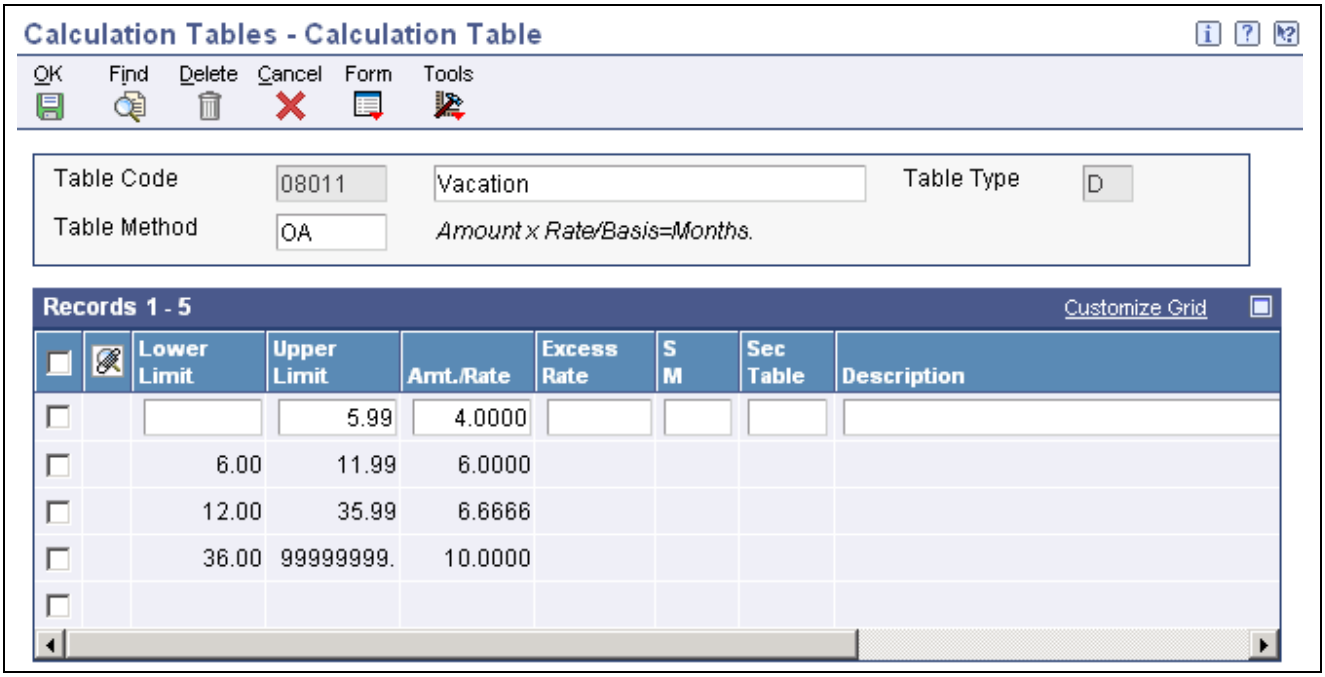
Based on Excess Life Insurance

This table lists based on excess life insurance calculations:

Table Method	Lower/Upper Ranges Represent	Calculation	Method
XL	Employee Age in Years	The maximum amount for data dictionary item #XL1-Hours basis. Remainder x Table amount.	3 or 9
XC	Employee Age in Years	The maximum amount for data dictionary item #XLC-Hours basis. Remainder x Table amount.	3 or 9

Example: Calculation Table Based on Months of Service

When you set up a calculation table based on months of service, the system uses only whole numbers for the lower and upper limits:



Calculation Table form

For example, the system reads the limits above as:

- 0 to 5
- 6 to 11
- 12 to 35
- 354 to 9,999,999

The system considers the months between the specified date and the payroll date, not the number of days. The system does not convert number of days to months. For example, the system would calculate months of service as follows:

- Start Date = 1/15 and Pay Date = 1/31

The system calculates one month of service. The employee started in January and was paid in January.

- Start Date = 1/15 and Pay Date = 2/15

  The system calculates two months of service. The employee started in January and was paid in February.

Example: Calculation Table Based on Periods Worked

You might want to set up a calculation table based on different amounts based on pay periods worked. For example, you might want to split a 75.00 per month health insurance premium between two pay periods.

This list shows the information to enter on each line of the calculation table:

Line	Information
Line one for the first pay period	Lower Limit: 1 Upper Limit: 1 Amount/Rate: 40
Line two for the second pay period	Lower Limit: 2 Upper Limit: 2 Amount/Rate: 35

Based on this calculation, the system deducts 40.00 in the first pay period and 35.00 in the second pay period.

CHAPTER 43

Understanding DBA Verification

You should research these questions when the system does not calculate a DBA as you expect:

- For whom is the DBA not being calculated? One employee? A group of employees? Everyone?
- At what level is the DBA assigned? Employee? Union? Required? One-Time Override?
- Does the DBA have start or stop dates?
- What is the value of the Calculate if No Gross field?
- Does the employee have gross wages?
- What is the DBA method? Flat dollar amount? Percentage? Wage attachment?
- Does the DBA use a calculation-table code for its calculation?
- Does the DBA have limits? If it has a limit, has the limit been met?
- Are the PDBAs in the Basis of Calculations table correct?
- Is the DBA based on another DBA? If so, does the based-on DBA calculate first?
- Does the DBA have a declining balance? If so, is an amount due?
- What is the value of the Calculate in Pre-Payroll field?
- Has the DBA already been calculated for this period?
- What is the employee's pay frequency? Biweekly? Semimonthly? Monthly? Weekly?
- Which period of the month are you processing?
- What is the value of the DBA Specification Withholding field?
- What payroll processes are you using? Pre-payroll? Interims?
- Does the value in the Period Number field in the pre-payroll parameters correspond to the value in the DBA Specifications Withholding field?
- Does the DBA calculate in a test interim?
- What is the value of the Z column on the employee's DBA Instructions form?

APPENDIX A

Delivered Workflow for PeopleSoft EnterpriseOne HCM Application Fundamentals

This appendix discusses the delivered workflow for PeopleSoft EnterpriseOne HCM Application Fundamentals.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Workflow Tools

Delivered Workflow for PeopleSoft EnterpriseOne HCM Application Fundamentals

This section discusses the PeopleSoft EnterpriseOne HCM Application Fundamentals workflow.

Termination Initialization

This section discusses the Termination Initialization workflow.

Description

Workflow Description	This process initiates the employee termination process by gathering information about the employee and retrieving processing options. A subprocess, TERMNTFY01, sends initial notifications. Another process, TERMEMP03, is initiated that controls the process from this point on. This information is updated when workflow approves the change: – Employment status – Benefit status – Date terminated
Workflow Trigger	An HR representative uses the Employee/Personal program (P0801EMP) to change these values: – Pay Status for an individual to T (terminated) – Benefit Status: 9 – Termination Date: Any valid date
Workflow Action	The termination process is initiated by starting several subtasks tasks to gather information about the employee and retrieve processing options. Another sub process (TERMNTFY) sends initial notifications. The TERMEMP03 process controls the activity flow after this point.

Workflow Objects

System	87
Workflow Object Name	TERMEMP01
Object ID	W0801EMPA
Event Description / Function Names	OK Button Clicked / Update Record to DB Before / StartTermWF
Sequence / Line Numbers	108, 45

Termination Notification

This section discusses the Termination Notification workflow.

Description

Workflow Description	As part of terminating an employee, termination notifications are sent to IT, HR, and Payroll. A company property report is also sent to a designated manager.
Workflow Trigger	An HR representative uses the Employee/Personal program (P0801EMP) to change these values: – Pay Status for an individual to T (terminated) – Benefit Status: 9 – Termination Date: Any valid date.
Workflow Action	The process sends four messages, one with an attached Time Entry application. The attached application launches and submits the company property report.

Workflow Objects

System	87
Workflow Object Name	TERMNTFY01
Object ID	TERMEMP01

Terminate Employee

This section discusses the Terminate Employee workflow.

Description

Workflow Description	As part of terminating an employee, this process serves as a driver to start other sub processes as specified in the processing options attached to the HRM Termination Workflow Processing Options program (P05W01).
Workflow Trigger	An HR representative uses the Employee/Personal program (P0801EMP) to change these values: – Pay Status for an individual to T (terminated) – Benefit Status: 9 – Termination Date: Any valid date.
Workflow Action	On the termination date, the system runs these processes: – TERMEMP05: Gets approval and calls TERMUPDATE. – TERMUPDATE: Updates the database. – TERMBEN: Terminates benefits. – TERMTIME: Sends the Time Enty program (P051131) to the specified HR administration person.

Workflow Objects

System	87
Workflow Object Name	TERMEMP03
Object ID	TERMEMP01

Cleanup Unpaid Time, Checks, DBA's

This section discusses the Cleanup Unpaid Time, Checks, DBA's workflow.

Description

Workflow Description	As part of terminating an employee, this process checks for unpaid time, checks, or DBA's and send an approval message to an HR person for approval.
Workflow Trigger	After an HR representative starts the termination process (TERMEMP01), TERMEMP03 is automatically started as a local sub process.
Workflow Action	This process checks for unpaid time, checks, or accrued sick, vacation, and holiday pay. If any balances are found, and the processing option is turned on, an approval application is sent to an HR person. The address book number of this person is hard-coded in the message. To override the default, recipient rules must be entered.

Workflow Objects

System	87
Workflow Object Name	TERMEMP05
Object ID	TERMEMP03

Termination of Benefits

This section discusses the Termination of Benefits workflow.

Description

Workflow Description	This process terminates employee benefits.
Workflow Trigger	After an HR representative starts the termination process (TERMEMP01), TERMEMP03 is automatically started as a local sub process.
Workflow Action	This process starts six other processes to check for fund allocations, flexible spending accounts, COBRA, and HIPAA eligibility, retrieves processing option values and determines if UCR is set in Common Display Settings. Depending on what was retrieved from the previous processes, these actions are initiated: – Send Batch Enrollment report (R083800) – Generate a COBRA mail merge letter – Generate a HIPAA mail merge letter – Send Enrollment with Eligiblity (P08334) – Notify Fund administrator – Notify FSA adminstrator

Workflow Objects

System	87
Workflow Object Name	TERMBEN
Object ID	TERMEMP03

Terminate Time Entry

This section discusses the Terminate Time Entry workflow.

Description

Workflow Description	This process sends the time entry application to the specified employee.
Workflow Trigger	After an HR representative starts the termination process (TERMEMP01), TERMEMP03 is automatically started as a local sub process.
Workflow Action	This process check for accrued sick, vacation, and holiday pay, unprocessed checks, and unpaid time. If any positive values are found, the Time Enty program (P051131) is sent to the specified employee.

Workflow Objects

System	87
Workflow Object Name	TERMTIME
Object ID	TERMEMP03

Termination Aborted Notification

This section discusses the Termination Aborted Notification workflow.

Description

Workflow Description	This process sends a notification to inform the recipient that the termination process has been aborted. This message is sent to all of those who received the original notifications in the TERMNTFY01 process.
Workflow Trigger	After an HR representative starts the termination process (TERMEMP01), TERMEMP03 is automatically started as a local sub process.
Workflow Action	The process sends four messages to the same employees who originally received messages in the TERMNTFY01 process.

Workflow Objects

System	87
Workflow Object Name	TERMABNOT
Object ID	TERMEMP03

EE Termination Update

This section discusses the EE Termination Update workflow.

Description

Workflow Description	This process checks for Time Entry and updates the changes in the data base.
Workflow Trigger	After an HR representative starts the termination process (TERMEMP01), TERMEMP03 is automatically started as a local sub process.
Workflow Action	If Skip Time Entry was not selected on the approval application, and the employee has unprocessed sick, vacation or holiday pay, this process starts the TERMEMP06 process to write time entry records. The N0500022 function then updates these fields in the data base: – Date Pay Stopped (PTDT) – Date Terminated (DT) – Benefit Status (BENS) – Pay Status (PAST) The B0500575 function is called from N0500022 to update the Employee Master Information table (F060116).

Workflow Objects

System	87
Workflow Object Name	TERMUPDATE
Object ID	TERMEMP03

APPENDIX B

PeopleSoft EnterpriseOne Human Capital Management Foundation Reports

This appendix discusses PeopleSoft EnterpriseOne Human Capital Management Foundation reports.

Running the Employee Roster Report

Select Employee Management (G05BE1), Employee Roster.

The Employee Roster report (R064011) lists all employees or selected groups of employees entered in the Payroll system. You run this report to verify that this employee information has been entered correctly:

- Home company
- Business unit
- Basic dates
- Group plan
- Workers compensation
- Federal and state tax exemption
- Job type and job step
- Pay status
- EEO status

Setting Processing Options for Employee Roster (R064011)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Address

Use these processing options to specify whether the system prints the address information and phone number and which phone number type to use.

1. Enter '1' to print address information

Use this processing option to print the current address for each employee on the report. The address will appear just below each employee number. Values are:

Blank or *0:* Do not print address

1: Print address

2. Enter '1' to print phone number

Use this processing option to specify whether to print a telephone number for each employee on the report. The phone number appears immediately below each employee number or each employee address. To indicate the type of phone number that the system prints, use this processing option in combination with Phone Number Type processing option. Values are:

Blank or *0:* Do not print a phone number.

1: Print a phone number.

3. Phone Number Type

Use this processing option in combination with the Enter 1 to print phone number option to specify the type of phone number that the system prints for all employees. For example, to print the home telephone number for each employee, enter HOM. This code is defined in UDC 01/PH.

Running the Employee Roster with Rate Report

Select Employee Management (G05BE1), Employee Roster with Rate.

The Employee Roster with Rate report (R064021) contains the same information as the Employee Roster report (R064011) plus this information:

- Salary amounts.
- Person who last changed the payroll data and the date that the change occurred.
- Work and residence tax areas.
- Employment status.
- Termination/change status.
- Contract employee information.
- Earned income credit status.
- Residence status.
- Tax method.
- Pay frequency and class.

Setting Processing Options for Employee Roster with Rate (R064021)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Employee No

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number

Use this processing option to specify the employee information that the system prints on the report. Values are:

A: Address book number

S: Social security number

O: Third number

Running the Update Employee Master Age As Of Report

Select Employee Adv & Technical Operations (G05BE3), Update EE Master Age as of.

The Update Employee Master Age As Of report (R083495) updates the employee age in the Employee Age field on the Personal form in the Employee Master program (P0801). The system calculates the new value based on the employee Date of Birth value and the date specified in your processing options.

Setting Processing Options for Update Employee Master Age As Of (R083495)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Date

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter the as of date to be used when calculating employees age.

Use this processing option to specify the as of date that the system uses when calculating the employee age.

Running the Employee Supplemental Data Report

Select Employee Supplemental Data (G05BSDE1), Employee Supplemental Data Report.

Examples of how you can run reports to review employee supplemental information are:

- As an individual employee summary.
- As a summary of all your employees and their related profile data.
- By supplemental data type.

To review complete supplemental information for one or more employees, run the Employee Supplemental Data Report program (R080410). This program compiles all of an employee's supplemental data into an easy-to-read, resume-style format.

The report includes a summary of data stored in these tables for each of the employees that you select:

- HRM Supplemental Data Types (F08090).
- Human Resources General Description-User Def Codes (F08092).
- Human Resources General Description - Narration (F08093).
- Employee Master Information (F060116).

The information that prints on this report is the same information that you can review on Employee Master (P0801).

You can list employees alphabetically by last name or numerically by employee number.

Setting Processing Options for Employee Supplemental Data Report (R080411)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

Use these processing options to specify whether the system prints certain types of information. Also use these processing options to specify default information regarding the designated printing form and printer settings.

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

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

Blank: Print the tax ID

1: Do not print the tax ID

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

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

Blank: Print the asking salary

1: Do not print the asking salary

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

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

Blank: Print extended narrative text

1: Do not print extended narrative text

Running the Employee Data by Data Type Report

Select Employee Supplemental Data (G05BSDE1), Employee Data by Data Type Report.

Run the Employee Report by Data Type program (R080400) to review all employees who have information in a particular supplemental data type category, such as language skills. The information that prints on this report is the same information that you can review online using the Supplemental Data program (P00092).

You can list employees alphabetically by last name or numerically by employee number.

This report includes a summary of data as it applies to certain employees from these tables:

- Supplemental Database Data Type (F00091).
- Supplemental Data (F00092).
- Employee Master Information (F060116).

Prerequisite

Prepare data for point-in-time reporting.

See Chapter 35, "Working with Point-in-Time Employee Reports ," Preparing Data for Point-in-Time Reports , page 346.

Setting Processing Options for Employee Report By Data Type (R080400)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Narrative

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

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

Use this processing option to specify whether the system prints narrative text on the report. Values are:

Blank: Print the text.

1: Do not print the text.

Running a Point-In-Time Employee Roster Report

Select Point in Time Employee Master (G05B55631), Point in Time Employee Roster.

After you review your data selection, use the Point-In-Time Employee Roster program (R064011D) to review all or selected groups of employees, as of a specific date, that are entered in the Payroll system. You can run this report to analyze employee information, prepare responses to governmental inquiries, or verify that this employee information has been entered correctly:

- Home company.
- Business unit.
- Basic dates.
- Group plan.
- Workers' compensation.
- Federal and state tax exemption.
- Job type and job step.
- Pay status.
- EEO status.

Setting Processing Options for Point in Time Employee Roster (R064011D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Address

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter '1' to print address information Use this processing option to specify whether you want the system to print employee address information on the report.

Point in Time

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

PO Item Use this processing option to specify date and version information for the report. Values are:

Effective Date: Enter a valid calendar date.

Version Name: Enter the report number that you want to run.

Running the Point-In-Time Employee Roster with Rate Report

Select Point in Time Employee Master (G05B31), Point in Time Employee Roster with Rate.

After you review your data selection, use the Point-In-Time Employee Roster with Rate program (R064021D) to review all or selected groups of employees, as of a specific date. This report is useful in preparing information in response to a governmental inquiry, analyzing employee information, and ensuring accurate data entry. In addition to the reporting parameters of the Point-In-Time Roster program (R064011D), this report contains this information:

- Salary amounts.
- Person who last changed the payroll data and the date that the change occurred.
- Work and residence tax areas.
- Employment status.
- Termination/change status.
- Contract employee information.
- Earned income credit status.
- Residence status.
- Tax method.
- Pay frequency and class.
- FLSA (Fair Labor Standards Act) exemption status.

See Also

Report Writing 8.94

Setting Processing Options for Point in Time Employee Roster with Rate (R064021D)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Employee No

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter 'A' to print Address Book number, 'S' for Social Security number or 'O' for Third number

Use this processing option to specify the employee information that the system prints on the report. Values are:

A: Address book number

S: Social security number

O: Third number

Point in Time

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

PO Item

Use this processing option to specify date and version information for the report. Values are:

Effective Date: Enter a valid calendar date.

Version Name: Enter the report number that you want to run.

Running the Employee History Log

Select Employee History (G05BH1), Employee History Log.

Run the Employee History Log report (R080423) to review history for either a single data item or for all data items that you are tracking for each employee. The information that prints on this report is the same information that you can review with the Employee History Inquiry program (P050242).

This report locates information from the Employee Master Information table (F060116) and the HR History table (F08042).

Running the Employee Salary History Analysis Report

Select Employee History (G05BH1), Employee Salary History Analysis.

Run the Employee Salary History report (R080424A) to review changes to the primary job salary within the date range that you define.

The system selects a salary record and an hourly record for each employee. It then compares the effective dates of the two records and chooses the earlier date to identify the pay class that is linked to the employee.

If the pay class is *S* (Salary), the system prints the employee's information based on salary information. If the pay class is *H* (Hourly), the system prints the employee's information based on hourly rate information.

Running the Employee Turnover Report

Select Employee History (G05BH1), Employee Turnover Report.

After you define the turnover columns, you can run the Turnover Report (R080430). You can create turnover reports based on Company, Business Unit, Check Route code, and Job Type.

Setting Processing Options for Turnover Report (R080430)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter the From Date to begin tracking turnover.

Use this processing option to specify the From Date to begin tracking turnover.

2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today.

Use this processing option to enter the Thru Date when calculations are to cease. Default of blank will calculate through today.

3. Enter the Turnover Column Group which contains the column headings you wish to have display on the report.

Use this processing option to enter the Turnover Column Group which contains the column headings you wish to have display on the report.

Running the Employee Activity Analysis Report

Select Employee History (G05BH1), Employee Activity Analysis.

Run the Employee Activity Analysis report (R080431) to review employee turnover by the dates and the data item that you define in your processing options. You can also set up your processing options to segment the date that you entered in the From Date and Thru Date fields into six segments, such as months or years.

Setting Processing Options for Employee Activity Analysis Report (R080431)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Setup

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1) From Date Use this processing option to limit reviews. The review date must be greater than or equal to the from date.

2) Thru Date Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru date.

3) Turnover Column Group Use this processing option to specify the Turnover column Group.

4) Data Item Use this processing option to specify a data item.

Segments

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1) Date 1 Use this processing option to specify Date 1.

2) Date 2 Use this processing option to specify Date 2.

3) Date 3 Use this processing option to specify Date3.

4) Date 4 Use this processing option to specify Date4.

5) Date 5 Use this processing option to specify Date 5.

6) Date 6 Use this processing option to specify Date 6.

Running the Job Evaluation Factor Data Report

Select Job Specifications (G05BJ1), Job Evaluation Factor Data.

After you evaluate jobs, you can run the Job Evaluation Factor Data report (R051450) to review the evaluation method, factors, points, and degrees assigned to each job. Use this information to compare the job evaluations for similar jobs and to determine whether the reporting structure of the jobs accurately reflects their evaluations.

Running the Job Data and Evaluation Points Report

Select Job Specifications (G05BJ1), Job Data & Evaluation Points.

You should run the Job Data & Evaluation Points report (R08001) to review job information with evaluation information such as evaluation method, evaluation date, and evaluation points.

Running the Job Evaluation Factors Report

Select Job Specifications Setup (G05BJ4), Evaluation Factors Table Report.

After you set up your evaluation methods for evaluating jobs, you can run the Evaluation Factors Table Report program (R080012) to review the evaluation methods that you defined. The information printed on the report is identical to the information in the Job Evaluation - Compensable Factors Table (F08011).

Running the Pay Ranges By Job Report

Select Job Specifications (G05BJ1), Pay Ranges by Job Report.

You can run the Pay Ranges by Job report (R052450) to review the pay ranges defined for each job. The information that prints is the same information that displays in Work With Pay Ranges By Job (P052002).

Setting Processing Options for Pay Ranges by Job (R052450)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter a Pay Range - As of Date. Blank will use the system date. Use this processing option to specify a Pay Range - As of Date. If you leave this processing option Blank, the system uses the system date.

Running the Employees Above/Below Pay Grade Report

Job Specifications (G05BJ1), Employees Above/Below Pay Grade.

Run the Employees Above/Below Pay Grade Max/Min report (R052001) to review employees paid above the maximum amount for their pay grade or below the minimum amount for their pay grade.

Setting Processing Options for Employees Above /Below Pay Grade (R052001)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Title Display

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1) Report Title Display: Use this processing option to specify the text that the system displays in the report title. Values are:

Blank: Employees Above Pay Grade Maximum

1: Employees Below Pay Grade Minimum

Running the Upcoming Employee Reviews by Supervisor Report

Select Pay Grade Step Administration (G05BJ2), Upcoming Reviews.

Upcoming Reviews is a batch program (R052202) to report employees who have upcoming reviews by supervisor. The system displays each employee with the Dates of Next Review and Type of Review. You can set up processing options to determine whether this report runs automatically on a specified date, to activate Enterprise Workflow Management, and to allow the system to update the Upcoming Reviews by Supervisor program (P052200) on the self-service website. If Workflow is activated, the system sends reminder messages to each supervisor about pending reviews.

You also set a processing option to determine which of the three versions you want to run. A version exists that reports on overdue reviews and a version that reports on all employees with upcoming reviews without specified review dates. Neither of these versions starts Workflow.

See Also

PeopleSoft EnterpriseOne Human Capital Management Self Service 8.11 PeopleBook, "Manager Self-Service," Reviewing Upcoming Employee Reviews by Supervisor

PeopleSoft EnterpriseOne Human Capital Management Self Service 8.11 PeopleBook, "Setting Up Manager Self-Service," Setting Up Upcoming Reviews by Supervisor

Setting Processing Options for Upcoming Reviews (R052202)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to select an employee for this report and to include the Uniform Resource Locator for supervisory review instructions.

1. Employee Number Display

Use this processing option to specify the employee number that you want to print on the report. Values are:

A: Address book number

S: Employee tax identification number

O: Other number

2. URL For Supervisor Review Instructions

Use this processing option to specify the uniform resource locator for the supervisor review instructions.

Process

Use these processing options to specify whether to run the Workflow Reminder Process and to define defaults that limit the report to specific parameters.

1. Workflow Reminder Process

Use this processing option to specify whether to run the workflow reminder process. Values are:

1: Run the workflow process.

0: Do not run the workflow process.

2. From Date Use this processing option to limit reviews. The review date must be greater than or equal to the from date.

3. Thru Date Use this processing option to limit reviews processed. The review date must be less than or equal to the Thru date.

4. Days From Today Use this processing option to limit reviews processed. Enter Days From Today to process all new review dates that are less than or equal to the system date and the number of days entered into the processing option. Enter Date of Thru Date to ignore this option.

Running the Job Profile Report

Select Job Supplemental Data (G05BSDJ1), Job Supplemental Data Report.

The Job Profile Report (R080412) helps you to review all jobs that have information for all data items.

Setting Processing Options for Job Profile Report (R080412)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Narrative

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text. Use this processing option to specify whether the system prints text information on the report. Values are:

Blank: Print the text.

1: Do not print the text.

Running the Job Data by Data Type Report

Select Job Supplemental Data (G05BSDJ1), Job Data by Data Type Report.

Run the Jobs Report by Data Type report (R080402) to review all jobs by a specified data item. For example, you can inquire on the Hazardous Materials Handling data item to identify all jobs that have this training as a requirement.

Glossary of PeopleSoft Terms

activity A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.

activity rule The criteria by which an object progresses from one given point to the next in a flow.

add mode A condition of a form that enables users to input data.

Advanced Planning Agent (APAg) A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

application server A server in a local area network that contains applications shared by network clients.

as if processing A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.

alternate currency A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

as of processing A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

back-to-back process A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.

batch processing A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.

In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.

batch server A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

batch-of-one immediate A transaction method that enables a client application to perform work on a client workstation, 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 and store-and-forward.

business function A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable 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	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is 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 in PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
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.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all 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.

date pattern A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

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 information Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).

direct connect A transaction method in which a client application communicates interactively and directly with a server application.

See also batch-of-one immediate and store-and-forward.

Do Not Translate (DNT) A type of data source that must exist on the iSeries because of BLOB restrictions.

dual pricing The process of providing prices for goods and services in two currencies.

edit code A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.

edit mode A condition of a form that enables users to change data.

edit rule A method used for formatting and validating user entries against a predefined rule or set of rules.

Electronic Data Interchange (EDI) An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.

embedded event rule An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.

Employee Work Center A central location for sending and receiving all PeopleSoft 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.

enterprise server A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.

EnterpriseOne object A reusable 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.

EnterpriseOne process A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

Environment Workbench An application that, during the Installation Workbench process, 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.

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.

event rule A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.

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. A facility is sometimes referred to as a *business unit* .

fast path A command prompt that enables the user to move quickly among menus and applications by using specific commands.

file server A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.

final mode The report processing mode of a processing mode of a program that updates or creates data records.

FTP server A server that responds to requests for files via file transfer protocol.

header information 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.

interface table See Z tables.

integration server A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.

integrity test A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interoperability model A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.

in-your-face-error In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

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.

jargon An alternative data dictionary item description that PeopleSoft EnterpriseOne or People 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. This server provides middleware services for security and state maintenance, along with data access and persistence.

JDBNET A database driver that enables heterogeneous servers to access each other's data.

JDEBASE Database Middleware A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.

JDECallObject An API used by business functions to invoke other business functions.

jde.ini A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.

JDEIPC Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.

JDENET PeopleSoft proprietary communications middleware package. This package 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 PeopleSoft EnterpriseOne supported platforms.

Location Workbench An application that, during the Installation Workbench process, 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.

logic server A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.

MailMerge Workbench An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

master business function (MBF) An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

master table See published table.

matching document A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

media storage object Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.

messaging server A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

named event rule (NER) Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

nota fiscal In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM) In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA) An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA) An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package 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 on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.

package build A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”

package location The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench An application that, during the Installation Workbench process, 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.

PeopleSoft Database See JDEBASE Database Middleware.

planning family A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

print server The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF) A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.

project In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published table Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

pull replication One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne 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 F98DRPCN table.

QBE An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.

refresh A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

replication server A server that is responsible for replicating central objects to client machines.

quote order In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, 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.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpiseOne systems.
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-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	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.

three-way voucher match In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

transaction processing (TP) 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 may include programs that validate data and format terminal screens.

transaction set An electronic business transaction (electronic data interchange standard document) made up of segments.

trigger One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

triggering event A specific workflow event that requires special action or has defined consequences or resulting actions.

two-way voucher match In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

User Overrides merge Adds new user override records into a customer's user override table.

variance In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (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 using the current bill of material, routing, and overhead rates.

Version 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.

visual assist Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

vocabulary override An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.

wchar_t An internal type of a wide character. It is used for writing portable programs for international markets.

web application server A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

web server A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

Windows terminal server A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

work day calendar In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

workflow The automation of a business process, in whole or in 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 server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.

XML CallObject An interoperability capability that enables you to call business functions.

XML Dispatch An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.

XML List An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.

XML Service An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.

XML Transaction An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS) Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.

Z table A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.

Z transaction Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

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