PeopleSoft®

# PeopleSoft EnterpriseOne Human Capital Management Self Service 8.11 PeopleBook

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PeopleSoft EnterpriseOne Human Capital Management Self Service 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.

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**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.

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## 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.<br>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.<br>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 Human Capital Management Self Service Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft application fundamentals.
- Common Elements used in this PeopleBook.

## PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- Foundation
- Human Capital Management (HCM) Fundamentals
- System Administration
- Work Orders
- Benefits
- Address Book
- Time and Labor
- Workflow Tools
- Human Resources
- Vendor Integration

## PeopleSoft Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*.

### See Also

*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, "PeopleSoft EnterpriseOne Financial Fundamentals Solutions Preface"

# Common Elements

**Add Opt**

Enter a code that identifies any additional options available for a benefit plan that have been defined in the Plan Additional Options table (F083202).

**Note.** Additional options must have the same provider, policy number, and enrollment and eligibility rules as the benefit plan to which they are associated.

**Address Number**

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**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.

**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.

**Calendar Year**

Enter the four-digit calendar year.

**Category Type**

Enter a code that identifies categories for DBAs that use special flex calculation plans, such as lump sum employer flex credits and employee flex deductions when remaining flex credits are negative.

**Company**

Enter the company to which the employee is assigned. This code is used to store historical payroll information and to determine accounts for some journal entries.

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.

**D B**

Enter a code that indicates whether the person is a dependent or a beneficiary of the employee. Valid codes are:

*D:* The person is a dependent.

*B:* The person is a beneficiary.

Blank: The system automatically designates the person as a beneficiary or dependent, depending on the benefit plan type.

**Data Item** Enter a code that the system uses to determine which fields in the Employee Personal Information forms are hidden or shown.

**Date Updated** Enter the date that specifies the last update to the file record.

**Effective Date** Enter a future date when all changes will take effect or the date when the changes went into effect. 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, a benefit enrollment effective date, or whatever is appropriate. .

**Electronic Signature ID** No action required. A code that identifies an electronic signature that the system assigns when an employee approves of an action in a self-service process.

**Ending 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.

**Enrollment Event Code** Enter the user defined code (08/BE) that you use to denote an enrollment event such as marriage.

**Enrollment Event Type** Enter a value that indicates the event during which the enrollment occurs. Values include:

*1:* Open Enrollment

*2:* Enrollment for current plan year

**Employee Flex Cost** Enter the amount of flex benefit credits used by the employee.

**Group Category or Benefit Group Category** Enter the category of a benefit group. The category is used to group benefit plans according to the type and/or rule. For example:

- MEDICAL: Required Medical Selections
- DENTAL: Optional Dental Selections
- LIFE: Required Life Ins Selections

Valid categories are set up in the Generic Rate and Message table (F00191) for system 08/type SG. Associated text for categories is stored in the General Message Detail table (F00192). For more information, see program P00191.

**Home Business Unit** The number of the business unit in which the employee generally resides.

**Home Company** Enter a code that specifies whether the system displays the Home Company field on employee self service time entry forms. The home company specifies the company for which the employee worked for the associated timecard. Values are:

*1:* Display this field.

Blank: Do not display this field. This is default.

**Job Step**

Enter a user defined code (07/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 (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.

You also 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.

**Language or Language Code**

Enter a user defined code (01/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.

**Order Number**

A number that identifies an original document. This document can be a voucher, a sales order, an invoice, unapplied cash, a journal entry, and so on.

**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 Frequency**

Enter a user defined code (07/PF) that indicates how often an employee is paid. Valid codes 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.

**Track PCP Flag**

Enter an option that specifies whether the benefit plan or benefit plan option tracks primary care physician numbers. If you choose this option, then the system displays a form during the enrollment process for an employee to enter the number for a primary care physician.

**PCP Number**

Enter a code that identifies the employee's or dependent's Primary Care Physician (PCP).

**PCP Visited**

Enter an option that indicates whether an employee has previously visited the primary care physician. Values are:

*0:* No

*1:* Yes

**Plan Cost**

Enter the cost that the system calculates for a plan or plan option.

**Plan Credit** Enter the credit that the system calculates for a plan or plan option.

**Plan Grouping Code** Enter an option that allows the user to designate which benefit plans or benefit plan options are related, based on a provider or other criteria.

**Plan ID** Enter an abbreviation or number that identifies a specific employee benefit. Examples are:

- Employee Health Insurance
- Accidental Death and Dismemberment
- Health Club Expense Reimbursement
- Employee Stock Appreciation Rights

A benefit plan typically is associated with a deduction, benefit, or accrual. For example, a medical plan is a benefit that might also require a deduction to withhold premiums from an employee's pay.

**Portal URL Links** Enter text that defines a portal URL link. This field displays the URL or code to use when the user executes the associated function.

**Program ID** No entry required. The number that identifies the batch or interactive program (batch or interactive object). For example, the number of the Sales Order Entry interactive program is P4210, and the number of the Print Invoices batch process report is R42565.

The program ID is a variable length value. It is assigned according to a structured syntax in the form TSSXXX, where:

T: The first character of the number is alphabetic and identifies the type, such as P for Program, R for Report, and so on. For example, the value P in the number P4210 indicates that the object is a program.

SS: The second and third characters of the number are numeric and identify the system code. For example, the value 42 in the number P4210 indicates that this program belongs to system 42, which is the Sales Order Processing system.

The remaining characters of the number are numeric and identify a unique program or report. For example, the value 10 in the number P4210 indicates that this is the Sales Order Entry program.

**Required Location Fields** Enter a value that represents the number of location category codes you need to know to accomplish the current setup task.

For example, to install a telephone you might need to know the first four location codes (state, city, building, and office number). To set up a computer account, you might need to know only the first two location codes (state and city).

**Send E-Mail** Enter a code that specifies whether the workflow process sends an email message when processing the task. The workflow process creates the email message by combining the media object associated with the setup task and the comments associated with the employee's actual task. Values are:

*T:* True. Send an email message.

*F:* False. Do not send an email message.

**Seq. Num.** Enter a number used to sequence information for review purposes only.

Use this field to specify the order in which categories appear on the Enrollment with Eligibility form and Benefits Employee Self Service forms.

**Shift Differential** Enter a code that specifies whether the system displays the Amount - Shift Differential field on employee self service time entry forms. This value represents any additional earnings that are applied to an employee's rate of pay due to the shift the employee works. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Stay In Group** Enter a code that identifies what plans an employee can elect during a life event change. Values are:

*0:* An employee can enroll in any other valid benefit plan or benefit plan option in the same benefit category.

*1:* An employee can enroll in a valid benefit plan and benefit plan option within the same plan grouping code (PLNGRP) as the benefit plan in which he or she is currently enrolled.

**Sub Class** Enter a code that represents the classification of the current task. The system uses this code to further define the task.

**Task Type** Enter a code that represents the primary category or classification of an employee setup task. Define the valid values in user defined code list 08/T1.

**Time Updated** No entry required. The time that specifies when the program executed the last update to this record.

**Union or Union Code** Enter a code that specifies whether the system displays the Union Code field on employee self service time entry forms. This user defined code (06/UN) represents the plan or union in which an employee works or participates. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Update Time** No entry required. Time that object was updated.

**Updated By** No entry required. This field is updated with the user ID of the person who last updated the field.

**URL Type** Enter a code that forms a part of the index keys to identify the URL that is associated with the record.

**User ID** No entry required. A code that identifies a user profile.

**Version** Enter a user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

**Work Stn ID** No entry required. The code that identifies the work station ID that executed a particular job.

# CHAPTER 1

# Getting Started with PeopleSoft EnterpriseOne Human Capital Management Self Service

This chapter discusses:

- HCM Self Service overview
- HCM Self Service implementation

## HCM Self Service Overview

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

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

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.

This is a table of the employee and manager applications that you can use based on the human capital management modules that you have purchased:

| Human Resources | Payroll | Time and Labor |
|---|---|---|
| Employee Self-Service:<br>• Enroll in benefits (open enrollment).<br>• Enroll in benefits (based on life events.<br>• Review employee personal profile information.<br>• Enter or revise competency information.<br>• Request a verification-of-employment letter.<br>• Enter automatic deposit information.<br>• Review and change dependents and beneficiaries information.<br>• Complete self appraisal.<br>• Change daily diary entries. | Employee Self-Service:<br>• Review pay stubs.<br>• Review and request leave time.<br>• Review and update IRS Form W-4. | Employee Self Service:<br>• Enter timecards<br>• Review timecard information |
| Manager Self-Service:<br>• Use Managers workbench.<br>• Change an employee status.<br>• Approve bank information for automatic deposits.<br>• Enter data for verification-of-employment letters.<br>• Create Organizational charts.<br>• Manage compensation.<br>• Run managers reports.<br>• Assign delegates.<br>• Approve automatic deposit information.<br>• Review upcoming employee reviews.<br>• Setup information for new employees.<br>• Approve competency information.<br>• Request employee competency changes.<br>• Browse internal jobs.<br>• Review organizational charts.<br>• Review historical/current performance appraisals. | | Manager Self Service:<br>Review and approve self-service timecards. |

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

## eRecruit

This is a table of the eRecruit features that you can use based on the human capital management modules that you have purchased:

| User | Features |
|---|---|
| Applicant Self Service | Create Log-in Name and Password<br>Change Password<br>Browse and Search Job Postings<br>View Job Posting/Description<br>Add to Job Basket<br>View Job Basket<br>Apply On-line<br>Email Job Posting to other interested individuals<br>View/Edit Personal Information<br>View Submitted Applications |
| Recruiter Self Service | Define Standard Phrases<br>Define Job Categories and Associated Tasks<br>Add Job Postings (in one or more languages)<br>Preview Job Postings<br>Manage/Edit Job Postings<br>• Attach Competencies.<br>• Add Multiple Languages to a Posting.<br>Delete Job Postings<br>Review Applicants<br>• Review References.<br>• Review Cover Letter.<br>• Review Resume.<br>• Review Job Specific Qualifications.<br>• Flag Applicants for Further Processing.<br>Manage Applicant Data |

# HCM Self Service Implementation

This section provides an overview of the steps that are required to implement the PeopleSoft EnterpriseOne HCM Self Service 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 the PeopleSoft EnterpriseOne Financial Management Solutions 8.11 Application Fundamentals PeopleBook, with information about where to find the most current version of each.

## Global Implementation Steps for HCM Self Service

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

| 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"<br>• *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 the HCM Self Service System

This table lists the implementation steps for the HCM Self Service system.

| Step | Reference |
|---|---|
| 1. Enter the common settings for self-service. | Chapter 2, "Setting Up Common Settings for Self Service," page 7 |
| 2. Set up verification of employment, name and address change, emergency contacts and phones, and paid time-off inquiry. | Chapter 3, "Setting Up Employee Self Service," page 9 |

| Step | Reference |
|---|---|
| 3. Create director form rules, review setup tables and instructions, set up the self-service form, and create a self-service process flow script for IRS For W-4. Also revise the IRS W-4 Form Workfile, set up URLs, and save employee W-4 information. | Chapter 4, "(USA) Setting Up IRS Form W-4," page 15 |
| 4. Set up upcoming reviews by supervisor, the employee setup process, employee status change, manager reports, organization charts for the Web, and manager delegates. | Chapter 5, "Setting Up Manager Self-Service," page 29 |
| 5. Set up the time entry director form, create the employee self service time entry interface, and assign pay types to employee groups. | Chapter 6, "Setting Up Self Service Time Entry," page 49 |
| 6. Set processing options for Recruitment Self Service Menu (P08400) and Applicant Login (P08405) | Chapter 8, "eRecruit System Setup," page 75 |
| 7. Set up posting categories, settings by posting category, standard phrase categories, and standard phrases. | Chapter 9, "eRecruit Applications Setup," page 77 |
| 8. Implement employee benefits setup. | Chapter 12, "Employee Self Service Benefits Setup," page 109 |
| 9. Set up common settings for benefits self-service. | Chapter 13, "Setting Up Common Settings for Benefits Self Service," page 115 |
| 10. Link categories to benefit groups | Chapter 14, "Defining Benefit Category Rules for Self Service," page 117 |
| 11. Set up URLs for:<br>Benefit plan options<br>Benefit plans<br>Benefit categories<br>Benefit groups | Chapter 15, "Setting Up URLs for Self Service Benefits," page 121 |
| 12. Implement benefit enrollment events | Chapter 16, "Setting Up Benefit Enrollment Events for Self Service," page 127 |
| 13. Set up benefit categories by enrollment event. | Chapter 17, "Setting Up Benefit Categories by Enrollment Event," page 131 |
| 14. Set up allowed dependent relationships by plan. | Chapter 18, "Setting Up Allowed Dependent Relationships by Plan," page 135 |
| 15. Set up dependent selection automatically and build the current coverage workfile. Set up a current dependent and beneficiary workfile, build the available plans workfile, exclude benefit plans or categories from a work file build, and build the personal information workfile. Also set up steps and rules for director process flows. | Chapter 19, "Setting Up Workfiles for Benefits Self Service," page 139 |
| 16. Set up benefit contribution limits and maximum coverage increase limits. | Chapter 20, "Setting Up Self Service Benefit Plan Guidelines," page 151 |

| Step | Reference |
|---|---|
| 17. Run the Populate Director Form Rules/Edits report, define process flow scripts, and set up translated director text. | Chapter 21, "Setting Up Self Service Process Flows," page 159 |
| 18. Set up form options, benefit confirmation statement options, processing options for the enrollment statement, and self-service benefits workflow approval. | Chapter 22, "Setting Up Form Options and Workflow Approval," page 169 |
| 19. Set processing options and run these programs:<br>Update Employee Personal Information to Live Tables (R054104)<br>Update Benefits Information to Live Tables (R085524) | Chapter 23, "Saving Self Service Employee Information," page 181 |
| 20. Review self-service history, set processing options for Work With Employee Self Service History (P085585), and revise the current coverage workfile. Revise the available plans workfile, and review dependent and beneficiary current coverage revisions. Revise the dependent and beneficiary updated revisions workfile, and revise the personal profile workfile. | Chapter 24, "Reviewing History and Revising Self Service Workfiles," page 185 |
| 21. Implement new DBA plan rates. | Chapter 25, "Setting Up New DBA Plan Rates," page 209 |
| 22. Purge these tables:<br>Employee Current and Pending Elections Work Table<br>Dependent and Beneficiary Cross-Reference Work Table<br>Current Dependent and Beneficiary Cross-Reference work Table<br>Employee Personal Information, Contacts, and Phone Work Tables<br>Available Plans and Plan Options Work Table | Chapter 26, "Managing Benefits Self Service Work Files," page 211 |

# CHAPTER 2

# Setting Up Common Settings for Self Service

This chapter provides an overview of the common settings that are required for self-service applications and describes how to enter those settings.

## Understanding Common Settings for Self Service Setup

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

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

You use the common settings for human resources to control specific features of multiple 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).

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

| Common Setting | Description |
|---|---|
| Using Self-Service Recruitment? | Specifies whether the eRecruit module is activated. |
| Date of Birth Required for Dep/Ben? | Specifies whether a dependent or beneficiaries date of birth is required. |
| Tax ID Required for Dep/Ben? | Specifies whether a dependent or beneficiaries Tax ID is required. |

| Common Setting | Description |
|---|---|
| Dependents | Specifies if the specific dependent is tracked with a benefit plan or if just the number of dependents covered by a plan is needed. |
| Using Employee Self-Service? | Specifies whether the Benefits Employee Self Service module is activated. |

# Entering the Common Settings for Self Service

This section describes how to enter common settings for self-service.

## Forms Used to Set Up Common Settings for Self Service

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With HRM Common Display Settings | W05004A | Self Service Setup (G05BESS4), Common Settings for EE Self Service Appl.<br>Compensation Mgmt System Setup menu (G08CM14), HRM Common Settings | Select the row containing the data item for which you want to change the current setting and then click Select. |
| System Control Revisions | W05004B | On System Control - Revisions, click the Yes or No option. | Specify the current setting and then click OK. |
| Work With HRM Common Display Settings | W05004A | On Work With HRM Common Display Settings, click Add. | Add extra data items, if required. |
| System Control Revisions | W05004B | On System Control - Revisions, choose a data item and then click the Yes or No option. | Specify the current setting and then click OK. |

## Entering the Common Settings

Access the System Control Revisions form.

# CHAPTER 3

# Setting Up Employee Self Service

This chapter provides an overview of employee self service setup and describes how to:

- Set up verification of employment.
- Set up name and address change.
- Set up emergency contacts and phones.
- Set up paid time-off inquiry.

## Understanding Employee Self Service Setup

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

## Setting Up Verification of Employment

This section provides an overview of setting up Verification of Employment and describes how to enter those settings.

### Understanding Verification of Employment Setup

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

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

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

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

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

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

---

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

---

## Prerequisites

Before you complete the tasks in this section:

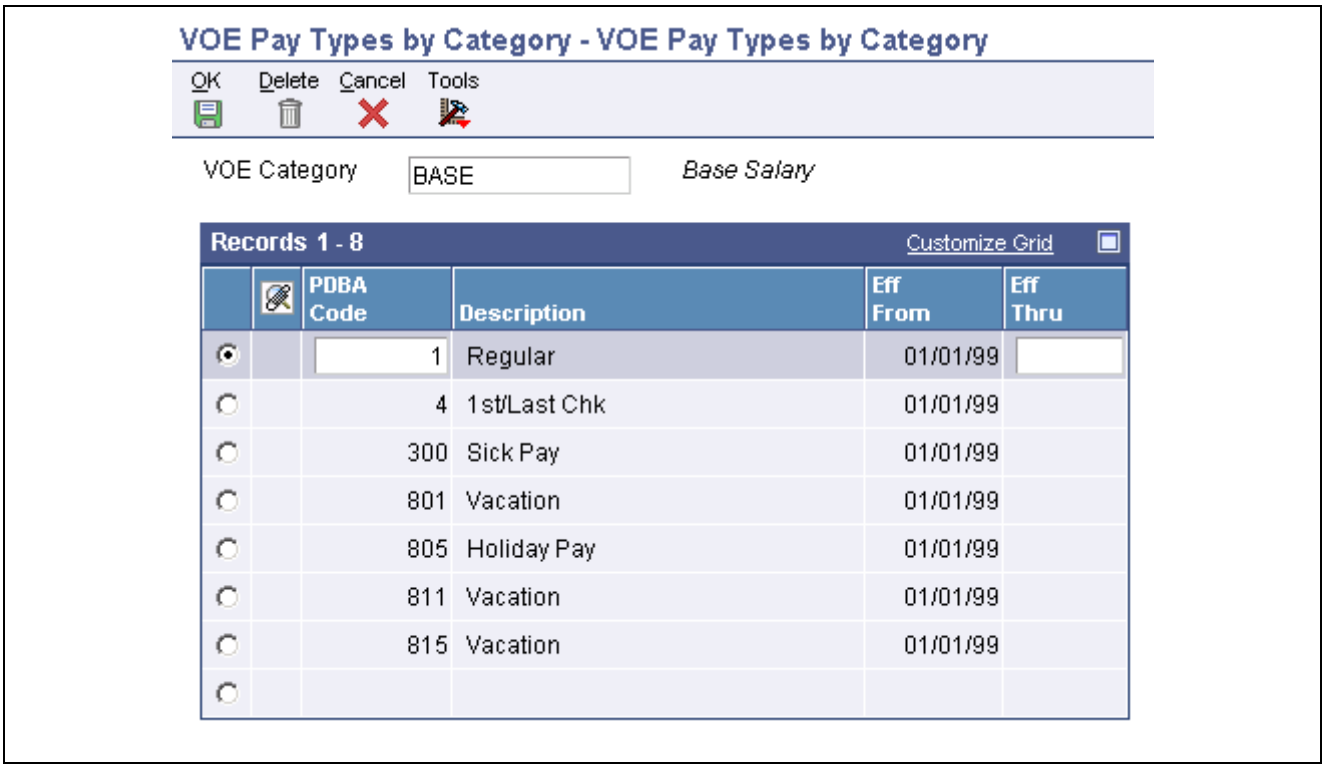
- Verify that your verification-of-employment letter is complete. Select and review the VOEREQUEST in the Maintain MailMerge Documents program (P980014). You must also hard code a company signature and phone number on the letter. See Setting Up Web Mail-Merge in the Human Capital Management Foundation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

## Forms Used to Set Up Verification of Employment

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Verification of Employment Categories | W05002A | Self Service Setup (G05BESS4), VOE Pay Types by Category | Click Add. |
| VOE Pay Types | W05002C | Click OK. | Enter required values, including effective dates. |

## Setting Up Verification of Employment

Access the VOE Pay Types form.




VOE Pay Types form

| Description | Glossary |
|---|---|
| VOE Category | This field is used to categorize pay types, such as those for base, overtime, commission, bonus, and other pay. |
| PDBA Code | 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. |
| Eff From | The calendar date on which a function, process, pay type, deduction, benefit, or accrual begins. When you enter the date, you must use the date format DD/MM/YYY. |

# Setting Up Name and Address Change

This section provides an overview of setting up Name and Address Change and describes how to enter those settings.

## Understanding Name and Address Change Setup

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

### See Also

Chapter 21, “Setting Up Self Service Process Flows,” page 159

# Setting Up Emergency Contacts and Phones

This section provides an overview of setting up Emergency Contacts and describes how to enter those settings.

## Understanding Emergency Contacts Setup

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

## Prerequisite

Set up the common settings for self-service.

See Chapter 2, “Setting Up Common Settings for Self Service,” page 7.

### See Also

Chapter 21, “Setting Up Self Service Process Flows,” page 159

*Portal Guide*

# Setting Up Paid Time-Off Inquiry

This section provides an overview of setting up Paid Time-Off Inquiry and describes how to enter those settings.

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

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

## Prerequisite

Set up the common settings for self-service.

See Chapter 2, “Setting Up Common Settings for Self Service,” page 7.

### See Also

Chapter 27, “Employee Self Service,” Self Service Timecard Entry, page 243

# CHAPTER 4

# (USA) Setting Up IRS Form W-4

This chapter provides an overview of IRS Form W-4 setup and describes how to:

- Create director form rules for IRS Form W-4
- Review setup table and instructions for IRS Form W-4
- Set up the self-service form for IRS Form W-4
- Create a self-service process flow script for IRS Form W-4
- Revise the IRS W-4 Form Workfile
- Set up URLs for IRS Form W-4
- Save employee W-4 information

## Understanding IRS Form W-4 Setup

Employees can use self-service to enter, review, and revise W-4 forms. The IRS Form W-4, Employee's Withholding Allowance for ESS program (P0855303) provides tabs for Name and Address and the Personal Allowances and Exemptions worksheet.

Employees access the IRS Form W-4, Employee's Withholding Allowance for ESS program by clicking a link on the organization intranet portal. To set up this access, you use the Self-Service Process Flow Setup program (P05400) to create a process flow script. You then link the Self-Service Director program (P05410) version that runs the script to the Web portal. You must set a processing option for the Self-Service Director program that specifies the correct process flow script.

When an employee enters the IRS Form W-4, Employee's Withholding Allowance for ESS program, the system copies the employee's address book number, tax ID, name, and address to the form. The employee can update name and address information. If the system administrator sets up a link on this form, employees can click the link to display I.R.S. Instructions for the W-4 form. Employees can choose a question mark icon that displays an instruction form. The instruction form contains information supplied by your organization to assist in completing the process. The Next and Previous options take a user to the previous or next step that is defined in the Director script. All worksheet tabs replicate the IRS Form W-4. After completing the W-4 form, an employee can print both the form and the associated worksheets. The worksheet information is not stored in the database.

While these forms provide a recommended number of allowances and a dollar amount to withhold, an employee can change the values on the W-4 form before continuing with the self-service process. After changes are made and the employee completes the acceptance form, the system saves the information in the IRS W-4 Form Work File table (F085303W).

A range of processing options for the self-service IRS Form W-4, Employee's Withholding Allowance for ESS program allow you to maintain the Personal Allowances Worksheet and the Deductions and Adjustments Worksheet when the government mandates new tax guidelines for allowances, wage limits, deductions, and credits for individuals in various categories. You can also specify a telephone number that an employee can use to contact the Social Security Administration to request a name change form.

# Prerequisite

We recommend that you retrieve a copy of the appropriate W-4 form from the I.R.S. The current W-4 form can be obtained from the I.R.S. Web site at`http://www.irs.gov/`.

### See Also

Chapter 21, "Setting Up Self Service Process Flows," page 159

*Portal Guide*

# Creating Director Form Rules for IRS Form W-4

This section provides an overview of the Populate Director Form Rules/Edits report for IRS Form W-4 and describes how to run the report.

## Understanding Director Form Rules for IRS Form W-4

The Populate Director Form Rules/Edits report (R8985500) creates and stores information in the Self-Service Step/Application Cross-Reference (F05402) and Self-Service Script Position Rules (F05403) tables. The Self-Service Process Flow Setup program (P05400) uses these tables to create new process flow scripts. You need to run this report before creating process flow scripts. If your self-service applications were set up before the IRS Form W-4 was available, you need to run this report again. You normally need to run this report only once unless you are setting up access to additional self-service programs after your initial setup.

If you are setting up self-service access to the IRS Form W-4 Employee's Withholding Allowance for ESS program (P0855303) after your initial self-service setup, then you need to run this report again.

### See Also

Chapter 21, "Setting Up Self Service Process Flows," Running the Populate Director Form Rules/Edits Report, page 159

## Running the Director Rules Report for IRS Form W-4

Employee Self Service General Mgmt (G08BESS327), Populate Director Form Rules/Edits

# Reviewing Setup Tables and Instructions for IRS Form W-4

This section provides an overview of the Populate Director Form Rules/Edits report for IRS Form W-4 and discusses how to review setup tables and instructions for IRS For W-4.

## Understanding Setup Tables and Instructions for IRS Form W-4

To ensure that all information for the two-earner/two-job tables on the W-4 is correctly entered, you need to review the information in the Setup Tables and Instructions for IRS Form W-4 program (P053031). The program displays a Media Object Viewer form that you can use to enter instructions. The system stores this information in the Tables In Worksheets for IRS Form W-4, EE Withhold Allowance table (F053031).

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

## Forms Used to Review Setup Tables and Instructions for IRS Form W-4

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Tables and Instructions for IRS Form W-4 | W053031A | Self Service Setup (G05BESS4), Setup Tables and Instructions for W-4 Form | Enter the calendar year and then choose W-4 Instructions from the Form menu. |
| Media Object Viewer | Not Applicable | On Media Object Viewer, use any of the media controls to enter information. | Enter W-4 Instructions and then click Save.<br>Information can be text, a web link, or any of the options provided. |
| Work With Tables and Instructions for IRS Form W-4 | W053031A | On Work With Tables and Instructions for IRS Form W-4, click Add. | Review information. |
| Tables in IRS Form W-4 | W053031B | Click OK. | Review existing table information for each table and marital status. Enter new information as required. |

## Reviewing Set Up Tables and Instructions for IRS W-4 Form report

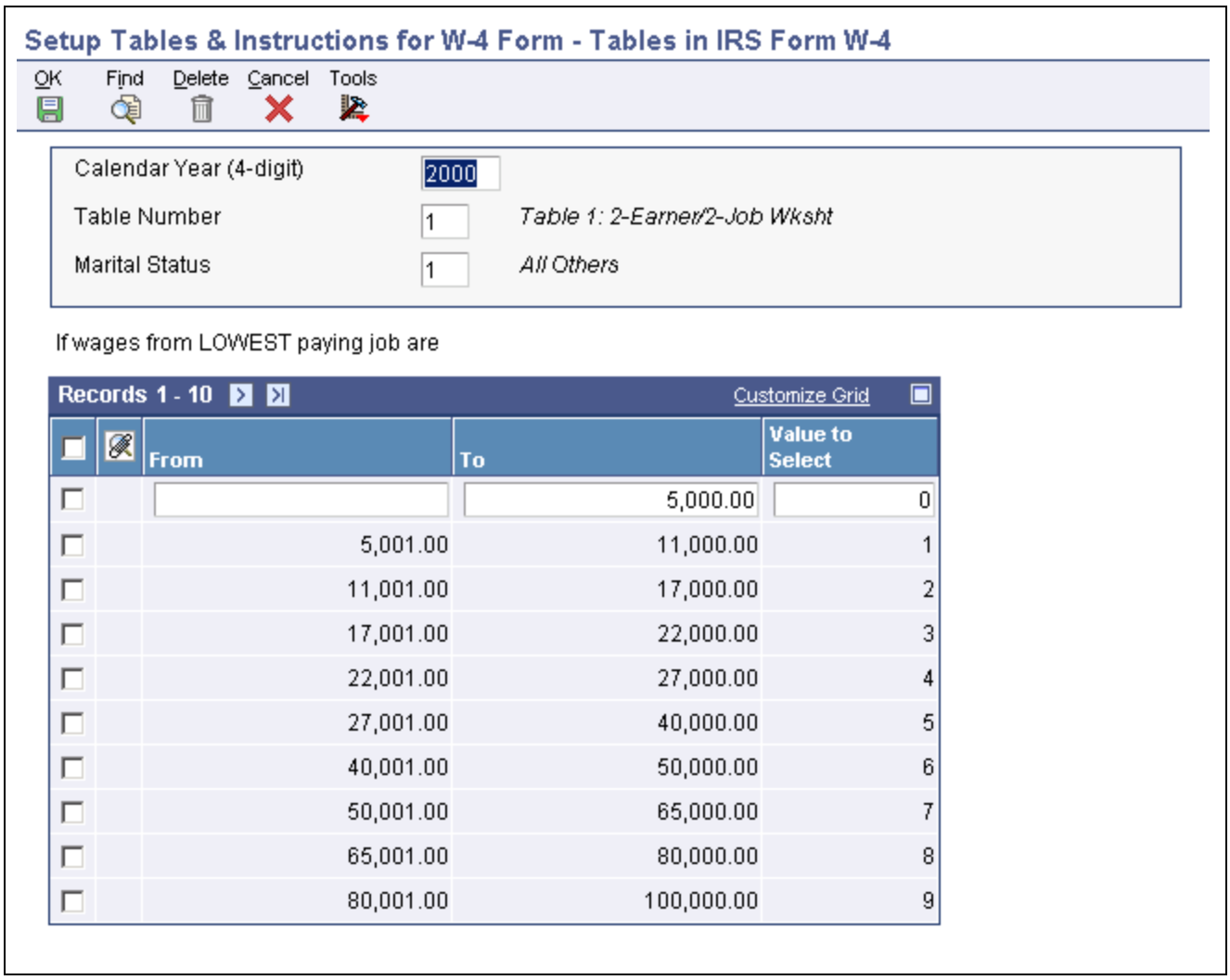
Access the Work With Tables and Instructions for IRS Form W-4 form.

To review setup tables and instructions for IRS Form W-4:

1. On Work With Tables and Instructions for IRS Form W-4, complete the Calendar Year following field in the detail area, click Find, and then choose W-4 Instructions from the Form menu:
2. On Media Object Viewer, use any of the media controls to enter the W-4 Instructions.
3. Click Save.

4. On Work With Tables and Instructions for IRS Form W-4, click Add.
5. On Tables in IRS Form W-4, complete these fields:
   - Table No.
   - Marital Status

Access the IRS Form W-4 form.




Tables in IRS Form W-4 form

1. Complete these fields for each value that you need to add:
   - From
   - To
   - Value to Select
2. Click OK.

Repeat steps 5 through 7 until you have entered the values that correspond to each marital status and table that you need to enter for the year.

| | |
|---|---|
| **Table No.** | Enter the table number of a table associated with the worksheet for IRS Form W-4. For example, for the year 1999, Table 1 is the Two-Earner/Two-Job Worksheet. |
| **Marital Status** | Enter a code that represents the marital status of an employee. This code is required by IRS Form W-4 Worksheet. |
| **From** | Enter the lower limit on wages in tables in IRS Form W-4 Attachments. |
| **To** | Enter the upper limit on wages in tables in IRS Form W-4 Attachments. |
| **Value to Select** | Enter the value a person filling the form would copy from the table. This entry is in a table in IRS Form W-4 attachments. |

# Setting Up the Self Service Form for IRS Form W-4

This section provides an overview of the Self Service Form for IRS Form W-4 and discusses how to set up the processing options.

## Understanding the Self Service Form for IRS Form W-4

The IRS Form W-4, Employee's Withholding Allowance for ESS program (P0855303) is the program that employees use to enter information needed for the IRS W-4 form. This program also provides the information on the IRS Personal Allowances Worksheet and the Deductions and Adjustments Worksheet to help employees determine the recommended number of allowances and the recommended withholding amount. The system saves the values that an employee enters for the W-4 form. The information entered for the worksheets is not saved after the self-service process is complete.

The system administrator needs to create a new version of the IRS Form W-4, Employee's Withholding Allowance for ESS program for each tax year. Processing options that define a range of parameters for W-4 information also need to be set for this program. You must use the Application Versions Interactive program (P983051) to create a new version and to set the processing options.

You can set processing options to automatically notify an administrator when employees change Form W-4 information.

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

## Setting Processing Options for IRS Form W-4, Employee's Withholding Allowance for ESS (P0855303)

Use these processing options to define the default values for the IRS Form W-4, Employee's Withholding Allowance for ESS program.

### Year

These processing options allow you to specify date and pay period information.

| | |
|---|---|
| **1. Enter the calendar year for the W-4** | Use this processing option to specify the calendar year for which the W-4 information is effective. Enter a 4-digit number for the year. |

**2. Enter the number of pay periods per year** Use this processing option to specify the number of pay periods that exist for your company in one calendar year.

## Per Allow Worksheet

These processing options allow you to enter values from the Personal Allowances Worksheet for IRS Form W-4.

**1. Enter the wage limit for a second job or a spouse's wages from Line B.** Use this processing option to specify the wage limit (in dollars) from a second job or a spouse's job. On the 2002 W-4 form, this amount is taken from line B.

**2. Enter the limit for child or dependent care expenses from Line F.** Use this processing option to specify the limit (in dollars) for child or dependent care expenses. On the 2002 W-4 form, this amount is taken from line F.

**3. Enter the lower limit for range 1 for unmarried individuals from Line G.** Use this processing option to specify the lower limit for range 1 for unmarried individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, the first bullet states: If your total income will be between $20,000 and $50,000 ($23,000 and $63,000 if married). In this case, enter the value 20,000.

Enter the lower limit in dollars.

**4. Enter the upper limit for range 1 for unmarried individuals from Line G.** Use this processing option to specify the upper limit for range 1 for unmarried individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, first bullet states: If your total income will be between $20,000 and $50,000 ($23,000 and $63,000 if married). In this case, enter the value 50,000.

Enter the upper limit in dollars.

**5. Enter the lower limit for range 1 for married individuals from Line G.** Use this processing option to specify the lower limit for range 1 for married individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, the first bullet states: If your total income will be between $20,000 and $50,000 ($23,000 and $63,000 if married). In this case, enter the value 23000.

Enter the lower limit in dollars.

**6. Enter the upper limit for range 1 for married individuals from Line G.** Use this processing option to specify the upper limit for range 1 for married individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, the first bullet states: If your total income will be between $20,000 and $50,000 ($23,000 and $63,000 if married). In this case, enter the value 63,000.

Enter the upper limit in dollars.

**7. Enter the lower limit for range 2 for unmarried individuals from Line G.**

Use this processing option to specify the lower limit for range 2 for unmarried individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, the second bullet states: If your total income will be between $50,000 and $80,000 ($63,000 and $115,000 if married). In this case, enter the value 50.000.

Enter the lower limit in dollars.

**8. Enter the upper limit for range 2 for unmarried individuals from Line G.**

Use this processing option to specify the upper limit for range 2 for unmarried individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 Form W-4, the second bullet states: If your total income will be between $50,000 and $80,000 ($63,000 and $115,000 if married). In this case, enter the value 80,000.

Enter the upper limit in dollars.

**9. Enter the lower limit for range 2 for married individuals from Line G.**

Use this processing option to specify the lower limit for range 2 for married individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 Form W-4, the second bullet states: If your total income will be between $50,000 and $80,000 ($63,000 and $115,000 if married). In this case, enter the value 63,000.

Enter the lower limit in dollars.

**10. Enter the upper limit for range 2 for married individuals from Line G.**

Use this processing option to specify the upper limit for range 2 for married individuals from Line G.

Review the Personal Allowances Worksheet for IRS Form W-4, line G, Child Tax Credit. On the 1999 W-4 form, the second bullet states: If your total income will be between $50,000 and $80,000 ($63,000 and $115,000 if married). In this case, enter the value 115000.

Enter the upper limit in dollars.

**11. Enter the combined earnings limit from Line H.**

Use this processing option to specify the combined earnings limit from Line H.

Review the Personal Allowances Worksheet for IRS Form W-4, line H. On the 1999 W-4 form, the second bullet states: If you are single, have more than one job and your combined earnings from all jobs exceed $32,000. In this case, enter the value 32000.

Enter the limit in dollars.

## Ded + Adj Wksh

These processing options allow you to enter values from the Deductions and Adjustments Worksheet for IRS Form W-4.

**1. Enter the percentage of income allowed for itemized medical expense deductions for Line 1.**

Use this processing option to specify the percentage of income allowed for itemized medical expense deductions for Line 1.

Specify the percentage of income allowed for itemized medical expenses. On the 2002 W-4 form, this percentage is taken from line 1.

**2. Enter the standard income limit for Line 1.**

Use this processing option to specify the standard income limit for Line 1.

Specify a value for itemized deductions. For example, if the worksheet for IRS form W-4 (line 1) guides you to reduce your itemized deductions if your income is over a specified amount, enter that amount here.

Enter the limit in dollars.

**3. Enter the income limit for married filing separately for Line 1.**

Use this processing option to specify the income limit for married filing separately for Line 1.

Specify an itemized deduction value. For example, if the worksheet for IRS form W-4 (line 1) guides you to reduce your itemized deductions if your income is over a specified amount if filing separately, enter that income amount here.

Enter the limit in dollars.

**4. Enter the standard deduction for married filing jointly or qualifying widow(er) for Line 2.**

Use this processing option to specify the standard deduction for married filing jointly or qualifying widow(er) for Line 2.

Use this processing option to specify an itemized deduction value. For example, if the worksheet for IRS form W-4 (line 2) guides you to reduce your itemized deductions if your income is over a specified amount if filing jointly or as a qualifying widow or widower, enter that income amount here.

Enter the deduction in dollars.

**5. Enter the standard deduction for head of household for Line 2.**

Use this processing option to specify the standard deduction for head of household for Line 2.

Review line 2 of the Deductions and Adjustments Worksheet for IRS Form W-4. On the 1999 W-4 form, line 2 states: Enter $7,200 if married filing jointly or qualifying widow(er), $6,350 if head of household, $4,300 if single, $3,600 if married filing separately In this case, enter the value 6350.

Enter the deduction in dollars.

**6. Enter the standard deduction for single for Line 2.**

Use this processing option to specify the standard deduction for single for Line 2.

Review line 2 of the Deductions and Adjustments Worksheet for IRS Form W-4. On the 1999 W-4 form, line 2 states: Enter $7,200 if married filing jointly or qualifying widow(er), $6,350 if head of household, $4,300 if single, $3,600 if married filing separately In this case, enter the value 4300.

Enter the deduction in dollars.

**Enter the deduction in dollars ($)**

Use this processing option to specify the deduction in dollars.

**7. Enter the standard deduction for married filing separately for Line 2.**

Use this processing option to specify the standard deduction for married filing separately for Line 2.

Review line 2 of the Deductions and Adjustments Worksheet for IRS Form W-4. On the 1999 W-4 form, line 2 states: Enter $7,200 if married filing jointly or qualifying widow(er), $6,350 if head of household, $4,300 if single, $3,600 if married filing separately In this case, enter the value 3600.

Enter the deduction in dollars.

**8. Enter the amount used to divide the value from Line 7 to determine the value of Line 8.**

Use this processing option to specify the dividing amount.

Review line 8 of the Deductions and Adjustments Worksheet for IRS Form W-4. On the 1999 W-4 form, line 8 states: Divide the amount on line 7 by $3,000 and enter the result here. In this case, enter the value 3000.

### SSA Phone

This processing option allows you to display the contact telephone number for the Social Security Administration.

**1. Phone number to contact the Social Security Administration to request a name change form**

Use this processing option to specify the contact telephone number of the Social Security Administration to request a name change form. Enter a phone number with area code.

### Process

These processing options allow you to specify default processes for printing and notification.

**1. Display the option to print the information entered in the W-4 worksheets**

Use this processing option to specify the option to print the information entered in the W-4 worksheets. Values are:

*1:* Display the option to print the W-4 worksheets

*0:* Do not display the option to print the W-4 worksheets

**2. Notify the administrator that the employee has made changes to his/her W-4 Withholding Information**

Use this processing option to specify whether an administrator receives notification. Values are:

*0:* Do not send notification.

*1:* Send notification.

**3. Enter the address book number of the administrator to be notified**

Use this processing option to specify the address book number of the administrator to be notified.

# Creating a Self Service Process Flow Script for IRS Form W-4

This section provides an overview of a Self Service Process Flow Script for IRS Form W-4 and discusses how to set up the form.

## Understanding a Self Service Process Flow Script for IRS Form W-4

You use the Self Service Process Flow Setup program (P05400) to create a script that includes the IRS Form W-4, Employee's Withholding Allowance for ESS program (P0855303). You need to observe this requirement regarding the placement of this program in the script: the IRS Form W-4, Employee's Withholding Allowance for ESS program must appear in the script prior to the Acceptance Form program (P085564). This requirement corresponds to one of the rules that you generated by running the Populate Director Form Rules/Edits report (R8985500): P085564 - Self Service Action Step 170. To include the IRS Form W-4, Employee's Withholding Allowance for ESS program, add step 50 in the desired script.

### See Also

Chapter 21, “Setting Up Self Service Process Flows,” page 159

# Revising the IRS W-4 Form Workfile

This section provides an overview of revising the IRS W-4 Form Workfile and discusses how to input revisions.

## Understanding the IRS W-4 Form Workfile

After you have run the Personal Employee Information Workfile Build program (R054101) and created the IRS W-4 Form Work File table (F085303W), a system administrator can use the IRS W-4 Form Work File Revisions program (P085303W) to review or change updated employee information. The IRS W-4 Form Work File is the live (permanent) table that stores the temporary information from the IRS Form W-4, Employee’s Withholding Certificate table (F053030).

When reviewing employee information, the system administrator can perform any of these actions:

- Approve the records
- Reject the records
- Reset the records to a pending status

## Forms Used to Review or Update the IRS W-4 Form Workfile

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| IRS W-4 Form Work File Revisions | W085303WA | Use the Fast Path and enter P085303W.<br>Click OK. | Access the I.R.S. Work File Revisions form, choose a type of records to review.<br>When finished with review and input, complete the update tracking fields. |

## Reviewing and Updating the IRS W-4 Form Workfile

Access the IRS W-4 Form Work file Revisions form.

To revise the IRS W-4 Form workfile:

1. On I.R.S. W-4 Form Work File Revisions, choose one of these options and then click Find:
   - Approved Records
   - Pending Records
   - Needing W-4 to be Printed
   - All Records
2. Review these fields and enter corrections as necessary:
   - Address Number
   - Date Employee Updated

- Time Employee Updated
- Calendar Year
- No. Allow
- Exempt Flag
- Mar Stat
- Name Chg
- Additional Federal Withholding
- Action Flag

3. Review these fields that cannot be changed:
   - Status
   - Appr By
   - Date Approved
   - Electronic Signature ID
   - User ID
   - Program ID
   - Work Stn ID
   - Updated By
   - Date Updated
   - Time Updated
4. When the review is complete and you are ready to complete the action, complete the Address Number field.
5. Choose the desired records.
6. Choose an appropriate action from the Row menu.
7. Click OK.

| | |
|---|---|
| **Approved Records** | Enter an option that specifies the type of processing for an event. |
| **Pending Records** | Enter an option that specifies the type of processing for an event. |
| **Needing W-4 to be Printed** | Enter an option that specifies the type of processing for an event. |
| **All Records** | Select an option (radio button) that specifies the type of processing for an event. |
| **Date Employee Updated** | No entry required. Date that the object was updated. |
| **Time Employee Updated** | No entry required. Time that object was updated. |
| **No. Allow** | Enter the total number of allowances claimed on IRS Form W-4 |
| **Exempt Flag** | Select a flag to indicate that an employee is claiming exemption from withholding of taxes on IRS Form W-4. To claim exemption, an employee has to meet all conditions listed on Form W-4. |
| **Mar Stat** | Enter a code that represents the marital status of an employee. This code is required by IRS Form W-4. |

**Name Chg** Select a flag, when set, that indicates the last name is different from that on the social security card. Values are:

Blank: Name is same

*1:* Name is same

**Additional Federal Withholding** Enter an additional amount to be withheld from each paycheck. This value may be calculated using the worksheets in IRS Form W-4.

**Action Flag** Enter a value that defines the type of change that will be made to a record. This flag is used by the system in subsequent record processing.

**Status** Enter a user defined name or remark. To enter information, you must use the Accepted or Mistaken Appr options from the Row menu.

**Appr By** Enter the initials of the person approving the spending account claim. To enter information, you must use the Accepted or Mistaken Appr options from the Row menu.

**Date Approved** Enter a date for which a change was approved. To enter information, you must use the Accepted or Mistaken Appr options from the Row menu.

# Setting Up URLs for IRS Form W-4

This section provides an overview of Setting Up URLs for IRS Form W-4 and discusses how to create web links for this form.

## Understanding URLs for IRS Form W-4 setup

Within the employee self service benefit programs, including the IRS Form W-4, Employee's Withholding Allowance for ESS program (P0855303), employees can click on an optional link to get information directly from the IRS. You can provide separate links to desired resource Web sites. The current values for these links are as follows:

- http://www.irs.gov/
- http://www.irs.gov/forms_pubs/forms.html
- http://www.irs.gov/forms_pubs/pubs.html

If UDC codes do not already exist for the URL descriptions, they can be added to UDC 08/UT. These values are suggested:

| New Y/N | Value | Description | Description 2 | Hard Coded Y/N | Special Handling Code |
|---|---|---|---|---|---|
| Y | IRS | I.R.S. Homepage | Blank | Y | Blank |
| Y | IRF | I.R.S. Forms | Blank | Y | Blank |
| Y | IRP | I.R.S. Publications | Blank | Y | Blank |

You use the Benefits Enrollment Plan/Option URL Address program (P085540) to assign the URL addresses. Although the URL specifications can potentially be implemented from more than one of the benefits setup programs, we recommend that you use the Categories By Benefit Group program (P08350) to assign URL addresses for the IRS website.

### See Also

Chapter 15, "Setting Up URLs for Self Service Benefits," page 121

# Saving Employee W-4 Information

This section provides an overview of the Budget Worksheet report and describes how to:

- Run the Update Employee W-4 Information to Live Tables report
- Set processing options for the Update Employee W-4 Information to Live Tables report

## Understanding the Update Employee W-4 Information to Live Tables report

You use the Update Employee W-4 Form Information to Live Tables program (R0855303) to transfer the W-4 information from the IRS W-4 Form Work File table (F085303W) into the IRS Form W-4, Employee's Withholding Certificate (F053030) and Employee Tax Exceptions/Overrides (F06017) tables for the selected employees.

A processing option allows you to run the batch program in proof mode to see any potential problems or in final mode to actually update the tables. You can use a second processing option to choose whether you want to update only the IRS Form W-4, Employee's Withholding Certificate table or the IRS Form W-4, Employee's Withholding Certificate and Employee Tax Exceptions/Overrides tables. The system administrator can choose whether to approve records while they are in the IRS W-4 Form Work File or wait until records are moved to the IRS Form W-4, Employee's Withholding Certificate table.

If the Files to Update processing option to 0, the system moves both approved and unapproved records to the IRS Form W-4, Employee's Withholding Certificate table. The system administrator can then approve or reject the unprocessed records. If the Files to Update processing option is set to 1, and a tax year is set in the Tax Year processing option, then the system moves only approved records into the IRS Form W-4, Employee's Withholding Certificate and Employee Tax Exceptions/Overrides tables.

## Running the Update Employee W-4 Information to Live Tables report

Enter R0855303 in the Fast Path. Alternately, you can run this report from Batch Versions (enter BV or P98305W in the Fast Path) so you can access the processing options.

## Setting Processing Options for Update Employee W-4 Form Information to Live Tables (R0855303)

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. Mode:** Use this processing option to specify the mode in which the report is run.

*0:* Proof

*1:* Final

**2. Files to update:** Use this processing option to specify the tables in which the system stores information.

*0:* Add records only to F053030.

*1:* Add approved records to F06017 and F053030.

Only approved records are added to the F06017.

**3. Tax Year:** Use this processing option to specify a 4-digit calendar year.

CHAPTER 5

# Setting Up Manager Self-Service

This chapter provides an overview of setting up manager self-service and describes how to:

- Set up Upcoming Reviews by Supervisor
- Set up the employee setup process
- Set up Employee Status Change
- Set up Manager Reports
- Set up Organizational Charts
- Set up Manager Delegates

## Understanding Manager Self-Service Setup

You can set up self-service programs that assist supervisors in managing the hiring and reviews of employees. Managers can access each of the programs in the Managers Workbench program (P08712).

## Setting Up Upcoming Reviews by Supervisor

This section provides an overview of setting up the Upcoming Reviews by Supervisor program and discusses how to set the processing options.

### Understanding Upcoming Reviews by Supervisor Setup

Employees in a managerial or supervisory position can use the Upcoming Reviews by Supervisor program (P052200). Supervisors can log onto the self-service site to see all employees whom they are responsible to review soon.

The Upcoming Reviews By Supervisor program can be run to report employees with upcoming reviews by supervisor and to add Enterprise Workflow Management functionality to the process. If the processing options for this report are set up correctly, the system automatically reports employees with upcoming reviews, reminds each supervisor of upcoming reviews by sending an email, and automatically updates the Upcoming Reviews By Supervisor program.

When a supervisor logs into the program, the system recognizes the employee number and displays the records for employees who have upcoming reviews. You can set processing options so that supervisors can choose options from the row menu to view employee information on these forms: Work With Organizational Assignments, Personal, and Work With Basic Compensation (Employee Master program P0801), and Supplemental Data Inquiry (Supplemental DB Inquiry program (P050200). You can choose whether you want to set up security to permit access to these forms by certain individuals only.

This program updates supervisors and eliminates the time that they would spend researching upcoming reviews for their employees.

You can also set a processing option to have the report run automatically on a certain date.

Processing options are also available to run versions that report past due reviews and reviews for all employees without specified dates. Neither of these versions include Workflow.

Upcoming Reviews By Supervisor (P052200) is an inquiry-only program. The information presented by the program is from the Employee Master Information table (F060116).

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

*EnterpriseOne Tools 8.94 PeopleBook: System Administration*

## Prerequisite

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

## Setting Processing Options for Upcoming Reviews by Supervisor (P052200)

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 define the defaults that will determine the options available when using this program.

**1. Enable Select Button To Basic Compensation**

Use this processing option to enable the row exit to Basic Compensation. Values are:

Blank: Disable row exit.

*1:* Enable row exit.

**2. Enable Organizational Assignment Row Exit**

Use this processing option to enable the row exit to Organizational Assignment. Values are:

Blank: Disable row exit.

*1:* Enable row exit.

**3. Enable Employment Information Row Exit** Use this processing option to enable the row exit to Employee Information. Values are:

Blank: Disable row exit.

*1:* Enable row exit.

**4. Enable Employee Profile Row Exit** Use this processing option to enable the row exit to Employee Profile. Values are:

Blank: Disable row exit.

*1:* Enable row exit.

**5. Enable Supplemental Data Row Exit** Use this processing option to enable the row exit to Supplemental Data. Values are:

Blank: Disable row exit.

*1:* Enable row exit.

**6. Enable Create Performance Appraisal** Use this processing option to enable the row exit to Create Performance Appraisal. Values are:

*0* or Blank: Disable Row Exit

*1:* Enable Row Exit

## Defaults

Use this processing option to define whether the program will provide the opportunity to enter a supervisor data item.

**1. Enable Supervisor Number Entry** Use this processing option to enable a supervisor data item to be entered. Values are:

*1:* Enable supervisor data item to be entered.

*0:* Disable data item. The supervisor data item will be either passed to the application or supplied from the user address book number.

## Version

Use these processing options to define the defaults that will determine the options available when using this program.

**1. Employee Compensation** Use this processing option to specify the version for Employee Compensation. The default version is ZJDE0001.

**2. Employee Organizational Assignment** Use this processing option to specify the version for Organizational Assignment. The default version is ZJDE0001.

**3. Create Performance Appraisal** Use this processing option to specify which version of the Create Performance Appraisal program to run. If this option is left Blank, the system uses the default version, ZJDE0001.

# Setting Up the Employee Setup Process

This section provides an overview of setting up the Employee Setup Process and discusses how to set the processing options.

## Understanding the Employee Setup Process

After hiring an employee, a manager can use self-service to add an employee record and initiate an employee setup process. Workflow then sends task approval messages and reminders about equipment setup to certain people.

You can define default setup tasks that can be automatically implemented each time a new employee is hired. Default tasks can be tasks that every new employee needs. For example, if your company provides a phone and a computer for most employees, you might want to set up default tasks for installing a phone, computer, and a network connection. Managers can add to or change these tasks unless you enter a lock code for tasks when you set them up. When you set up a default task, always associate it with a job type and step. Information entered as a default task updates the Default Setup Tasks table (F087101).

You also set up a task list by location. You enter every possible setup task for every location. For every task in the task list, you can specify an approver, a task recipient, and other task details. Managers can choose tasks from the task list and assign them to a new employee's setup record.

You can set up each task to do one or more of these activities: run a report, send an email message, create a work order, or start a Workflow process. You must first customize a report, set up a work order, or set up an additional Workflow process if you are planning to attach these activities to a task.

You can also require an approval for each task that you set up. If you require an approval, Workflow sends an email approval form to the address book number of the person that you designated in the Approver field. You must also set your processing options to determine whether Workflow should obtain a process approval for the entire employee setup process for every new employee record.

The system determines the date to begin the approval process from the values that you enter in these three fields on the Work With Setup Tasks Details form:

- Based On Date
- Duration
- Offset Days

To determine the date to begin each task, the system performs this sequence of actions:

1. Retrieves the date from the Based On Date field (for instance, the arrival date of the employee)
2. Adds the number of days from the Duration field (the number of days needed to complete the task)
3. Adds the number of days from the Offset Days field (the number of days, when added to the Duration values, that determine the day by which the task must be completed)

The information that you enter in the header area of the setup forms updates the Setup Task List table (F087102). The information that you enter in the detail area of the setup forms updates the Setup Task Details table (F087103).

To process employee setup tasks, two workflow processes must be functioning. You can use the Object Management Workbench (OMW) to ensure that these workflow processes are activated.

| Workflow Process | Explanation |
| --- | --- |
| EESETUP01-Employee Setup Approval | The workflow process that sends an approval form for the entire employee setup process to the address book number of the approver. After workflow obtains an approval, it sends approval forms for each setup task that requires an approval. If you want your system to obtain an approval for this process, you must set a processing option. |
| EESUTSK01-Employee Task Setup | This workflow process is started for each setup task assigned to the employee. This process will first check to see if there is sufficient location information to process the setup task. If not it will notify the originator and wait for the information to be entered. If the activation date has not yet arrived the process will sit in waiting state until that time. When the previous two conditions are met the process activates the task. by setting the status of the F08711 record to A and then depending on how the task is setup will do one or more of the following: send an email message to the task recipient, run a report, create a work order, or start a new workflow process. |

### See Also

*PeopleSoft EnterpriseOne Work Orders 8.11 PeopleBook*, "Creating Work Orders"

## Prerequisites

Before you complete the tasks in this section:

- You must set up numerous user defined codes for the employee setup process, including location codes 08/L1 through 08/L0. See Adding a User Defined Code in the Foundation Guide.
- Set up the common settings for self-service. See Setting Up Common Settings for Human Capital Management in the Human Capital Management Foundation Guide.
- Set up your processing options to require a process approval and to specify an ending status for the process approval.
- Verify that the workflow processes are activated.

## Forms Used to Set Up the Employee Setup Process

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Default Setup Tasks | W087101B | Manager's Employee Setup Options (G05BMSS4), Default Setup Tasks<br>Click Add. | Review existing tasks. |
| Edit Default Setup Tasks | W087101C | Click OK. | Create a list of setup tasks for a particular job. |
| Work With Setup Tasks | W087102B | Manager's Employee Setup Options (G05BMSS4), Setup Task List<br>Click Add. | Review existing information. |
| Work With Setup Tasks Details | W087102F | Click OK. | Set up all of the details for each task in an employee setup list of tasks. |

## Setting Up Default Tasks

Access the Work With Default Setup Tasks form.

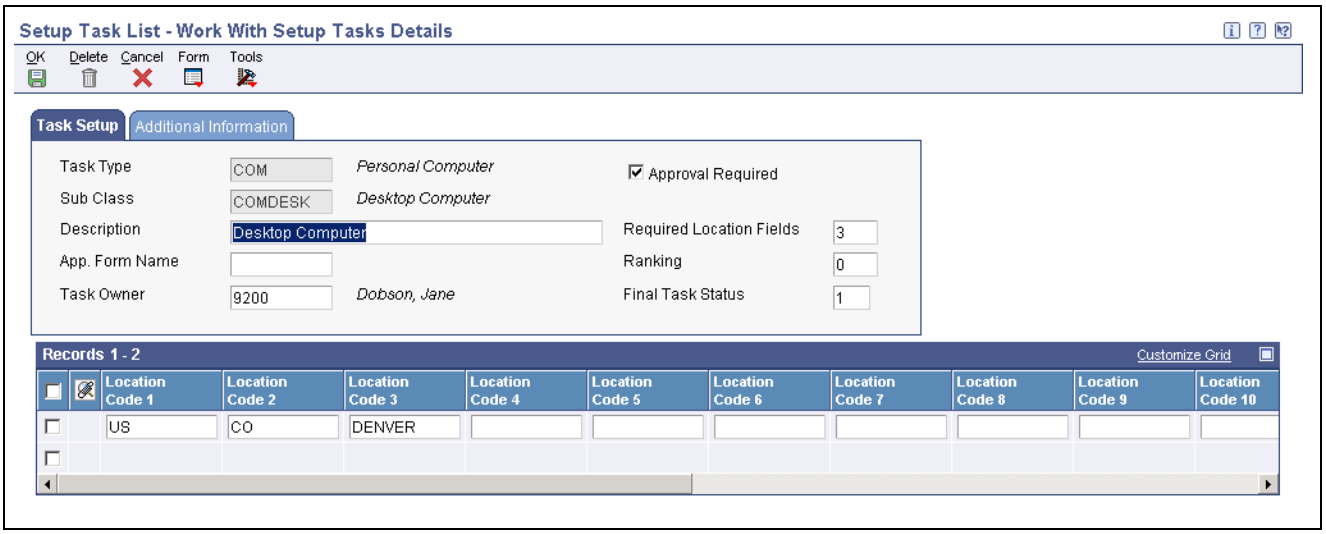
To set up default tasks:

1. On Work With Default Setup Tasks, click Add.
2. On Edit Default Setup Tasks, complete these fields:
   - Job Type
   - Job Step
   - Task Type
3. Complete these optional fields and click OK:
   - Sub Class
   - Lock Code

**Lock Code** Enter a code that specifies whether the hiring manager can change the selected default setup task. When Y is placed in this column you are not allowed to assign a task with the same task type but different sub class if that task has a hire ranking. For example if a computer desktop task has a ranking of 5 and computer laptop has a ranking of 8. If you lock the computer desktop task (by placing Y in the column) then employee's with this job type/step will not be allow the receive a computer laptop. Ranking of tasks is set on the Employee Setup Tasks application P087102).

## Setting Up Tasks by Location

Access the Work With Setup Tasks form.




Work With Setup Tasks Details form

To set up tasks by location:

1. On Work With Setup Tasks, click Add.
2. On Work With Setup Tasks Details, complete these fields in the header area:
   - Task Type
   - Sub Class
   - Description
   - Required Location Fields
   - Ranking
   - Final Task Status
3. Select the Approval Required option in the header area, if applicable:
4. Enter your address book number or the address book number of the person responsible for monitoring this task in the Task Owner field. This field is information only this person will not receive any messages or approvals.
5. Complete the optional App. Form Name field if you have an additional form set up to enter additional task information.

   **Note.** This application is accessed by from the approval application or the Employee Setup Entry form. However it will only work on a Windows client and not on the web.

6. Complete the Task Recipient field in the detail area.

   The task recipient receives any email, work order, or report that you attach to this task.
7. To identify the employee workspace, complete as many of the Location Code fields that are required.
8. To define the number of required fields, you can set the required value in the Required Location Fields field.

   The system displays an error if fewer than the required number of fields are completed.
9. If you select the Approval Required option, complete the Approver field.
10. If you set up a customized report for this task, complete these fields:
    - Report Name

- Version

11. If you set up an additional workflow process for this task, complete the Process ID field.
12. To send an email message to the task recipient, complete the Send E-Mail field. The text of the email message comes from media object attached to this task. The hiring manager is given the opportunity to update the contents of this media object on the Employee Setup Task Entry form. This is a way to send task specific information to the person assigned to work on the task.

    If your organizational procedures are set up for work orders, you might want to create a work order for this task.
13. If you create a work order, complete the Order Number field.
14. Complete these fields so that the system can determine the start date of the task:
    - Offset Days
    - Duration
    - Based on Date
15. Repeat these steps to enter different locations for the task.
16. When you are finished, click OK.

**Ranking** Enter a code that specifies the rank of tasks within a task type. You rank tasks to restrict users from changing the subclass of a task to a subclass with a higher rank.

See Chapter 5, "Setting Up Manager Self-Service," Setting Up Default Tasks, page 34.

**Final Task Status** Enter a code that represents the status that the task will be set to when it is completed. Numeric status codes are reserved for competed tasks.

.

**Approval Required** Enter a code that specifies whether an approval is required for this task. Values are:

*Y:* An approval is required for this task.

*N:* An approval is not required for this task.

**Task Owner** No entry required. This field contains the address book number of the owner of the setup task.

This field is for future use and is not currently used anywhere else in the system.

**App. Form Name** No entry required. This field is used to store the name of the application associated with a task. This application will provide a place for the user to enter specific information necessary to complete the setup task. This application can be accessed from the Task Approval application or the Employee Setup Task Entry form but only on a fat client and not from a web client.

**Task Recipient** No entry required. The address book number of the person who is assigned to the current employee setup task.

**Location Code 1–10** Enter a user defined category code that defines the location of an employee. You set up this code to meet the needs of your organization.

| | |
|---|---|
| | For example, you can set up a category code to represent country, city, state, campus, building, office, or other location.<br><br>The Human Resources system provides this code to allow you to define a custom setup process for new employees based on the location where the employee will work. |
| **Approver** | Enter an address book number of the person who approves any given work. The system verifies this number against the Address Book Master table (F0101). |
| **Report Name** | Enter the name that identifies an Enterprise One report that will be sent to the task recipient when the task is processed. |
| **Process ID** | Enter the process name of the workflow process you want to assign to this task. This process will get started when the task is processed. |
| **Offset Days** | Enter the number of days, plus or minus, to adjust the actual start date (or the date work will begin on the task) . The start date is calculated by taking the Base on Date and subtracting the number of days in the Duration field and then adding the days in the Offset Days field. For example if you want the phone installation to be completed one day prior to the employee arriving at his or her desk and it takes 3 days to install a phone, then you would enter the these values: Based on Date=Arrival Date, Duration = 3, Offset = –1. This will allow the phone installation process to start 4 days prior to the Arrival Date. |
| **Duration** | Enter a value that specifies how long the setup task will take. The system also uses this value to calculate the task start date. |
| **Based on Date** | Enter a user defined code (08/BO) that will specify which date you use to calculate the completion date of the setup task. Predefined values are Arrival Date, Creation Date or Start Date. Arrival Date is entered by the hiring manager when creating the setup process. Creation Date is the date the setup process was created and the Start Date is the DateEmployementStart (DST) in the Employee Master record (F060116) |

# Setting Up Employee Status Change

This section provides an overview of setting up the Employee Status Change program and discusses how to:

- Set up the processing options for Employee Status Change Setup program.
- Set up employee status change.

## Understanding Employee Status Change Setup

Employee Status Change Setup (P08730) is one of the suite of programs that a manager can use from Manager's Workbench (P08712). Managers can use Employee Status Change Setup to perform any of these changes:

- Promotion
- Job status
- Location

- Leave of absence
- Department or supervisor

Managers can save time and effort by using the five default tasks above to perform the most frequent types of employee changes. For example, when an employee changes jobs, the supervisor can initiate the change using the Manager's Workbench. Workflow can route the status change to human resources for the appropriate approvals. Once the change request has been approved, the change will automatically be updated in the system.

Your software has been supplied with a default version that contains options, approval requirements, and data items that are common to a large cross-section of organizations. As a result, little or no change might be required for this application to meet your needs. If you want to add data items to any of the existing change forms, you will find that the majority of the fields from the Employee Master Information table (F060116) are currently available.

If you want to change the default workflow process, the best approach is to make a copy of the existing version, rename the new version appropriately, and make changes only to the new version. Because any new version must maintain the same data structure (input parameters), this approach will result in less effort and fewer errors. You use the Employee Status Change Setup program to customize the setup of the Employee Status Change program (P08720).

The Select Employee Status Change Request form contains an option to select a user defined status change. . To add user defined change types, you must first create a corresponding UDC record in the 08/S4 UDC table.

Normally, you will use the existing processing option settings for Employee Status Change Setup. These settings are:

- Business Function Name
- Hide Status Change Initialization Function Name

The Business Function Name refers to the function that will be used to initiate the workflow process. If you have a business need to change this function make sure that the new function has the same data structure as the default function. If you don't intended to change this function, then put a 1 in the Hide Status Change Initialization Function Name processing option and this field will be hidden on the setup form.

## Prerequisite

Verify that workflow process EESTSCHG-Employee Status Change is activated in the Object Management Workbench (OMW). See Activating a Workflow Process Version in the EnterpriseOne Workflow Tools Guide.

# Form Used to Set Up the Employee Status Change Program

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Employee Status Change Setup | W08730A | Self Service Setup menu (G05BESS4), Status Change Setup<br>Click OK. | Enter a Change Type and review currently selected data items. A check mark in the row header indicates that the data item is selected and appears as an available choice in the Employee Status Change program (P08720). If a lightening bolt symbol appears in the row header, the field is a required field and is marked with an asterisk in Employee Status Change.<br>Add new fields if desired.<br>The All option displays all of the enabled data items from the Employee Master Information table (F060116) from which you can select. |

# Setting Processing Options for Employee Status Change Setup (P08730)

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 the system will apply when you initiate the status change process.

**1. Business Function Name**

Use this processing option to specify the business function you want to use to initiate the status change workflow process. This business function must also handle the other workflow processes such as aborting, escalating, restarting, and approving.

The default function is Initiate Status Change. The source module is N0800206.

**2. Hide Status Change Initialization Business Function**

Use this processing option to specify whether you want to allow the user to see the Status Change business function driver used to initiate the Status Change process. It is recommended that you set this value to 1. Values are:

*0:* No

*1:* Yes

## Setting Up the Employee Status Change Program

Access the Employee Status Change Setup form.

To set up employee status change:

From the Self Service Setup menu (G05BESS4), choose Status Change Setup.

1. On Employee Status Change Setup, complete the Change Type field and click Find:
2. To change the status of a selected field to a required field, double-click the row-header (the field with the check mark) so that the lightening bolt symbol appears. Alternatively, you can highlight the row and press the Select button.
3. To completely deselect a field, double-click the row-header again so that no symbol appears.
4. To add a new field, click the All display option:
5. Double-click the row-header of the data item(s) that you want to add and click OK.

**Change Type** Enter a code that specifies the type of status change. The status change type is validated against UDC 08/S4.

An example of a status change type is PROMO for Promotion. To define a new type of status change, you must first add the change type to the UDC table.

**All** Selecting All will display all possible data items to choose from whether they have been selected.

**Approval Type** Enter a value form the UDC table 05/AP. The approval type selected will determine who will receive an approval message. The approval types are setup using the Approval Hierarchy application (P05844)..

# Setting Up Manager Reports

This section provides an overview of setting up manager reports and discusses how to set up the Manager's Report Setup form.

## Understanding Manager Reports setup

Managers and their delegates can use the Managers Reports program (P08740), to automate required reporting procedures and save time. System administrators use the Managers Reports Setup program (P08741) to set up the reports that are run in the Managers Reports program.

The Managers Reports Setup program includes a list of categories that are defined in UDC 08/RP. You can modify this list to meet organizational needs and then attach reports to each category as desired. To automatically run a category of reports from the Managers Reports program, managers can create a user defined list that contains all or some of the reports in a particular category. The list can even contains reports from multiple categories. Once the list is created, the manager can submit the entire list. Managers retain the option of changing the sequence in which the system runs a list of reports and can also run individual reports instead of an entire list.

You can also set up report versions in the Managers Reports Setup program. Creating report versions allows you to set up lists of reports to meet a wide range of needs. You could create a different version for each category.

The Manage Reports process has been designed to take advantage or reports that can be run for a particular employee and have the employee's Address Number in the report data structure. When adding reports that fit this criteria to a report category, press the Map Report Data Structure row exit. This will allow you to map a data item from the Employee Master to the data items in the report data structure. To run a report for a specific employee you would want to map AN8 from F060116 to the Address Number field in the report data structure.

### See Also

Chapter 28, "Manager Self-Service," Running Managers Reports, page 276

## Prerequisites

Before you complete the tasks in this section:

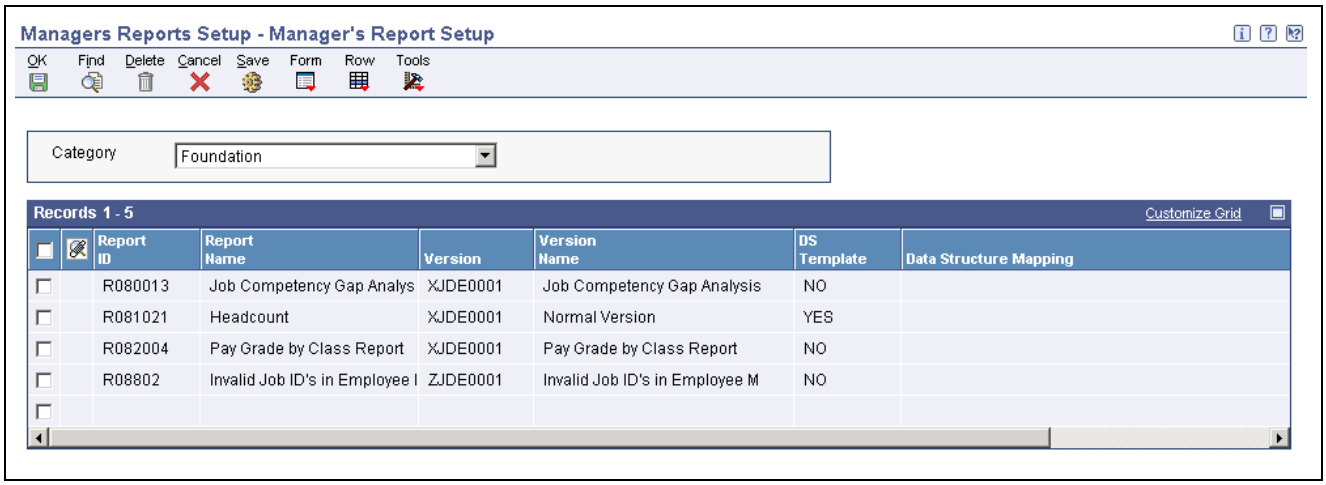
- To set up new category codes to which you can assign a new selection of reports, before starting this process, see Understanding User Defined Codes for Human Capital Management Systems in the Human Capital Management Foundation Guide.
- To create a user defined code, see Adding a User Defined Code in the Foundation Guide. To create a new category for human resources reports, use 08 in the Product Code field and RP in the User Defined Codes field.

## Forms Required to Set Up Manager Reports

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Manager's Report Setup | W08741A | Self Service Setup menu (G05BESS4), Managers Reports Setup | Review existing report names that might be currently assigned to categories.<br>Assign desired reports to individual categories. |

## Setting Up Manager Reports

Access the Manager's Report Setup form.




Manager's Report Setup form

To set up manager reports:

1. On Manager's Report Setup, complete the Category field and click Find to display the report names that are currently assigned.
2. To assign a report to a category, complete these fields:
   - Report ID
   - Version
3. After you have added the necessary reports, click OK.

**Category** Enter the name of a report category. Each report is associated with a category to make creating and maintaining lists of reports easier and to allow you to view or submit just the reports that belong to a particular category.

**Report ID** 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

**DS Template** Display only. Specifies whether the report has a data structure for passing in runtime parameters. When a report has a data structure the Map Report Data Structure row exit will be enabled. Pressing this button will display the Work With Data Structure Mapping form (P08770). This form will allow you to setup a mapping between items in the Employee Master

(F060116) and items in the data structure. This mapping will allow run reports for a specific employee.

# Setting Up Organizational Charts for the Web

This section provides an overview of setting up organizational charts for the web and discusses how to set up the Generate Graphic Organization program.

## Understanding Organizational Charts for the Web

You can use the Generate Graphic Organization Chart program (P08713W) to customize the appearance of your organizational charts. If you choose to complete none of the setup options, managers can still enter an employee ID and then click the Display Chart option to produce a chart.

You can use the Profile option on the Form menu to review Address Book and Employee Master Information for the person who is listed in the Employee field.

## Forms Used to Set Up Organizational Charts for the Web

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Organization Chart | W08713WB | Manager Self Service (G05BMSS1), Generate Graphic Organizational Chart<br>Display Options, Form menu. | Use search and select form to move to the Org Chart Display Options form. |
| Organization Chart Display Options | W08713WC | Click OK. | Set up options for identification, color, chart layout, and pictures. |

## Setting Processing Options for Generate Graphic Organizational Charts (P08713W)

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

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

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

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

# Organizational Charts Setup

Access the Organization Chart program.

To set up organizational charts for the Web:

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

1. On Organization Chart, choose Display Options from the Form menu.
2. On Org Chart Display Options, select these optional options to display on a chart:
   - Address Number
   - Job Title
3. Enter a color value for each of these chart options:
   - Level 1
   - Level 2
   - Level 3
   - Background
4. To define chart layout options, complete these fields:
   - Cell Height
   - Cell Width
   - Font Size
   - Columns/Page
   - Rows/Page
   - Chart Height
   - Chart Width
   - Line Wrap
   - Show Page Number
   - Repeat top level manager on each page
   - Show Terminated
5. To display employee pictures on charts, enter a fully qualified directory path where the .jpg files are stored in the Image Location field:
6. To save your choices, click OK.

**Address Number** Place a check in this field if you want the employee's address number to appear on the chart.

**Job Title** Place a check in this field if you want the employee's job title to appear on the chart.

| | |
|---|---|
| **Level 1** | Enter an RGB color or valid HTML named color or use the visual assist to pick a color from list. |
| **Level 2** | Enter an RGB color or valid HTML named color or use the visual assist to pick a color from list. |
| **Level 3** | Enter an RGB color or valid HTML named color or use the visual assist to pick a color from list. |
| **Cell Height** | Enter a value for the height of each nod . |
| **Cell Width** | Enter a value for the height of each node. |
| **Font Size** | Enter a number for the font size. |
| **Columns/Page** | Enter the number of columns to print on each page. This is only used if the Page Layout box is check on the Organization Chart form. If the chart is too wide to fit on a page then this option will allow the chart to be split on to multiple pages for printing. |
| **Rows/Page** | Enter the number of rows to appear on each page. This is only used if the Page Layout box is check on the Organization Chart form. If the chart contains more rows than can fit on a page then this option will allow the chart to be split on to multiple pages for printing. |
| **Chart Height** | Enter a value that changes the height of the frame that displays the chart. |
| **Chart Width** | Enter a value that changes the width of the frame that displays the chart. |
| **Line Wrap** | Check this box to allow text within each node to wrap on to multiple lines. |
| **Repeat top level manager on each page** | Check this box if you want to redisplay the top level employee on each page of the chart. |
| **Show Terminated** | Check this box if you would like to show terminated employees on the chart. Terminate employees will be displayed with a red background and strike through font. |
| **Image Location** | Enter the file location on the Web server where employee pictures are stored. To display a picture of the employee on the Profile form the name of the image must be the employees address book number followed by .jpg. For example the picture of Cathy McDougle would be 7500.jpg. |

# Setting Up Manager Delegates

This section provides an overview of setting up delegates for managers and discusses how to perform the setup function.

## Understanding Manager Delegates Setup

After employees enter timecards in the system, managers can review and approve, change, or reject those timecards. Occasionally, managers are not available to review and approve timecards. In these circumstances, you can use the Manager Delegates Setup program (P051126) to set up delegates to perform certain review and approval functions on behalf of the manager.

When you set up manager delegates, you can assign an authorization level to each delegate. The authorization level specifies how much authority the delegate has during the timecard review and approval process. Delegates with an authorization level of *2* are only able to approve or reject timecards, and delegates with an authorization level of *1* are able to approve, change, delete, and reject timecards on behalf of the manager.

You can also assign effective dates to delegate records. For example, if a manager is on vacation for two weeks, you might set up a delegate that has review and approval authority during the time that the manager is unavailable. After the ending date that is assigned to the delegate record is reached, the delegate no longer has authorization to review and approve employee timecards. A manager can have no more than two active delegates at any given time.

## Form Used to Set Up Manager Delegates

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Manager Delegates Setup | W051126B | Time Entry Self Service Setup (G05BESS41), Manager Delegate Setup | Review existing information and enter new values to set up desired delegates for a manager. |

## Setting Processing Options for Manager Delegates Setup (P051126)

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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### Defaults

This processing option specifies whether the Manager field is accessible and the address book value can be changed. When the value is set to the default *0,* the system automatically detects the address book number of the manager who is currently signed onto the system, disables the field, and displays only delegates who are subordinate to the displayed manager. When the value is set to *1,* the system activates the Manager field, does not automatically detect an address book number, and displays the subordinate delegates for any manager whose address book number is entered.

**1. User Level** Use this processing option to specify whether to display delegates for different managers or to display the delegates for only one manager. Values are:

*0:* Only see one manager's delegates. (default)

*1:* Can change managers to see everyone's delegates.

## Setting Up Delegates for managers

Access the Work With Manager Delegates Setup form.

**Delegate Number** Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Authorization Type** Enter a code that specifies the type of authorization that a manager can specify for a delegate. Values are:

*1:* Change/delete/approve/reject

*2:* Only approve/reject

# CHAPTER 6

# Setting Up Self Service Time Entry

This chapter provides an overview of self-service time entry setup and describes how to:

- Set up the Time Entry Director form.
- Create the employee self service time entry interface.
- Assign pay types to employee groups.

## Understanding Self Service Time Entry Setup

Before employees can enter timecard information using the self-service time entry applications, you must create the text that appears on the time entry forms, set up user interfaces, assign manager delegates for managers who review and approve timecards, and specify the available pay types that can be used for each employee group.

First, you must set up the director form. The director form is the first form that employees see when they access the self-service time entry system. You can enter text that will appear on this form. This text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that might be needed for employees to enter timecards correctly.

In addition to director text, the director form also contains links to the actual time entry interfaces. You can activate the links to the Employee Summary Time Entry program (P051128), the Employee Daily Time Entry program (P051127), or to both programs. Though the system displays all of the links on the form, which links are active is determined by the processing option settings for the Time Entry Self Service Director program (P051125).

After you set up the director, you must set up user interfaces for the time entry applications. You can create multiple interfaces to accommodate the business requirements of different companies or business units within your organization. To set up a user interface for self-service time entry, you choose which fields you want to display on the time entry forms. These fields are set as default fields that the system automatically displays on Employee Daily Time Entry and Employee Summary Time Entry:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked

- Equipment Hours

The system also provides you with over 50 additional predefined fields to choose from. These fields allow you to quickly and easily configure your user interfaces to meet the business needs of your organization.

You can specify which pay types are available to employees within different employee groups. For example, employees in business unit 100 might need to use different pay types than employees in business unit 200, or employees with Job Type A-200 might use different pay types than employees with Job Type B-55. You can use the Classification/Pay Cross Reference program (P05932) to specify the available pay types for each employee group. When you set up this information, employees can enter timecards for only the pay types that are assigned to their employee group. If you do not set up this information, employees will receive a hard error on this field and will not be able to complete time entry.

You can define employee groups according to this criteria:

- Job Type only
- Job Type and Job Step only
- Business Unit only
- Union Code only
- Shift Code only
- Job Type, Job Step, Business Unit, Union Code, and Shift Code

You can select the fields that you use to define employee groups for pay type assignment in the processing options for the Time Entry Self Service Director program.

To set up delegates who can assist managers with timecard approvals, you can use the Manager Delegates Setup program (P051126) to designate one or more subordinate employees as delegates for each manager. You also assign an authority level for each delegate. Manager delegates are employees who are given permission to perform duties on behalf of a manager. For example, if a manager is not available to review and approve timecards before the timecard approval deadline, a manager delegate could review and approve the timecards for that manager.

# Setting Up the Time Entry Director Form

This section provides an overview of the Time Entry Director form and discusses how to set up director text.

## Understanding the Time Entry Director Form

The Time Entry Self Service Director program (P051125) displays the first form that employees see when they access the self-service time entry system. You define the text that appears on this form. This text is called director text. You use director text to provide user instructions for employees or to provide pay-period specific information that employees might need to enter timecards correctly. If you choose to include pay-period specific information in director text, you must revise the text for each pay period.

These examples illustrate the types of information that you might want to include in director text.

### Example 1

July 1-15 time entry reports are due by noon July 16: 80 total hours.

Overtime reminder: All employees who are eligible for overtime are responsible for coding all overtime hours worked to pay code 300. If you have any questions about overtime eligibility, please speak with your manager or a human resources representative.

### Example 2

To enter timecards using this self-service form, verify that the date in the Pay Period Ending Date field is correct and then click the Summary Time Entry link to access the time entry screen. On the time entry screen, complete all of the fields and then click Save. Your manager will review your timecards and you will receive an email response regarding the approval status of your timecards. If you have questions regarding the time entry process or the review and approval process, please speak with your manager or a human resources representative.

In addition to director text, the director form also contains these links to employee or manager programs (interfaces):

- Daily Time Entry
- Summary Time Entry
- Manager Review and Approval

You use the processing options for the Time Entry Self Service Director program to specify which of these links are active.

The director form also automatically displays the last day of the pay period, based on information that you enter in the processing options.

## Forms Used to Set Up Director Text

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Director Text | W051124A | Time Entry Self service Setup (G05BESS41), Director Text Setup<br><br>Click Add. | Enter values to set up director text. |
| Define Director Text | W051124B | Click OK. | In the text pane, enter text for the self-service time entry form. |

## Setting Processing Options for Time Entry Self Service Director (P051125)

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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## Date/Pay Cycle Code

Use these processing options to specify the pay period ending dates that are displayed on the Time Entry Self Service Director form. The system displays the date that is linked to the employee pay cycle code. To ensure that the correct date is displayed on time entry forms, these processing options must be updated each pay period.

**1. Pay Period Ending Date - Weekly** Use this processing option to specify the last day of the workweek for weekly processing periods.

**Weekly Pay Cycle Code** Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

**2. Pay Period Ending Date - Bi-Weekly** Use this processing option to specify the last day of biweekly processing periods.

**Bi-Weekly Pay Cycle Code** Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

**3. Pay Period Ending Date - Semi-Monthly** Use this processing option to specify the last day of semimonthly processing periods.

**Semi-Monthly Pay Cycle Code** Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

**4. Pay Period Ending Date - Monthly** Use this processing option to specify the last day of monthly processing periods.

**Monthly Pay Cycle Code** Use this processing option to specify the master pay cycle that the system uses to determine pay period dates.

## Pay Type

Use these processing options to specify the pay types that the system uses to create timecards for lump sum entries in the Quick Entry section of the summary time entry forms.

**1. Pay Type - Regular** Use this processing option to specify the pay type that the system assigns to timecard information that is entered for regular pay in the self-service time entry program.

**2. Pay Type - Sick Leave** Use this processing option to specify the pay type that the system assigns to timecard information that is entered for sick pay in the self-service time entry programs.

**3. Pay Type - Vacation** Use this processing option to specify the pay type that the system assigns to timecard information that is entered for vacation pay in the self-service time entry programs.

**4. Pay Type - Holiday** Use this processing option to specify the pay type that the system assigns to timecard information that is entered for holiday pay in the self-service time entry programs.

**5. Pay Type - Overtime** Use this processing option to specify the pay type that the system assigns to timecard information that is entered for overtime pay in the self-service time entry programs.

**6. Cross Reference Search** Use this processing option to specify the criteria that are used to set up a pay type cross-reference table for employee self service time entry. You use the

pay type cross-reference table to define pay types that various employee groups can use for time entry.

For example, if you want to assign pay types to employees by job type and job step, enter *2*. If you enter *2,* you should define pay types for all employee groups that use job type and job step.

To assign pay types to employee groups by business unit, enter *3*.

To assign pay type cross-references that use different criteria for each employee group, enter 0. Entering *0* allows pay types to be assigned to specific employee groups and allows for a default set of pay types to be set up by leaving all of the options blank. This also allows any or none of the options to be used to define pay type cross-references. Values are:

*1:* Job type

*2:* Job type and job step

*3:* Business unit

*4:* Union code

*5:* Shift code

*0* or Blank (default): Any or all cross reference options

## Leave Entry

Use these processing options to specify how the system verifies employee available leave balances and which table the system uses to retrieve employee leave balances.

**1. Leave Time Available**

Use this processing option to specify the method that the system uses to respond to leave requests or for leave taken by an employee. If you enter any value other than 0, an employee can take only available leave. This value is in effect for all pay types that are set up to use leave tracking. Values are:

*0:* Do not validate available leave time.

*1:* Display a hard error if an insufficient available balance exists.

*2:* Display a warning if an insufficient available balance exists.

*3:* Display a hard error if the combined available and accrued balances are insufficient.

*4:* Display a warning if the combined available and accrued balances are insufficient.

**2. Leave History Source**

Use this processing option to specify the table from which the system retrieves history information. Values are:

*0* or Blank: Calendar Month DBA Summary History table (F06145) or Employee Transaction History Summary table (F06146)

*1:* Fiscal and Anniversary Year History table (F06147)

## Account Number

Use these processing options to specify how the system validates account numbers that are included on employee timecards.

**1. Validate # sign**

Use this processing option to specify whether the system allows employees to enter a pound sign (#) in place of a valid account number. If this is not allowed, the system verifies the validity of the account numbers associated with each timecard. Values are:

*0:* Allow a pound sign (#) entry

*1:* Do not allow a pound sign (#) entry

**2. Posting Account Only**

Use this processing option to specify whether the system verifies that the account number entered for timecards can be posted. Values are:

*0:* Allow all account numbers (default)

*1:* Allow only account numbers that can be posted

**3. Dynamic Account Creation**

Use this processing option to specify whether the system uses dynamic account creation when an account number that does not exist in the Account Master table (F0901) is entered on a timecard. You should set this option to 0 if dynamic account creation is not included in your accounting process. Values are:

*0:* Do not dynamically create accounts.

*1:* Create accounts dynamically.

**4. Validate Account**

Use this processing option to specify whether the system automatically verifies and retrieves the correct account number from the Employee Master Information table (F060116). When this processing option is set to 1, the system first compares the account number that is entered on the timecard to existing account information in the Employee Master Information table. If the employee enters no account number, then the system uses data that is linked to the account number such as the job location, cost code, pay type, and union, to retrieve the correct account number. Values are:

*0:* The system does not verify and retrieve the account number.

*1:* The system verifies and retrieves the account number.

## Multicurrency

Use these processing options to enable the multicurrency feature for Employee Self Service Time Entry and to specify the currency that the system uses. To use multicurrency, this feature must also be activated in the Time Entry MBF Processing Options (P050002A), Recharge tab, Enable Multi-Currency Functionality. Also on the Recharge tab, you should enter appropriate values for the remaining processing options.

**1. Multicurrency**

Use this processing option to specify whether to enable multicurrency time accounting. When multicurrency time accounting is enabled and a timecard is saved, the system retrieves the currency code and then saves it in the Employee Transactions - Batch File (F06116Z1). Values are:

*1:* Enable multicurrency time accounting.

*0:* Do not enable multicurrency time accounting

**2. Currency Mode**

Use this processing option to specify the currency that the system uses for the transaction. To use the currency of the country where the employee's home company is located, choose Domestic. To use the currency for another country as the base currency, choose Foreign. Values are:

*D:* Domestic Currency

*F:* Foreign Currency

### Manager

Use this processing option to specify whether the missing timecard feature can be used.

**1. Multicurrency** Use this processing option to specify whether managers can view records for employees who have not entered timecards for the specified period. Values are:

*0:* Enable the missing timecard option.

*1:* Disable the missing timecard option.

### Administrator

Use these processing options to specify whether the system displays each of the available time entry links on the self-service time entry forms. You can also specify the text that the system displays for each link.

**1. Show Daily Time Entry Link** Use this processing option to specify whether the system displays a link to the Employee Daily Time Entry program (P051127). If you do not display the Daily Time Entry link, the employee cannot access the program. Values are:

*0:* The system displays the Daily Time Entry Link.

*1:* The system does not display the Daily Time Entry Link.

**Daily Time Entry Override Name** Use this processing option to override the text for the link to the Daily Time Entry program. You must display the Daily Time Entry link in order for the system to display the text that you enter in this processing option.

**2. Show Summary Time Entry Link** Use this processing option to specify whether the link to the Summary Time Entry application is displayed for users. If you do not show the Summary Time Entry link, the employee will not be able to see the link to Summary Time Entry, and will not be able to access the program. Values are:

*0:* Show Summary Time Entry Link

*1:* Don't show Summary Time Entry Link

**Summary Time Entry Override Name** Use this processing option to override the text for the link to the Summary Time Entry program. You must display the Summary Time Entry link in order for the system to display the text that you enter in this processing option.

**3. Show Manager Approval Time Entry Link** Use this processing option to allow Employee Self Service Time Entry users to approve timecards using the Manager Approval program. If you do not show the Manager Approval link, employees cannot access Manager Approval. Values are:

*0:* Show Manager Approval Link

*1:* Don't show Manager Approval Link

**Manager Approval Time Entry Override Name** Use this processing option to override the text for the Manager Approval link. You must choose to show the Manager Approval link in order for the system to display the text that you enter in this processing option.

## Setting Up Director Text

Access the Work With Director Text form.

To set up director text for self-service time entry:

1. On Work With Director Text, click Add.
2. On Define Director Text, complete these fields:
   - Company
   - Business Unit
3. In the text pane, enter the text that you want to appear on the employee self service time entry form.

   **Note.** You can only enter text in the text pane. Do not enter any other type of text, OLE objects, or images into the text pane. Also, when you enter text into the text pane, you must enter the HTML code `<BR>` when you want a line break. Using the Enter key will not simulate a line break when the text appears on the director form.

4. Click OK.
5. To enter different director text for different groups within your organization, complete steps 1 through 4 for each company and business unit combination for which you want to create director text.
6. To use the same director text for all employees in your organization, complete these steps once and enter 0 in the Company field and leave the Business Unit field blank.

# Creating the Employee Self Service Time Entry Interface

This section provides an overview of setting up the employee self service time entry interface and discusses how to enter the values.

## Understanding the Employee Self Service Time Entry Interface

Before employees can enter timecard information into the system, you must define the information that appears on the interface that employees use. These fields are set up to display by default on all self-service time entry forms; however, you can choose to display additional fields:

- Pay Type
- Hours
- Work Date
- Subledger
- Subledger Type
- Charge To
- Shift Code
- Equipment Worked
- Equipment Hours

You can use the ESS Time Entry Setup program (P051123) to choose from over 50 additional predefined fields to appear on the employee time entry interface. These fields allow you to quickly and easily create time entry forms that meet the requirements of your organization. Depending on your business needs, you can create different time entry interfaces for each home company and home business unit combination within your organization.

For example, if you want employees in Company A to enter simple time entry records that do not require a large amount of data entry, you can choose to display only the default fields for Company A employees.

Conversely, you might want employees in Company B to enter detailed time entry information. In this case, you might select a large number of additional fields to appear on the employee time entry interface for Company B. Examples of additional fields that you might want to display are:

- Company - Home
- Object Account
- Subsidiary
- Item Number
- Unites - Pieces
- Amount - Sales
- Union Code
- Work State
- Billing Rate

## Forms Used to Set Up the Employee Self Service Time Entry Interface

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With ESS Time Entry Setup | W051123A | Time Entry Self service Setup (G05BESS41), Self Service Screen Setup.<br>Click Add. | Use the search and select form to access Work With ESS Time Entry Setup. |
| ESS Time Entry Setup Revisions | W051123B | Click OK. | Click each tab and enter appropriate values.<br>Repeat steps 2-7 for additional companies and business unit combinations. |

## Setting Up the Employee Self Service Time Entry Interface

Access the Work With ESS Time Entry Setup form.

To create the employee self service time entry interface:

1. On Work With ESS Time Entry Setup, click Add.
2. On ESS Time Entry Setup Revisions, complete these fields:
   - Company
   - Business Unit

3. To specify which time entry programs you want employees to use, click one of these options:
   - Summary Time Entry
   - Daily Time Entry
   - Both
4. On the Fields 1-22 tab, click any of these options that you want to appear on the time entry interface:
   - Account Number
   - Job Type
   - Job Step
   - LS Amnt
   - Opt Sequence
   - Equip Worked On
   - Union
   - Batch
   - Uprate Amount
   - Shift Differential
   - Amount or Percent
   - Billing Rate
   - Home Company
   - Cost Code
5. Click the Fields 23-42 tab and then click any of these options that you want to appear on the time entry interface:
   - Home Business Unit
   - Tax Area
   - Item
   - Piece Rate
   - Pieces
   - Phase
   - Record Type
   - WCI Code
   - SC/WC
   - Check Route
   - Cat 001
   - Cat 002
   - Cat 003
   - Cat 004
   - Bill RtCd

- Equipment Object
- Equipment Blrt

6. Click the Fields 43-52 tab and then click any of these options that you want to appear on the time entry interface:
   - Cost Type 1
   - Cost Object 1
   - Cost Type 2
   - Cost Object 2
   - Cost Type 3
   - Cost Object 3
   - Cost Type 4
   - Cost Object 4
   - Activity Code
   - Leave Type
   - Leave ID Number
7. Click OK.
8. Complete steps 2 through 7 for each company and business unit combination for which you want to create a separate user interface. If you want to use the same user interface for all of the employees in your organization, you can create one interface by entering 0 in the Company field and leaving the Business Unit field blank.

**Summary Time Entry** Enter the option that specifies which type of time entry (summary or detail) uses the currently selected fields.

**Daily Time Entry** Enter the option that specifies which type of time entry (summary or detail) uses the currently selected fields.

**Both** Enter the option that specifies which type of time entry (summary or detail) uses the currently selected fields.

**Account Number** Enter the code that specifies whether the system displays the Account Number - Input field on employee self service time entry forms. This code identifies the general ledger account associated with the time entry record. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Job Type** Enter a code that specifies whether the system displays the Job Type (Craft) field on employee self service time entry forms. This user define code (07/G) defines the job in which the employee works. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Job Step** Enter a code that specifies whether the system displays the Job Step field on employee self service time entry forms. This user defined code (07/GS) represents a subcategory of a job type. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**LS Amnt** Enter a code that specifies whether the system displays the Amount Entered Gross Pay field on employee self service time entry forms. This value represents the amount of pay an employee receives before taxes and deductions. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Opt Sequence** Enter a code that specifies whether the system displays the Sequence Number field on employee self service time entry forms. This code is used to indicate an order of succession. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Equip Worked On** Enter a code that specifies whether the system displays the Equipment Worked On field on employee self service time entry forms. This code is the identification number for the equipment that an employee maintained, repaired, or worked on. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Batch** Enter a code that specifies whether the system displays the Batch Number field on employee self service time entry forms. This code is used to identify a group of time entry records that the system processes and balances as a unit. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Uprate Amount** Enter a code that specifies whether the system displays the Amount Uprate field on employee self service time entry forms. This value is added to the employee's base hourly rate. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Amount or Percent** Enter a code that specifies whether the system displays the Percent or Amount field on employee self service time entry forms. This value is used to determine whether a shift differential is a percentage or a flat amount. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Billing Rate** Enter a code that specifies whether the system displays the Rate Distribution (Billing) field on employee self service time entry forms. This value is the rate that is used for billing or recharge purposes. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Cost Code**

Enter a code that specifies whether the system displays the Subsidiary field on employee self service time entry forms. The subsidiary represents a subdivision of an object account. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Home Business Unit**

Enter a code that specifies whether the system displays the Home Business Unit field on employee self service time entry forms. This value identifies the business unit where the employee generally works. Values are:

*1:* Display this field.

Blank: Do not display this field. This is default.

**Tax Area**

Enter a code that specifies whether the system displays the Tax Area field on employee self service time entry forms. This code is the Vertex GeoCode that identifies the employee's geographical location for taxation purposes. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Item**

Enter a code that specifies whether the system displays the Item Number - Short field on employee self service time entry forms. This code is used as an inventory code to identify items. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Piece Rate**

Enter a code that specifies whether the system displays the Rate - Piecework field on employee self service time entry forms. This rate represents the amount of pay an employee receives for each item or piece that is produced. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Pieces**

Enter a code that specifies whether the system displays the Units - Pieces field on employee self service time entry forms. This value represents the number of pieces or items completed for piecework employees. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Phase**

Enter a code that specifies whether the system displays the Categories Work Order 1 field on employee self service time entry forms. This code is used to indicate the current stage or phase of a work order. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Record Type**

Enter a code that specifies whether the system displays the Record Type field on employee self service time entry forms. Record Type is a code that identifies whether the employee is a payroll employee, a recharge employee, or both. Values are:

*1:* Display this field.

Blank: Do not display this field. This is default.

**WCI Code** Enter a code that specifies whether the system displays the Worker's Compensation field on employee self service time entry forms. This code represents the Worker's Compensation Insurance code under which the employee is insured. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**SC/WC** Enter a code that specifies whether the system displays the Sub Class - Worker's Comp field on employee self service time entry forms. This code is used to define any special circumstances that would result in multiple rates for a single Worker's Compensation Insurance code. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Check Route** Enter a code that specifies whether the system displays the Routing Code - Check field on employee self service time entry forms. This code is used to specify the check routing or mail stop code associated with an employee's payment, and is used in sorting payments to facilitate their handling and delivery. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Cat 001** Enter a code that specifies whether the system displays the Category Code - Payroll 1 field on employee self service time entry forms. You can use this code to track information that is specific to your organization. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Bill RtCd** Enter a code that specifies whether the system displays the Equipment Rate Code field on employee self service time entry forms. This user defined code (00/RC) is used to identify the billing method that is used for a piece of equipment. For example code DY refers to daily billing and MO refers to monthly billing. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Equipment Object** Enter a code that specifies whether the system displays the Equipment Object Account field on employee self service time entry forms. This code represents the account to which amounts associated with equipment utilization are charged. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Equipment Blrt** Enter a code that specifies whether the system displays the Billing Rate - Equipment field on employee self service time entry forms. This value

represents the monetary amount that is billed for the use of equipment. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Cost Type 1**

Enter a code that specifies whether the system displays the Managerial Analysis Type field on employee self service time entry forms. This field should be displayed if the Managerial Analysis Code field is displayed. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Cost Object 1**

Enter a code that specifies whether the system displays the Managerial Analysis Code field on employee self service time entry forms. This code works the same way as the subledger code; however, the system does not post this code to the Account Balances table (F0902). Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Activity Code**

Enter a code that specifies whether the system displays the Activity Based Costing Code field on employee self service time entry forms. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Leave Type**

Enter a code that specifies whether the system displays the Leave Type field on employee self service time entry forms. This code is used to identify the type of time that an employee codes to a leave pay type. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

**Leave ID Number**

Enter a code that specifies whether the system displays the Leave Request Number field on employee self service time entry forms. This code is the unique identification number of the leave request that is associated with a time entry record. Values are:

*1:* Display this field.

Blank: Do not display this field. This is the default.

# Assigning Pay Types to Employee Groups

This section provides an overview of assigning pay types to employee groups and discusses how to input the values.

## Understanding Pay Types Assignment

To simplify the time entry process and to ensure that employees enter timecards using the correct pay types, you can use the Classification/Pay Cross Reference program (P05932) to specify the available pay types for specified employee groups within your organization. Linking pay types with employee groups is also necessary for the self-service time entry programs to function properly. You can define groups based on job types, job steps, business units, shift codes, union codes, or any combination of these fields. You can use the processing options for the Time Entry Self Service Director program (P051125) to specify which of these fields you want to use to create employee groups for pay type classification purposes.

When you assign pay types to specific employee groups, employees can use only the pay types that have search criteria that match the information in the Employee Master Information table (F060116). For example, if you assign a pay type to business unit 100 and job type A-50, only employees who are listed in the Employee Master Information table with business unit 100 and job type A-50 can enter timecards using that pay type. Additionally, only the pay types associated with an employee group are displayed with the search function for the pay type field during the time entry process.

You can also set up a set of default pay types for employees who are listed in the Employee Master Information table with business unit and job type values that do not meet specified search criteria. You might want to do this in order to identify employee groups for which you have not set up pay type information. For example, if you set up pay type information for each employee group within your organization, you can set up default information and include only one pay type in the default set. If an employee does not meet the search criteria for any of the other employee groups, that employee can enter time using only the pay type that you have set up in the default set. You can then review time entry records to find employees who have entered timecards using that pay type. By identifying those employees, you can identify employee groups for which you need to set up pay type information.

You might also want to use a default set of pay types if you have a large number of employees in different employee groups who can use the same pay types. For example, if only three of the business units within your organization require unique pay types, you might set up pay types for each of the three business units. However, if the rest of the employees within your organization use the same pay types, you can set up a default set of pay types for those employees rather than setting up the same pay type information for each business unit.

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**Note.** Assigning pay types to employee groups is required in order for self-service time entry programs to function properly. You must set up pay type information so that employees in your organization can use the pay types you set up. If no pay types are set up, then employees will receive a hard error on the pay type field and will not be able to enter a self-service timecard.

---

## Forms Used to Assign Pay Types to Employee Groups

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Classification Pay/Cross Reference | W05932A | Rate Derivation Setup (G05BRD4), Classification Pay/X-Ref<br>Click Add. | Use the search and select form to access the Classification/Pay Cross Reference Revisions form |
| Classification/Pay Cross Reference Revisions | W05932C | Click OK. | Enter appropriate values to assign pay types to existing employee groups. |

## Setting Up Pay Type Assignment for Employee Groups

Access the Work With Classification Pay/Cross Reference form.

To assign pay types to business units:

1. On Work With Classification Pay/Cross Reference, click Add.
2. On Classification/Pay Cross Reference Revisions, complete any of these fields to define the employee group to which you want to assign pay types:
   - Job Type
   - Job Step
   - Union Code
   - Business Unit
   - Shift Code

   **Note.** To create a default set of pay types, leave all of these fields blank.
3. In the detail area of the form, enter the beginning pay type code in a range of pay types in the From Trans field.
4. Enter the ending pay type code in a range of pay types in the Thru Trans field.

   **Note.** When you are entering a range of pay types to assign to an employee group, both the pay type in the From Trans field and the pay type in the Thru Trans field are included in the range and assigned to the specified group. If you do not want to enter a pay type range, you can enter the same pay type code in the From Trans and Thru Trans fields.
5. Choose a blank row in the detail area and complete steps 3 and 4 until you have assigned all of the pay types for the specified business unit.
6. Click OK.

**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.

**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.

# CHAPTER 7

# Understanding the eRecruit System

This chapter provides an overview of the eRecruit System and describes:

- eRecruit tables.
- User Defined Codes.

## The eRecruit System

Traditionally, the process of recruiting new employees has been one of the least efficient human resource processes. The manual steps typically associated with recruitment are time-consuming and inefficient. Organizations can increase efficiency and reduce costs by using their corporate websites to attract candidates for job openings. Automating the recruitment process through the use of technology effectively controls costs and reduces the amount of time needed to fill an open requisition.

The use of the Internet for recruiting purposes has increased dramatically. Recent surveys indicate that the majority of the world's largest companies use their corporate Websites as a recruiting tool to attract potential employees. Posting jobs on your corporate Website allows you to publicize your staffing needs at no additional cost. Electronic recruitment allows you to collect, store, and retrieve information about potential candidates for job openings, reducing the time-to-hire and effectively removing the most desirable candidates from the job market before your competitors can hire them.

The PeopleSoft EnterpriseOne eRecruit system includes these business processes:

- Creating job postings
- Applying online
- Integrating eRecruit applicants into the applicant and requisition systems

The self-service transactions provided in the eRecruit system are targeted to both external applicants and internal applicants (employees). External applicants and employees can use eRecruit to perform these tasks:

- Review information about current job openings in the organization
- Apply for a position within the organization
- Search for a job posting that matches the desired criteria
- Email a job posting to a third party who might be interested in the position
- Review the jobs for which the applicant has submitted applications

The PeopleSoft EnterpriseOne eRecruit system shares information with Applicant Information (P08401) and Requisition Information (P08102) programs and receives information from the Competency Information (P05104) program.

# eRecruit Tables

The eRecruit system uses these tables:

| Table | Description |
|---|---|
| Extended Applicant Information (F08403) | Stores applicant information, such as the address number, recruitment number, and percentage of time the applicant is willing to travel for a job. |
| Applicant Login Information (F08405) | Stores applicant signon information for all users, such as user ID and the last date on which the applicant signed on to the system. |
| eRecruit Encryption Key (F08406) | Stores the encryption key for eRecruit external applicant passwords and email addresses. |
| Job Posting Tab Settings (F08460) | Stores the preference to hide or show job posting fields and the competencies tab in the Manage Job Postings program (P08470) |
| Standard Phrases (F08461) | Stores details about a standard phrase, such as phrase ID, phrase category, language preference, and the wording of the phrase. |
| Disable Applicant Activities (F08462) | Stores activities that you can set up to be enabled or disabled for the applicant, or disabled internally, externally, or both. |
| Posting Element Display Settings (F08463) | Stores the display options for a job posting. |
| Job Posting Fields by Tabs (F08464) | Stores all of the fields that can be customized and that are associated with a job posting tab in the Manage Job Postings program (P08470). |
| Job Posting Field Preferences (F08465) | Stores the settings for fields in each tab of the Manage Job Postings program (P08470), such as whether the field is hidden when the user creates a job posting. |
| eRecruit General Constants (F08466) | Stores general email and Website information, as well as the language that is associated with the Website and email address. |
| Job Postings (F08470) | Stores basic header information for each job posting, such as the posting number and category, related requisition number, salary range, and dates for the posting. |
| Job Posting Competencies (F08471) | Stores the competencies that are related to job postings. |
| Job Posting Text (F08472) | Stores related details for each job posting description, such as the posting ID, language information, and descriptive text about the job posting. |

| Table | Description |
|---|---|
| Job Posting Sort Workfile (F08473) | Stores job posting information by language that the applicant uses when searching the postings, such as the category and description of the posting, internal and external posting dates, and location. |
| Job Basket (F08474) | Stores job posting information for the jobs that an applicant is considering. |
| Recruitment Information (F08490) | Stores applicant personal information details, such as name, address, phone, asking salary, and hours available to work. |
| EEO Survey (F08492) | Stores high-level information about the applicants who complete the optional EEO survey, such as recruitment number, minority identification, and sex. |
| References (F08496) | Stores contact information for the references that the applicant provides. |
| Recruit Apply Posting (F08498) | Stores details about the applicants who apply for a job posting, such as recruitment number, eRecruit status, and the date of the application submission. |

# User Defined Codes for eRecruit

These user defined codes apply specifically to the PeopleSoft EnterpriseOne eRecruit system.

## Ascending Descending (08R/AD)

You use ascending and descending codes to organize a search of job postings. The system allows you to sort by any combination of job location, job category, and date job posted in ascending or descending order for each criteria.

Ascending and descending codes are hard-coded and should not be changed. You can choose from these codes:

- 0: Ascending
- 1: Descending

## eRecruit Status (08R/AS)

You use eRecruit status codes to specify the applicant's current status in the application process for a particular job. In the first step, the applicant has not completed the job submission. In the second step, the applicant has submitted information that has not yet been reviewed by the recruiter. In the third step, the recruiter has reviewed the applicant's submission and indicated that the applicant is an actual candidate for the position. Therefore, the applicant's information will be transferred to the Applicant Master table (F08401). In the final step, the Applicant Master table has been updated.

eRecruit status codes are hard-coded and should not be changed. You can choose from these codes:

- 0: Entered but not submitted
- 1: Submitted

- 2: Marked for update to table F08401
- 3: Updated to the Applicant Master

### Disable Applicant Activities (08R/AA)

You use disable applicant activities codes to specify the information that an applicant can review when browsing job postings. For example, you can disable Paste Cover Letter so that the applicant does not see this form.

Disable applicant activities codes are hard-coded and should not be changed. You can choose from these codes:

- 0: Paste Resume
- 1: Paste Cover Letter
- 2: Enter References
- 3: Send Confirmation to Applicant
- 4: Personal Info/EEO
- 5: Job Basket
- 6: EEO Survey
- 7: Apply to Posting
- 8: View Submitted Applications
- 9: Enter Job Specific Qualifications

### Element ID (08R/EI)

You use element ID codes to specify the list of elements that the system can display when an applicant reviews job details. For example, you might display the job title, job location, and job category for the applicant. You specify the elements to display in the eRecruit Setup program (P08460).

Element ID codes are hard-coded and should not be changed. You can choose from these codes:

- 1: Job Title
- 2: Job Location
- 3: Job Posting ID
- 4: Job Category
- 5: Posting Date
- 6: Position Openings
- 7: Salary Range
- 8: Posting Description
- 9: Job Qualifications

### Internal/External/Both (08R/IE)

You assign internal, external, and both codes to an applicant activity to denote whether the activity is used internally, externally, or both. Examples of applicant activities include:

- Paste resume
- Paste cover letter

- Enter references
- EEO survey

You might request references from your external applicants, but not from internal applicants (employees). You can assign an external code to this activity so that employees will not be asked to provide references.

These internal, external, and both codes are hard-coded and should not be changed:

- 0: Internal
- 1: External
- 2: Both

### Job Posting Location (08R/JL)

You use job posting location codes to indicate the city or location within a city where the job opportunity exists. Applicants can search for job postings by location.

Except for the asterisk code that indicates all locations, job posting location codes are not hard-coded; you can add, revise, and remove codes to correspond to your business needs.

### Letter Component (08R/LC)

You use letter component codes to format the subject and message of the email messages sent when an applicant applies to a job posting. For example, the email typically contains information such as the job posting, posting number, posting description, and applicant name.

These letter component codes are hard-coded and should not be changed:

- 0: Subject:
- 1: Job Posting
- 2: Posting Number
- 3: Posting Description
- 4: Application Date
- 5: Date
- 6: Dear
- 7: Applicant Name
- 8: Custom Text

### Mandatory/Hide/Disable (08R/MH)

You assign mandatory, hide, and disable codes to a field in the Manage Job Postings program (P08470) in order to specify display options for the field. These codes are hard-coded and should not be changed:

- Blank: Optional
- 0: Mandatory
- 1: Hide
- 2: Disable

## Phrase Category (08R/PH)

You use phrase category codes to group standard phrases according to type. For example, you might create a number of standard phrases that your marketing department frequently uses, and assign them to a MKTG category.

**Important!** You should not edit phrase category codes in the UDC tables; instead, use the eRecruit Setup program (P08460).

Phrase category codes are not hard-coded, so you can add, revise, and remove codes to correspond to your business needs. Examples of phrase category codes might include:

- 0: Marketing
- 1: Technical
- 2: Performance

## Posting Category (08R/PC)

You use posting category codes to group job postings according to type. For example, you might create an EXEC category that contains all of the settings that apply to executive job postings. The asterisk category is hard-coded and applies to all categories. You can add and revise posting categories that correspond to your business needs, but you cannot remove a posting category if you have attached postings to that category.

**Important!** You should not edit phrase category codes in the UDC tables; instead, use the eRecruit Setup program (P08460).

Examples of posting categories might include:

- 0: Marketing
- 1: Technical
- 2: Performance

## Posting Status (08R/PS)

You use posting status codes to indicate the status of a job posting. The system uses the active status in conjunction with the posting dates to determine whether or not a posting should display, either internally or externally. The special handling code *1* specifies that the posting status is active. Special handling code *2* specifies that the posting status is pending.

An applicant who browses job postings sees only active postings. Postings displayed in the job basket as closed are at an inactive status. The inactive status indicates the posting has passed the expiration date or the posting has been marked as inactive.

## Job Posting (08R/WS)

The system uses job posting tab codes to identify the tab in the Manage Job Postings program (P08470) that contains the data item. The system uses these values when the user selects a setting for that data item (such as Mandatory, Hide, or Disable).

These job posting tab codes are hard-coded and should not be changed:

- 0: General Info
- 1: Job Title

- 2: Competencies

### Resumé Flag (08R/RF)

The system uses resumé flag codes to indicate the type of attachments the applicant can submit to a particular job posting.

These resumé flag codes are hard-coded and should not be changed:

- 0: No resumé or cover letter
- 1: Resumé attached
- 2: Cover letter attached
- 3: Both resumé and cover letter

### Sort Fields (08R/SF)

You use sort fields codes to specify the sort parameters for search results when an applicant is browsing jobs. The applicant can sort by these hard-coded sort field codes:

- 0: Job Location
- 1: Job Category
- 2: Posting Date

### Travel Percentage (08R/TP)

You use travel percentage codes to specify the percentage of time the applicant is willing to travel for a particular job. Travel percentage codes are not hard-coded, so you can add, revise, and remove codes to correspond to your business needs.

# CHAPTER 8

# eRecruit System Setup

This chapter provides an overview of eRecruit system setup and describes how to:

- Set processing options for Recruitment Self Service Menu.
- Set processing options for Applicant Login.

## Understanding eRecruit System Setup

You must complete a few general system setup steps before you begin to set up the eRecruit process. System setup includes:

- Enabling the eRecruit system in the Common Settings for HR Employee Self Service Programs program (P05004)
- Setting up anonymous user sign on
- Completing the processing options for the Recruitment Self Service Menu program (P08400)
- Completing the processing options for Applicant Login program (P08405)

### Prerequisite

Set the common setting Using Self-Service Recruitment? to Yes - Enable Self-Service Recruitment in the Common Settings for HR Employee Self Service Programs (P05004).

See Chapter 2, "Setting Up Common Settings for Self Service," page 7.

## Setting Processing Options for Recruitment Self Service Menu (P08400)

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.

### E-Mail Type

This processing option specifies the email address type that was previously defined in the system.

**1. Electronic Address Type** Use this processing option to specify the email address type that is associated with the employee as defined in the Electronic Address table (F01151). The employee can override this value.

# Setting Processing Options for Applicant Login (P08405)

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.

### User ID and Password

These processing options specify the minimum length for the user ID and password that the applicant uses to sign on to eRecruit.

**1. Minimum User ID Length** Use this processing option to specify the minimum length for the User ID. The length can be from 1 to 70 characters. If left blank or zero, the system assigns a default value of 8 characters.

If you modify this processing option, you must also modify the help text item for New Applicant Registration (S08405B) so that the minimum User ID length matches.

**2. Minimum Password Length** Use this processing option to specify the minimum length for the Password. The length can be from 1 to 70 characters. If left blank or zero, the system assigns a default value of 8 characters.

If you modify this processing option, you must also modify the help text item New Applicant Registration (S08405B) so that the minimum password length matches.

# CHAPTER 9

# eRecruit Applications Setup

This chapter provides an overview of eRecruit Setup and describes how to:

- Define posting categories.
- Define settings by posting category.
- Define standard phrase categories
- Define standard phrases

## Understanding eRecruit Setup

The eRecruit Setup program (P08460) allows you to set preferences for many of the recruiter activities, such as display options for the Manage Job Postings program (P08470), display options for job postings, and information about how the applicants will apply for job postings.

The eRecruit Setup program includes one power form that you can use to perform all of the setup steps that you need to set up the eRecruit system. From this form, you can update all tables related to the setup for eRecruit. Each section of the form represents a separate table.

**Important!** Because each section of the power form represents a separate table, you must be sure to save the information that you add in each section before you proceed to the next section. For this reason, a Save button appears in each section. The system prompts you to save your work if you attempt to access another tab without first saving your work.

## Defining Posting Categories

This section provides an overview of posting categories and discusses how to enter the definitions.

### Understanding Posting Category Definitions

You create posting categories to classify the types of job postings that your company uses. Typically, you group the job postings according to your organization's business practices. Commonly used posting categories might include: Executive, Administrative, Financial, and Technical. When you group your job postings within these categories, applicants can easily search for the postings that best match their qualifications.

Grouping postings by category also allows you to define settings for each posting category, as discussed in a later setup step.

You can delete a posting category if you have not attached a job posting to it. When you delete the posting category, you also delete all of the settings for that posting category.

### See Also

Chapter 9, "eRecruit Applications Setup," Defining Settings by Posting Category, page 78

## Form Used to Define Posting Categories

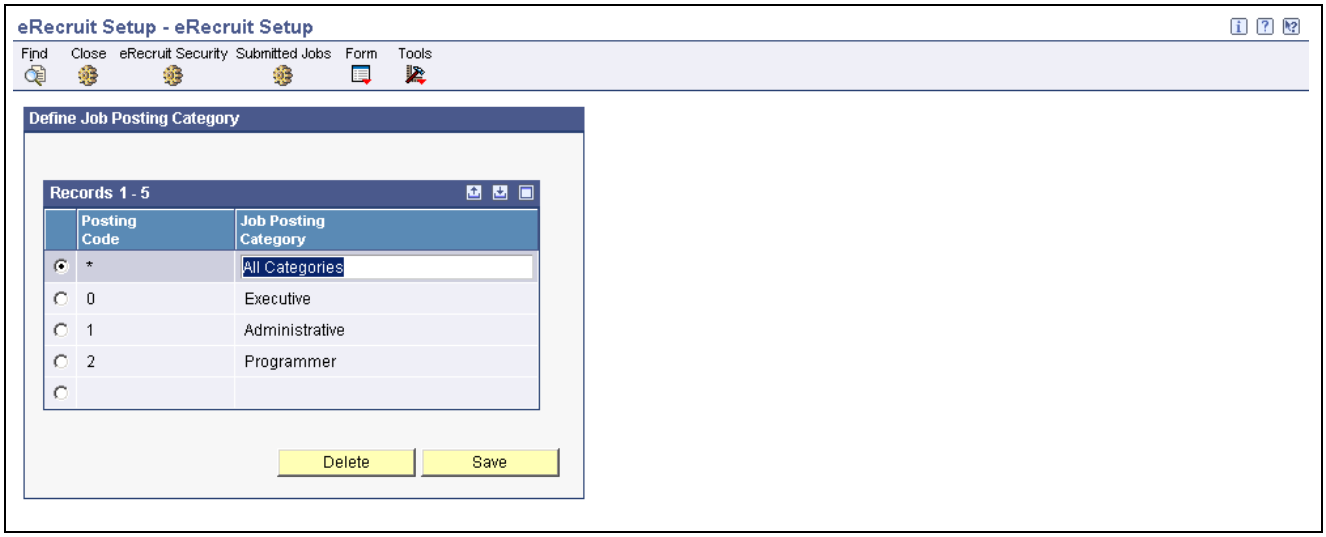
| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| eRecruit Setup | W08460A | Recruitment Management Setup (G08BRM4), eRecruit Setup.<br>Click Save. | Complete appropriate information. |

## Posting Category Information

Access the eRecruit Setup form.

Access the eRecruit Setup form.

***Warning!*** All additions, edits, and deletions to the Job Posting Category should be done on this form. If not, information that is connected to the posting category can become corrupted.




eRecruit Setup form

**Posting Code** Enter a list of valid codes for a specific user defined code list.

**Job Posting Category** Enter a user defined name or remark.

# Defining Settings by Posting Category

This section provides an overview of settings by posting category and discusses how to enter the values.

## Understanding Settings by Posting Category

You define settings for each posting category in the eRecruit Setup program (P08460). This table describes the settings that you define on each tab in the Define Settings By Posting Category section:

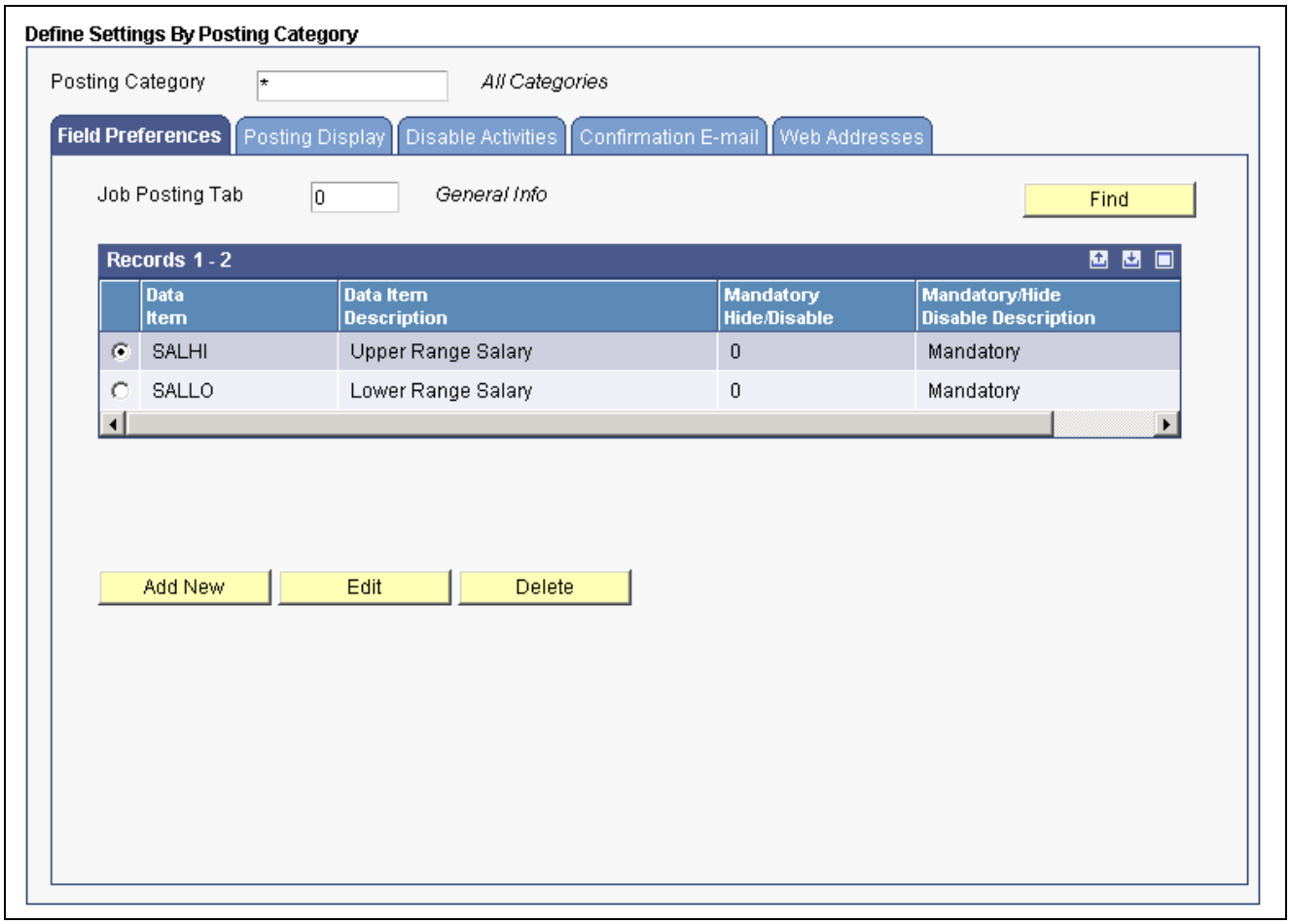
| Tab Name | Settings |
|---|---|
| Field Preferences | You define field preferences to specify the fields that appear in the Manage Job Postings program (P08470) when the recruiter creates a job posting. Posting Tab selections are included in UDC (08R/WS). You can also specify whether the system hides or shows competencies for each posting category. |
| Posting Display | You define posting display settings to select portions of the posting that are visible to the applicant, as well as the order of appearance. You can choose to define the settings differently for each posting category. Thus, an EXEC posting type might display different elements in a different order than an ADMIN posting type. Posting display elements are included in UDC (08R/EI). |
| Disable Activities | You can disable the applicant activities in UDC (08R/AA). If you include an activity here, the applicant can not perform the activity when browsing job postings or applying for a job posting. You can disable the activity for internal applicants, external applicants, or both. |
| Confirmation E-mail | You can define by posting category the email that the system sends to applicants when they apply for jobs. |
| Web Addresses | You can define settings for system level email and Website addresses for all eRecruit correspondence. You can set up the addresses by posting category and language. E-mails that the system sends to the recruiter or applicant contain the email address that you specify here. The Website URL is included in e-mails the system sends to the applicant. |

## Forms Used to Define Settings by Posting Category

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Define Settings By Posting Category | W08460A, Sub-form | From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup | Use the multi-part form, with multiple tabs, to find existing values and enter new information. |

## Settings by Posting Category

Access the Define Settings By Posting Category form.




Define Settings By Posting Category form

To define settings by posting category:

In the Define Settings by Posting Category section, complete the Posting Category field to specify the category for which you will define settings.

## Field Preferences

Access the Field Preferences tab.

1. On the Field Preferences Tab enter *0* in the Job Posting Tab field to define field preferences for the General Info tab in the Manage Job Postings program (P08470), and then click Find.
2. Click Add New, and then complete these fields as needed to specify the fields that will appear in the Manage Job Postings program (P08470) when the recruiter creates a job posting:
   - Data Item
   - Mandatory Hide/Disable
3. To edit field preferences, select the record that you want to edit, click Edit, and then change the Mandatory Hide/Disable field, as needed.
4. Enter *1* in the Job Posting Tab field to define field preferences for the Job Title tab in the Manage Job Postings program (P08470), and then click Find.
5. Repeat steps 3 and 4, as needed.

6. Enter a *2* in the Job Posting Tab field to define field preferences for the Competencies tab in the Manage Job Postings program (P08470), and then click Find.
7. To hide the Competencies tab for a posting category, click the Hide Competencies Tab field to add a check mark. Click theHide Competencies Tabfield again to remove the check mark to show the Competencies tab for a posting category.

**Posting Category** Enter a user defined code (08R/PC) that assigns a job posting to a specific group.

**Mandatory Hide/Disable** Enter a user defined code (08R/MH) that is used within the Manage Job Postings program (P08470) to specify the display options for a field.

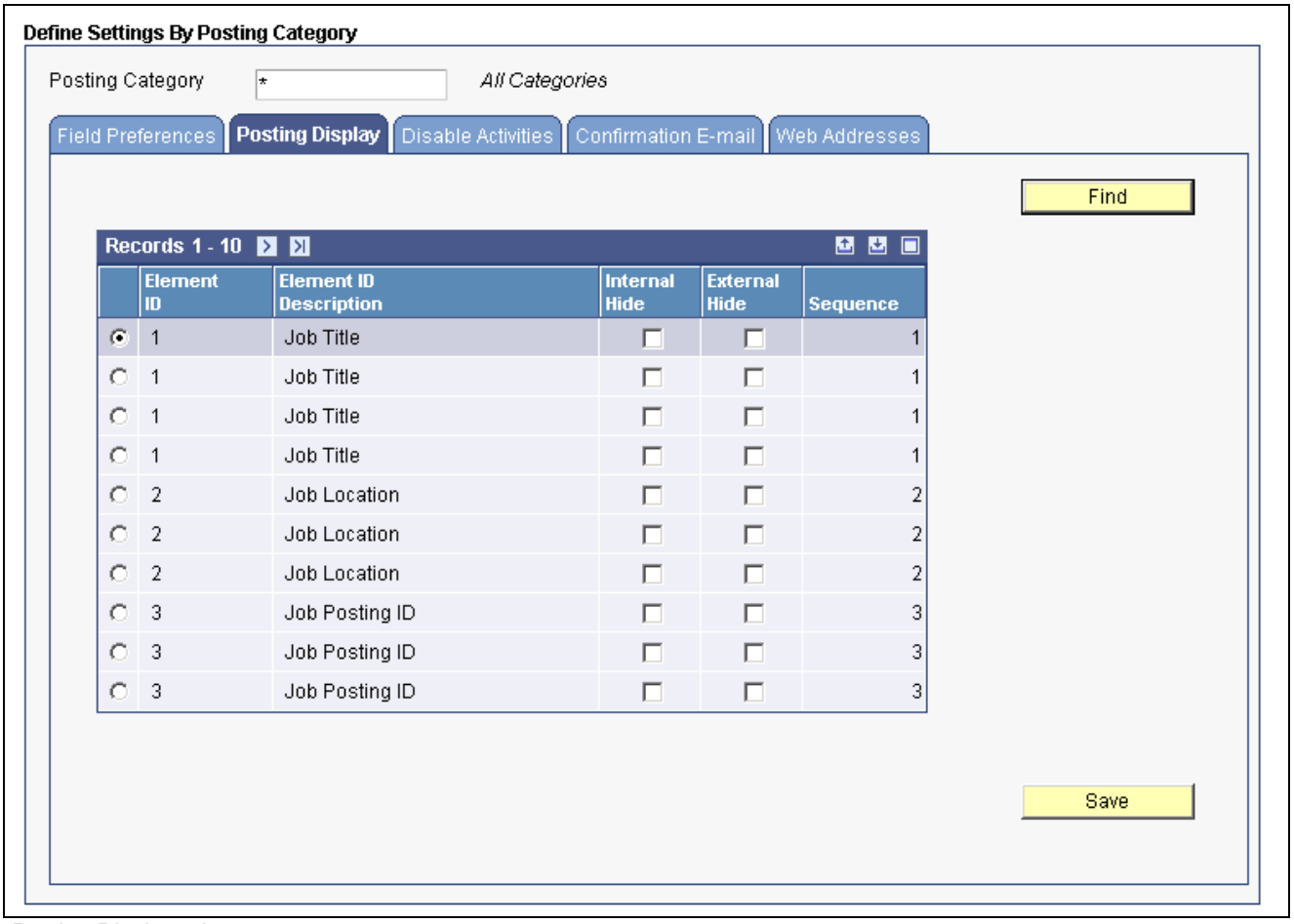
**Hide Competencies** Enter a value that specifies whether you want to hide or show an item. Values are:

*0:* Do not hide.

*1:* Hide.

## Posting Display Tab

Access the Posting Display tab.




Posting Display tab

1. Choose the Posting Display tab.

2. Complete these fields to define how the job postings appear to the applicant:
   - Element ID
   - External Hide
   - Internal Hide
   - Sequence

**Note.** You define posting display settings according to the posting category. For example, the elements that you display for an executive posting category and the order in which you display them might differ from the elements and order that you would display for an administrative posting category.

The detail area displays all of the available posting elements. You can hide the element or choose the order in which it appears, but you cannot delete the element.

**Element ID** Enter a user defined code (08R/EI) that identifies an element of a job posting. You specify the elements the system displays to the applicant in the eRecruit Setup program (P08460). Examples of element IDs include Job Title, Job Location, and Job Category.

**External Hide** Enter a value that specifies whether you want to hide or show an item. Values are:

*0:* Do not hide.

*1:* Hide.

**Internal Hide** Enter an option that specifies whether a posting element is hidden internally. Values are:

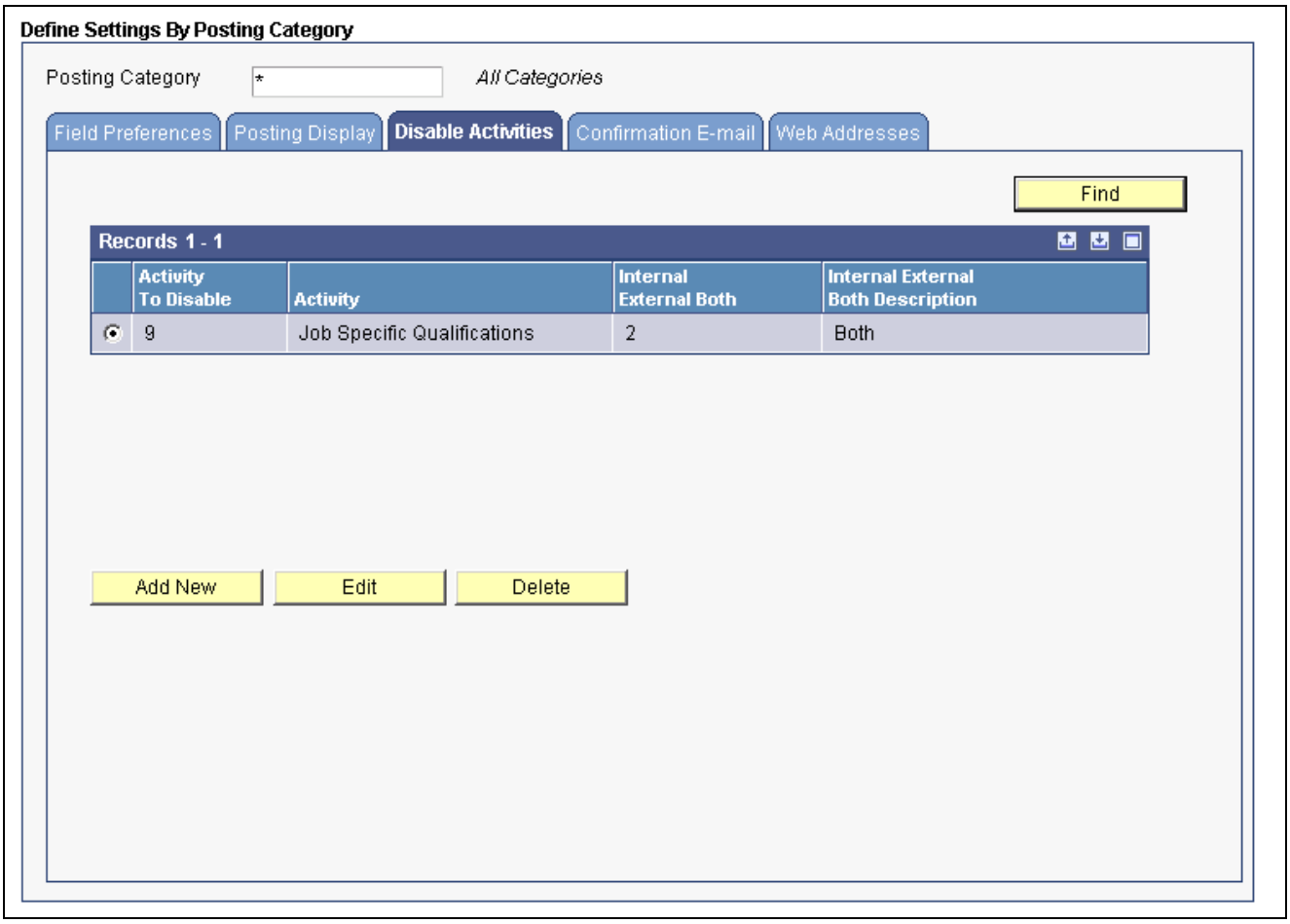
*0:* Do not hide.

*1:* Hide.

**Sequence** Enter a value that is assigned to a posting element (UDC 08R/EI) to specify the sequence in which that element appears in the job posting display.

## Disable Activities Tab

Access the Disable Activities tab.




Disable Activities tab

1. Choose the Disable Activities tab.
2. Complete these fields to define the applicant activities that you want to disable for a particular posting type, and to indicate whether you want to disable the activity for internal applicants, external applicants, or both:
   - Activity To Disable
   - Internal External Both

---

**Note.** You must add the activity to the detail area in order to disable it. All activities listed in the Disable Applicant Activities UDC table (08R/AA) are enabled unless you add them to the detail area.

---

**Activity To Disable** Enter a user defined code (08R/AA) that is assigned to an activity which is used by an applicant. You can set up each activity to be disabled on the Disable Activities tab of the eRecruit Setup application (P08460).

**Internal External Both** Enter a user defined code (08R/IE) assigned to an applicant activity that denotes whether the activity is disabled internally, externally, or both.

## Confirmation E-mail

Access the Confirmation E-mail tab.

1. Choose the Confirmation E-mail tab and enter the text of the email that you want to send to applicants when they apply for a job.

You can create confirmation email text in multiple languages.

**Important!** You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

<BR> (line break)

<P> (paragraph)

<B> (bold)

</B> (end bold)

<U> (underline)

</U> (end underline)

Tags are not case-sensitive.

2. To review the confirmation email as the applicant will see it, click the Preview button.

### Web Addresses tab

Access the Web Addresses tab.

1. Choose the Web Addresses tab.
2. Complete these required fields to specify the general system-level email address and Web site that the system uses in email to applicants and recruiters:

   The email address is the From address used in email sent by the system. Applicants receive email when they register to use the eRecruit system, forget their password and when they apply for a job posting. Recruiters receive system email when an applicant applies for a job posting and when an applicant changes their personal information.

   - Language Code
   - Electronic Address
   - Website URL

**Electronic Address** Enter the email address or Uniform Resource Locator (URL) for either an individual or an entity.

**Website URL** Enter the email address or Uniform Resource Locator (URL) for either an individual or an entity.

# Defining Standard Phrase Categories

This section provides an overview of standard phrase categories and discusses how to enter the values.

# Understanding Standard Phrase Categories

You define categories for standard phrases to classify the types of standard phrases that your company uses. Typically, you group the standard phrases according to your organization's business practices. Commonly used standard phrase categories might include Marketing and Technical.

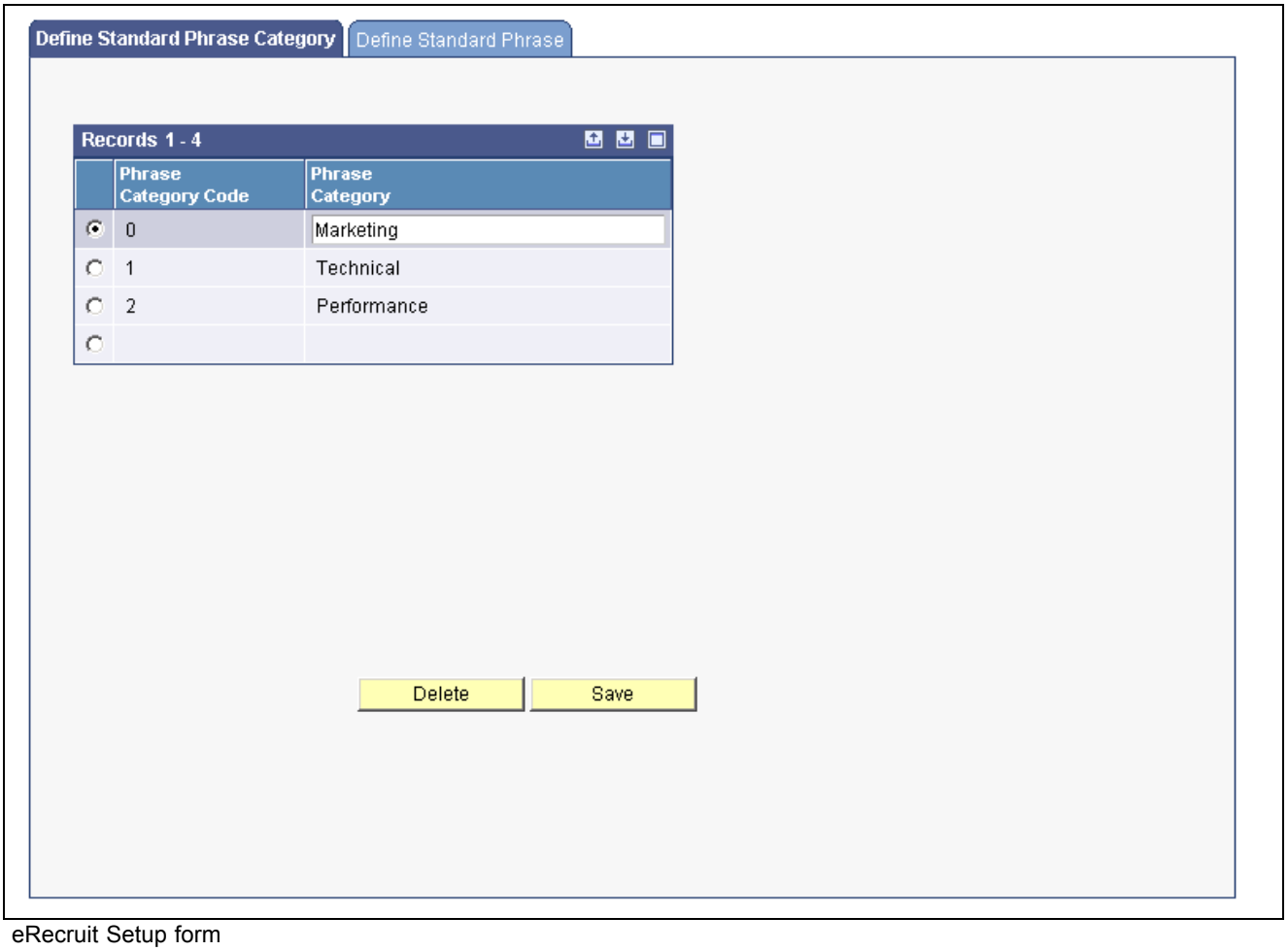
When you delete the standard phrase category, you delete all of the standard phrases for that category, as well.

# Form Used to Define Standard Phrase Categories

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| eRecruit Setup | W08460A | From the Recruitment Management Setup menu (G08BRM4), choose eRecruit Setup<br><br>Click Save. | Complete the required fields. |

# Standard Phrase Categories

Access the eRecruit Setup form.




eRecruit Setup form

**Phrase Category Code** Enter a list of valid codes for a specific user defined code list.

**Phrase Category** Enter a user defined name or remark.

# Defining Standard Phrases

This section provides an overview of standard phrases and discusses how to enter the values.

## Understanding Standard Phrases

Companies typically use basic phrases repeatedly when creating job postings. You can save time by creating standard phrases that you use frequently and storing them by category to use over and over again. The user who creates the job postings can choose to add a selected standard phrase to the posting.

This table illustrates examples of commonly used standard phrases:

| Standard Phrase Category | Standard Phrase |
|---|---|
| Legal | We are an Equal Opportunity Employer. |
| Marketing | XYZ Travel is a leader in the retail travel industry, with over 500 locations worldwide. Visit us on the Web at www.xyztravel.com. |
| Benefits | We provide excellent benefits and compensation packages including medical, dental, vision, 401(k), employee stock purchase plan, health club, and quarterly bonus program. |
| Salary | Salary commensurate with experience. |
| Skills | • BA/BS degree plus 5 years industry experience<br>• Excellent communication skills<br>• Ability to work independently<br>• Proficiency in Spanish a plus |
| Technical | • BS degree in Computer Science<br>• 3 years experience<br>• Working knowledge of C++, Java, HTML<br>• Public sector industry knowledge |

**Important!** You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

<BR> (line break)

<P> (paragraph)

<B> (bold)

</B> (end bold)

<U> (underline)

</U> (end underline)

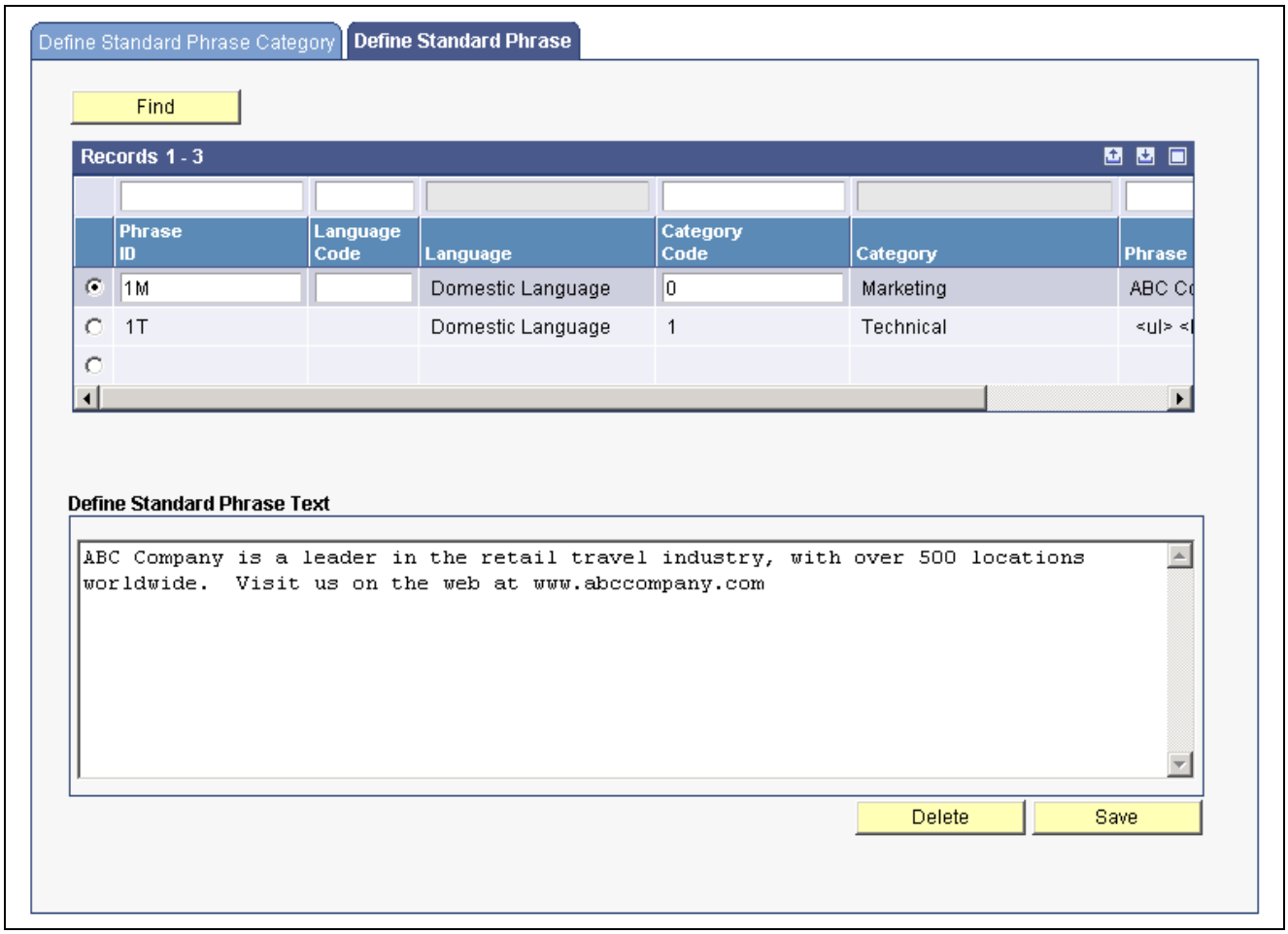
Tags are not case-sensitive.

## Form Used to Define Standard Phrases

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| eRecruit Setup | W08460A | Recruitment Management Setup (G08BRM4), eRecruit Setup | Define Standard Phrase tab:<br>Enter new values for standard phrases.<br>When you leave the Language field blank, the system uses the Domestic Language that you specified in UDC (01/LP). |

## Standard Phrases

Access the eRecruit Setup form.




eRecruit Setup form

To define standard phrases:

1. On eRecruit Setup, complete these required fields in the Define Standard Phrase section:
   - Phrase ID
   - Phrase Category
2. Complete the Language Code field, as needed:
3. Enter the desired text for your standard phrase in the Define Standard Phrase Text box, and then click Save. To add or edit the text for a standard phrase, you must first select the phrase in the detail area.

**Phrase ID** Enter a unique identification value that is assigned to a standard phrase.

**Phrase Category** Enter a user defined code (08R/PH) that assigns a standard phrase to a specific group.

# CHAPTER 10

# Managing Job Postings

This chapter provides an overview of job postings management and describes how to:

- Create and edit a job posting.
- Build Job Posting Records

## Understanding Job Posting Management

The Manage Job Postings program (P08470) is a power form that combines on separate tabs all of the process steps needed to create job postings. From this form you can add, edit, review, copy, and delete job postings.

Recruiters can search job postings using these filter fields:

- Created by User
- Business Unit
- Posting Category

Alternatively, you can enter search criteria in the Query By Example (QBE) fields.

Manage Job Postings integrates with the Requisition Information program (P08102). For example:

- From the Row menu of the Work with Requisitions form (W08102I), you can access Manage Job Postings.
- From the Form menu on the Requisition Information form (W08102E), you can access Manage Job Postings.

When you delete a requisition, the system displays a message indicating that the associated job posting will be deleted as well. Conversely, when you delete a job posting, you can choose to delete or retain the associated requisition. You can have a requisition with no job posting, but you cannot have a job posting with no requisition.

## Prerequisite

Before you can create job postings, you must complete the setup steps in the eRecruit Setup program (P08460). See eRecruit Setup (P08460) in the Human Capital Management Self Service Guide for more information.

# Creating and Editing a Job Posting

This section provides an overview of job posting creation and discusses how to:

- Set processing options.
- Create a job posting.
- Edit a job posting.
- Run the job posting records program.

## Understanding Job Posting

You create job postings in the Manage Job Postings program (P08470), which is a power form that combines on separate tabs all of the process steps for creating the posting.

When you create a job posting, you use the Job Description to provide specific information about the job. When you set up a job posting for an opening for which the applicants will not apply online, include in this text the details about how to apply for the job. For example, your company might want to host a job fair to interview applicants for many openings. In this section, you can include details about the job fair and any associated contact information.

You might need to publish a job posting in more than one language. You can customize the job posting text by language using the Use Multiple Languages option.

You can attach to the job posting text standard phrases that you defined in the eRecruit Setup program (P08460) by accessing the Add Standard Phrase link to the Standard Phrase Search and Select program (P08461S).

If you are using the PeopleSoft EnterpriseOne Competency Management system, you can also attach selected competencies to the job posting.

After you create the job posting, the Copy function allows you to duplicate the posting easily.

After job postings are published by running the Build Job Posting Records for Language report (R08473), applicants can review the job postings that meet this criteria:

- The posting has an active status.
- The system date is within the date ranges for the posting.

From the Form and Row menus of the Manage Job Postings program, you can access the programs that you use to complete these business processes:

- Enter position information.
- Enter requisition information.
- Enter requisition activity information.
- Review job entry and evaluation information.
- Enter applicant information.
- Work with job competency information.

# Forms Used to Create and Edit a Job Posting

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Manage Job Postings | W08470A | eRecruit (G08BE1), Manage Job Postings<br>Manager Self-Service (G05BMSS1), Manage Job Postings<br>Click Add. | Advance to Category Selection form. |
| Category Selection | W08470E | Click OK. | Complete required fields. |
| Add Job Postings | W08740B | Select Add Standard Phrase. | Complete required fields.<br>If you leave the field blank, the system enters the next number when you exit from the field. |
| Standard Phrase Search and Select | W08461SA | Click Select. | Choose phrase and then click Select.<br>The standard phrase that you selected will be appended to the end of the job description text. Repeat this step for each standard phrase that you want to include. |
| Add Job Posting | W08470B | Click Preview. | Add key words.<br>Do not use any special characters in the Keywords field. Separate the keywords with spaces only.<br>When you click Preview, the system saves the job posting. |
| Job Titles/Descriptions - Multiple Languages | W08470B | Select Use Multiple Languages. | Create title and descriptions in another language.<br>The system allows you to create only one Job Title and Description per language. Repeat step 16 for as many languages as you require for this posting. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Job Titles/Descriptions - Multiple Languages | W08470B | Select Competencies tab. | Attach competencies to the job positing.<br><br>When you click Find, the system saves the posting and finds the appropriate competencies for the job.<br><br>The competencies in bold are job competencies, a more general competency category. The remaining competencies are competency options, which are more specific competencies that are related to the general category. You must include the job competencies if you want to include any of the subordinate competency options. Conversely, when you select a competency option, the system selects the job competency as well. When you deselect a job competency so that it is not included in the job posting, the system deselects all of the subordinate competency options. |
| Manage Job Postings | W08470A | eRecruit (G08BE1), Manage Job Postings<br><br>Click Select. | Select a job posting.<br><br>You can edit the job description using HTML codes to control formatting. When you select a job title and then click Delete, you delete the information in the detail area *and* the associated job description and keywords. |
| Build Job Posting Records | W98305WA | eRecruit (G08BE1), Build Job Posting Records (R08473), Available Versions | Run the report. |

# Setting Processing Options for Manage Job Postings (P08470)

This processing option specifies the competency description view that the system uses for the competencies that are related to job postings.

## Competencies

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

**1) Job Competency Description View**

Use this processing option to specify the competency description view that the system uses for all of the competencies that are associated with job postings. Values are:

*COA:* Manager Coaching View

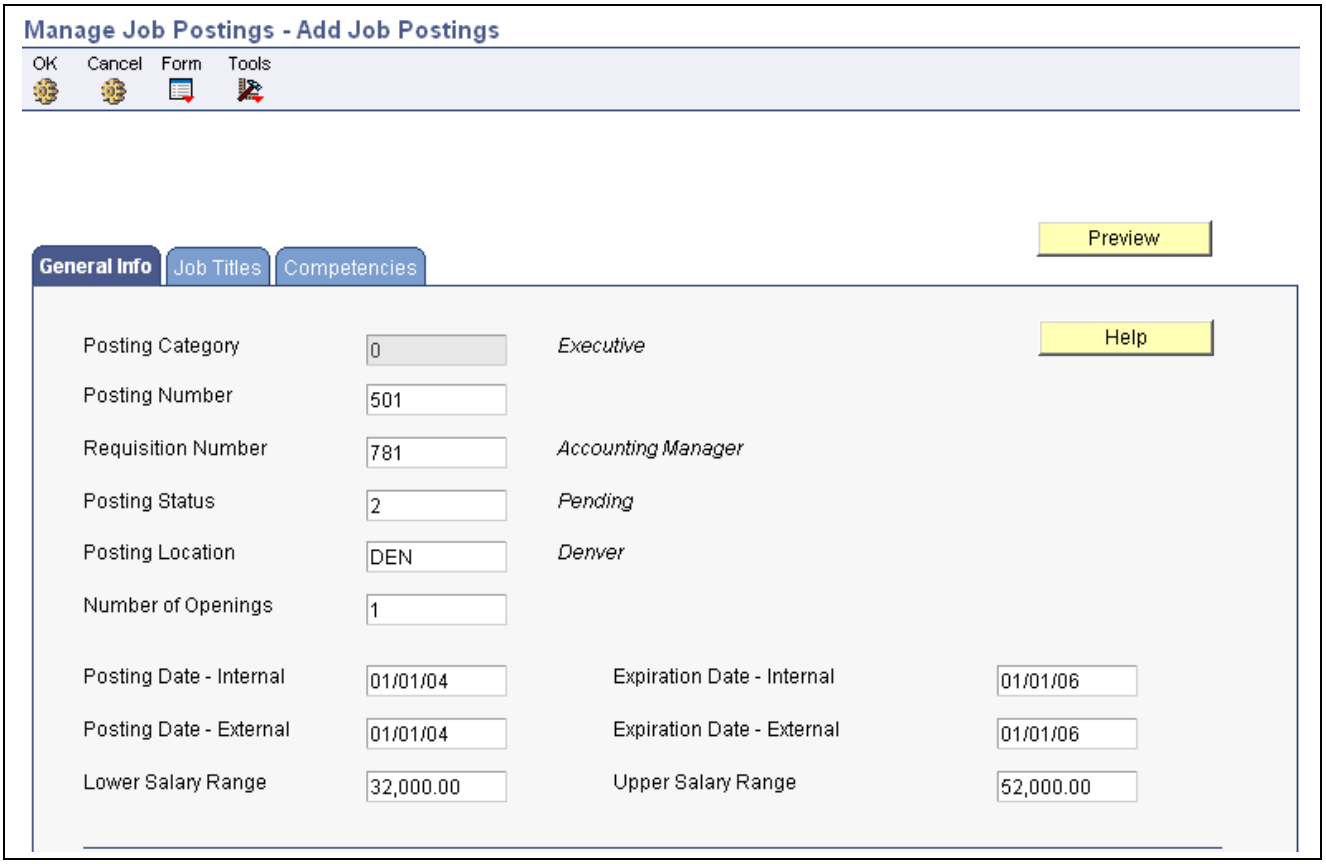
*EE:* Employee View (default)

*HR:* Human Resource View

*MGR:* Manager View

# Create a Job Posting

Access the Manage Job Postings form.




Manage Job Postings form

To create a job posting:

1. On Manage Job Postings, click Add.
2. On Category Selection, complete the Posting Category field, and then click OK.
3. On Add Job Posting, you can either complete the Posting Number field or leave it blank and allow the system to complete the field using next numbers.
4. On Add Job Posting, choose the General Info tab and complete these fields:
   - Requisition Number
   - Posting Location

- Lower Salary Range
- Upper Salary Range

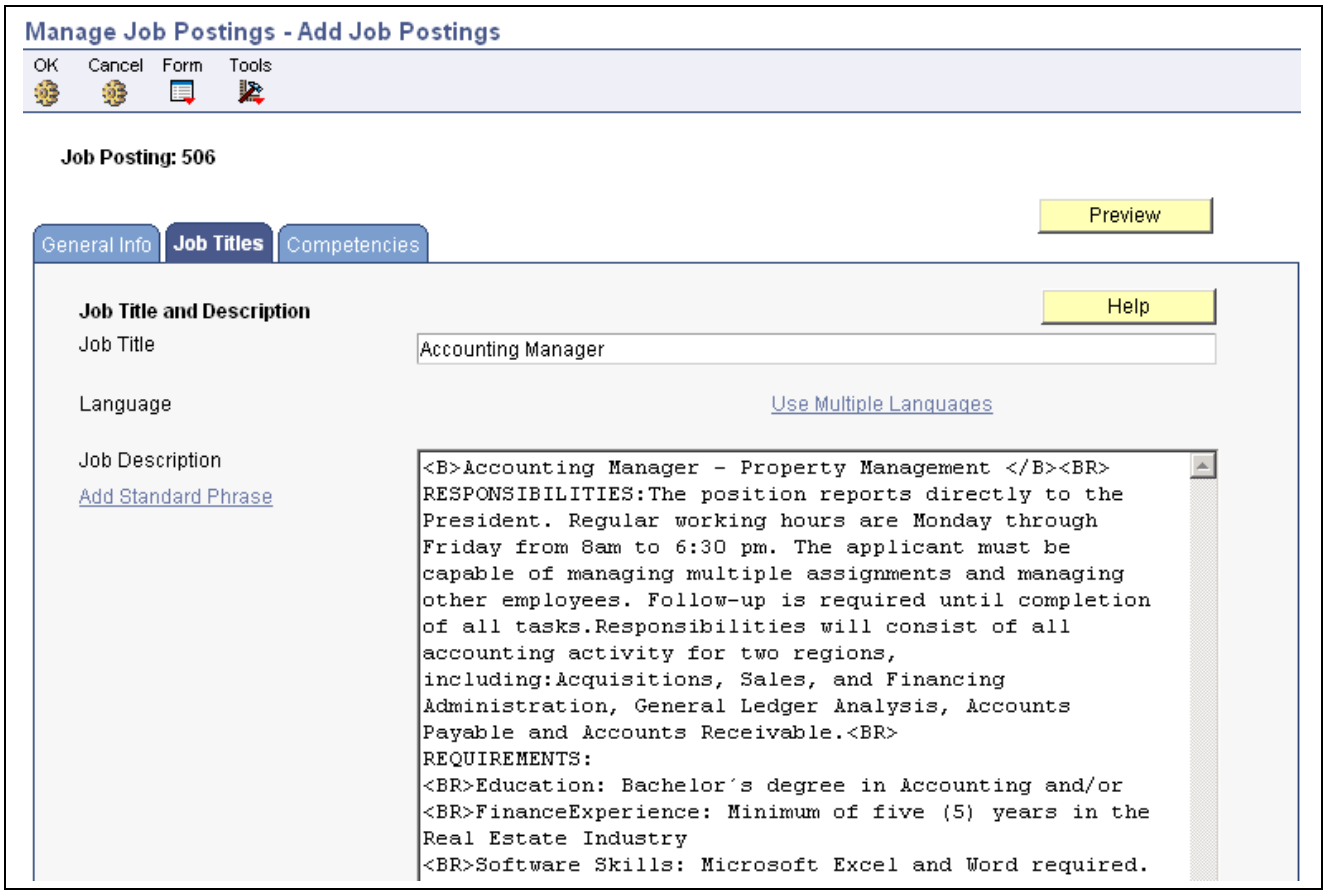
5. Complete these fields to specify the date ranges for the internal and external posting:
   - Posting Date - Internal
   - Expiration Date - Internal
   - Posting Date - External
   - Expiration Date - External
6. Enter your email address in the Recruiter Notification E-mail field.
7. If you want to receive an email notification for each applicant submission to the job posting, click the Receive Posting Submissions by E-mail option.
8. Choose the Job Titles tab and complete these fields:
   - Job Title
   - Language Code
9. In the Job Description field, enter the information that you want the applicant to see regarding the job.
10. To include a standard phrase in the posting text, click the Add Standard Phrase link.
11. On Standard Phrase Search and Select, select the phrase that you want to include in the job description, and then click Select.
12. On Add Job Postings, complete the Keywords field with the keywords that the applicant will use to search for this job posting:
13. Click the Preview button to review the job posting as the applicant will see it.
14. Click OK to save the posting.
15. To create job titles and descriptions in multiple languages, click the Use Multiple Languages link.
16. To create a new Job Title and Description in another language, on Job Titles/Descriptions - Multiple Languages, clickAdd New, and then complete these fields:
    - Job Title
    - Language
    - Job Description
    - Keywords
17. To attach competencies to the job posting, choose the Competencies tab, complete these required fields, and then click Find:
    - Competency Structure Type
    - Organizational Business Unit
    - Job Type
    - Job Step
18. In the Include column, select the competencies to include in your job posting.
19. Click OK.

**Posting Category** Enter a user defined code (08R/PC) that assigns a job posting to a specific group.

| | |
|---|---|
| **Posting Number** | Enter a unique number that identifies a job posting. You can enter a posting number or allow the system to generate the posting number using next numbers. |
| **Requisition Number** | Enter a 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. |
| **Posting Location** | Enter a user defined code (08R/JL) that indicates the location of a job posting. |
| **Lower Range Salary** | Enter a low range salary amount for a job posting. |
| **Upper Range Salary** | Enter a high range salary amount for a job posting. |
| **Posting Date - Internal** | Enter a date on which a job posting becomes active internally. |
| **Expiration Date - Internal** | Enter a date on which a job posting becomes inactive internally. |
| **Posting Date - External** | Enter a date on which a job posting becomes active externally. |
| **Expiration Date - External** | Enter a date on which a job posting becomes inactive externally. |
| **Recruiter Notification E-mail** | Enter an email address or Uniform Resource Locator (URL) for either an individual or an entity. |
| **Receive Posting Submissions by E-mail** | Enter an option that specifies whether the user who created the job posting will receive an email notification for each submission by an applicant to that posting. |

## Job Postings Form, Job Titles

Access the Job Postings form, Job Titles tab.



Add Job Postings form

**Job Title** Enter a job title that is associated with a job posting.

**Keywords** Enter a segment of text within a search string. For example, in the search string human resources representative, each word is a segment or keyword.

**Job Description** You can enter detailed information about the job, as well as any special instructions. For example, you might want the applicants for a job to apply at a job fair. You can provide all details about the job fair in the Job Description field, including email links or a URL.

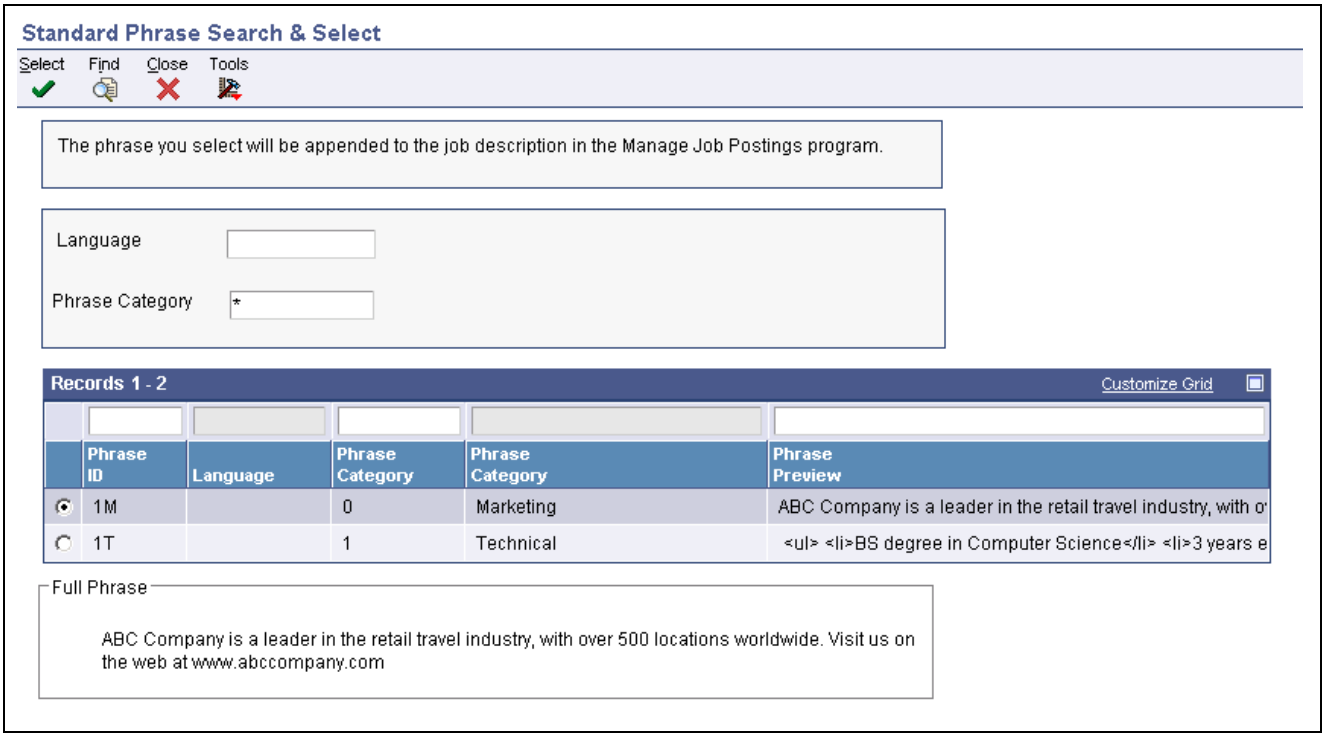
You must use HTML tags to attach formatting to the text. Commonly used HTML formatting tags include:

- <BR> (line break)
- <P> (paragraph)
- <B> (bold)
- </B> (end bold)
- <U> (underline)
- </U> (end underline)

Tags are not case-sensitive.

## Standard Phrase Search & Select Form

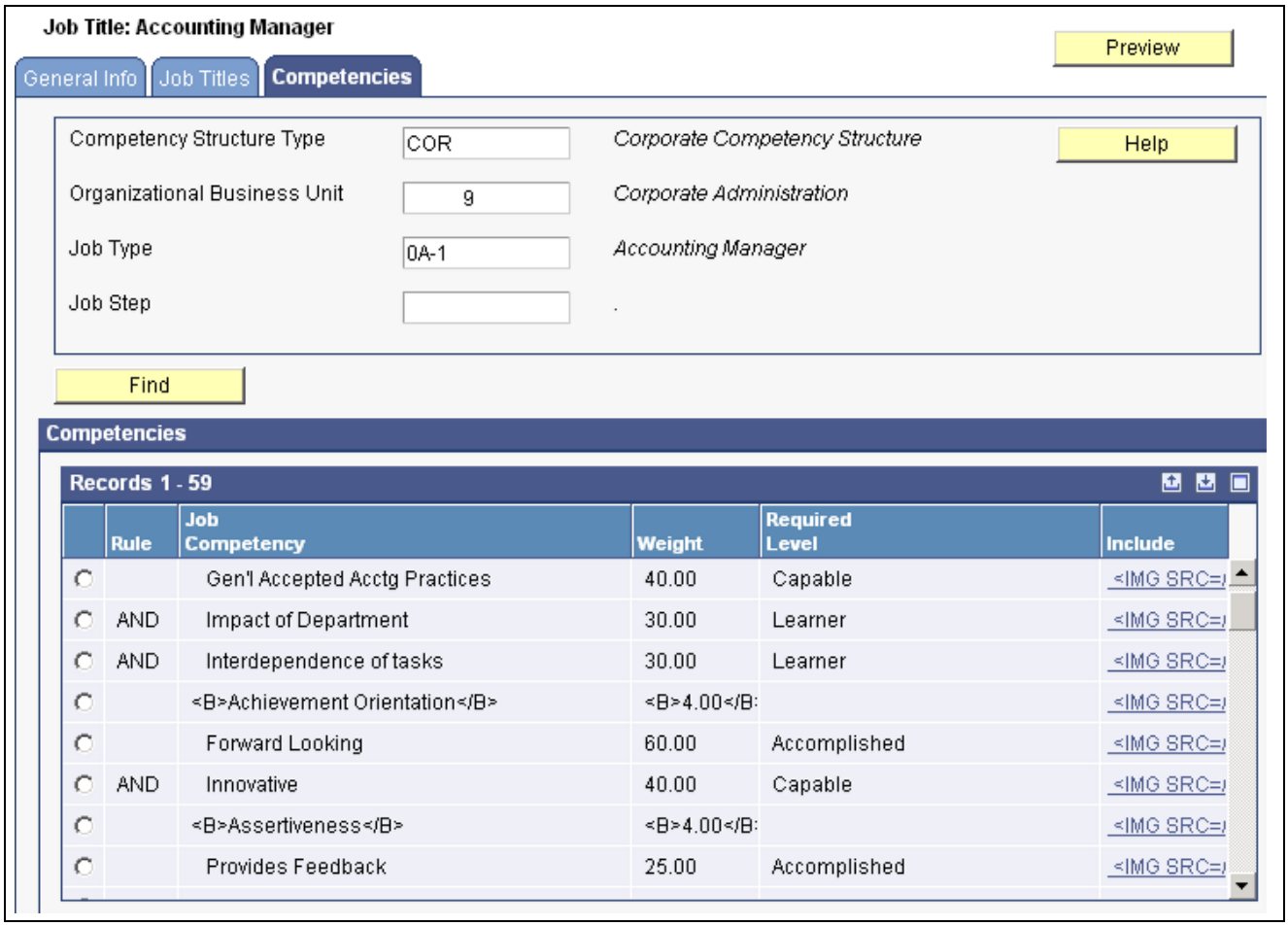
Access the Standard Phrase Search & Select form.




Standard Phrase Search & Select form

## Add Job Postings Form, Competencies

Access the Add Job Postings form, Competencies tab.



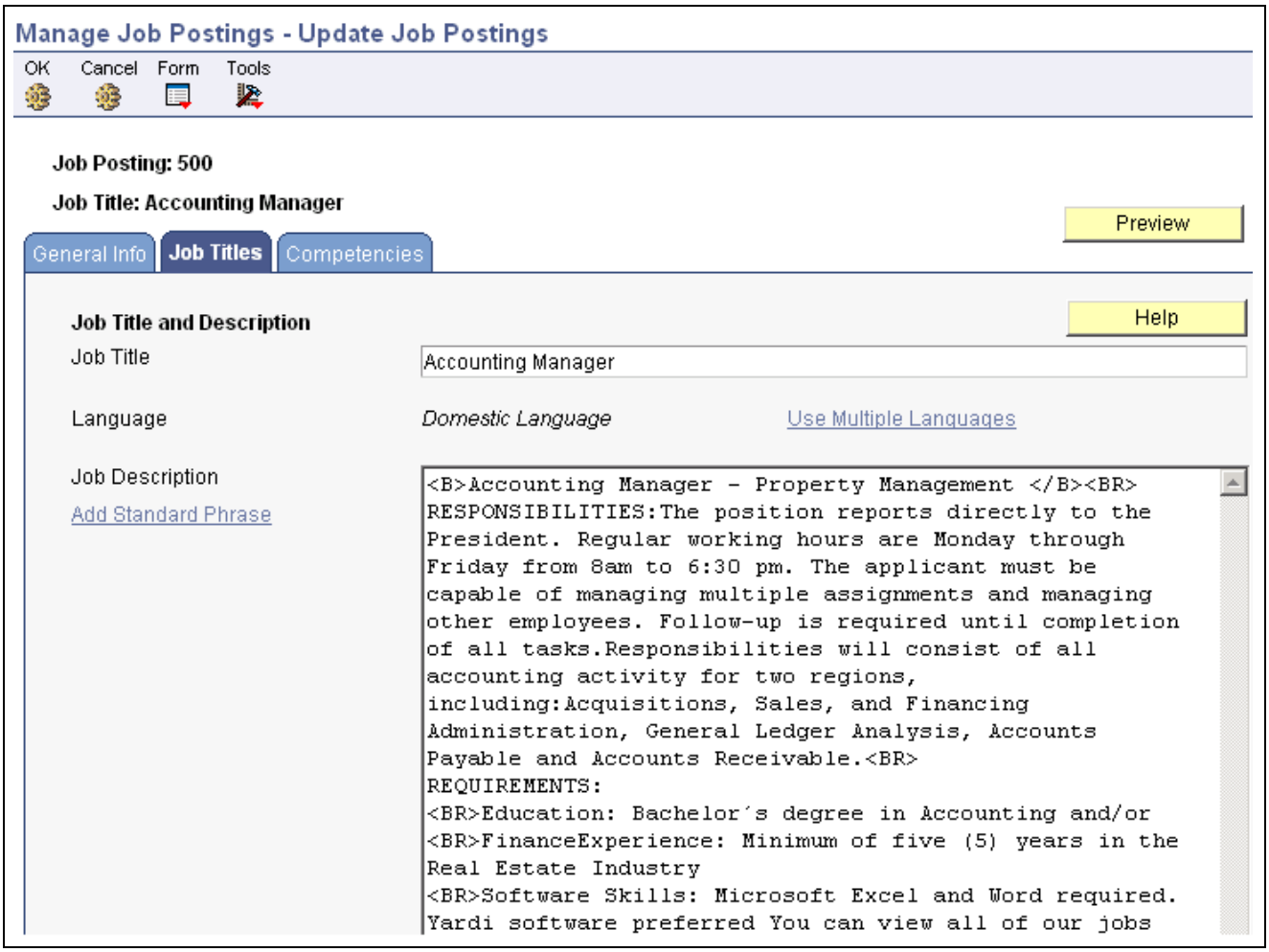

Add Job Postings form: Competencies tab

**Competency Structure Type** Enter a user-defined code (00/TS) that identifies the type of organization structure, such as financial or responsibility. Each type of organization structure can have a separate hierarchy.

**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.

# Edit a Job Posting

Access the Update Job Posting form.




Update Job Posting form

To edit a job posting:

1. On Manage Job Postings, complete any of these fields, and then click Find:
   - Created By User
   - Business Unit
   - Posting Category
2. Select the job posting that you want to edit, and then click Edit.
3. On Update Job Posting, edit the posting, as necessary, and then click OK.

# Job Posting Records

This section provides an overview of job posting records and discusses how to run the program.

## Understanding Job Posting Records

You run the Build Job Posting Records program to enable the system to display the job postings to applicants. This program deletes all records from the Job Posting Sort Workfile table (F08473) for the languages that you process and creates new language-specific records based on the information in these tables:

- Job Postings (F08470)
- Job Posting Text (F08472)

Applicants see the new language records when they browse job postings.

## Running the Job Posting Records Program (R08473)

From the eRecruit menu (G08BE1), choose Build Job Posting Records (R08473).

# CHAPTER 11

# Processing eRecruit Applicants

This chapter provides an overview of the eRecruit applicant processing and describes how to:

- Review submitted applications.
- Process recruitment records.
- Update applicant personal information.

## Understanding eRecruit Applicant Processing

After applicants submit applications, you can review the submissions and select applicants that are viable candidates for the position. You can choose single or multiple records for immediate processing, or you can mark records to be processed later through a batch process.

## Prerequisite

Set the common setting for Using Self-Service Recruitment? to Yes - Enable Self-Service Recruitment in the Common Settings for HR Employee Self Service Programs (P05004). See Common Settings for Self-Service Applications in the Human Capital Management Self-Service Guide for more information.

## Reviewing Submitted Applications

This section provides an overview of submitted applications review and discusses how to review submitted applications.

### Understanding Submitted Applications Review

The Review Applicants program (P08498) allows the recruiter to review the records of all applicants who have applied online to a job posting. The recruiter can search the records by any of these:

- Applicant name
- Posting number
- Requisition number
- Requisition number ranges

- Date received
- Date received ranges
- Status
- Creator of job posting

The recruiter can select a record and review the associated cover letter, resume, references, or job qualifications, if the system has been enabled for these processes. After reviewing the information, the recruiter updates the status of the applicant only if the applicant is being considered for the position. The system then adds the applicants' records to the Applicant Master table (F08401), the Requisition Information table (F08102) and Address Book.

The recruiter can choose to mark individual records for immediate update, or select a group of records to update through a batch process.

## Forms Used to Review Submitted Applications

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Recruit Applicant Review | W08498A | Process eRecruit Applicants (G08BE2), Review Applicants<br>Manager Self-Service (G05BMSS1), Review Applicants<br>On Applicant Review, click Select. | Use the search and select form to choose an applicant record. |
| eRecruit Applicant Information | W08498B | On Applicant Information, select Job Qualifications from the Form menu. | The system must be enabled for cover letters, resumés, and job qualifications in order for the applicant to include them.<br>On Applicant Information, choose Process Now from the Form menu. |

## Setting Processing Options for Review Applicants (P08498)

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 the statuses that the system assigns to the applicant during the eRecruit process.

**1. Default Applicant Status:** Use this processing option to specify the applicant status that the system assigns to new applicants that originate from the eRecruit process.

**2. Default Candidate Requisition Status:** Use this processing option to specify the requisition status that the system assigns to new applicants that originate from the eRecruit process when a record is created for the Requisition Activity program (P08102). The default Candidate Requisition Status value is CAN. If you change this value, make sure that the status you use does not have a special handling code attached to it. Special handling codes have repercussions in the Requisition Activity program (P08102).

## Review Submitted Applications

Access the Applicant Review form.

To review submitted applications:

1. On Applicant Review, complete any of these filter fields to locate applicants for a particular job posting, and then click Find:
   - Given Name
   - Surname
   - Posting Number
   - eRecruit Status
   - Created By
   - Submit Date
   - Req No.
2. Select the applicant record that you want to review, and then click Select.
3. On Applicant Information, review the applicant's general information.
4. To review a cover letter or resumé, choose Cover Letter/Resumé from the Form menu.
5. To review job qualifications, choose Job Qualifications from the Form menu.
6. To select this applicant for immediate processing, choose Process Now from the Form menu.
7. To select this applicant for processing through the batch process, choose Mark for Batch from the Form menu.
8. If you previously selected this applicant for batch processing and now want to remove the applicant from the batch, choose Unmark for Batch from the Form menu.
9. Alternatively, you can select all available applicants for batch processing by choosing Mark All for Batch from the Form menu.
10. Click OK.

**Given Name** Enter the first name of an individual. This field is informational only.

**Surname** Enter the last name of an individual. This field is informational only.

**Posting Number** Enter a unique number that identifies a job posting. Posting numbers are already assigned, so next numbers does not create a new posting number.

**eRecruit Status** Enter a user defined code (08R/AS) that indicates to the recruiter the status of an eRecruit applicant's submission to a job posting.

| | |
|---|---|
| **Created By** | Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location. |
| **Submit Date** | Enter the date on which an applicant submitted his or her resume, cover letter, or both. |
| **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. |
| **eRecruit Status** | Enter a user defined code (08R/AS) that indicates to the recruiter the status of an eRecruit applicant's submission to a job posting. |

# Processing Recruitment Records (R08470)

This section provides an overview of the Processing Recruitment Records report and describes how to:

- Run the report.
- Set processing options for the Processing Recruitment Records report.

## Understanding Recruitment Records Processing

Use this program to process recruitment records based on data selection and the records that you selected as Mark for Update. The report displays exceptions only, unless you set processing option 3 to 1, in which case it displays information for all records.

The system updates the status of the applicant only if the applicant is being considered for the position. The system then adds the applicants' records to the Applicant Master table (F08401), the Requisition Information table (F08102) and Address Book

## Running the Processing Recruitment Records Report

From the eRecruit menu (G08BE1), choose Process Recruitment Records.

## Setting Processing Options for Process Recruitment Records (R08470)

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 the mode in which the system processes the records, as well as which records to process and the amount of detail information to display on the report.

**1. Mode:** Use this processing option to specify the mode in which the process will run. Values are:

*0:* Do not run the process in final mode. Do not update any information.

*1:* Run the process in final mode and update the appropriate files.

If you leave this processing option blank, the system runs the report in pending mode.

**2. Selected Records Only:** Use this processing option to specify which records the UBE will process. Values are:

*0:* Process all of the records with an Applicant Status of 1 or 2.

*1:* Process only records with an Applicant Status of 2 .

If you leave this processing option blank, the system processes all of the records with an Applicant Status of *1* or *2*.

**3. Show Detail:** Use this processing option to specify whether information for successfully processed records will be displayed. Records that were not processed successfully are always displayed as exceptions. Values are:

*0:* Do not display information for successfully processed records.

*1:* Display information for all records.

If you leave this processing option blank, the report does not display the information.

**4. Default Applicant Status:** Use this processing option to specify the applicant status that the system assigns to new applicants that originate from the eRecruit process.

**5. Default Candidate Requisition Status:** Use this processing option to specify the requisition status that the system assigns to new applicants that originate from the eRecruit process when a record is created for the Requisition Activity program (P08102). The default Candidate Requisition Status value is CAN. If you change this value, make sure that the status you use does not have a special handling code attached to it. Special handling codes have repercussions in the Requisition Activity program (P08102).

# Updating Applicant Personal Information (R08490)

This section provides an overview of the Updating Applicant Personal Information report and describes how to:

- Run the report.
- Set processing options for the Updating Applicant Personal Information report.

# Understanding the Updating Applicant Personal Information Report

From the Process eRecruit Applicants menu (G08BE2), choose Update Applicant Info.

Run the Update Applicant Personal Information batch program to update address book entries or applicant information for applicants with address book numbers. For applicants who have an address book search type of A, the system updates information in the address book tables, as well as the applicant information in the Applicant Master table (F08401) and the Extended Applicant Information table (F08403). When the search type is not equal to A, the system updates only the applicant information.

The system updates these address book tables:

- Address By Date (F0116)
- Address Book - Who's Who (F0111)
- Address Book - Contact Phone Numbers (F0115)

When the applicant's personal information changes and the associated processing option is enabled, the system sends an email notification to the recruiter who is associated with each posting to which the applicant has submitted an application.

# Running the Updating Applicant Personal Information Report

From the Process eRecruit Applicants menu (G08BE2), choose Update Applicant Info.

# Setting Processing Options for Update Applicant Info (R08490)

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

This processing option specifies the mode the system uses to update the records.

**1. Process Mode**

Use this processing option to specify the mode to use when processing Update Applicant Personal Info (R08490). Values are:

*0:* Pending Mode

*1:* Final Mode

In pending mode, the system does not update any database tables.

If you use final mode, the system prints the report, and updates the Address Book tables (F0116, F0111, F0115, F08401) and the Extended Applicant Information table (F08403) for an external applicant. The system updates only the Extended Applicant Information table for internal applicants.

## Defaults

This processing option specifies the electronic address type for the email address that the applicant enters.

**1. Electronic Address Type (required)**

Use this processing option to indicate the type of address that is assigned to an electronic address. Address types are stored in UDC table 01/ET. Values are:

*E:* Email address

*I:* Uniform Resource Locator (URL)

## Notifications

This processing option specifies email notification options.

**1. Send Change Notification E-mail**

Use this processing option to specify whether the system sends an email notification to the posting owner when an applicant's information has changed and the applicant has responded to the posting. The system sends an email notification when the Receive Resumé Submissions via email option is enabled in the Manage Job Postings program (P08470). Values are:

Blank, *N:* Email will not be sent.

*Y:* Email will be sent .

# CHAPTER 12

# Employee Self Service Benefits Setup

This chapter provides an overview of employee self service benefits setup and describes how to implement the setup process.

## Understanding Employee Self Service Benefits Setup

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

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

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

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

| Program Version | Event Version Code |
|---|---|
| New Hire Enrollment | NHR (New Hire) |
| Rehire Enrollment | RHR (Rehire) |
| Marriage | MAR (Marriage) |
| Divorce | DIV (Divorce) |
| Children | CHD (Children) |
| Open Enrollment | OPN (Open Enrollment) |

Employee Self Service Benefits Setup includes only those instructions that are required to set up employee self service benefits. These instructions assume that the setup procedures for employee benefits are complete. In some cases, such as setting up benefit plans and plan options, you need to review the existing setup to ensure that self-service considerations are included.

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

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

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

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

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

### See Also

*PeopleSoft EnterpriseOne Benefits 8.11 PeopleBook*, "Setting Up Benefits Administration," Setting Up Benefit Plans

*PeopleSoft EnterpriseOne Benefits 8.11 PeopleBook*, "Setting Up Benefits Administration," Setting Up Plan Options

*PeopleSoft EnterpriseOne Benefits 8.11 PeopleBook*, "Setting Up Benefits Administration," Setting Up Group Information

# Implementing Employee Benefits Setup

This section provides an overview of implementing employee benefits setup and describes how to complete the setup process.

## Understanding Employee Benefits Setup Implementation

You can use the ESS Setup Director program (P05410) to organize and implement the setup procedures for benefits self-service. This program introduces a director approach to the benefits setup task that simplifies and expedites setting up your software for a benefits enrollment offering. The program includes a list of links to the programs that you use, including program versions and processing options. After you complete this setup process, to activate employee access to self-service offerings, you must also implement a link to benefits enrollment on your organization's intranet Web portal.

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

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

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

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

## See Also

Chapter 3, "Setting Up Employee Self Service," page 9

Chapter 2, "Setting Up Common Settings for Self Service," Understanding Common Settings for Self Service Setup, page 7

*PeopleSoft EnterpriseOne Benefits 8.11 PeopleBook*, "Setting Up Benefits Administration"

# Forms Used to Implement Self Service Benefits Setup

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| ESS Setup Director | W054100B | Employee Self Service General Setup (G08BB413), Self-Service Director<br>Click Continue. | Implement the setup process.<br>Note the programs that you want to include in your setup process.<br>Note the programs that require a new version or processing option settings.<br>To move all items on the Available Items list to the Selected Items list, click the double, right arrow.<br>To move an item from the Selected Items list to the Available Items list, click the single, left arrow.<br>When the Selected Items list is complete, and you click Continue to begin the first task, the system displays the first program on the list of selected items. |
| ESS Instructions | W054100A | Click Continue.<br>Click Next. | To refresh the screen, if necessary, select Refresh from the Tools menu.<br>When you complete the last selected item and click Next, this action completes the process of setting up program versions and specifying appropriate processing options.<br>The system automatically displays the ESS Setup Director form so that you can select the setup programs that are required to complete the setup process. |

# Implement Self Service Benefits Setup

Access the ESS Setup Director form.

ESS Setup Director form

To implement employee benefits setup:

1. On ESS Setup Director, click the ESS Setup Applications option and then review the resulting list of links in the Available Items pane.
2. In the Available Items pane, click each link and review the documentation that the system automatically displays.
3. To review the programs for which you need to create a new version or set processing options, click ESS Versions/Processing Options and review the list of links.
4. To create a Selected Items list of links, click a version or processing option link on the Available Items list and then click the single, right arrow between the Available Items and Selected Items lists.
5. Repeat the previous step for each version or processing option link that you want to move into the Selected Items list.
6. When the Selected Items list is complete, to begin the first task, click Continue.
7. On ESS Instructions, review data that might exist.
8. To access the program and add or change data, choose Edit Setup.
9. After you complete the task for the selected program, choose Cancel or Close.
10. On ESS Instructions, to move to the next selected item on your list, choose Next.
11. Repeat steps 7 through 10 until you complete all of the selected items on your list.
12. To review a previous program or documentation in the Selected Items list, click Previous.
13. When you complete the last selected item, click Next.

14. On ESS Director, choose the ESS Setup Applications option.
15. Repeat steps 4 through 11 until all of the tasks on your Selected Items list is complete.

**ESS Setup Applications** Enter a code that specifies an indicator setting. Values are:

*0:* No

*1:* Yes

**ESS Versions/Processing Options** Enter a code that specifies an indicator setting. Values are:

*0:* No

*1:* Yes

# CHAPTER 13

# Setting Up Common Settings for Benefits Self Service

This chapter provides an overview of setting up common settings for self-service and describes how to implement the settings.

## Understanding Common Settings for Benefits Self Service

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

### See Also

*PeopleSoft EnterpriseOne Benefits 8.11 PeopleBook*, "Setting Up Benefits Administration," Setting Up Common Settings for Benefits Enrollment

## Implementing the Settings

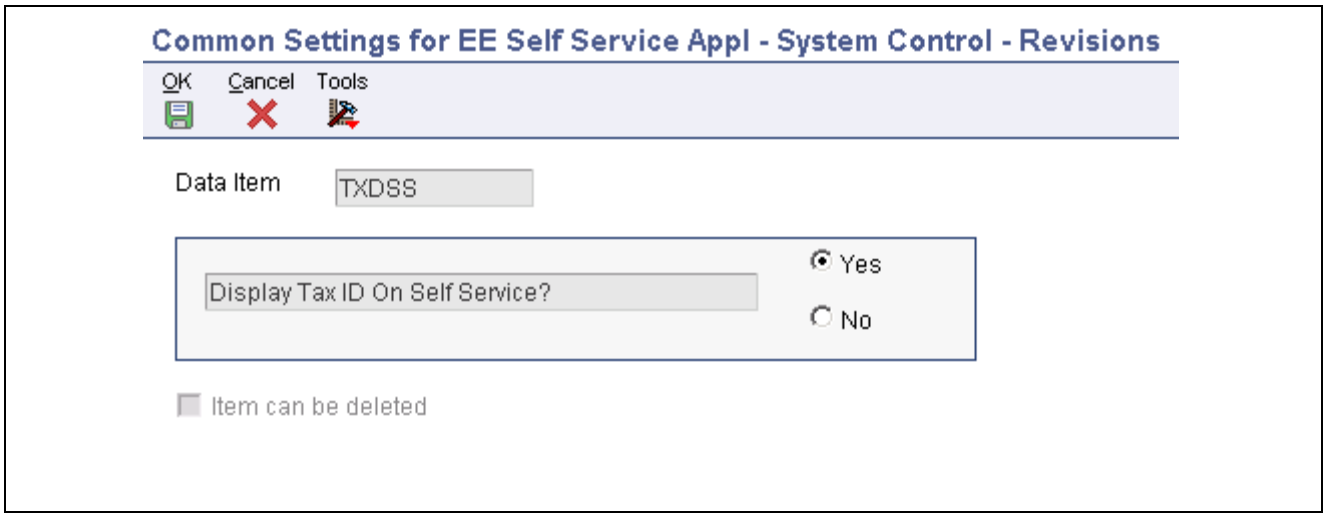
This section describes how to enter common settings.

### Forms Used to Set Up Common Settings for Benefits Self Service

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With HRM Common Display Settings | W05004A | Self Service Setup (G05BESS4), Common Settings for EE Self Service Appl | Enter appropriate common settings. |

### Entering the Common Settings

Access the System Control Revisions form.




System Control — Revisions form

To set up common settings for self-service benefits:

1. On Work With HRM Common Display Settings, review these data items:
   - PCPN
   - PCPV
   - USEESS
2. To change the current setting for an item, choose the data item and click Select.
3. On System Control - Revisions, choose either the Yes or No option, and then click OK.
4. On Work With HRM Common Display Settings, click Add to add data items.
5. On System Control - Revisions, complete the Data Item field.
6. Choose either the Yes or No option and click OK.
7. On Work With HRM Common Display Settings, click Find to display the new data item and verify the setting.

**PCPN** Enter an option that determines whether the system requires a primary care physician number for self-service health and welfare benefit plans or benefit plan options that are set up to track primary care physician information.

**PCPV** Enter an option that determines whether the system tracks an employee visit with a primary care physician.

**USEESS** Enter an option that determines whether enhanced employee self service software is being used instead of standard employee self service software in the Xe release of PeopleSoft EnterpriseOne.

# CHAPTER 14

# Defining Benefit Category Rules for Self Service

This chapter provides an overview of defining benefit category rules for self-service, describes how to setup benefit category rules for self-service, and describes how to link categories to benefit groups

## Understanding Benefit Category Rules for Self Service

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

For self-service, benefit categories must be defined as belonging to one of these classifications:

- Health and Welfare
- Indemnity
- Retirement Savings
- Other

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

---

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

A benefit category should not allow more than one benefit plan election. A benefit category should also specify whether benefit plans within the category are optional. For example, values for the benefit category rule are Optional (O) or Required (R).

---

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

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

---

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

---

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

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

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

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

# Linking Categories to Benefit Groups

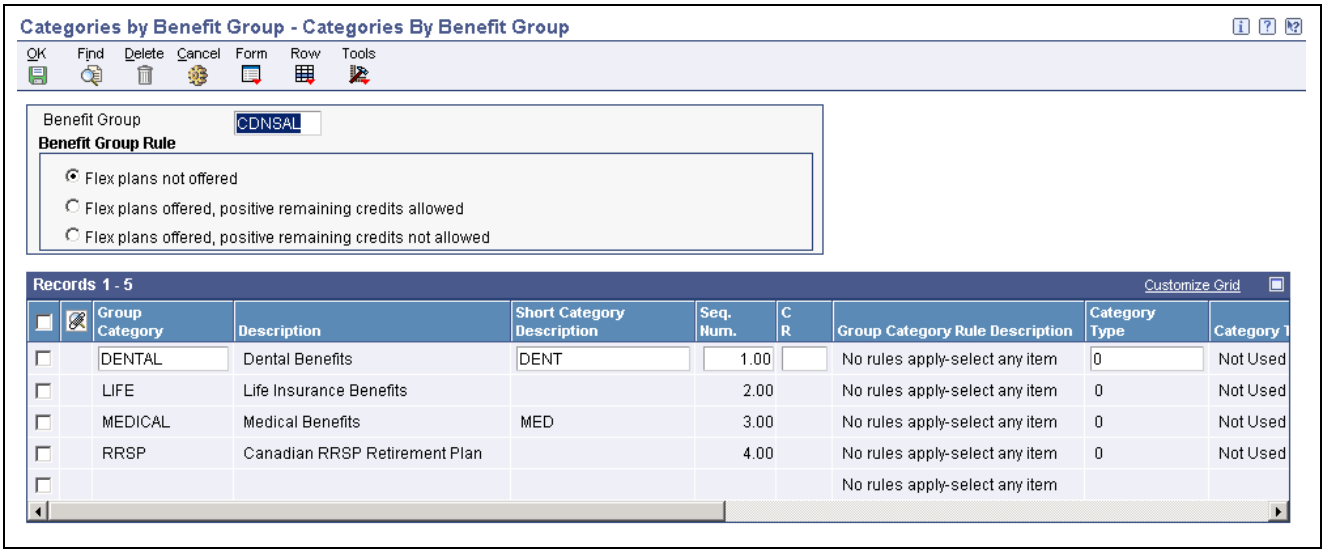
This section provides an overview of linking categories to benefit groups and discusses how to link categories to benefit groups.

# Forms Used to Link Categories to Benefit Groups

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Benefit Groups | W08350A | Benefits Administration Setup (G08BB4), Categories by Benefit Group<br>Click Select. | Find a benefit group record. |
| Categories By Benefit Group | W08350B | Click OK. | To link categories to benefit groups, enter appropriate values. |

# Link Categories to Benefit Groups

Access the Categories By Benefit Group form.




Categories By Benefit Group form

To link categories to benefit groups:

1. On Work With Benefit Groups, complete the Benefit Group field and then click Find.
2. Choose the benefit group record and then click Select.
3. On Categories By Benefit Group, click one of these options in the Benefit Group Rule group box to indicate whether the benefit group offers flex plans, and if so, how it treats positive remaining credits:
   - Flex plans not offered
   - Flex plans offered, positive remaining credits allowed
   - Flex plans offered, positive remaining credits not allowed
4. Complete these fields and click OK:
   - Group Category
   - Seq. Num.
   - C R

- Category Type

**Flex plans not offered**

Enter a rule assigned to the benefit group that determines whether the benefit group contains flex plans and whether you want to keep track of flex credits that remain after an employee has enrolled in benefit plans. Select one of these options:

- Flex plans are not offered.
- Flex plans are offered. Positive remaining credits are allowed
- Flex plans are offered. Positive remaining credits are not allowed.

**Flex plans offered, positive remaining credits allowed**

Enter a rule assigned to the benefit group that determines whether the benefit group contains flex plans and whether you want to keep track of flex credits that remain after an employee has enrolled in benefit plans. Select one of these options:

- Flex plans are not offered.
- Flex plans are offered. Positive remaining credits are allowed
- Flex plans are offered. Positive remaining credits are not allowed.

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

Enter a rule assigned to the benefit group that determines whether the benefit group contains flex plans and whether you want to keep track of flex credits that remain after an employee has enrolled in benefit plans. Select one of these options:

- Flex plans are not offered.
- Flex plans are offered. Positive remaining credits are allowed
- Flex plans are offered. Positive remaining credits are not allowed.

**C R**

Enter a rule that defines the election criteria for a benefit category. Values are:

*O:* Optional. The enrollee may choose one.

*R:* Required. The enrollee must choose one.

Blank: No rule applies. The enrollee may choose any item or items.

# CHAPTER 15

# Setting Up URLs for Self Service Benefits

This chapter provides an overview of setting up URLs for self-service benefits and describes how to:

- Set up URLs for benefit plan options.
- Set up URLs for benefit plans.
- Set up URLs for benefit categories.
- Set up URLs for benefit groups.

## Understanding URLs for Self Service Benefits

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

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

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

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

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

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

# Prerequisites

See these topics in the Benefits Guide:

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

# Setting Up URLs for Benefit Plan Options

This section provides an overview of setting up URLs for benefit plan options and discusses how to set up the link addresses.

## Understanding URLs for Benefit Plan Options

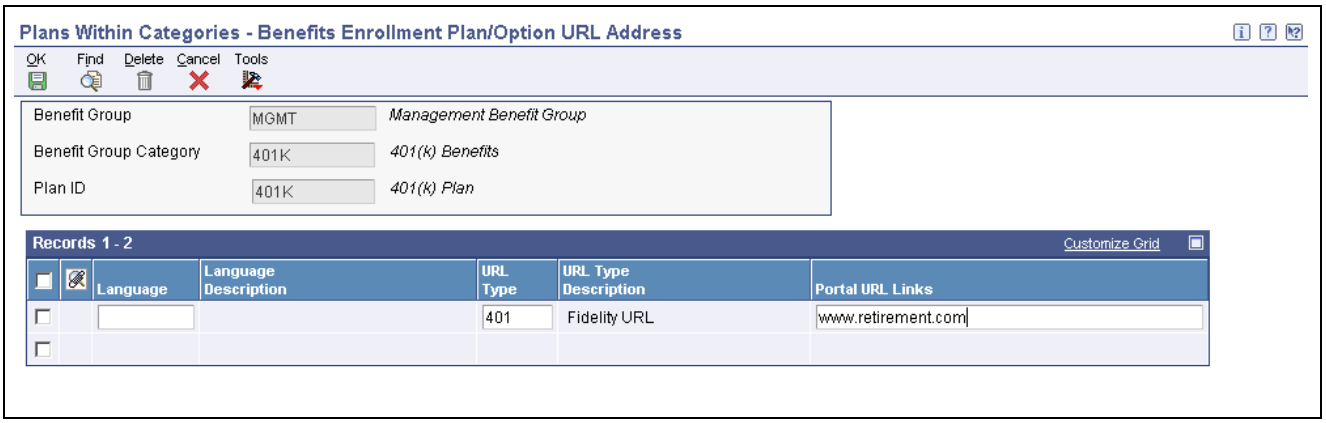
Within the employee self service benefit programs, employees can click on a benefit plan option link to get information. Depending on the links that might be defined, employees might also have links to resources for benefit plans, benefit categories, and benefit groups. You can provide separate links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

## Forms Used to Set Up URLs for Benefit Plan Options

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work with Categories within Groups | W08351C | Benefits Administration Setup (G08BB4), Plans Within Categories<br><br>Click Select. | Select a benefit category. |
| Plans Within Categories | W08351B | Select Associate URLs from the Row menu. | Select a benefit plan. |
| Benefits Enrollment Plan/Option URL Address | W085540A | Click OK. | Do not change the user defined code PCP, that is defined for the URL type. Employee self service software recognizes only PCP and Blank as valid values. |

## Set Up URLs for Benefit Plan Options

Access the Plans Within Categories form.




Plans Within Categories form

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

To set up URLs for benefit plan options:

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

   An example of the format for a sample URL might appear as follows: http://www.benefitsprovider.com.
4. On Benefits Enrollment Plan/Option URL Address, complete these fields:
   - Plan Option
   - Language
   - URL Type
   - Portal URL Links
5. Click OK.

**Plan Option** Enter a code that identifies any additional options available for a benefit plan that have been defined in the Plan Additional Options table (F083202).

Note: Additional options must have the same provider, policy number, and enrollment and eligibility rules as the benefit plan to which they are associated.

# Setting Up URLs for Benefit Plans

This section provides an overview of setting up URLs for benefit plans and discusses how to set up the link addresses.

# Understanding URLs for Benefit Plans

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

# Forms Used to Set Up URLs for Benefit Plans

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work with Categories within Groups | W08351C | Benefits Administration Setup (G08BB4), Plans Within Categories<br>Click Select. | Choose a benefit category. |
| Plans Within Categories | W08351B | Select Associate URLs from the Row menu. | Choose a benefit plan. |
| Benefits Enrollment Plan/Option URL Address | W085540A | Click OK. | Do not change the user defined code PCP, that is defined for the URL type. Employee self service software recognizes only PCP and Blank as valid values.<br>The system displays the Plan Option and Add Optional Description columns only when a plan option exists. |

# Set Up URLs for Benefit Plans

Access the Benefits Enrollment Plan/ Option URL Address form.

To set up URLs for benefit plans:

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

   An example of the format for a sample URL might appear as follows: http://www.benefitsprovider.com.
4. On Benefits Enrollment Plan/Option URL Address, complete these fields:
   - Language
   - URL Type
   - Portal URL Links
5. Click OK.

# Setting Up URLs for Benefit Categories

This section provides an overview of setting up URLs for benefit categories and discusses how to set up the link addresses.

## Understanding URLs for Benefit Categories

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

## Forms Used to Set Up URLs for Benefit Categories

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Benefit Groups | W08350A | Benefits Administration Setup (G08BB4), Categories by Benefit Group<br>Click Select. | Select a benefit group. |
| Categories By Benefit Group | W08350B | Select Associated URLs from the Row menu. | Select a benefit plan. |
| Benefits Enrollment Plan/Option URL Address | W085540A | Click OK. | Do not change the user defined code PCP, that is defined for the URL type. Employee self service software recognizes only PCP and Blank as valid values.<br>The system displays the Plan Option and Add Optional Description columns only when a plan option exists. |

## Set Up URLs for Benefit Categories

Access the Benefits Enrollment Plan/Option URL Address form.

To set up URLs for benefit categories:

1. On Work With Benefit Groups, complete the Benefit Group field and click Find:
2. Choose the benefit group and click Select to display the benefit categories that are linked to the benefit group.
3. On Categories By Benefit Group, choose a benefit category and choose Associate URLs from the Row menu.

   An example of the format for a sample URL might appear as follows: http://www.benefitsprovider.com.
4. On Benefits Enrollment Plan/Option URL Address, complete these fields:
   - Language

- URL Type
- Portal URL Links

5. Click OK.

# Setting Up URLs for Benefit Groups

This section provides an overview of setting up URLs for benefit groups and discusses how to set up the link addresses.

## Understanding URLs for Benefit Groups

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

## Forms Used to Set Up URLs for Benefit Groups

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Benefit Groups | W08350A | Benefits Administration Setup (G08BB4), Categories by Benefit Group<br>Associated URLs, Row menu. | Select a benefit group. |
| Benefits enrollment Plan/Option URL Address | W085540A | Click OK. | Enter a URL. |

## Set Up URLs for Benefit Groups

Access the Benefits Enrollment Plan/Option URL Address form.

To set up URLs for benefit groups:

1. On Work With Benefit Groups, complete the Benefit Group field and click Find.
2. Choose Associated URLs from the Row menu.

   The format of a sample URL might appear as: http://www.benefitsprovider.com.
3. On Benefits Enrollment Plan/Option URL Address, complete these fields:
   - Language
   - URL Type
   - Portal URL Links
4. Click OK.

# CHAPTER 16

# Setting Up Benefit Enrollment Events for Self Service

This chapter provides an overview of setting up benefit enrollment events for self-service and describes how to implement the settings.

## Understanding Benefit Enrollment Events for Self Service

Although you normally set up benefit enrollment events when your benefits administration software is installed, you need to review these specifications when you add benefits self-service functionality to your system. When you set up benefit enrollment events, you can use the Benefits Enrollment Setup program (P08500) to define the time period during which an event is open for online changes or enrollments. For example, open enrollment events allow changes from a specific date until another specific date. Other types of events, such as new hire enrollment events, allow changes starting on a variable date, such as the date of hire, and extending for a certain number of days following that date.

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

## Implementing Benefit Enrollment Events

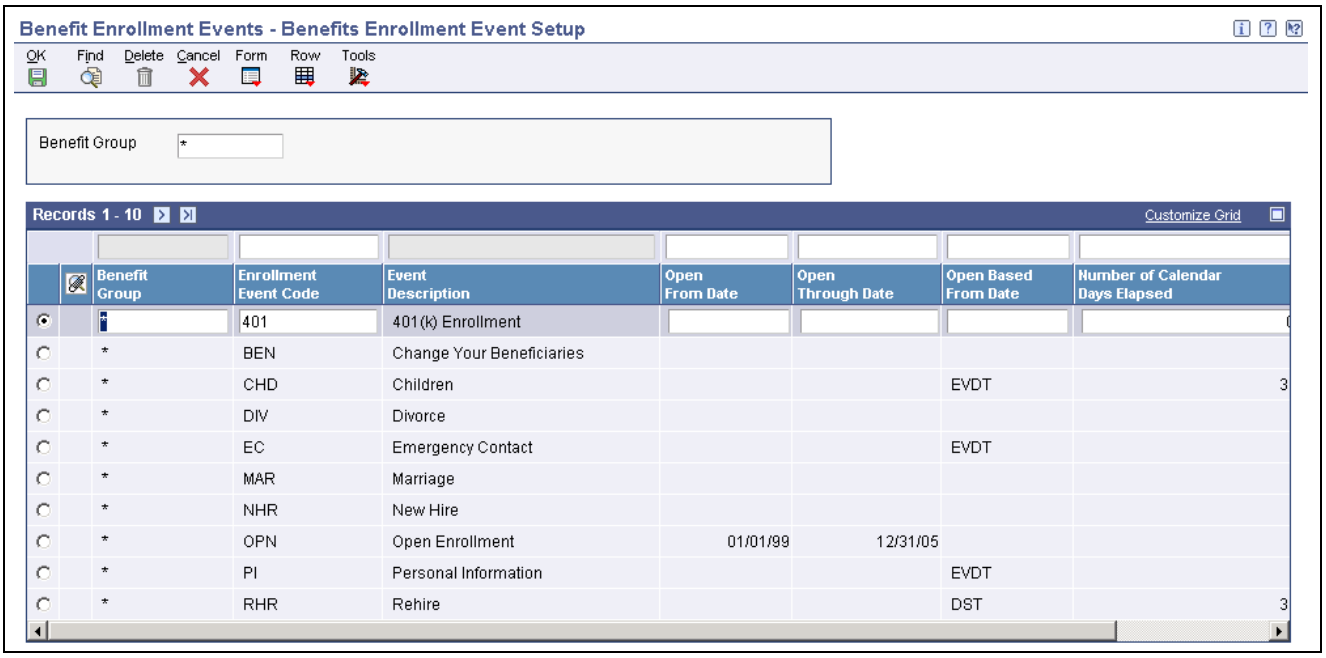
This section describes how to implement benefit enrollment events.

# Forms Used to Implement Benefit Enrollment Events

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Benefits Enrollment Event Setup | W08500A | Self Service Setup (G05BESS4), Benefit Enrollment Events | Search for desired values.<br>The system first searches for an exact benefit group match and then for the generic * character. You can indicate that an event is open for all benefit groups by typing * in the Benefit Group field. For example, an employee in the EXEC benefit group is in open enrollment from 9/1/05 through 9/30/05. An employee in MGMT is in open enrollment from 11/1/05 through 11/30/05.<br>If an event allows changes after a specific date, you can enter a data item, such as the employee's start date or the event date, in the Open Based From Date field.<br>If you do not define a time period for an enrollment event, the system assumes that the event is open all year. |

# Benefit Enrollment Events Set Up

Access the Benefits Enrollment Event Setup form.




Benefits Enrollment Event Setup form

To set up benefit enrollment events:

1. On Benefits Enrollment Event Setup, click Find.
2. If the event is not listed already enter values in the empty grid row for these fields:
   - Benefit Group (* for all groups)
   - Enrollment Event Code
3. If the enrollment event will allow changes between specific dates, complete these fields:
   - Open From Date
   - Open Through Date
4. If the enrollment event allows changes for a certain number of days following a specific or variable date, complete these fields:
   - Open Based From Date
   - Number of Calendar Days Elapsed
5. Complete the Enrollment Effective Date field.
6. Repeat steps 1 through 4 for every enrollment event, and then click OK to save your changes.

**Open From 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.

**Open Through 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.

| | |
|---|---|
| **Open Based From Date** | 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. |
| **Number of Calendar Days Elapsed** | Enter the number of days that must pass after an employee's start date before the employee can enroll in the plan. |
| **Enrollment Effective Date** | Enter the date on which an enrollment in a plan takes effect. |

CHAPTER 17

# Setting Up Benefit Categories by Enrollment Event

This chapter provides an overview of setting up benefit categories by enrollment event and describes how to implement the settings.

## Understanding Benefit Categories by Enrollment Event

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

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

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

## Implementing the Settings

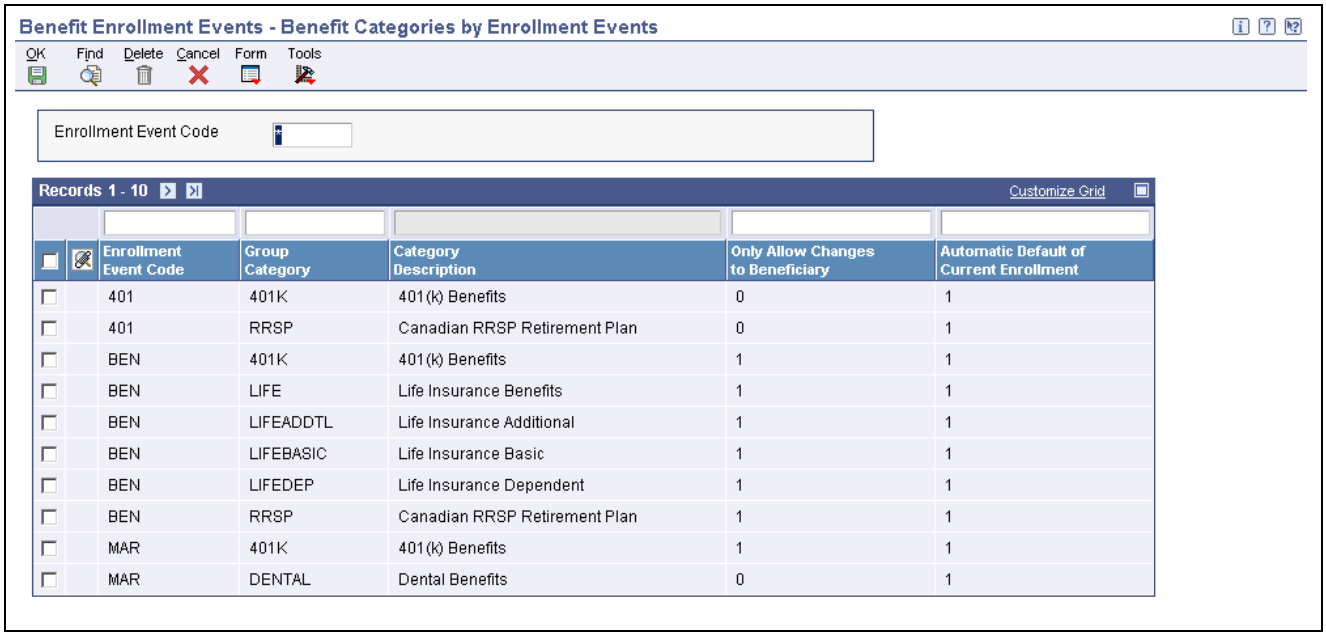
This section describes how to enter settings to set up benefit categories by enrollment event.

# Forms Used to Set Up Benefit Categories by Enrollment Event

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Benefits Enrollment Event Setup | W08500A | Self Service Setup (G05BESS4), Benefit Enrollment Events<br>Select Categories By Event from the Form menu. | Access the Benefit Categories by Enrollment Events form. |
| Benefit Categories by Enrollment Events | W085510A | Click OK. | If the benefit plans are the same, and a processing option is set appropriately in the Current Enrollment Work File Build program (R085530), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), you should not accept the default. |

# Set Up Benefit Categories by Enrollment Event

Access the Benefit Categories by Enrollment Events form.




Benefit Categories by Enrollment Events form

To set up benefit categories by enrollment event:

1. On Benefits Enrollment Event Setup, choose Categories By Event from the Form menu.
2. On Benefit Categories by Enrollment Events, complete these fields in the detail area:
   - Enrollment Event Code

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

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

**Category Description** Enter a descriptive statement of up to 50 characters in length.

**Only Allow Changes to Beneficiary** Enter a code that designates whether the only changes that you can make to plans within a benefit category are changes to the beneficiary information.

**Automatic Default of Current Enrollment** Specify whether the system should automatically default to the current enrollment. Values are:

*0:* Do not allow previous coverage to default as the new coverage

*1:* Allow previous coverage to default as the new coverage

# CHAPTER 18

# Setting Up Allowed Dependent Relationships by Plan

This chapter provides an overview of setting up allowed dependent relationships by plan and describes how to implement the settings.

## Understanding Allowed Dependent Relationships by Plan

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

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

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

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

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

### See Also

Chapter 19, "Setting Up Workfiles for Benefits Self Service," Setting Up Dependent Selection Automatically, page 139

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

# Implementing the Settings

This section describes how to implement allowed dependent relationships by plan.

## Forms Used to Implement Allowed Dependent Relationships by Plan

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Allowed Dependent Relationships by Plan | W085500A | Employee Self Service General Setup (G08BB413), Allowed Dependent Relationships by Plan | You can add values to the list of allowed relationships in UDC 08/RL. Review the entries in this table to ensure that the correct special handling codes exist. A value of *, allowing all relationships, is an allowed value, even though this character does not display in the UDC table.<br><br>A UDC for dependent relationships must contain either a *D* or *A* in the Special Handling field. If the UDC contains a *B* in the Special Handling field, then the relationship is automatically excluded from being covered as a dependent. |

## Implement Allowed Dependent Relationships by Plan

Access the Allowed Dependent Relationships by Plan form.

To set up allowed dependent relationships by plan:

1. On Work With Allowed Dependent Relationships, complete the Plan ID field and then click Find:
2. Select the Plan Id and Add Option that you would like to setup for dependent relationships
3. Specify the allowed dependent relationships for the plan by completing the Relation field.
4. When all relationships are specified for the plan, click OK.

**Additional Option** Enter a code that identifies any additional options available for a benefit plan that have been defined in the Plan Additional Options table (F083202).

**Note.** Additional options must have the same provider, policy number, and enrollment and eligibility rules as the benefit plan to which they are associated.

**Relation** Enter a user defined code (system 08/type RL) that defines the relationship of the dependent or beneficiary to the employee.

# CHAPTER 19

# Setting Up Workfiles for Benefits Self Service

This chapter provides an overview of setting up common settings for self-service and describes how to:

- Set up dependent selection automatically.
- Build the current coverage workfile for self-service.
- Set up a current dependent and beneficiary workfile.
- Build the available plans workfile for self-service.
- Exclude benefit plans or categories from a work file build.
- Build the personal information workfile.
- Set up steps and rules for director process flows.

## Understanding Workfiles for Benefits Self Service

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

## Setting Up Dependent Selection Automatically

This section provides an overview of setting up dependent selection automatically and describes how to:

- Run the Automatically Setup SS Dependent Selection (R085505)
- Set processing options for the Run the Automatically Set Up Dependent Min/Max program

### Understanding Automatic Dependent Selection

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

- Minimum number of dependents
- Maximum number of dependents

- Valid relationships per plan or plan option

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

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

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

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

The system calculates the minimum number of dependents as follows:

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

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

### See Also

Chapter 18, “Setting Up Allowed Dependent Relationships by Plan,” page 135

## Running the Automatically Setup SS Dependent Selection (R085505)

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

## Setting Processing Options for Automatically Setup SS Dependent Selection (R085505)

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.

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

Use this processing option to have the system default in the minimum number of dependents. Values are:

*1:* Yes

*0:* No

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

Use this processing option to have the system write a default value for allowed relationships if a value is not found. Values are:

*1:* Yes

*0:* No

# Building the Current Coverage Workfile for Self Service

This section provides an overview of setting up dependent selection automatically and describes how to:

- Run the Current Enrollment Work File Build program.
- Set Processing Options for Current Enrollment Work File Build (R085530).

## Understanding the Current Coverage Workfile for Self Service

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

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

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

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

- Plan Additional Options (F083202)

You should run this report at these times:

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

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

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

# Running the Current Enrollment Work File Build program

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

# Setting Processing Options for Current Enrollment Work File Build (R085530)

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.

## Version

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

**1. R085537 Version:** Use this processing option to specify the version of the Build Current Dependent/Beneficiary Work File program (R085537) that the system uses when you run the UBE. The Build Current Dependent/Beneficiary Work File program supplies current dependent and beneficiary enrollment data for the Current Dep/Ben X-Reference Work Table (F085537W).

If you want to run a specific version of the Build Current Dependent/Beneficiary Work File program that has user-defined data selection, you should specify that version. If you leave this processing option blank, the system does not run the Build Current Dependent/Beneficiary Work File program and no dependent and beneficiary information is generated.

# Setting Up a Current Dependent and Beneficiary Workfile

This section provides an overview of the Current Dependent/Beneficiary Work File program and describes how to:

- Run the Build Current Dependent/Beneficiary Work File program.
- Set processing options for the Build Current Dependent/Beneficiary Work File program.

## Understanding the Current Dependent and Beneficiary Workfile

When you build the Current Dep/Ben X-Reference Work Table (F085537W), the system searches these tables:

- Employee Master Information (F060116)
- Employee Enrollment (F08330)
- Dep/Ben to Employee Plan X-Reference (F08336)
- Participant File (F08901)
- Primary Care Physician Table (F08338)
- Dep/Ben X-Reference Tag Table (F08336B)
- Plan/Plan Option Tag Table (F08320B)

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

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

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

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

## Running the Build Current Dependent/Beneficiary Work File Program

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

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

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

### Process

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

**1. Enrollment Event Type:** Use this processing option to specify the event type that the system uses when saving data in the Current Dep/Ben X-Reference Work Table (F085537W). Open enrollment indicates an event that occurs during a set date range, normally only once, during the year. Current enrollment indicates life events that can happen at any time during the year. Examples of current enrollment events are marriage, divorce, or the birth of a child. Values are:

*1:* Open enrollment

*2:* Current enrollment

# Building the Available Plans Workfile for Self Service

This section provides an overview of the available plans workfile for self-service and describes how to:

- Run the Available Plans Work File Build program.
- Set processing options for the Available Plans Work File Build.

## Understanding the Available Plans Workfile for Self Service

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

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

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

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

If the employee's current enrollment is available for open enrollment, and a processing option is set appropriately in the Available Plans Work File Build program (R085520), the system supplies the current enrollment as the default enrollment. However, if a current plan is no longer available (for example, if you are changing insurance carriers), defaulting of all enrollment plans is not allowed.

You can build the Available Plans and Plan Options by Employee Work Table (F085520W) for either open enrollment or current enrollment. In open enrollment, available plans and plan options, as well as their costs, might change. In current enrollment, which is typically associated with new hire, rehire, life event, or special enrollment, the available plans and plan options remain the same. The effective date processing option is used to obtain the active plans and plan options, with their associated costs and credits, for the event type. If you do not set up an effective date in the processing options, the system date will be used.

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

You can set processing options to specify:

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

## Prerequisites

Before you complete the tasks in this section:

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

### See Also

Chapter 14, "Defining Benefit Category Rules for Self Service," page 117

## Running the Available Plans Work File Build program

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

## Setting the Processing Options for Available Plans Work File Build (R085520)

Use these processing options to set default values.

### Date

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

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

If the effective date is left blank, the system date is used.

### Event Type

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

**1. Event Type:** Use this processing option to specify the event type that the system uses when saving data in the Available Plans and Plan Options by Employee Work Table (F085520W). Open enrollment indicates an event that occurs during a set date range, normally only once, during the year. Current enrollment indicates life events that can happen at any time during the year. Examples of current enrollment events are marriage, divorce, or the birth of a child. Values are:

*1:* Build available plans and plan options for open enrollment.

*2:* Build available plans and plan options for current enrollment.

**2. Process Defaulting:** Use this processing option to specify whether the system checks to see if the current employee's enrollment can be defaulted during an open enrollment. This option is valid only when saving data in the Available Plans and Plan Options by Employee Work Table (F085520W) for an open enrollment event. Values are:

Blank (default): Do not save information for automatic defaulting.

During open enrollment, employees need to elect

each benefit plan or plan option.

*1:* Save information for automatic defaulting.

During open enrollment, the system displays the benefit plans and plan options in which each employee is currently enrolled and marks them as elected. Employees can normally change the current elections.

# Excluding Benefit Plans or Categories From a Work File Build

This section provides an overview of the excluding benefit plans or categories from a work file build and describes how to implement exclusions.

## Understanding Benefit Plan or Category Exclusion from a Work File Build

You can use the Plans/Categories to Exclude From Work File program (P085501) to choose either benefit plans or benefit group categories that you want to exclude when you are building the work files for benefits self-service. If your organization has DBAs that use special-use benefit plans or benefit group categories that are set up for purposes other than regular employee benefits, then you might want to use this approach to exclude these plans or categories when you are preparing for benefits open enrollment or a benefits enrollment that is based on a life event. If you do not exclude these special-use benefit plans or benefit group categories, then the system displays them as employee self service benefit options.

The Plans/Categories to Exclude From Work File program allows you to choose an existing program version for either the Available Plans Work File Build (R085520) or the Current Enrollment Work File Build (R085530) and then specify a benefit plan or benefit group category identification to exclude from the work file build. To view exclusions that might exist, you can choose Exclusions from the Form menu.

## Forms Used to Exclude a Benefit Plan or Category

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Excluded Benefits | W085501A | Employee Self Service General Mgmt (G08BESS327), Plans/Categories to Exclude From Work File | Add a benefit plan or category that you want to exclude from the workfile build.<br>To view existing versions, choose Version from the Form menu.<br>You normally choose either a benefit plan or a benefit group category, but not both. |

## Exclude a Benefit Plan or Category

Access the Excluded Benefits form.

To exclude benefit plans or categories from a work file build:

1. On Excluded Benefits, choose one of these options:
   - R085520
   - R085530
2. Enter an existing version identification in the Version field.
3. To exclude a benefit plan, enter a plan identification in the Plan ID field.
4. Click the adjacent Add button to add the benefit plan to the grid.
5. To exclude a benefit group category, enter a benefit group category identification in the Benefit Group Category field.
6. To save the exclusions to the current version, click OK.

**R085520** Select an option that allows you to choose either the Available Plans Work File Build program (R085520) or the Current Enrollment Work File Build program (R085530). When you associate one of these choices with an existing version identification, you can specify benefit plans that you want to exclude from the work file build for self-service.

**R085530** Select an option that allows you to choose either the Available Plans Work File Build program (R085520) or the Current Enrollment Work File Build program (R085530). When you associate one of these choices with an existing version identification, you can specify benefit plans that you want to exclude from the work file build for self-service.

# Building the Personal Information Workfile

This section provides an overview of the Budget Worksheet report and describes how to:

- Run the Personal Employee Information Workfile Build report.

- Set processing options for the Personal Employee Information Workfile Build report.

## Understanding the Personal Information Workfile

You use the Personal Employee Information Workfile Build program (R054101) to create tables that contain employee, dependent, and beneficiary personal information. The report obtains information from these tables:

- Employee Master Information (F060116)
- Address Book - Contact Phone Number (F0115)
- Address Book - Who's Who (F0111)

The benefits self-service programs use this information to display employee personal information. These tables provide a temporary location that the system uses to store data before writing it back to the originating tables.

The tables that this program updates are:

- Employee Personal Profile Information Work Table (F054101W)
- Employee Phone Number Work Table (F054115W)
- Employee Emergency Contact Work Table (F054111W)

## Running the Personal Employee Information Workfile Build Report

From the Personal Information Work File Mgmt menu (G08BESS324), choose Personal Information Work File Build.

## Setting Processing Options for Personal Employee Information Workfile Build (R054101)

You can use these processing options to specify who is included in the work file build and whether the system saves IRS Form W-4 information in a work file.

### Process

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

**1. Write Personal Information for Employee, Dependent/Beneficiary, or Both:**

Use this processing option to specify information that the Personal Employee Information Workfile Build program (R054101) saves in employee self service work files. Values are:

*1* or Blank: Employee only (default).

*2:* Dependents and beneficiaries (R085537)*must* be run first).

*3:* Employee, dependents, and beneficiaries (R085537) *must* be run first).

**Note.** To create records for dependents and beneficiaries, you must run the Build Current Dependent/Beneficiary Work File program (R085537) before you run this program.

**2. Build the I.R.S. W-4 Tax Form work table (F085303W)**

Use this processing option to specify whether the system saves information in the IRS W-4 Form Work File table (F085303W). This table stores self-service information that employees can review or change. Values are:

*0* or Blank: Do not build the IRS W-4 Form Work File table.

*1:* Build the IRS W-4 Form Work File.

# Setting Up Steps and Rules for Director Process Flows

This section provides an overview of the Populate the F05402 and F05403 Files UBE and describes how to Run the Populate Director Form Rules/Edits program.

## Understanding Steps and Rules for Director Process Flows

When you run the Populate Director Form Rules/Edits program (R8985500), the system builds these files:

- Self-Service Step/Application Cross-Reference (F05402)
- Self-Service Script Position Rules (F05403)

The system saves information about objects and applications that can be specified in a process flow in the Self-Service Step/Application Cross-Reference table. The Self-Service Process Flow Setup program (P05400) uses information from this file to define process flows.

The system saves rules and functional parameters for self-service process flows in the Self-Service Script Position Rules table.

## Running the Populate Director Form Rules/Edits Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

# CHAPTER 20

# Setting Up Self Service Benefit Plan Guidelines

This chapter provides an overview of setting up self-service benefit plan guidelines and describes how to:

- Set up benefit contribution limits.
- Set up maximum coverage increase limits.

## Understanding Self Service Benefit Plan Guidelines

Many organizations include contribution and coverage change limits in their benefit plans and benefit plan options. For example, to participate in plans that allow for employee contributions, such as a retirement savings benefit plan, employees might have to contribute a minimum amount. In addition, organizations normally impose a maximum amount that employees can contribute. You can use the Benefit Amount Rate Edits program (P085573) to create these rules.

For other indemnity benefit plans such as life insurance, organizations often limit the amount of coverage increase that employees can choose during enrollment events. Even if employees are permitted to enroll for higher coverage when they are hired, companies often limit annual increases. For example, if an employee is enrolled in a life insurance plan that provides $10,000 of coverage, a rule might exist that the employee can elect to change to another plan that provides an increase of no more than $5,000. Thus an employee with $10,000 coverage cannot elect a life insurance benefit plan with more than $15,000 coverage. You can use the Maximum Insurance Coverage Increase program (P085574) to set this limit.

## Setting Up Benefit Contribution Limits

This section provides an overview of benefit contribution limits and discusses how to set up the limits.

### Understanding Benefit Contribution Limits

Organizations often offer employee benefit plans or benefit plan options to which employees can voluntarily contribute an amount or percentage of their salary. For example, an organization might offer a 401(k) plan that allows employees to contribute up to eight percent of their salary. The organization might also stipulate that if employees choose to participate, they must contribute a minimum of one percent. You can use the Benefit Amount Rate Edits program (P085573) to define the minimum and maximum limits for deductions, benefits, and accruals (DBAs).

To set minimum and maximum limits for a DBA, you can use the Plan Master program (P08320) to choose a benefit plan. You need to review current DBAs that might be currently attached to the benefit plan and then use a Form menu option to choose the Benefit Rates. When you specify the minimum and maximum amounts that the organization allows for a specific DBA, you also need to specify the frequency type. The frequency type determines how the system distributes the amount deducted from salary over a period of one year.

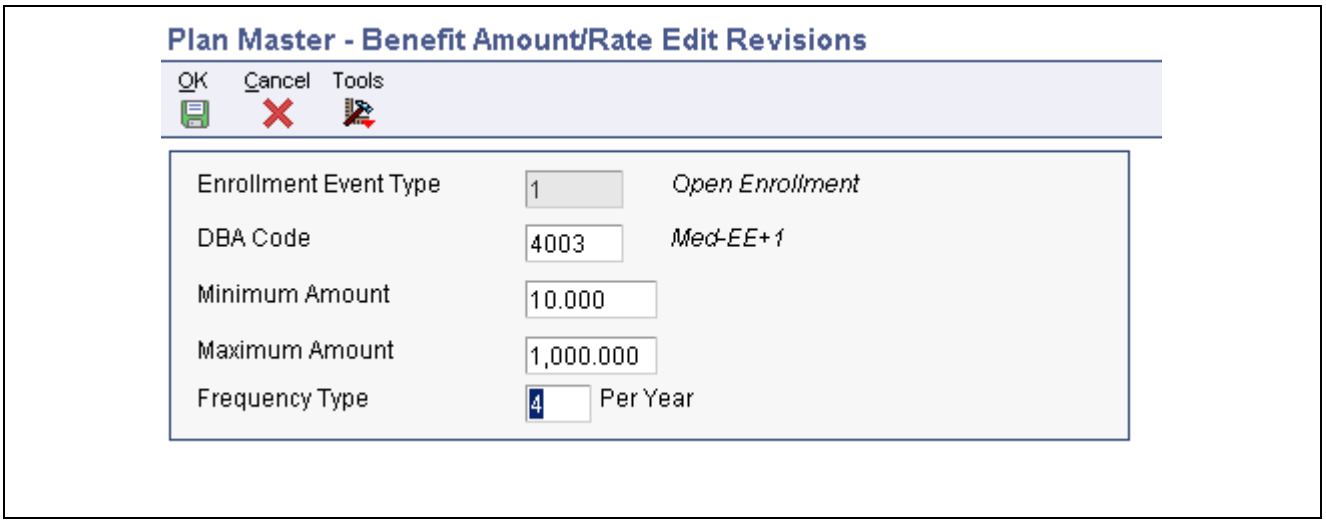
The system stores information that you enter in the Benefit Amount Rate Edits program in the Entered Benefit Amount/Rate Edits table (F085573W).

## Forms Used to Set Up Benefit Contribution Limits

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Plan Master | W08320B | Benefits Administration Setup (G08BB4), Plan Master<br>Click Select. | Select a benefit plan record. |
| Plan Master | W08320A | Calc./Eligibility tab<br>Choose Benefit Rates from the Form menu | The system uses EE Payroll Deduction or EE Flex Cost, but not both. If a value exists for EE Payroll Deduction and EE Flex Cost, the system uses EE Payroll Deduction and ignores EE Flex Cost.<br>The Benefit Rates menu option is available only when you first perform one:<br>• Choose EE Payroll Deduction.<br>• Choose EE Flex Cost and EE Payroll Deduction is blank. |
| Work With Benefit Amount/Rate Edits | W085573A | Click Add. | Find and display existing records |
| Benefit Amount/Rate Edit Revisions | W085573B | Click OK. | Add minimum and maximum limits.<br>You can enter minimum and maximum amounts for additional DBAs before canceling this form. |

## Set Up Benefit Contribution Limits

Access the Plan Master form.




Plan Master form

To set up benefit contribution limits:

1. On Work With Plan Master, click Find to display existing benefit plans.
2. Choose a benefit plan, and then click Select.
3. On Plan Master, click the Calc./Eligibility tab and review these fields:
   - EE Payroll Deduction
   - EE Flex Cost
4. Choose one of these fields, and then choose Benefit Rates from the Form menu:
   - EE Payroll Deduction
   - EE Flex Cost
5. On Work With Benefit Amount/Rate Edits, complete these fields and then click Find to display existing records:
   - Enrollment Event Type
   - DBA Code
6. To add minimum and maximum limits to a DBA, click Add.
7. On Benefit Amount/Rate Edit Revisions, complete these fields:
   - DBA Code
   - Minimum Amount
   - Maximum Amount
   - Frequency Type
8. Click OK.

**EE Payroll Deduction** Enter the DBA defined in the Payroll Transactions Constants table (F069116) that is used to calculate the dollar amount that the employee contributes by enrolling in the plan. In most cases, this DBA is defined to deduct pay from the enrolled employee's check.

**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.

**Minimum Amount** Enter the minimum amount per pay period that an employee can enter for this benefit plan.

**Maximum Amount** Enter the maximum amount per pay period that an employee can enter for this benefit plan.

**Frequency Type** Enter the period of time for which the minimum and maximum amounts apply. When an employee enters an amount or rate for a flat amount DBA during self-service enrollment, the system translates this amount to a pay period amount. For example, if the maximum is 1200 per year, and an employee is paid monthly, the system allows him or her to enter amounts up to 100 (the annual amount of 1200 divided by 12 months). The system allows an employee who is paid bimonthly to enter amounts up to 50. Values are:

*1:* Per Pay Period

*2:* Per Month

*3:* Per Quarter

*4:* Per Year

# Setting Up Maximum Coverage Increase Limits

This section provides an overview of maximum coverage increase limits and discusses how to set up the limits.

## Understanding Maximum Coverage Increase Limits

Many organizations offer life insurance benefit plans and benefit plan options to employees. Employees can normally choose to enroll in one or more of the plans or decline enrollment. Companies often allow employees to enroll in any available insurance benefit plan when they are hired, but limit annual increases after the initial enrollment. To qualify for an exception to the annual increase rule, an organization might require a physical examination.

You can use the Maximum Insurance Coverage Increase program (P085574) to create a coverage increase limit rule. You can create this rule for any of these:

- Benefit plans
- Benefit categories
- Benefit plans within benefit categories

Before creating a new coverage increase limit rule, you need to review the premium and coverage information on the Premium/Coverage tab on the Plan Master form. After reviewing this information, you can choose a benefit plan and then use the Allowed Increment option on the Row menu of the Plan Master program (P08320) to access the Maximum Insurance Coverage Increase program. Alternatively, you can choose the Categories by Benefit Group program (P08350) and implement the same procedure.

If you create a coverage increase limit rule for a benefit plan, the rule then applies to everyone in the company who is covered by the benefit plan. If you create a rule for a benefit category, then only employees within the benefit category are affected by the rule. If you create a rule for a benefit plan within a benefit category, then only employees within the category who elect the benefit plan are affected by the rule.

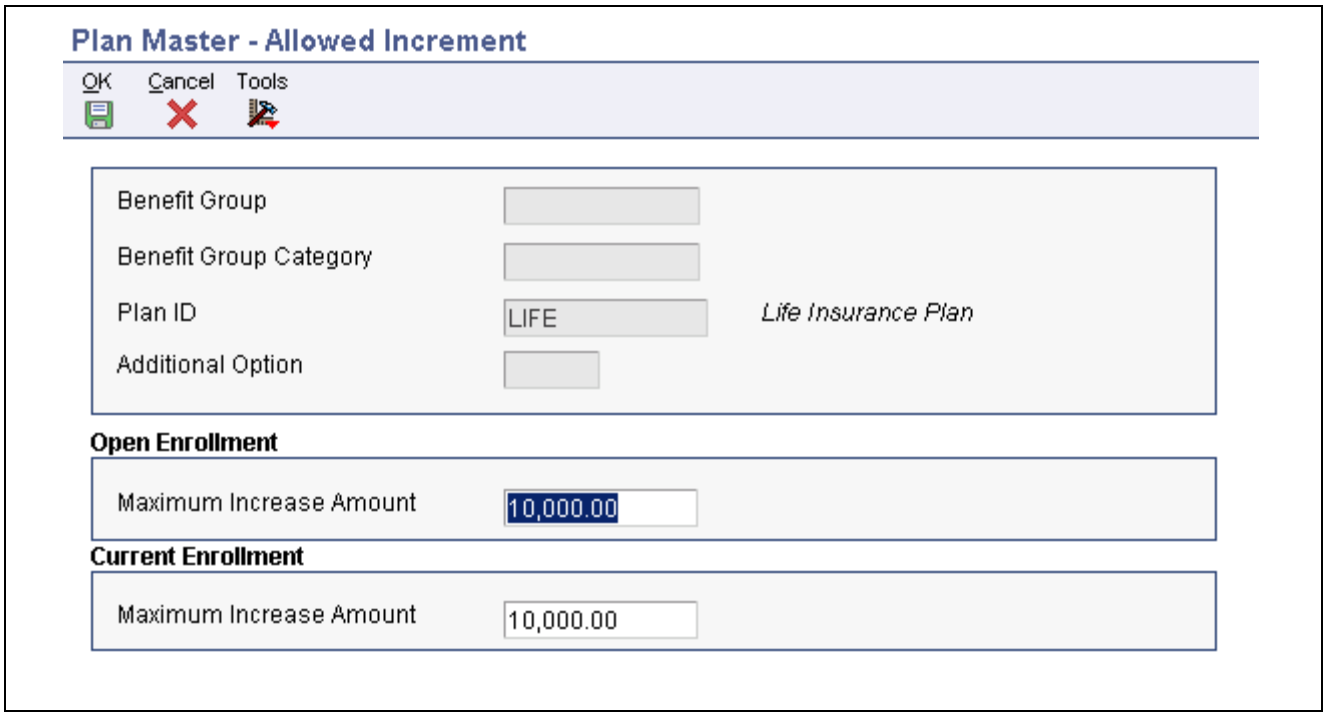
The system stores information that you enter in the Maximum Insurance Coverage Increase Amounts table (F085574).

## Forms Used to Set Up Maximum Coverage Increase Limits

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Plan Master | W08320B | Benefits Administration Setup (G08BB4), Plan Master<br>Click Select. | Select an indemnity benefit plan. |
| Plan Master | W08320A | Premium/Coverage tab<br>Click Cancel. | Review the information. |
| Work With Plan Master | W08320B | Select Allowed Increment from the Row menu. | Select a benefit plan. |
| Allowed Increment | W085574B | Click OK. | Enter values.<br>If you want to create limit rules only at the benefit plan level, this step ends the procedure. If you want to create limit rules at a more specific level, then continue with these steps. |
| Work With Benefit Groups | W08350A | Benefits Administration Setup, Categories by Benefit Group<br>Click Select. | Display existing employee benefit groups.<br>Select a benefit group. |
| Categories By Benefit Group | W08350B | Select Assign Plans from the Row menu. | Select an indemnity benefit plan record such as *Life Insurance Benefits.* |
| Plans Within Categories | W08351B | Select Allowed Increment from the Row menu. | Select an employee benefit plan. |
| Allowed Increment | W085574B | Click OK. | Complete the Maximum Increase Amount field under Open Enrollment. |
| Plans Within Categories | W08350B | Click OK. | Save the new values. |

## Set Up Limits

Access the Allowed Increment form.




Allowed Increment form

To set up maximum coverage increase limits:

1. On Work With Plan Master, click Find to display current benefit plans.
2. Choose an indemnity benefit plan and click Select.
3. On Plan Master, click the Premium/Coverage tab and review these fields:
   - Premium Payment
   - Age Rate Table
   - Per Coverage Dollars
   - Maximum Premium Amount
   - Amount - Coverage
   - Salary Factor
   - Rounding Amount
4. Click Cancel to return to Work With Plan Master.
5. Choose a benefit plan, and then choose Allowed Increment from the Row menu.
6. On Allowed Increment, complete the Maximum Increase Amount field under Open Enrollment.
7. Complete the Maximum Increase Amount field under Current Enrollment.
8. Click OK.
9. Exit to the menu and choose Categories by Benefit Group.
10. On Work With Benefit Groups, click Find to display existing employee benefit groups.
11. Choose a benefit group and click Select.
12. On Categories By Benefit Group, choose an indemnity benefit plan record such as Life Insurance Benefits, and then choose Assign Plans from the Row menu.

13. On Plans Within Categories, choose an employee benefit plan and choose Allowed Increment from the Row menu.
14. On Allowed Increment, complete the Maximum Increase Amount field under Open Enrollment.
15. Complete the Maximum Increase Amount field under Current Enrollment.
16. Click OK.
17. On Plans Within Categories, click OK.

| | |
|---|---|
| **Premium Payment** | Enter the premium payment amount that applies to this plan. |
| **Age Rate Table** | Enter the table used if the calculation requires table values. |
| **Per Coverage Dollars** | Enter the amount of coverage that is paid for by the amount in the Monthly Premium field (data item PREP). For example, a premium charge can be defined as thirty dollars for every thousand dollars of coverage. In this case, the monthly premium is 30, and the number in the Per Coverage Dollars field is 1000. |
| **Maximum Premium Amount** | Enter the maximum premium amount permitted. |
| **Amount - Coverage** | Enter the dollar amount of coverage that this plan provides to every employee enrolled in the plan. |
| **Salary Factor** | Enter a multiplier (factor) that the system uses to calculate the amount of coverage provided to an employee, based on the employee's salary.<br>For example, a salary factor of 2.0 indicates coverage for an employee in the amount of twice the employee's salary. |
| **Rounding Amount** | Enter the amount that the system uses to round the coverage dollars to the nearest whole number. For example, if the coverage dollars are 15,250 and you enter 1,000 in this field, the system rounds the coverage dollars to 16,000. |
| **Maximum Increase Amount** | Enter the maximum increase of coverage that an employee can elect. |

# CHAPTER 21

# Setting Up Self Service Process Flows

This chapter provides an overview of self-service process flows and describes how to:

- Run the Populate Director Form Rules/Edits report.
- Define Process Flow Scripts.
- Set up translated director text

## Understanding Self Service Process Flows

Benefits self-service software includes the opportunity for human capital management administrators to extensively tailor the enrollment process to meet organizational requirements. Accessing this software through an Internet Web portal, you can change the appearance of the interface and the processes that employees use to manage their benefits.

You need to run the Populate Director Form Rules/Edits program (R8985500) prior to creating or changing self-service process flows.

You can use the Self-Service Process Flow Setup program (P05400) to define the process flow for your self-service programs. The process flow includes the steps that are necessary to complete a full life event or open enrollment change. These steps might include a variety of interactive programs, or director forms. You can create company or country-specific processes for each life or open enrollment event, including translated text to meet the needs of specific employee audiences.

Setting up process flows is required before employees, managers, or candidates can use self-service functions that require more than one program to complete.

## Running the Populate Director Form Rules/Edits Report

This section provides an overview of the Populate Director Form Rules/Edits report and describes how to run the report.

### Understanding the Populate Director Form Rules/Edits Report

The Populate Director Form Rules/Edits program (R8985500) creates and stores information that is used by the Self-Service Process Flow Setup program (P05400) to create new process flow scripts. You need to run this report before creating or changing process flow scripts. You normally need to run this report only once unless you are setting up access to additional self-service programs after your initial setup. This report populates these tables:

- Self-Service Step/Application Cross-Reference (F05402)
- Self-Service Script Position Rules (F05403)

The Self-Service Setup/Application Cross-Reference table saves a list of all the programs that you might need when you create process flow scripts.

The Self-Service Script Position Rules table saves all of the rules that govern the setup of self-service process scripts.

## Running the Populate Director Form Rules/Edits Report

From the Employee Self Service General Mgmt menu (G08BESS327), choose Populate Director Form Rules/Edits.

# Defining Process Flow Scripts

This section provides an overview of process flow scripts and describes how to define scripts.

## Understanding Process Flow Scripts

A human capital management administrator can use the Self-Service Process Flow Setup program (P05400) to define the action steps for new self-service process flows, copy and edit existing process flows, or delete process flows that are no longer applicable to organizational requirements. These process flows define the procedure that an employee uses to enroll in or change benefits or personal information.

For a new process flow, the user initially defines general information about the script, including the company and country to which the process flow applies. Next, the administrator defines each action step of the process flow. If the action step requires a program, the user specifies the program, including the version number. You can select only self-service programs. If the action step specifies a director form, the system uses the Self-Service Director Text program (P05401) to provide a form where the administrator defines the director text.

When you set up a process flow for an enrollment event, you should first create a default process flow for company 00000. In the default process flow, you should leave the country value blank so that the system always finds at least one script for each event. If you experience difficulty with running a process flow, the default process flow provides a shortcut to creating a new process flow.

To plan a self-service process flow and implement the procedure with minimum effort, you need to be aware of the rules and program relationships that govern process flows. You generated these rules by running the Populate Director Form Rules/Edits program (R8985500). When you specify action steps in a process flow that violates any of the rules, the system produces an error and an explanation of the problem.

### Self Service Process Flow Rules and Program Relationships

These are examples of the rules that govern the creation of a self-service process flow:

- A director must be included between each application in the flow. Each script must follow this order: director, program, director, program, and so on.
- The first director in a script must be enabled.
- If an action step is required in a flow, then you must also enable that step in the flow. Although a setup option exists for disabling an action step, required action steps must always be enabled.

- If you specify Self Service Action Step 70 *Dependent List* (P085551 - ZJDE001) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568 - ZJDE0002). Step 70 must precede Step 160.
- If you specify Self Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must place it after Step 70 *Dependent List* (P085551 - ZJDE001).
- If you specify Self Service Action Step 80 *Beneficiary List* (P085551 - ZJDE0002) in the process flow, then you must include Step 160 *Preview Benefit Changes* (P0855568 - ZJDE0002). Step 80 must precede Step 160.
- If you specify Self Service Action Step 100 *Number of Dependents to Cover* (P085560) in the process flow, then you cannot include Step 120 *Health & Welfare' Enrollment* (P085570). If you specify Step 120 *Health & Welfare' Enrollment* (P085570) in the process flow, then you cannot include Step 100 *Number of Dependents to Cover* (P085560). If you specify Step 100 or Step 120 in the process flow, then you must include Step 160 *Preview Benefit Changes* (P085568). Step 100 or 120 must precede Step 160.
- If you specify Self Service Action Step 150 *COBRA Notification* (P085580) in the process flow, then this step must follow any of these steps if they are in the process flow:

| Self Service Action Step | Program Number | Program Version (if required) |
|---|---|---|
| 70 | P08551 | ZJDE0001 |
| 80 | P08551 | ZJDE0002 |
| 100 | P085560 | Not Required |
| 120 | P085570 | Not Required |
| 160 | P085568 | ZJDE0002 |
| 170 | P085564 | Not Required |
| 180 | P085568 | ZJDE0003 |
| 190 | P085563 | ZJDE0001 |
| 200 | P085563 | ZJDE0002 |
| 210 | P085563 | ZJDE0003 |
| 220 | P085563 | ZJDE0004 |

- You must specify all or none of these Self Service Action Steps: 160 *Preview Benefit Changes* (P085568 - ZJDE0002), 170 *Accept Benefit Changes* (P085564), and 180 *Final Benefit Confirmation Statement* (P085568 - ZJDE0003). If you specify all three steps, you must define them in sequence after Steps 60 (P085562), 70 (P085551 - ZJDE0001), 100 (P085560) and 120 (P085570).
- When you specify these Self Service Action Steps, you must define them in this sequence: 160 (P085568 - ZJDE0002), 170 (P085564) and 180 (P085568 - ZJDE0003).
- If you specify any of these Self Service Action Steps, then you must include Step 160 (P085568 - ZJDE0002): 190 *'Indemnity' Plans to Change* (P085563 - ZJDE0001), 200 *'Retirement' Plans to Change* (P085563 - ZJDE0002), 210 *'Other' Plans to Change* (P085563 - ZJDE0003), or 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 160 must follow any of these steps in the process flow.

- If you specify Self Service Action Steps 190 *'Indemnity' Plans to Change* (P085563 - ZJDE0001), 200 *'Retirement' Plans to Change* (P085562 - ZJDE0002), and 210 *'Other' Plans to Change* (P085563 - ZJDE0003) in the process flow, then do not include Step 220 *Change All Remaining Categories* (P085563 - ZJDE0004). Step 220 causes redundancies in the script because the first three steps include the benefit plans that are defined in Step 220.

You can define any of the optional Self Service Category Codes, and use them for process identification and sorting at a later time.

The process of creating a self-service process flow includes multiple forms that the system displays in sequence. After completing a form, select Next.

Because all self-service process flows must begin with a director form, the system automatically selects the Display Director Form option and disables the Call An Application option.

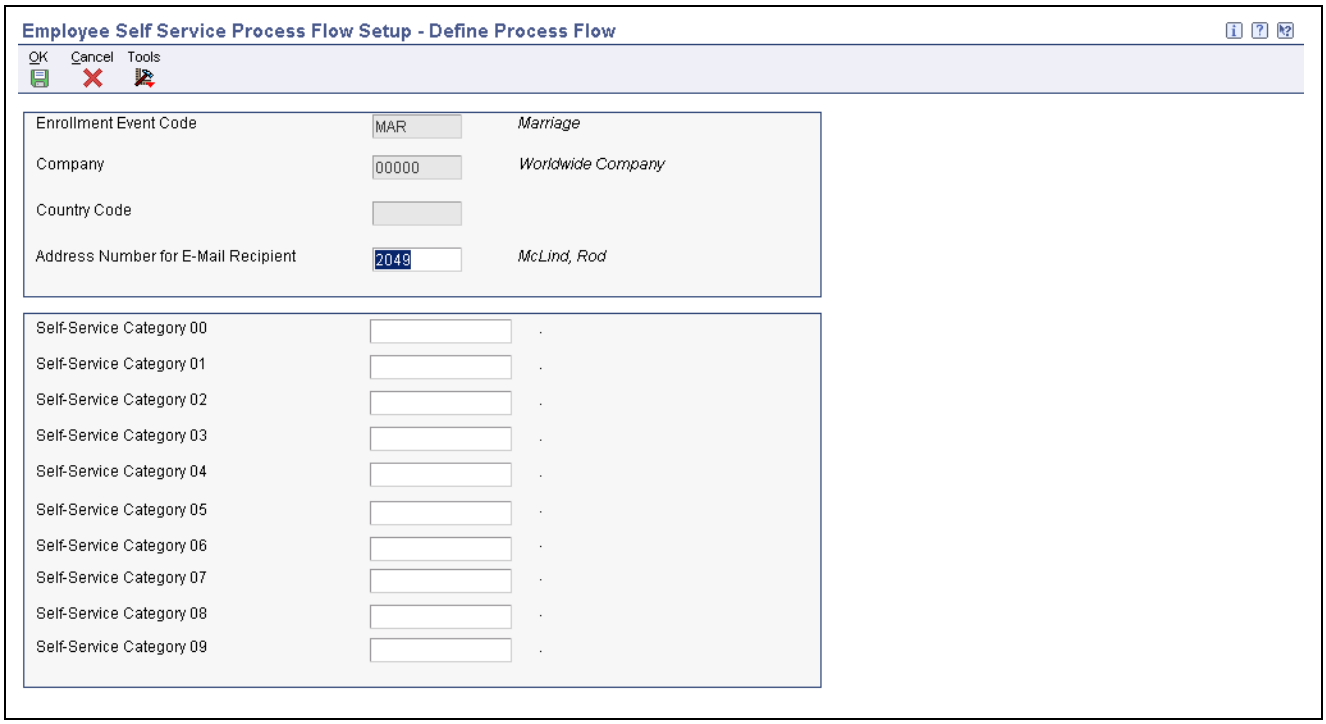
## Forms Used to Define Process Flow Scripts

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Self-Service Process Flow Scripts | W05400A | Employee Self Service Director Setup (G08BB411), Employee Self Service Process Flow Setup<br>Click Add. | Use the search and select form to access the Define Process Flow form. |
| Define Process Flow | W05400B | Click OK. | Enter appropriate values.<br>You enter the Enrollment Event Code in a processing option for the director when running a script. |
| Define a Process Flow Step | W05400C | Click OK.<br>Select Director Text from the Form menu. | Enter optional values.<br>On subsequent steps of the process flow, use the Version field only when you need to specify a specific program version. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Define Director Text | W05401B | Click OK. | To display a welcome message in the first director form, or describe the previous step for subsequent director forms, enter text in the first text field.<br><br>Do not use the Enter keyboard command to begin a new line of text. To format text in these fields, use HTML tags.<br><br>To display text below the list of enrollment process steps on the director form, use the second text field to enter appropriate text. The system also displays this text when an employee chooses online help.<br><br>To provide additional help for this process step, enter information in the third text field. For example, you might provide a sample of a correct entry, an explanation of possible warning messages, or instructions to resolve data entry problems. The system displays information from the third text field only when an employee clicks Help on this step in the process flow. |
| Design a Process Flow Step | W05400C | Action heading.<br><br>Action Definition heading.<br><br>Click Next. | The system automatically selects one of these options based on the process sequence. For example, after you define a director process step, the system automatically chooses the Call An Application option.<br><br>The system automatically provides the next number in sequence. You can change this number to alter the order in which the forms are displayed to employees. |

## Define Scripts

Access the Define Process Flow form.




Define Process Flow form

To define a process flow script:

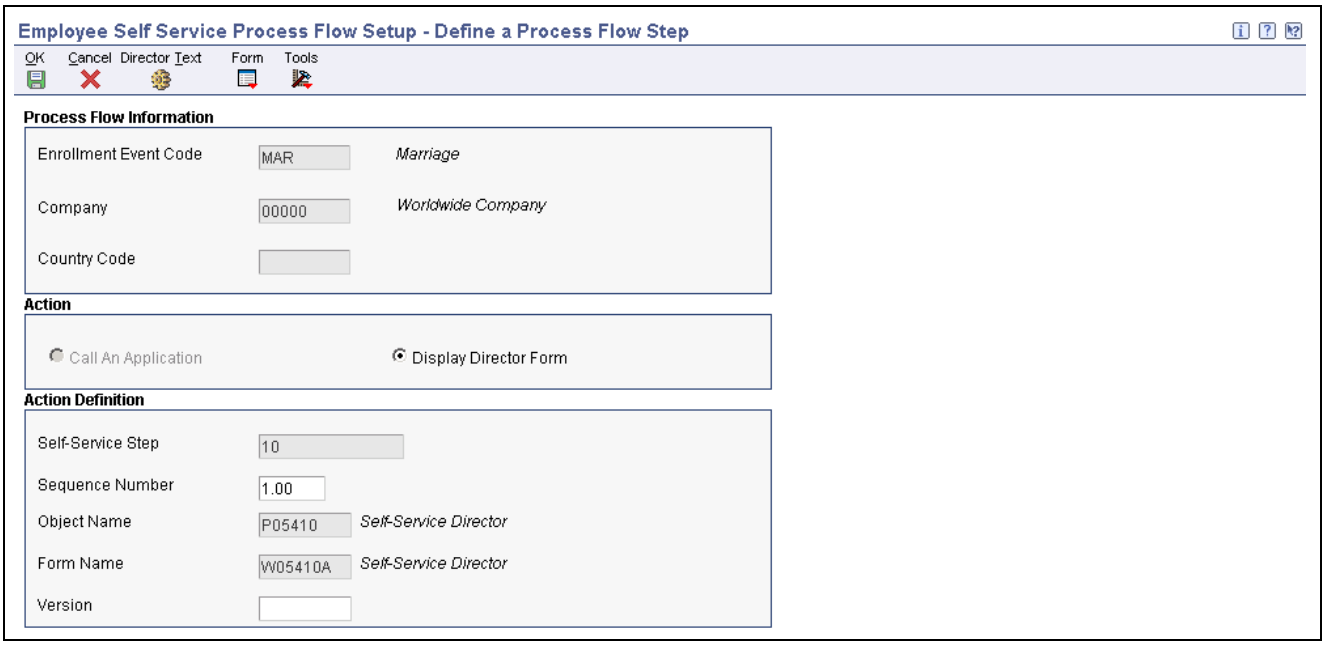
1. On Work With Self-Service Process Flow Scripts, click Add.
2. On Define Process Flow, complete these fields:
   - Enrollment Event Code
   - Company
3. Complete these optional fields and then click OK.
   - Country Code
   - Address Number for E-Mail Recipient

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

**Address Number for E-Mail Recipient** Enter a number that identifies an entry in the Address Book system. Use this number to designate the recipient of the email message an employee would send when they choose to “Contact HR” during the ESS process.

## Define a Process Flow Step

Access the Define a Process Flow Step form.



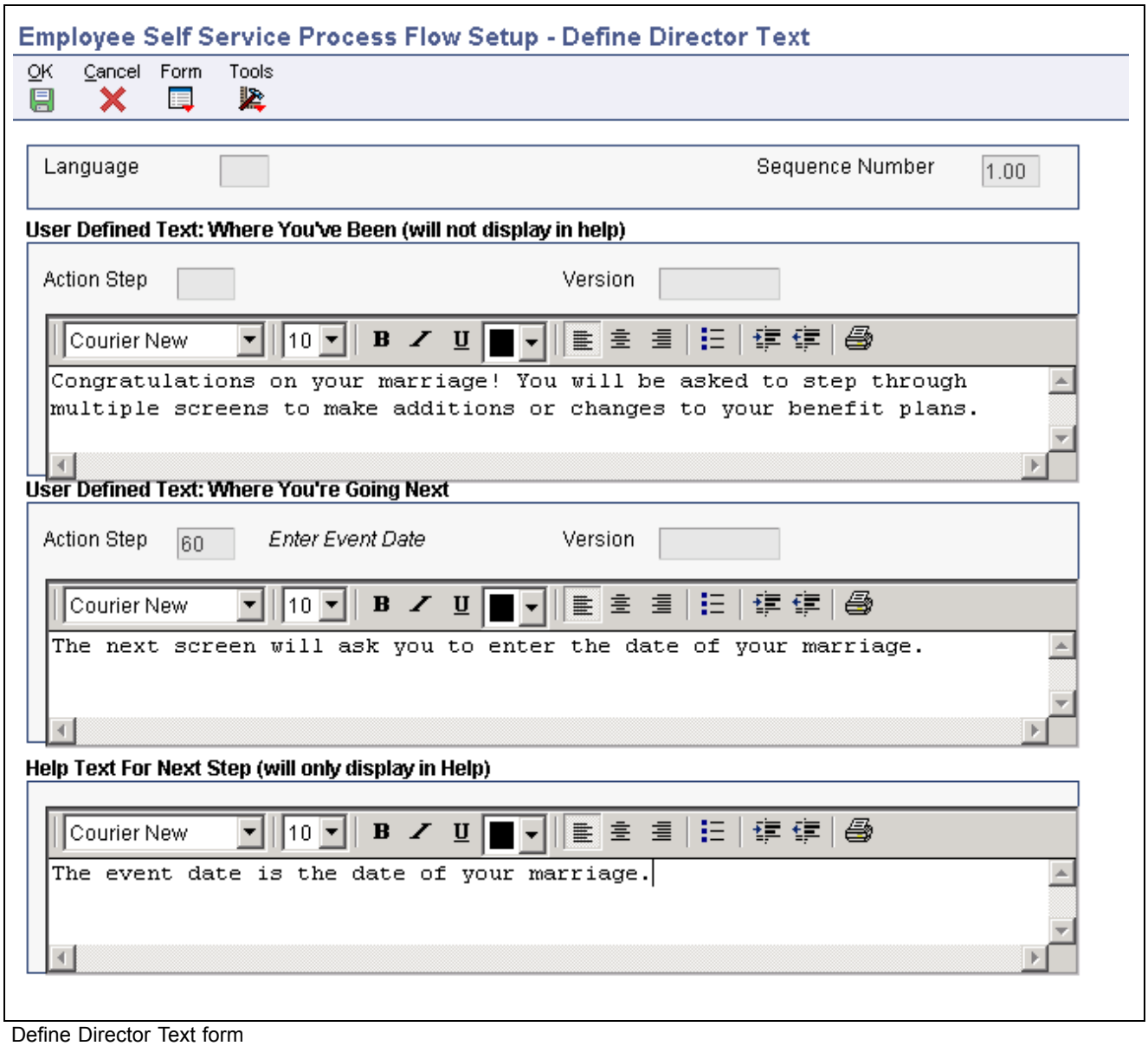

Define a Process Flow Step form

1. On Define a Process Flow Step, review the Sequence Number field and click Next.
2. On Define Director Text, add employee instructions, comments, or feedback that assist an employee in the enrollment process step.
3. On Define Director Text, click OK.
4. On Design a Process Flow Step, review these options under the Action heading:
   - Call An Application
   - Display Director Form
5. Complete these fields under the Action Definition heading and click Next:
   - Self-Service Step
   - Sequence Number
6. Repeat steps 2 - 7 until all steps of the process flow are complete.
7. When all process flow steps are defined, click Finish on the final appearance of the Design a Process Flow Step form.
8. On Process Flow Detail, review the process flow, make changes or additions, and then click OK.

**Sequence Number** Enter a number that specifies the sequence of information.

## Define Director Text

Access the Define Director Text form.



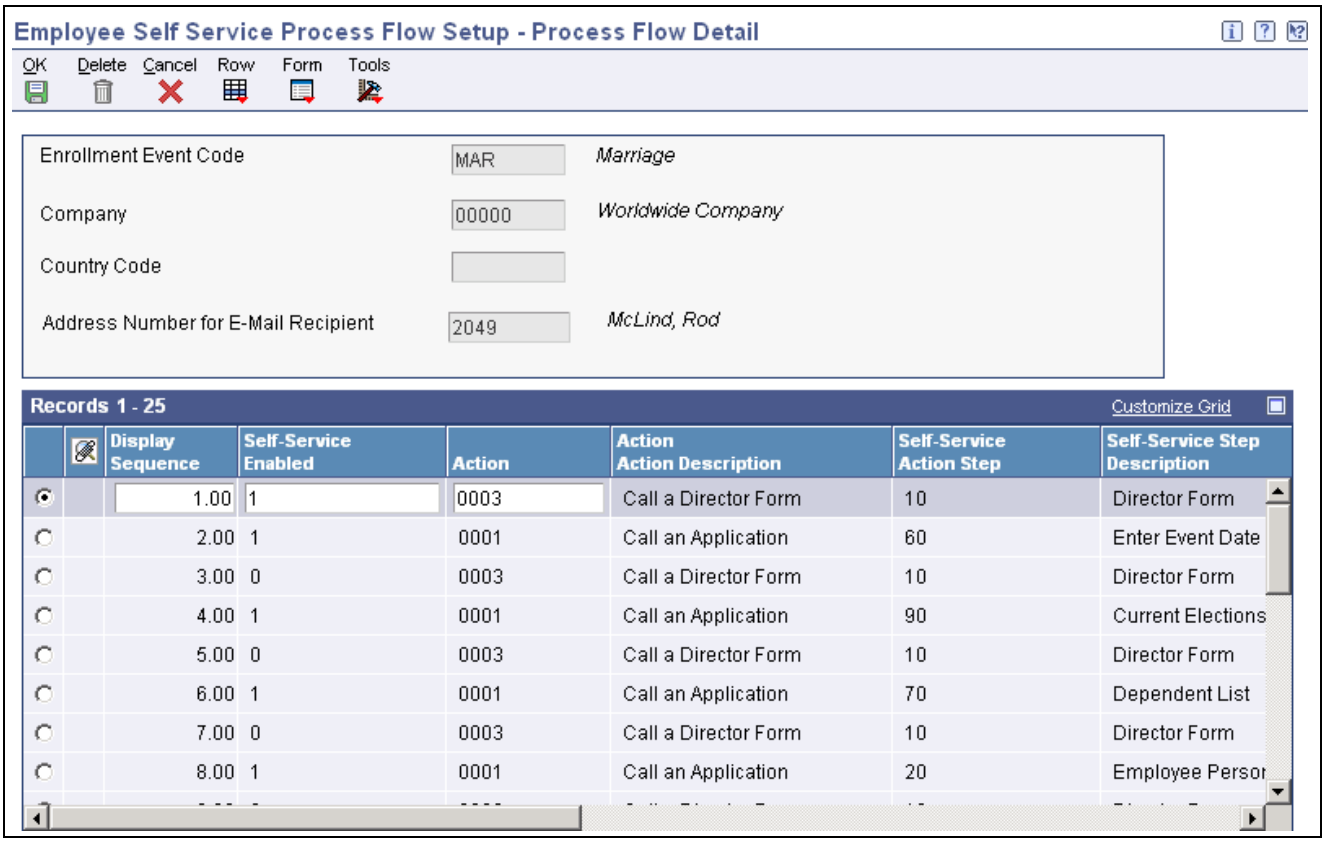

Define Director Text form

The HTML image tag for the help icon is as follows: `<IMG SRC =/jde/owjava/images/res/QuestBook.jpg>`. Depending on your setup procedures, the path for this image might be different in your system.

In the example above, if an employee clicks Help in the Enter Event Date program (P085562), the system displays the help text that you enter into the third text field on the Define Director Text form.

## Process Flow Detail

Access the Process Flow Detail form.



Process Flow Detail form

# Setting Up Translated Director Text

This section provides an overview of translated director text and describes how to set up the text.

## Understanding Translated Director Text

Each organization defines self-service process flows that employees use to enroll in benefits. Each of the director forms within a process flow contains user defined text in the domestic language that assists employees with the task. When self-service process flows are defined for additional companies and countries, the director form text entries might require translation.

To set up translated director text, you use the Self-Service Director Text program (P05401) to enter translated text.

## Forms Used to Set Up Translated Director Text

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| On Work With Director Text | W05401A | Employee Self Service Director Setup (G08BB411), Employee Self Service Director Setup<br>Click Select. | Find and select a record.<br>The domestic text from the record appears in each of the windows. |
| Define Director Text | W05401B | Select Translate from the Form menu.<br>Click OK. | Enter translated text. |

## Setting Up Translated Text

Access the Define Director Text form.

To set up translated director text:

1. On Work With Director Text, complete these fields and then click Find:
   - Enrollment Event Code
   - Company
   - Country Code
   - Sequence Number
2. Choose a self-service process flow record and click Select.
3. On Define Director Text, choose Translate from the Form menu.
4. Complete the Language field.
5. Enter translated text into each of the text areas.
6. When finished entering translated text, click OK.

# CHAPTER 22

# Setting Up Form Options and Workflow Approval

This chapter provides an overview of form options and describes how to:

- Set up form options.
- Set up benefit confirmation statement options.
- Set up self-service benefits workflow approval.

## Understanding Form Options and Workflow Approval Setup

Although self-service forms are designed to display personal information that many organizations find appropriate and useful, in the context of self-service, some human capital management administrators might need to change these choices. You can use the Employee Self Service Form Options program (P085550) to hide certain fields on a form or to disable certain fields so that the system displays information, but employees cannot enter changes.

You can use the Benefit Confirmation Statement Options program (P085518) to define the text on certain buttons in benefit enrollment statements. You normally define these statement forms at various intervals of the process flows for benefits enrollment.

You can design and use workflow processes to notify specific employees when an employee enters self-service changes. The system allows workflow processes to be created for these workfiles:

- Benefits information
- Personal information
- Emergency contact information

You can use the ESS Workfile Approval Setup program (P085515) to specify workflow processes that the system starts when changes are made to certain workfiles. You can have different versions of the same workflow process but which ever one is active at the time will be the version executed when a benefit change is made. If there are no active versions, the benefit change will be automatically approved in the F05420 record.

## Setting Up Form Options

This section provides an overview of setting up form options and describes how to:

- Set processing options for the Self-Service Director.
- Set processing options for Employee Information - Telephone Numbers.
- Set processing options for Dependent Enrollment.

- Set the form options.

## Understanding Form Options

The system default setting for the Employee Self Service Form Options program is to show all fields and enable input. Only overrides to this default need to be specified. If no overrides are entered, employees have full access to each of the features. The Grouping Code field is connected to UDC 08/EG. This UDC contains a record for each program that has controls that can be hidden. The predefined Grouping Codes are as follows:

| Grouping Code | Program Name |
|---|---|
| CON | Employee emergency contacts |
| DAB | Dependent and beneficiary personal information |
| PER | Employee personal information |

You can also set up processing options that specify display options on these forms:

- Self-Service Director (P05410)
- Employee Information - Telephone Numbers (P054215)
- Enrollment Statement (P085568)
- Dependent Enrollment (P085570)

To set up these processing options, you use the Interactive Versions program (P983051) to find the processing options template and then choose Processing Options from the Row menu.

## Forms Used to Set Up Form Options

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Employee Self Service Form Options | W085550A | Employee Self Service General Setup (G08BB413), Employee Self Service Form Options<br>Click OK. | Hide or display desired fields. |

## Setting Processing Options for Self-Service Director (P05410)

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

This processing option specifies the label for an enrollment event.

**1. Process Flow Event** Use this processing option to specify the type of processing event.

### Display

This processing option specifies whether the system displays or hides certain elements.

**1. Display Marital Status on the Director Form?** Use this processing option to specify whether the system displays the employee's marital status on the Director form. Values are:

*0:* No

*1:* Yes

**2. Display Salary on the Director Form?** Use this processing option to specify whether the system displays the employee's salary information on the Director form. Values are:

*0:* No

*1:* Yes

**3. Display Birth Date on the Director Form?** Use this processing option to specify whether the system displays the employee's birth date on the Director form. Values are:

*0:* No

*1:* Yes

**4. Display User Defined Text?** Use this processing option to specify whether the system displays user defined text that explains the next process step after completing information on Work With Self-Service Process Flow Scripts (P05400). Values are:

*0:* No

*1:* Yes

## Setting Processing Options for Employee Information - Telephone Numbers (P054215)

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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### Display

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

**Display Phone Prefix** Use this processing option to specify whether the phone prefix is displayed. Values are:

*0:* No, do not display prefix

*1:* Yes, display prefix

# Setting Processing Options for Dependent Enrollment (P085570)

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

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

**Hide Benefit Calculations** Use this processing option to specify whether the system displays benefit calculations. Value are:

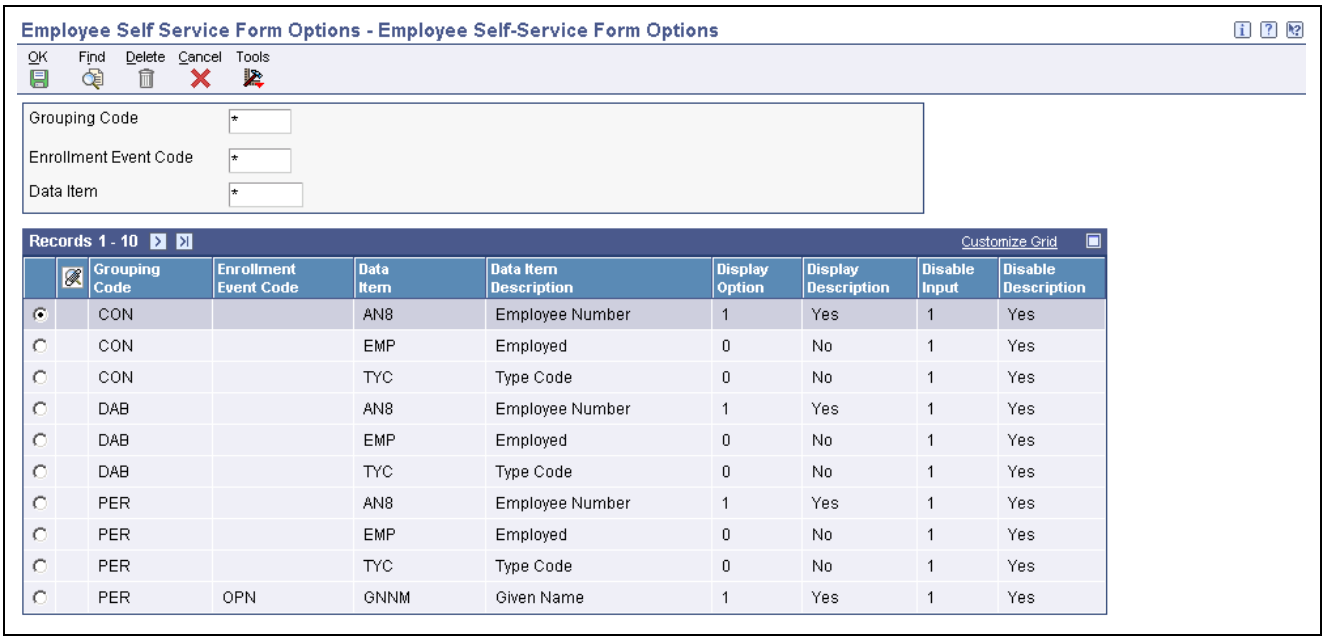
*0:* Do Not Hide

*1:* Hide Calculation Button

*2:* Hide Calculation Button and Totals

# Set the Form Options

Access the Employee Self Service Form Options form.




Employee Self-Service Form Options form

To set up form options:

1. On Employee Self-Service Form Options, complete these fields and then click Find:
   - Grouping Code
   - Enrollment Event Code
   - Data Item
2. To hide or disable the display of a data item, complete these fields for each item:
   - Grouping Code
   - Enrollment Event Code
   - Data Item
   - Display Option
   - Disable Input
3. Click OK.

**Grouping Code** Enter a code that associates related data dictionary objects so that actions, such as hiding and showing, can be performed on the entire group instead of on each of the individual items.

**Display Option** Select a flag to display the records for a particular operation or all the records. Values are:

*0:* No, do not display data item.

*1:* Yes, display data item.

**Disable Input** Enter a code that lets the system revise the records using new information.

Values are:

*0:* Yes, allow updating.

*1:* No, do not allow updating.

# Setting Up Benefit Confirmation Statement Options

This section provides an overview of setting up benefit confirmation statement options and describes how to:

- Set processing options for enrollment statement
- Set up benefit confirmation statement options.

## Understanding Benefit Confirmation Statement Options

You can change text on the buttons to suit individual events, versions, languages, countries, and organizations. You can change the text on each button or you can hide the text. If you leave the text field blank, the system uses the default text that is currently displayed in the software.

On some forms, certain buttons are always hidden, regardless of the settings that you might input in this program. For example, the Next button is valid only on the Current Statement and Final Statement. The Back button is valid only on the Current Statement and the Pending Statement. The Submit Your Changes button exists on the Pending Statement .

## Forms Used to Set Up Benefit Confirmation Statement Options

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Benefit Statement Options | W085518A | Employee Self Service General Setup (G08BB413), Benefit Confirmation Statement Options<br>Click OK. | Configure the options. |
| Statement Text | W085518D | Select Statement Text from the Row menu.<br>Click OK. | Review and update only the confirmation statement text. |

# Setting Processing Options for Enrollment Statement (P085568)

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.

### Options

Use these processing options to set default values.

**1. Confirmation Statement Options** Use this processing option to specify the type of statement. Values are:

*C:* Current Statement

*P:* Pending Statement

*F:* Final Statement

**2. Employer Cost** Use this processing option to specify display settings. Values are:

*0:* Hide

*1:* Show

**3. Final Statement** Use this processing option to specify display settings. Values are:

*0:* Show summary of benefits

*1:* Show transaction number only

**4. Previous Employee Cost** Use this processing option to specify display settings. Values are:

*0:* Hide

*1:* Show

**5. Categories To Display** Use this processing option to specify display settings. Values are:

*0:* Show all categories

*1:* Show only categories in F085510

**6. Categories In Final Statement** Use this processing option to specify display settings. Values are:

*0:* Show all categories

*1:* Show only enrolled categories

## Default

Use these processing options to specify mailing address information for declined coverage statements. Values are:

**1. Enter the Company Name** Use this processing option to specify the company name.

**2. Enter the Company Address** Use this processing option to specify the company address.

**3. Enter the City** Use this processing option to specify the city.

**4. Enter the State** Use this processing option to specify the state.

**5. Enter the Postal Code** Use this processing option to specify the postal code.

**6. Enter the Persons Name For, Attention Of:** Use this processing option to specify the display setting. Values are:

*For:* (person's name)

*Attention Of:*

### Date

Use these processing options to specify calendar date information for the current enrollment form. Enter a valid date to override the options. Values are:

**1. Current Enrollment Form Date to Display** Use this processing option to specify display settings. Values are:

*0:* No date displayed

*1:* Latest plan enrollment date

*2:* System date

**2. Current Enrollment Form Date to Display** Use this processing option to specify the current enrollment form date to display.

### E-Mail

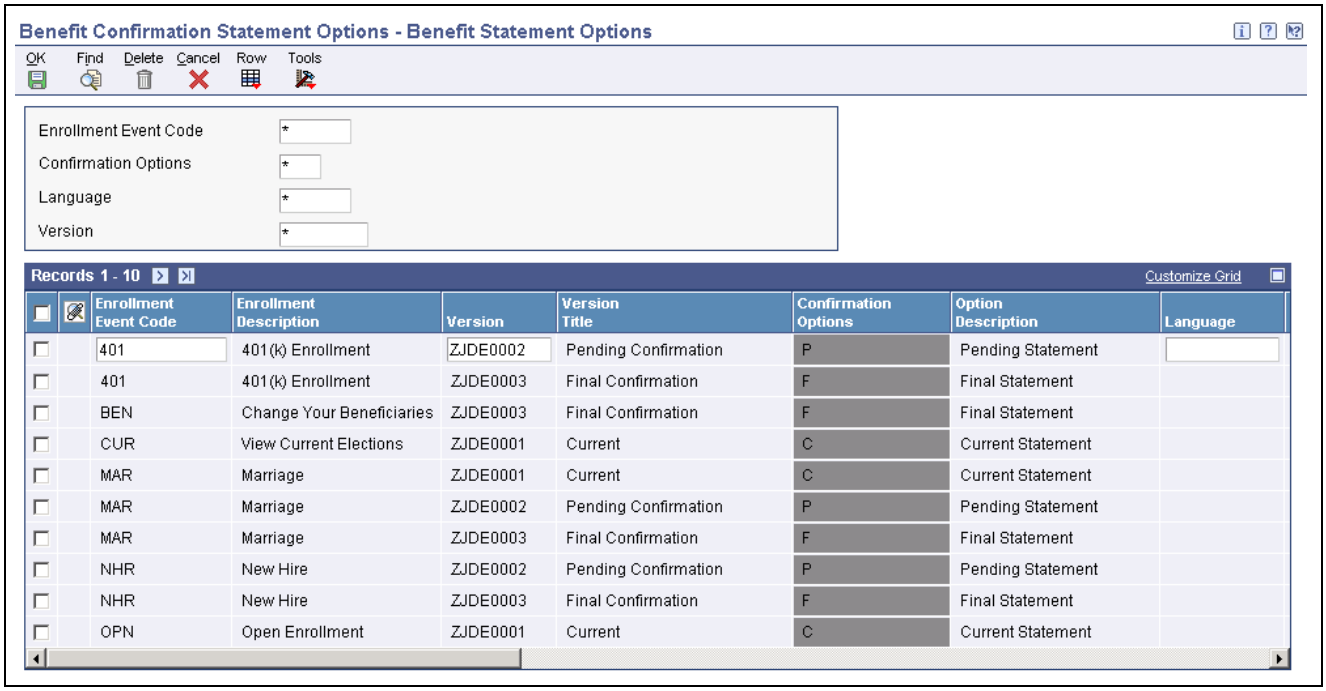
Use this processing option to specify a valid email address. Values are:

**1. From E-Mail Address** Valid email address

Blank: Same as To Address

## Set Up Statement Options

Access the Benefit Statement Options form.




Benefit Statement Options form

To set up benefit confirmation statement options:

1. On Benefit Statement Options, complete these fields:
   - Enrollment Event Code
   - Confirmation Options

- Language
- Version Title

2. To configure the Next, Back, Print, Mail, and Submit buttons on the benefit confirmation form, complete these fields for each event:
   - Enrollment Event Code
   - Version
   - Language
   - Print Button Text
   - Mail Button Text
   - Send E-Mail to HR Text
   - Hide Mail
   - Hide Print
   - Statement Text
3. When all enrollment event changes are complete, click OK.
4. To review and update only the confirmation statement text, you can choose an enrollment record and then choose Statement Text from the Row menu.
5. When changes are complete, click OK.

**Confirmation Options** Enter a value that identifies the version of the Employee Self Service Confirmation Form that the system uses. You can use the current, pending, or final versions.

**Version Title** Enter a user defined version name or remark.

**Print Button Text** Enter the text that the system displays on the Print button on employee self service forms.

**Mail Button Text** Enter the text that the system displays on the Mail button on employee self service forms.

**Send E-Mail to HR Text** Enter the text that the system displays on the Send E-Mail to HR text block on employee self service forms.

**Hide Mail** Enter an option that determines whether a user can choose to have a copy of the benefit confirmation statement mailed to their home address using the employee self service forms. Values are:

*0:* Display and enable the option

*1:* Hide and disable the option

**Hide Print** Enter an option that determines whether a user can print a copy of the benefit confirmation statement using the employee self service forms. Values are:

*0:* Display and enable the print option

*1:* Hide and disable the print option

**Statement Text** Enter a user defined name or remark to be shown on the confirmation statement.

# Setting Up Self Service Benefits Workflow Approval

This section provides an overview and describes how to set up self-service benefits workflow approval.

## Understanding Self Service Benefits Workflow Approval

Employee self service benefits software includes the BENAPPRV default process. This process sends an email message and includes an acceptance form. Although the system uses only the BENAPPRV workflow process, you can create and use additional workflow processes, modified to meet organizational requirements, with each enrollment event code and work file combination. The system requirement for each workflow process is that the data structures cannot be changed.

In an open enrollment event, employee benefit changes start the workflow process. If an employee enters additional changes through self-service, the system terminates any related, active workflow processes and removes pending approvals from the email system. If the workflow process cannot start, possibly because the version number is unavailable, the system sends the process recipient a notification message regarding the process failure and then accepts the benefit changes. If workflow processes are enabled in your software, you cannot update employee changes to the live tables until all workflow processes are approved.

To create a new workflow process, from OMW create a copy of BENAPPRV.

You can modify a workflow process until the new process is run the first time. When you run the workflow process, the system creates an instance record and saves the record in the Process Instance table (F98860). You must delete all instance records created by running a workflow process before you can enter changes to the process.

## Forms Used to Set Up Self Service Benefits Workflow Approval

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Benefits Workflow Approval Setup | W085515C | Employee Self Service Workflow Setup (G08BB412), Self Service Benefits Workflow Approval | Enter values to set up the workflow approval.<br>The value in the Process Status column will display a Y if any of the versions for the selected workflow process are active. |

## Set Up Workflow Approval

Access the Benefits Workflow Approval Setup form.

To set up a self-service benefits workflow approval:

1. On Benefits Workflow Approval Setup, complete one or both of these fields and click Find:
   - Enrollment Event Code
   - Work File Object Name
2. To ensure that the workflow process includes appropriate specifications, review these fields:
   - Event Code
   - Work File Object Name

- Workflow Process
- Process Status
- MB DS

**Work File Object Name** Enter the name of the work file object to be used in workflow processes.

**Event Code** Enter the user defined code (08/BE) that you use to denote an enrollment event such as marriage.

**Workflow Process** Enter the unique identifier for a process. If no value is entered, a next number is assigned. Once assigned, the value cannot be changed.

**Process Status** Indicates if there is an active version of the process. Only one active version can exist of a workflow process. Values are:

*Y:* Active

*N:* Not active

*E:* In use

**MB DS** Enter a field that determines the mailbox associated with the queue that should be used on delivery of the message.

# CHAPTER 23

# Saving Self Service Employee Information

This chapter provides an overview of self-service employee information and describes how to:

- Save employee personal information.
- Save self-service benefits information.

## Understanding Saving Employee Information

When employees enter changes to their benefits, personal information, or dependent and beneficiary information, the system saves the changes in workfiles. This information needs to be periodically saved to system live files. After you set up benefits self-service, including the required workfiles, you need to schedule reports to run that periodically save this information.

Other programs such as Address Book Constants (P0000) can also cause the system to save information that can be subsequently saved in the live tables that contain self-service information. For example, when a value in Address Book Constants is set to record address information with an effective date, the Update Employee Personal Information to Live Tables program (R054104) includes the date effective address information when you save self-service changes. When you set up your system to include date effectiveness, you also need to run the Effective Address Update program (R01840) to mark the latest address as the current address.

### See Also

*PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, "Setting Up the Address Book System," Setting Up Constants

## Saving Employee Personal Information

This section provides an overview of saving employee personal information and describes how to:

- Run the Update Employee Personal Information to Live Tables program.
- Set processing options for the Update Employee Personal Information to Live Tables program.

### Understanding Employee Personal Information Storage

You can use the Update Personal Info to Live Tables program (R054104) to save self-service changes to live system tables. This program also saves new date effective address information if the appropriate option is set in the Address Book Constants program (use P0000). Processing options specify the types of changes that are saved:

- Employee personal information
- Dependent and beneficiary information
- Employee personal information and dependent and beneficiary information

You should run this program after employees use self-service to change any of their personal information. Since you might not be aware of when changes are entered, you should schedule this program to run periodically so that the system saves new information to the live tables at least once each week. You should also run this program at the conclusion of each open enrollment period. After the system updates the live tables, employees can review the new changes on self-service forms.

The Update Personal Info to Live Tables program includes a review of self-service workflow. This program verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this programs process saves information to history tables so that employees can look up changes by transaction number.

The system references these tables for this program:

- Employee Personal Profile Information Work (F054101W)
- Employee Phone Number Work (F054115W)
- Employee Emergency Contact Work (F054111W)
- Employee Master Information (F060116)

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**Note.** If the GeoCoder for Human Resource Management applications is active, the Update Personal Info to Live Tables program automatically updates employee tax area information if the changes that are made using self-service include a change to the employee's city, state, county, province, or postal code. If there are multiple valid GeoCodes for the employee's new address information, the system produces an exception report and does not update the employee's GeoCode. In these instances, you must select the correct GeoCode from the exception report and manually update the employee's tax area information.

---

### See Also

*PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook*, "Assigning Tax Area Information Using the GeoCoder"

## Running the Update Employee Personal Information to Live Tables Program

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Personal Info to Live Tables.

## Setting Processing Options for Update Employee Personal Information to Live Tables (R054104)

You can use these processing options to specify the group of individuals whose records are processed and the mode in which the UBE is run.

### Process

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

**1. Write Personal Information for Employee, Dependent/Beneficiary or Both:**

Use this processing option to specify the group of individuals whose employee self service records are processed. Values are:

*1:* Employee records from the employee self service work files.

When you use this value, you should run the program in proof mode.

*2:* Dependent and beneficiary records from the employee self service work files.

When you use this value, you should run the program in proof mode.

*3:* Employee, dependent, and beneficiary records from the employee self service work files.

When you use this value, you can run the program in either proof or final mode.

**2. Mode:**

Use this processing option to specify the mode in which the system runs the process.

*0:* Run the process in proof mode. Do not update the tables.

*1* (or Blank): Run the process in final mode and update all appropriate tables.

# Saving Self Service Benefits Information

This section provides an overview of saving self-service benefits information and describes how to:

- Run the Update Benefits Information to Live Tables program.
- Set processing options for the Update Benefits Information to Live Tables program.

## Understanding Benefits Information Storage

From the Update Work File Data to Live Tables menu (G08BESS325), choose Update Benefits Info to Live Tables.

You can use the Update Benefits Information to Live Tables program (R085524) to save self-service benefit changes. This program ensures that any eligibility rules are met and then saves changes from benefit workfiles to system live tables. If changes are made during open enrollment, you should run this program after the open enrollment period is closed. If changes are made because of life events, then you should run this program before each payroll is processed, so the system can save new DBA information to the appropriate files.

The Update Benefits Info to Live Tables program includes a review of self-service workflow. This program verifies that required workflow approvals are complete before the system processes employee benefit changes. The final step of this programs process saves information to history tables so that employees can look up changes by transaction number.

The system references these tables for this program:

- Employee Master Information (F060116)
- Available Plans and Plan Options by Employee Work Table (F085520W)
- Dependent/Beneficiary X-Reference Work Table (F085536W)

# Setting Processing Options for Update Benefits Information to Live Tables (R085524)

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. Enrollment Event Type:** Use this processing option to specify the enrollment event type. Values are:

*1:* Open Enrollment

*2:* Current Enrollment

**2. Mode:** Use this processing option to specify the mode that the system uses to run the report. Values are:

*0:* Proof

*1:* Final

## Defaults

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

**1. End Enrollment Status:** Use this processing option to specify the desired ending enrollment status.

**2. End Enrollment Status based on Plan End Date(s):** Use this processing option to specify the desired ending enrolment status based on plan end dates.

# CHAPTER 24

# Reviewing History and Revising Self Service Workfiles

This chapter provides an overview of setting up common settings for self-service and describes how to:

- Review employee self service history.
- Revise the Current Coverage Workfile.
- Revise the Available Plans Workfile
- Review Dependent and Beneficiary Current Coverage Revisions
- Revise the Dependent and Beneficiary Updated Revisions Workfile
- Revising the Personal Profile Workfile

## Understanding Self Service History and Workfiles

Employees can use the Work With Employee Self Service History program (P085585) to review changes to their company benefits. When an employee enters changes to benefits, either as the result of a qualifying life event or during open enrollment, the system tracks all changes and saves them in history files. An employee might use this program to review current benefits to see if they need to be updated or to check the records for errors.

A system administrator can use workfile maintenance programs to enter changes to the benefits self-service workfiles. Although entering changes directly to a workfile should be an unusual event, you can directly change the data in the workfiles to correct errors or enter changes that occur outside of normal parameters. You might use this approach for any of these tasks:

- Review files for data errors
- Correct errors
- Enter changes to data outside of open enrollment

**Important!** Access to this program should have the highest possible level of system security because when you revise self-service benefits information manually:

The system does not validate data entry.

Changes entered in this program can create unintentional detrimental effects in other programs.

Data can be removed or changed that negatively affects payroll processing and employee benefits.

Only an expert software user should enter changes to benefits self-service workfiles. The user should be aware of all of the benefits self-service tables and understand the interactions of the enhanced self-service software. No data integrity checking is performed by any of the maintenance programs. For example, if a system administrator changes an employee enrollment from family coverage to employee only, errors result unless associated dependent records for the family enrollment are also changed.

A system administrator can remove data from the workfiles without replacing the data with valid values. For example, if an administrator mistakenly removes a benefit plan option, all employees enrolled in the benefit plan option are affected. The self-service workfiles might require rebuilding as the result of potential errors.

If you find it necessary to enter manual changes to self-service benefits history tables, back up your history workfiles and contact PeopleSoft for technical support.

# Reviewing Employee Self Service History

This section provides an overview of employee self service history review and describes how to:

- Set processing options for the Work With Employee Self Service History program.
- Review employee self service history.

## Understanding Employee Self Service History

The Work With Employee Self Service History program displays historical information in these categories:

- Personal information
- Telephone information
- Emergency contact information
- Dependent and beneficiary information
- Benefit plan and benefit plan option information

The Work With Employee Self Service History program uses these tables:

- Employee Personal Profile Information History (F054101)
- Employee Emergency Contact History (F054111)
- Employee Phone Number History (F054115)
- Available Plans and Plan Options by Employee History (F085520)
- ESS History Table Cross Reference (F085528)

If changes to benefit information are required, and the open enrollment period is open, you can enter changes until open enrollment closes. If the open enrollment period is closed, you should contact the human capital management administrator.

If changes to benefit information are entered as the result of a qualifying life event, and the allowed period of time for entering benefit changes has not expired, you can enter changes. If the allowed period of time for entering benefit changes has expired, you should contact the human capital management administrator.

## Forms Used to Review Employee Self Service History

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Employee Self-Service History Reference | W085585A | Intranet Portal, Employee Self-Service History Reference<br>Choose Next. | The underlined reference number is a link to historical information.<br>When you view the Personal Profile History, Emergency Contacts History, or Plan/Plan Option History forms, a Next button appears only if changes exist. |

# Setting Processing Options for Work With Employee Self Service History (P085585)

Use these processing options to set default values.

### Default

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

**1. Address Number of HR E-Mail Recipient**

Use this processing option to specify whether the system displays an option to enter the address number of an HR representative who is designated to receive email notification. Values are:

*0:* No

*1:* Yes

### Display

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

**1. Display Employer Cost column on Plan and Plan Option History Form.**

Use this processing option to specify whether the system displays the Employer Cost column on the Plan and Plan Options History form.

**2. Display text and buttons to resemble the Enrollment Statement.**

Use this processing option to specify whether the system displays text and buttons for each of these enrollment statements. Values are:

*C:* Current Enrollment Statement (Default)

*P:* Pending Enrollment Statement

*F:* Final Enrollment Statement

## Review History

Access the Employee Self-Service History Reference form.

To review employee self-service history:

1. On Employee Self-Service History Reference, choose an underlined reference number. Depending on the link that you choose, one or more of these history forms appears:
   - Employee Personal Profile History
   - Emergency Contacts History
   - Dependent/Beneficiary History
   - Plan/Plan Option History
2. To view the financial summary for benefit plan or benefit plan options, choose the Plan/Plan Option History link, then choose Next. The plan/plan option history form displays the same data that appears on the final benefits enrollment confirmation form during the open enrollment process. Depending on how the self-service benefits programs are set up, these items might not appear:
   - Flex cost column
   - Employer cost column
   - Cost per pay period row
   - Send E-mail to HR button

# Revising the Current Coverage Workfile

This section provides an overview and describes how to revise the Current Coverage Workfile.

## Understanding the Current Coverage Workfile

An expert system administrator can use the Employee Enrollment Work File Revisions program (P085530W) to enter changes to data in the Employee Current/Pending Elections Work Table (F085530W) before the system saves the temporary information from this table in the live tables. For example, if data errors are discovered in current employee coverage information, the system administrator can change, remove, and add data to the workfile.

After you build the Employee Current/Pending Elections Work Table, this table provides a picture of all the current employee enrollment information. Because enrollment changes that employees enter do not affect this file, you can use this file as a reference point when working in the Available Plans and Plan Options by Employee program (P085520W).

The system administrator should be aware that many changes that are possible in this program might include interdependent considerations in other tables. All changes to data using the benefits maintenance programs must be entered and tracked manually. The system does not review, track, or implement related changes to this or other tables.

### See Also

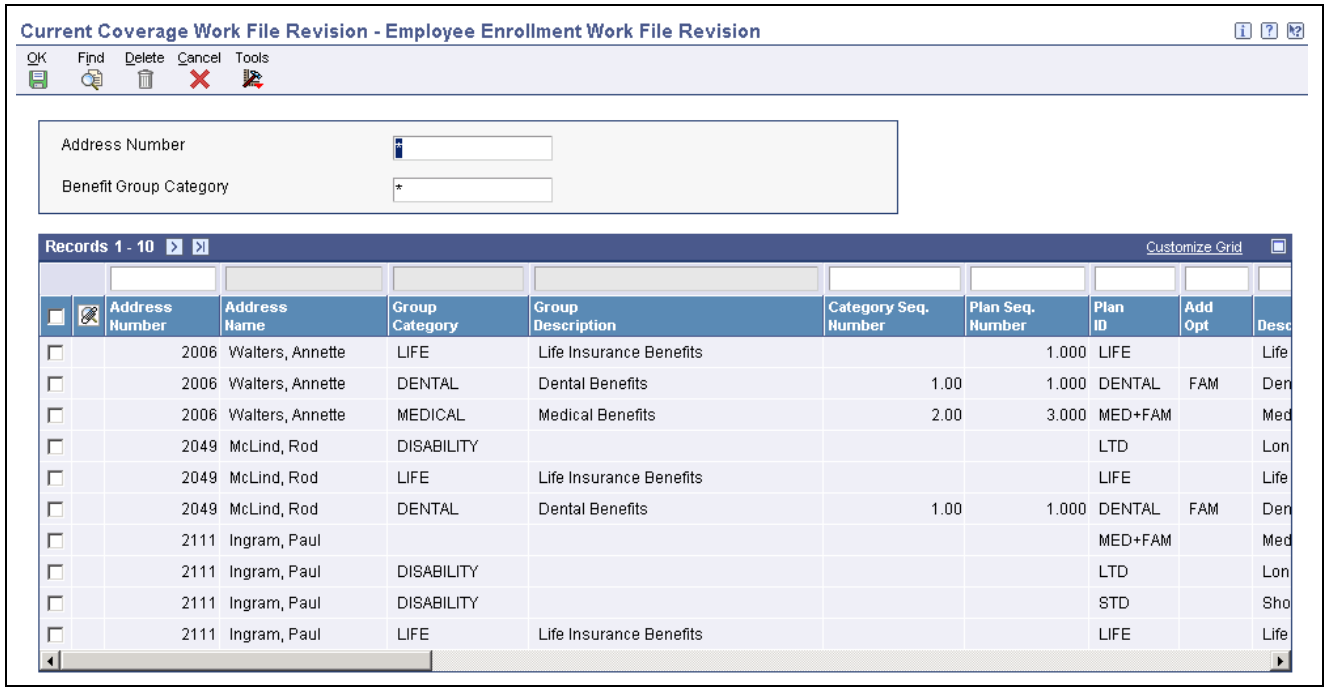
Chapter 23, “Saving Self Service Employee Information,” page 181

# Forms Used to Revise the Current Coverage Workfile

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Employee Enrollment Work File Revision | W085530WA | Current Coverage Work File Management (G08BESS321), Current Coverage Work File Revision | The values in step 3 cannot be changed. These values are used for history tracking purposes and display information about the last change to the employee benefit record. |

# Revise the Workfile

Access the Employee Enrollment Work File Revision form.



Employee Enrollment Work File Revision form

To revise the current coverage workfile:

1. On Employee Enrollment Work File Revision, complete one or both of these fields, and then click Find:
   - Address Number
   - Benefit Group Category
2. Review the values in these fields, making changes if appropriate:
   - Address Number
   - Group Category
   - Plan Seq. Number
   - Plan ID
   - Add Opt
   - Effective Date

- Benefit Category Classification
- Plan Grouping
- Plan Cost
- Plan Credit
- Flex Cost
- D B
- Additional Amount
- Amount or Rate
- Amount or Rate
- PCP Flg
- PCP Visited
- PCP Number
- Category Seq. Number
- Category Type
- Ending Date
- Stay In Group
- Non-Participating Plan

3. Review the values in these fields:
   - User ID
   - Program ID
   - Work Stn ID
   - Date Updated
   - Time Updated
4. Click OK to save the changes in the workfile.

**Category Seq. Number** Enter a number used to sequence information for review purposes only.

**Benefit Category Classification** Enter a code that designates benefit categories that are grouped together.

**Additional Amount** Enter an additional amount that the employer contributes toward the cost of a benefit option. For example, an employer might pay 100.00 toward the cost of the option for family medical coverage.

**Amount or Rate** Enter a value in this field as a percentage, a dollar amount or an hourly rate depending upon where it is being used.

When used in conjunction with a Deduction, Benefit or Accrual Type this field may represent many of the above values depending upon the value of the D/B/A method code (DEDM).

**Amount or Rate** Enter a value in this field as a percentage, a dollar amount or an hourly rate depending upon where it is being used;

| | |
|---|---|
| | When used in conjunction with a Deduction, Benefit or Accrual Type this field may represent many of the above values depending upon the value of the D/B/A method code (DEDM). |
| **Plan Seq. Number** | Enter a number used to organize the table into a logical group for online viewing and reporting. |
| **Non-Participating Plan** | Enter a code that specifies whether an employee can elect to decline participation in the benefit plan. |
| **User ID** | Enter the code that identifies a user profile. |

# Revising the Available Plans Workfile

This section provides an overview and describes how to revise the Available Plans Workfile.

## Understanding the Available Plans Workfile

An expert system administrator can use the Available Plans and Plan Options by Employee program (P085520W) to enter changes to the data in the Available Plans and Plan Options by Employee Work Table (F085520W) before the system stores the temporary information from this table in the live tables.

After you build the Available Plans and Plan Options by Employee Work Table, this table provides a current picture of all the available benefit plans and benefit plan options from which an employee can choose. As employees enter changes, this file records the changes that are active for the upcoming benefit plan year.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, an employee is unable to update benefits choices during open enrollment and open enrollment is now closed. During open enrollment, the system automatically assigned the current benefit choices as the choices for the upcoming benefit year. The records in the Available Plans and Plan Options by Employee Work Table show that the employee is enrolled in a Preferred Provider Option benefit plan (PPO) for the upcoming benefit year. The employee wants to change medical coverage from a PPO plan to an HMO plan. The system administrator can use the Available Plans and Plan Options by Employee program to remove the employee enrollment in the PPO plan and record an enrollment in an HMO plan. The system administrator must be aware that if dependents are affected by the benefit plan change, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

### See Also

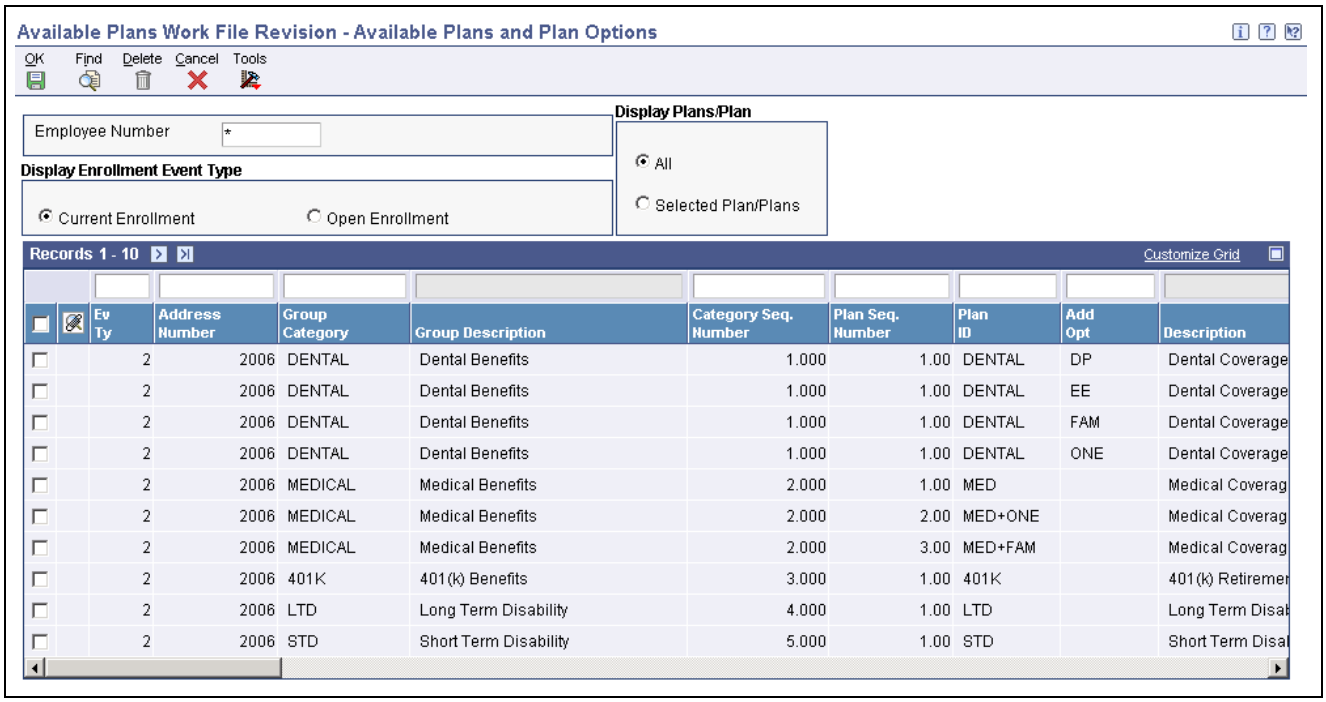
Chapter 23, “Saving Self Service Employee Information,” page 181

# Forms Used to Revise the Available Plans Workfile

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Available Plans and Plan Options | W085520WA | Available Plans Work File Mgmt (G08BESS322), Available Plans Work File Revision<br><br>Display Enrollment Event Type area.<br><br>Display Plans/Plan area. | Electronic Signature ID and the next four data items, Date Updated, Time Updated, Updated By, and Program ID, track the last time that the employee made a change to the benefit record.<br><br>Date Updated and the three data items, Update Time, User ID, and Work Stn ID, track the last time anyone made a change to the benefit record, whether that person was the employee or another person.<br><br>The values in step 5 cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record. |

# Revise the Available Plans Workfile

Access the Available Plans and Plan Options form.




Available Plans and Plan Options form

To revise the available plans workfile:

1. On Available Plans and Plan Options, complete the Employee Number field.
2. In the Display Enrollment Event Type area, select either the Current Enrollment or the Open Enrollment option.
3. In the Display Plans/Plan area, choose either the All or the Selected Plan/Plans option, and then click ‘Find.
4. Review the values in all of the fields and make changes, if appropriate:
5. Click OK to save the changes in the workfile.

**Employee Number** Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Ev Ty** Enter a value in the field that indicates the event during which the enrollment occurs. Valid values include:

*1:* Open Enrollment

*2:* Enrollment for current plan year

**Sequence Number** Enter a number used to organize the table into a logical group for online viewing and reporting.

**Amt Rte** Enter a code that indicates whether you can enter an amount or rate when you enroll an employee in a benefit plan. Typically, you enter *Y* (yes) when the employee determines the amount of a deduction or a benefit. Examples include 401(k) percentages, dependent care, and health care reimbursements.

**Employee DBA ID** Enter the DBA defined in the Payroll Transactions Constants table (F069116) that is used to calculate the dollar amount that the employee contributes by enrolling in the plan. In most cases, this DBA is defined to deduct pay from the enrolled employee’s check.

**Employer DBA ID** Enter the DBA defined in the Payroll Transactions Constants table (F069116) that the system uses to calculate the dollar amount that the employer contributes to the employee enrolled in the plan. In most cases, this DBA is defined as a benefit to add pay to the enrolled employee’s check.

**Additional Amount** Enter an additional amount that the employer contributes toward the cost of a benefit option. For example, an employer might pay 100.00 toward the cost of the option for family medical coverage.

**Non-Participating Plan** Enter a code that specifies whether an employee can elect to decline participation in the benefit plan.

**Ded Pnts** Enter the DBA defined in the Payroll Transactions Constants file (F069116) that is used to calculate the points amount that the employee contributes by enrolling in the plan in a flexible spending environment.

DBAs used for points in a benefit plan or option must meet two requirements:

- The DBA must have blanks in the specification for Gross Effect and Net Effect (data items PAYG and PAYN) so that the use of non-dollar points does not add or subtract dollars from employee pay.

- The DBA must have an M in the specification for Journal Entry (Y/N/M) (see data item NMTH) so that the use of (non-dollar) points does not affect the G/L system.

**Cred Pnts**

Enter the DBA defined in the Payroll Transactions Constants table (F069116) that will be used to calculate the points amount that the employer contributes to an employee enrolled in a flexible spending environment.

DBAs used for points in a benefit plan or option must meet two requirements:

- The DBA must have blanks in the specification for gross effect and net effect (data items PAYG and PAYN) so that the use of non-dollar points does not add or subtract dollars from employee pay.
- The DBA must have an M in the specification for Journal Entry (Y/N/M) (data item NMTH) so that the use of non-dollar points does not affect the G/L system.

**Amount or Rate**

Enter a value in this field as a percentage, a dollar amount or an hourly rate depending upon where it is being used.

When used in conjunction with a Deduction, Benefit or Accrual Type this field may represent many of the above values depending upon the value of the D/B/A method code (DEDM).

**Amount or Rate**

Enter a value in this field as a percentage, a dollar amount or an hourly rate depending upon where it is being used;

When used in conjunction with a Deduction, Benefit or Accrual Type this field may represent many of the above values depending upon the value of the D/B/A method code (DEDM).

**M P**

Enter a code that indicates whether the plan is required for all employees. Valid codes are:

*Y:* Yes, all employees must participate in this plan. You should not use this code unless all employees are required to participate in the plan.

*N:* No, all employees are not required to participate in this plan. It is optional.

**Dft Pln**

Enter a code that specifies if the plan is a default plan in the category. An employee is automatically enrolled in this plan if no other plans within the category are selected. Valid codes are:

*Y:* Yes, this is a default plan.

*N:* No, this is not a default plan.

**Selc 01**

Enter a code used to prompt detail selection from a list of items. Typically, the legitimate selection codes are explained at the bottom of the screen of the video display. If not, see the program help instructions.

This code indicates that the employee is enrolled in a benefit plan or a benefit plan option. When benefit plans are changed during an enrollment, whether the employee enrolls or withdraws from the plan, the system enters an event code in the Enrollment Event Code field. The system also enters 1 in the SELC 01 field when the employee enrolls in a benefit plan. Values are:

| | |
|---|---|
| | *0* or blank: The benefit plan changed, but the employee is not enrolled in the plan.<br>*1:* The employee is enrolled in the benefit plan. |
| **Benefit Category Classification** | Enter a code that designates benefit categories that are grouped together. |
| **Decline Coverage Notification** | Enter a code that the system uses to indicate that the benefit administrator needs to be notified when an employee elects to decline benefit coverage. |
| **Defaulting Allowed** | Enter a code that specifies whether the system automatically displays a benefit plan or benefit plan option as the chosen plan, based on prior enrollment. |
| **Max DP** | Enter a variable that denotes the maximum number of dependents that may be enrolled in a benefit plan. |
| **Minimum Dependents** | Enter the minimum number of people that can be covered under a specific plan or plan option. This number includes the employee. For example, if the plan allows an employee plus one dependent, then the minimum number is 2. |
| **Number Partic** | Enter a value that specifies the number of participants that have elected coverage for a specific plan. |
| **Sequence Number** | Enter a number used to sequence information for review purposes only. |
| **Short Category Description** | Enter a short description (up to 15 characters) of the benefit category. |
| **Short Plan/Option Description** | Enter a short description (up to 15 characters) of the benefit plan or benefit plan option. |

# Reviewing Dependent and Beneficiary Current Coverage Revisions

This section provides an overview and describes how to review dependent and beneficiary current coverage revisions.

## Understanding Dependent and Beneficiary Current Coverage Revisions Review

A Human Capital Management administrator can use the Current Dep/Ben X-Reference Work Table program (P085537W) to review current dependent and beneficiary information that is contained in the Current Dep/Ben X-Reference Work Table (F085537W). This table provides a picture of current dependent and beneficiary enrollment information that is updated each time that you build a new Employee Current/Pending Elections Work Table (F085530W).

If information in this table is incorrect, you should not enter corrections to this table. Because the system does not save information from this table in the live tables, any changes that you enter in this table are lost. An expert system administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to enter changes to the Dependent/Beneficiary X-Reference Work Table (F085536W). After you save changes to the workfile and then build new workfiles, your changes are included in the new Current Dep/Ben X-Reference Work Table.

### See Also

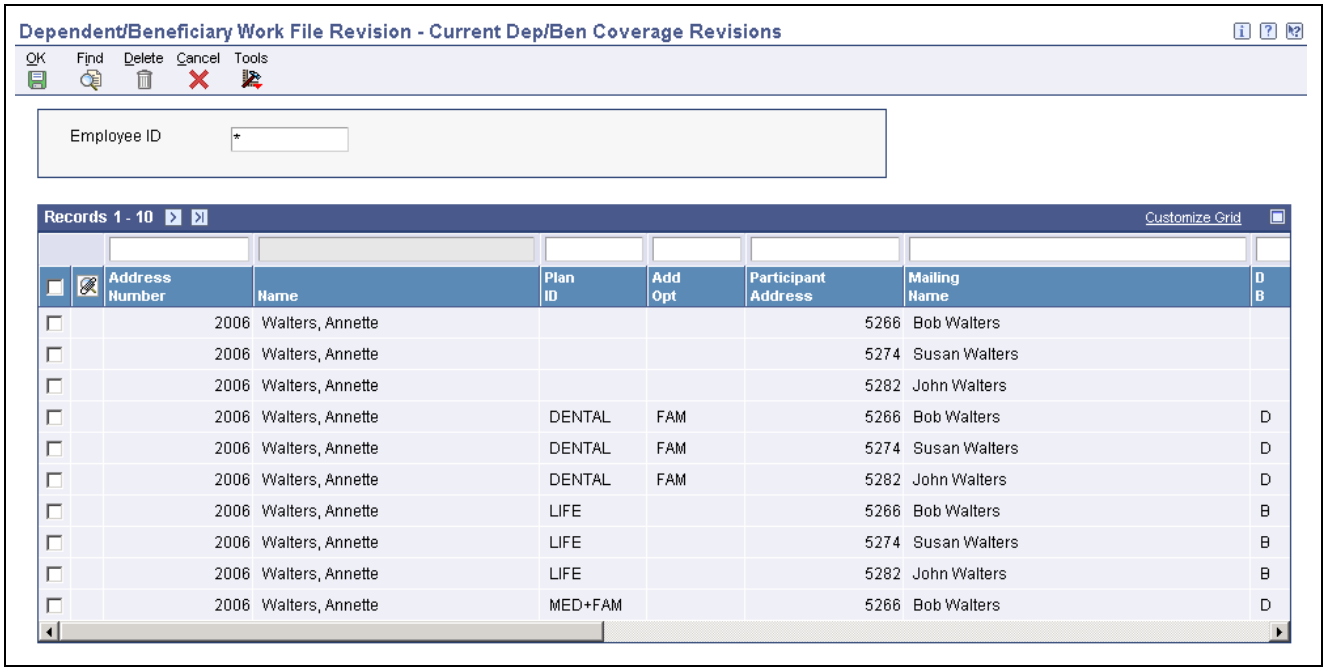
Chapter 26, "Managing Benefits Self Service Work Files," page 211

## Forms Used to Review Dependent and Beneficiary Current Coverage Revisions

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Current Dep/Ben Coverage Revisions | W085537WA | Dependent/Beneficiary Work File Management (G08BESS323), Dependent/Beneficiary Work File Revision | Review pertinent information. |

## Review the Revisions

Access the Current Dep/Ben Coverage Revisions form.




Current Dep/Ben Coverage Revisions form

To review dependent and beneficiary current coverage revisions:

1. On Current Dep/Ben Coverage Revisions, complete the Employee ID field and then click Find.
2. Review the values in the fields, but do not enter changes.

# Revising the Dependent and Beneficiary Updated Revisions Workfile

This section provides an overview and describes how to revise the Dependent and Beneficiary Updated Revisions Workfile

## Understanding the Dependent and Beneficiary Updated Revisions Workfile

An expert Human Capital Management administrator can use the Dependent/Beneficiary Coverage Revisions program (P085536W) to review updated dependent and beneficiary information that is contained in the Dependent/Beneficiary X-Reference Work Table (F085536W). This table displays updated dependent and beneficiary enrollment information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator might enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, during open enrollment, an employee enters dependent or beneficiary information that contains errors. When the open enrollment period is over, errors might exist in the Dependent/Beneficiary X-Reference Work Table, but the workfile records have not been saved in the live tables. The system administrator can use the Dependent/Beneficiary Coverage Revisions program to correct the errors. The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. The system does not review, track, or implement related changes to this or other tables.

### See Also

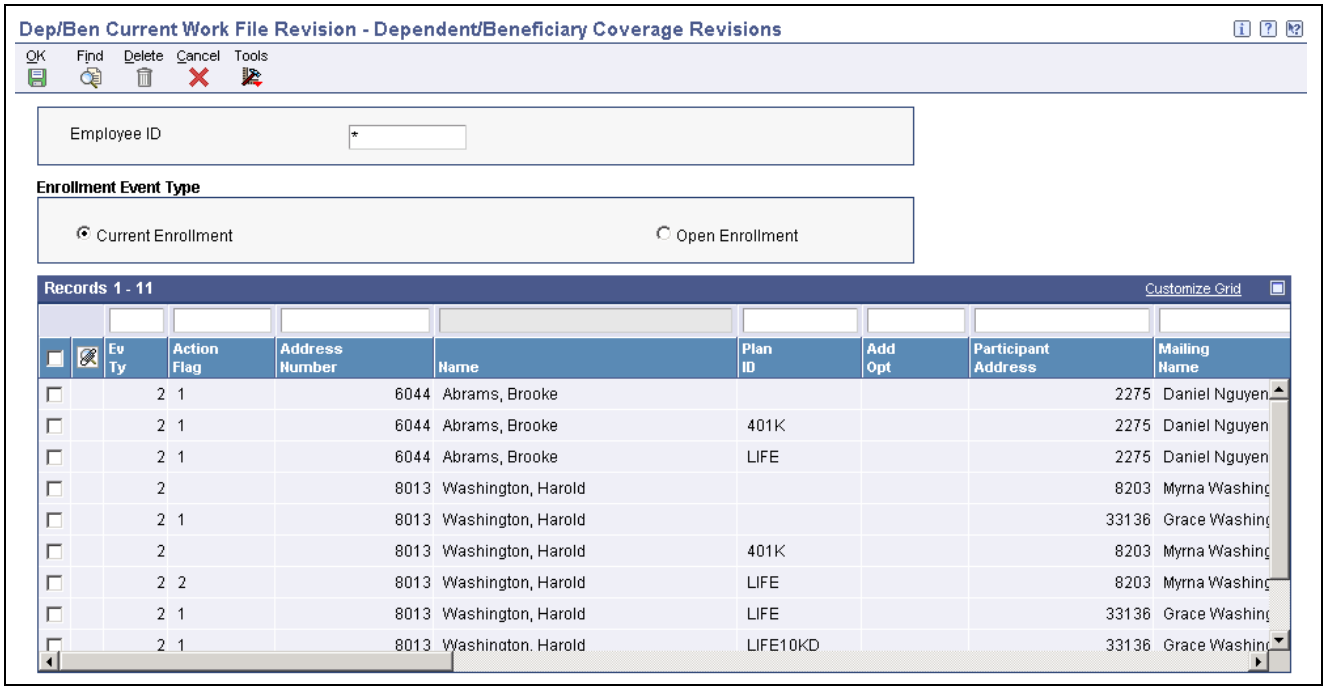
Chapter 23, “Saving Self Service Employee Information,” page 181

# Forms Used to Revise the Dependent and Beneficiary Updated Revisions Workfile

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Dependent/Beneficiary Coverage Revisions | W085536WA | Dependent/Beneficiary Work File Management (G08BESS323), Dep/Ben Current Work File Revision | Electronic Signature ID and the next five data items, Date Updated, Update Time, Updated By, User ID, and Program ID, track the last time that the employee made a change to the benefit record.<br><br>Work Stn ID, Date Updated, and Time Updated track the last time anyone made a change to the benefit record, whether that person was the employee or another person.<br><br>The values in step 5 cannot be changed. They are for history tracking purposes and display information about the last change to the employee benefit record. |

# Revising the Workfile

Access the Dependent/Beneficiary Coverage Revisions form.




Dependent/Beneficiary Coverage Revisions form

To revise the dependent and beneficiary updated coverage revisions workfile:

1. On Dependent/Beneficiary Coverage Revisions, complete the Employee ID field.
2. In the Enrollment Event Type area, choose one of these options:
   - Current Enrollment
   - Open Enrollment
3. Click Find.
4. Review the values in these fields and make changes, if appropriate:
   - Ev Ty
   - Action Flag
   - Address Number
   - Plan ID
   - Add Opt
   - Participant Address
   - Mailing Name
   - D B
   - R L
   - Ben %
   - Secondary Ben %
   - New Ben %
   - New Second Ben %
   - Effective Date
   - Ending Date
   - Enrollment Event Code
   - Event Date
   - PCP Number
   - PCP Visited
   - A/I
5. Review the values in these fields:
   - Electronic Signature ID
   - Date Updated
   - Update Time
   - Updated By
   - User ID
   - Program ID
   - Work Stn ID
   - Date Updated
   - Time Updated

6. Click OK to save the changes in the workfile.

**Employee ID** Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Current Enrollment** Enter a value that indicates the event during which the enrollment occurs. Valid values include:

*1:* Open Enrollment

*2:* Enrollment for current plan year

**Open Enrollment** Enter a value that indicates the event during which the enrollment occurs. Valid values include:

*1:* Open Enrollment

*2:* Enrollment for current plan year

**Ev Ty** Enter a value that indicates the event during which the enrollment occurs. Valid values include:

*1:* Open Enrollment

*2:* Enrollment for current plan year

**Action Flag** Enter a value that defines the type of change that will be made to a record. This flag is used by the system in subsequent record processing.

**Participant Address** Enter the address number of the participant as defined in the Participant file table (F08901).

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

**R L** Enter a user defined code (system 08/ type RL) that defines the relationship of the dependent or beneficiary to the employee.

**Ben %** Enter the percentage of any proceeds from the benefit that goes to the participant. For example, you can designate that as the primary beneficiary, the participant is to receive 90% of the proceeds from a life insurance policy.

This figure must have a value between zero and 100.

If you do not type a value in this field, the system inserts 100%.

**Secondary Ben %** Enter the percentage of any proceeds from the benefit that will go to the secondary beneficiary if the primary beneficiaries are no longer eligible.

For example, the secondary beneficiary might be designated to receive 90% of the proceeds from a life insurance policy. If the participant wants to change this percentage, enter the new percentage.

Enter the percentage as a whole number between zero and 100.

**New Ben %** Enter the new percentage of any proceeds from the benefit that will go to the primary beneficiary.

For example, the primary beneficiary might be designated to receive 90% of the proceeds from a life insurance policy. If the participant wants to change this percentage, you enter the new percentage.

Enter the percentage as a whole number between zero and 100.

**New Second Ben %** Enter the new percentage of any proceeds from the benefit that will go to the secondary beneficiary if the primary beneficiaries are no longer eligible.

For example, the secondary beneficiary might be designated to receive 90% of the proceeds from a life insurance policy. If the participant wants to change this percentage, you enter the new percentage.

Enter the percentage as a whole number between zero and 100.

**Event Date** Enter the date on which a work order event took place.

**A/I** Enter a value that specifies whether a currency relationship is active *A* or inactive *I*. The system calculates active currency relationships only. The default value is *A*.

# Revising the Personal Profile Workfile

This section provides an overview and describes how to revise the Personal Profile Workfile.

## Understanding Personal Profile Workfile Revisions

An expert Human Capital Management administrator can use the Employee Personal Profile Information Table Revision program (P054101W) to review updated dependent and beneficiary information that is contained in the Employee Personal Profile Information Work Table (F054101W). This table displays current employee, dependent, and beneficiary personal profile information that employees enter using self-service. The system periodically saves this information to live tables.

A system administrator can enter changes to this table to correct data errors or to change information that is not accessible to an employee. For example, during open enrollment, an employee might enter personal profile information that contains errors. When open enrollment closes, a system administrator might need to enter corrections to the temporary workfile records before saving the new data in the live tables. The system administrator can use the Employee Personal Profile Information Table Revision program to correct the errors.

The system administrator must be aware that if the new information contains errors, all issues that might be related to the change must be manually addressed. This program allows changes to all data in the table except the fields that track the individuals entering changes and when changes are entered. The program even allows changes to data that is not entered by an employee. The system does not review, track, or implement related changes that might be required in other tables.

### See Also

Chapter 19, “Setting Up Workfiles for Benefits Self Service,” Building the Personal Information Workfile, page 147

## Forms Used to Revise the Personal Profile Workfile

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Employee Personal Profile Information Table | W054101WB | Personal Information Work File Management (G08BESS324), Personal Profile Work File Revision<br>Profile Revisions, Row menu. | Determine whether inaccurate information exists. |
| Employee Personal Profile Information Table Revisions | W054101WA | Click OK. | Enter changes as appropriate.<br>When you click OK, the system immediately saves your changes in the workfile. The system saves your changes in the live tables only when the next workfile build is run. |

## Revise the Workfile

Access the Employee Personal Profile Information Table Revisions form.

To revise the personal profile workfile:

1. On Work With Employee Personal Profile Information Table, complete one of these fields and click Find:
   - Address Number
   - Participant Address
2. Review the values in each field to determine whether inaccurate information exists.
3. To enter personal profile changes, choose a record and then choose Profile Revisions from the Row menu.
4. On Employee Personal Profile Information Table Revisions, review all of the fields, making changes if appropriate:
5. Review the fields that the system provides only to track changes to this table:
   - Electronic Signature ID
   - Date Updated
   - Time Update
   - Updated By
   - Program ID
   - User ID
   - Work Stn ID
   - Date Updated
   - Time Updated
6. When you are finished making changes, click OK to save the new data.
7. To change telephone number information, choose a record and then choose Phone Number from the Row menu.

8. On Employee Phone Number Table Revisions, review these fields and make changes, if appropriate:
   - Prefix
   - Phone Number
   - Phone Type
   - Action Flag
   - Line Number
9. Review these fields that the system provides to track changes to this table.
10. When changes are complete, click OK.
11. To change emergency contact information, choose a record and then choose Emergency Contact from the Row menu.
12. On Employee Emergency Contact Table Revisions, review the fields and make changes, if appropriate.
13. Review the fields that the system provides to track changes to this table.
14. When changes are complete, click OK.

| | |
|---|---|
| **Participant Address** | Enter the address number of the participant as defined in the Participant file table (F08901). |
| **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. |
| **Middle Name** | Enter the middle name or initial of an individual. This field is informational only. The name<br><br>does not appear on any reports. |
| **M I** | Enter the first letter of the individual's middle name. This is primarily used to facilitate certain statutory reporting requirements. |
| **Mailing Name** | Enter the company or person to whom billing or correspondence is addressed. |
| **Given Name** | Enter the first name of an individual. This field is informational only. |
| **Surname** | Enter the last name of an individual. This field is informational only. |
| **Job Desc** | Enter a title associated with an employee's job. |
| **Supervisor Name** | Enter the address book name of the supervisor. |
| **Business Card Title** | Enter the title that a person uses on his or her business card. |
| **Tax ID** | Enter the identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person/Corporation Code). If no value exists for TAXC, the system uses the Corporate Entity.<br><br>Attention Accounts Payable users: The Supplier Master record supplies the default value for the tax ID for 1099 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 non-blank address lines plus the city, state, and postal code.
- On 1099 returns, the system prints only the last non-blank address line plus the city, state, and postal code.
- On other U.S. federal magnetic media, the system prints only the last non-blank address line plus the city, state, and postal code.

**Address Line 2** Enter 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 non-blank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last non-blank 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 non-blank 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 non-blank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last non-blank 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 non-blank address line plus the city, state, and postal code.

**Address Line 4** Enter 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 non-blank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last non-blank 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 non-blank address line plus the city, state, and postal code.

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

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

**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.

**Ctry** Enter a user defined code (00/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.

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

**Birth Date** Enter the employee's date of birth.

**Gender** Enter a value that represents the gender of the individual. Valid codes are:

*M:* Male

*F:* Female

**Dep/Ben Tax ID** Enter an identification code that various tax authorities require. This code can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format according to the value of the Person/Corporation Code (TAXC). If there is no value for TAXC, the system uses the Corporate Entity.

**H.S. Grad** Enter a code that indicates whether the participant is a high school graduate. Valid codes are:

*Y:* Yes, the participant is a graduate.

*N:* No, the participant is not a graduate.

**Emp** Enter a code that indicates whether the participant is employed (anywhere). Valid codes are:

*Y:* Yes, the participant is employed.

*N:* No, the participant is not employed.

**F.T. Student** Enter a code that indicates whether the participant is a full time student. Valid codes are:

*Y:* Yes, the participant is a full time student. The SCA (School Attending) field must contain the name of the school.

*N:* No, the participant is not a full time student. The SCA (School Attending) field cannot contain an entry.

**School Attending** Enter the name of the school the participant is attending, if any. This field is used in conjunction with the FTS field. If the FTS field contains a Y (Yes), you must enter the name of the school in this field.

**D F** Enter a code that indicates whether the participant is currently disabled. Valid codes are:

*Y:* Yes, the participant is disabled.

*N:* No, the participant is not disabled.

If the participant is currently disabled, you must type a date in the Date of Disability field.

**Disb. Date** Enter the date on which the participant became disabled, if applicable. If the code in the Disability Flag field is *Y* (Yes), you must type a date in this field.

**Death Date** Enter the date on which the participant died.

**Medicare Date** Enter the date on which the participant elected to receive Medicare Hospital Insurance versus any health insurance supplied by the company, if applicable.

**Electronic Address** Enter the email address or Uniform Resource Locator (URL) for either an individual or an entity.

**Action Flag** Enter a value that defines the type of change that will be made to a record. This flag is used by the system in subsequent record processing.

**Time Update** No entry required. The time that the object was updated.

**Prefix** Enter the first segment of a telephone number. In the United States, the prefix is the three-digit area code.

**Phone Number** 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.

**Phone Type** Enter a user defined code (01/PH) that indicates either the location or use of a telephone number. Valid values include:

Blank: Business telephone number

*FAX:* Fax telephone number

*HOM:* Home telephone number

**Line Number** Enter a value that is used to create a unique key within a file. If you are using a program which will allow you to resequence the records, we recommend you use one of these data dictionary items: DSS5, DSS7, or DSS9.

**Salutation Name** Enter the name that you would use to address an individual in written correspondence. Examples include Ms. Green, Dr. Strasheim, Herr Obermeyer, Mr. Pitt. The software does not use the value in this field in any reports. It is informational only.

**Address** 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 non-blank address lines plus the city, state, and postal code.
- On 1099 returns, the system prints only the last non-blank address line plus the city, state, and postal code.
- On other U.S. federal magnetic media, the system prints only the last non-blank address line plus the city, state, and postal code.

**Type Code** A user defined code (01/W0) that identifies the Who's Who entry. Examples include:

*A:* Attention name

*B:* Billing

*C:* Contact name

*E:* Emergency Contact

*O:* Other

*T:* 1099 legal name

**Professional Title** Enter the professional title of a Who's Who person.

**Line ID** Enter a value that is used to identify the line ID number for a Who's Who record.

**Display Sequence** Enter a number that specifies the order of a group of records on the form.

**Remark** Enter up to 40-characters of text into this field.

# CHAPTER 25

# Setting Up New DBA Plan Rates

This chapter provides an overview and describes how to set up new DBA plan rates.

## Understanding DBA Plan Rates

If any of your benefit plans are changing rates during the open enrollment period, you can cross-reference the current year's DBAs (deductions, benefits, and accruals) with the current rates to the DBAs that reference the new rates. This cross-reference lets you effectively change the rates that appear for the enrollment period without changing the rates for the current DBAs.

You need to cross-reference DBAs only for benefit calculations that are table based or if the DBA is changing radically (for example, from a flat dollar amount to a percentage). If you do not set up a cross-reference, the system retrieves new rates from the Plan Master Rates table (F083203). If you set up both the Plan Master Rates table and the DBA cross-reference, the system uses the DBA cross-reference.

You need to set up the DBA cross-reference before you build the workfiles for open enrollment.

## Prerequisite

Set up the DBAs for the new rates. See Setting Up Deductions, Benefits, and Accruals in the Human Capital Management Foundation Guide.

## Implementing New DBA Plan Rates

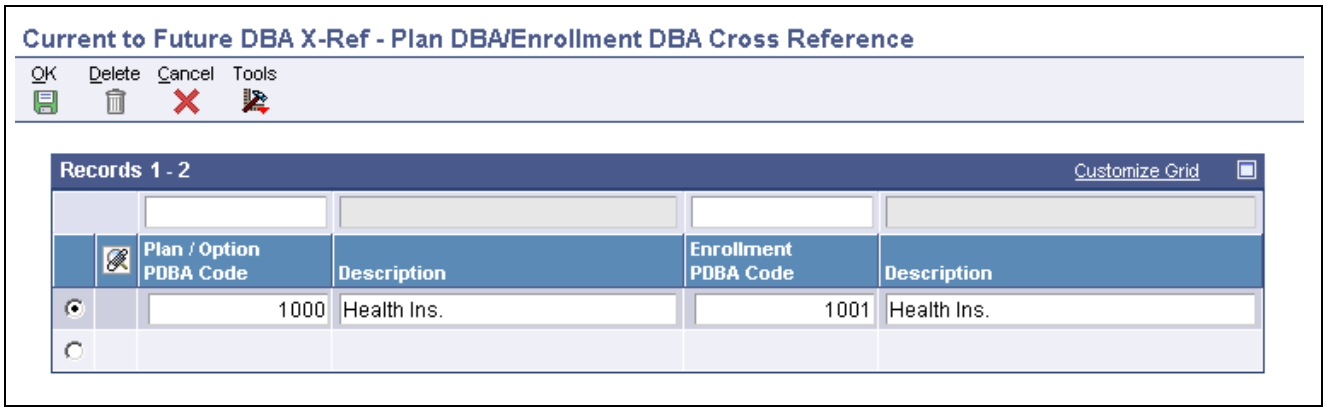
This section describes how to implement new DBA plan rates.

### Forms Used to Set Up New DBA Plan Rates

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Plan DBA/Enrollment DBA Cross Reference | W08515A | Self Service Setup (G05BESS4), Current to Future DBA X-Ref | You still need to change your enrollment plan's DBA amounts to the new rates prior to the period in which they will be effective. |

# Implement New DBA Plan Rates

Access the Plan DBA/Enrollment DBA Cross Reference form.




Plan DBA/Enrollment DBA Cross Reference form

To cross-reference new DBA plan rates:

1. On Plan DBA/Enrollment DBA Cross Reference, enter the current year's DBA in the Plan / Option PDBA Code field.
2. Enter the corresponding DBA for the new rate in the Enrollment PDBA Code field.
3. Repeat steps 1 and 2 for all the rates that are changing, and then click OK to save your changes.

**Plan / Option PDBA Code** 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.

**Enrollment PDBA Code** The code associated with a deduction, benefit, or accrual (DBA) that was used to calculate the employee's net payment. This code prints on the right side of the payment stub.

# CHAPTER 26

# Managing Benefits Self Service Work Files

This chapter provides an overview of managing self-service work files and describes how to:

- Purge the Employee Current and Pending Elections Work Table.
- Purge the Dependent and Beneficiary Cross-Reference Work Table.
- Purge the Current Dependent and Beneficiary Cross-Reference Work Table.
- Purge the Employee Personal Information, Contact, and Phone Work Tables.
- Purge the Available Plans and Plan Options Work Table.

## Understanding Benefits Self Service Work Files

Before each annual open benefits enrollment, you should remove old data from your self-service work files. By removing old data, you reduce the possibility that the system could save old data that is no longer applicable to the current work force in the live tables.

## Purging the Employee Current and Pending Elections Work Table

This section provides an overview and describes how to run the Purge Employee Current/Pending Elections Work Table.

### Understanding the Employee Current and Pending Elections Work Table

You can use the Purge Employee Current/Pending Elections Work Table program (R085540) to remove existing data from the Employee Current/Pending Elections Work Table (F085530W). This program also uses data in the Employee Master Information table (F060116).

### Running the Purge Employee Current/Pending Elections Work Table Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Employee Current/Pending Work Table.

# Purging the Dependent and Beneficiary Cross-Reference Work Table

This section provides an overview of the Purge Dependent/Beneficiary X-Reference Table program and describes how to:

- Run the Purge Dependent/Beneficiary X-Reference Table program.
- Set processing options for the Purge Dependent/Beneficiary X-Reference Table program.

## Understanding Dependent and Beneficiary Cross-Reference Work Table Maintenance.

You can use the Purge Dependent/Beneficiary X-Reference Table program (R085542) to remove existing data from the Dependent/Beneficiary X-Reference Work Table (F085536W). This program also uses data in the Employee Master Information table (F060116).

You can set a processing option to specify whether this program deletes records that have not been saved to live files. You can also set a processing option to specify the type of enrollment.

You might want to set up an additional version of this UBE so that you can run one version prior to open enrollment and another version for benefit enrollments that are based on life events.

## Running the Purge Dependent/Beneficiary X-Reference Table Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Dependent/Beneficiary X-Reference Table.

## Setting Processing Options for Purge Dependent/Beneficiary X-Reference Table (R085542)

These processing options allow you to specify whether the program removes data that the system has not saved in live tables. You can also designate the type of enrollment records that the system removes.

### Delete

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

**1. Delete Unprocessed Records in F08336W**

Use this processing option to specify whether the system removes unprocessed records from the Dependent/Beneficiary X-Reference Work Table (F085536W) that have not been saved in live tables. Values are:

Blank: Keep (do not delete) unprocessed records.

*1:* Delete unprocessed records.

**2. Enrollment Event Type**

Use this processing option to specify the type of records that the system removes from the Dependent/Beneficiary X-Reference Work Table (F085536W). Values are:

*1:* Open Enrollment

*2:* Current Enrollment

# Purging the Current Dependent and Beneficiary Cross-Reference Work Table

This section provides an overview and describes how to run the Purge Current Dep/Ben X-Reference Work Table program.

## Understanding Current Dependent and Beneficiary Cross-Reference Work Table Maintenance

You can use the Purge Current Dependent/Beneficiary X-Reference program (R085543) to remove existing data from the Current Dep/Ben X-Reference Work Table (F085537W). This program also uses data in the Employee Master Information table (F060116).

## Running the Purge Current Dep/Ben X-Reference Work Table Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Current Dependent/Beneficiary X-Reference.

# Purging the Employee Personal Information, Contacts, and Phone Work Tables

This section provides an overview of the Purge Employee Personal, Contact, Phone Work Tables program and describes how to:

- Run the Purge Employee Personal, Contact, Phone Work Tables program.
- Set processing options for the Purge Employee Personal, Contact, Phone Work Tables program.

## Understanding Employee Personal Information, Contacts, and Phone Work Tables Maintenance

You can use the Purge Employee Personal/Contact/Phone program (R054040) to remove existing data from these tables:

- Employee Personal Profile Information Work (F054101W)
- Employee Emergency Contact Work (F054111W)
- Employee Phone Number Work (F054115W)

This program also uses data in the Employee Master Information table (F060116).

You can set processing options to specify whether you want the system to remove records that have not been previously saved in live tables.

## Running the Purge Employee Personal, Contact, Phone Work Tables Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Employee Personal/Contact/Phone.

## Setting Processing Options for Purge Employee Personal/Contact/Phone (R054040)

Use this processing option to specify whether you want the system to remove data that has not been saved in live tables.

### Delete

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

**1. Delete Unprocessed Records in F054101W, F054111W, and F054115W.**

Use this processing option to specify whether the system removes records that have not been saved in live tables. The system removes records from these tables:

- Employee Personal Profile Information Work Table (F054101W).
- Employee Emergency Contact Work Table (F054111W).
- Employee Phone Number Work Table (F054115W).

Values are:

Blank: The system keeps unprocessed records (does not delete).

*1:* The system removes unprocessed records.

# Purging the Available Plans and Plan Options Work Table

This section provides an overview of the Purge Available Plans/Plan Options program and describes how to:

- Run the Purge Available Plans/Plan Options program.
- Set processing options for the Purge Available Plans/Plan Options program.

## Understanding Available Plans and Plan Options Work Table Maintenance

You can use the Purge Available Plans and Plan Options by Employee Table to remove existing data from the Available Plans and Plan Options by Employee Work Table (F085520W).

You can set a processing option to specify whether you want the system to remove records that have not been saved to live tables. You might also want to set up a second version of this program. You can set a processing option so that one version removes open enrollment records and the second version removes life event enrollment records.

# Running the Purge Available Plans/Plan Options Program

From the Employee Self Service General Mgmt menu (G08BESS327), choose Purge Available Plans/Plan Options.

# Setting Processing Options for Purge Available Plans/Plan Options (R085541)

These processing options allow you to specify whether you want the system to remove records that have not been saved in the live tables. You can also specify the type of enrollment event records that you want removed.

## Delete

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

**1. Delete Unprocessed Records in F085520W.**

Use this processing option to specify whether the system removes records that have not been saved in live tables. The system removes records from the Available Plans and Plan Options by Employee Work Table (F085520W). Values are:

Blank: The system keeps (does not remove) records that have not been saved in live tables.

*1:* The system removes records that have not been saved in live tables.

**2. Enrollment Event Type**

Use this processing option to specify the type of records that the system removes from the Available Plans and Plan Options by Employee Work Table (F085520W). Values are:

*1:* Open enrollment

*2:* Current enrollment

# CHAPTER 27

# Employee Self Service

This chapter provides an overview of employee self service and describes how to:

- Request a verification-of-employment letter.
- Review personal profile information.
- Review pay stubs.
- Enter automatic deposit information.
- Enter competency information using self-service.
- Enter timecards using self-service.

## Understanding Employee Self Service

Self-service allows employees to review and input information using a company intranet portal. One of the most common self-service functions that companies offer is open enrollment for benefits. Also common self-service offerings are access to employee personal information.

## Requesting a Verification-of-Employment Letter

This section provides an overview of verification-of-employment letters and discusses how to:

- Set the processing options
- Request a verification-of-employment letter

### Understanding Verification-of-Employment Letters

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

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

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

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

## Forms Used to Request a Verification-of-Employment Letter

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Verification Of Employment Requests | W05003A | Employee Self Service (G05BESS1), Verification of Employment<br>Click Select. | Review existing information<br>Select a record. |
| Verification of Employment Data | W05003B | Request Information tab | Enter required data. |
| Verification of Employment Data | W05003B | Employment Data tab<br>Click OK. | Enter required data.<br>The Work With Verification Of Employment Requests form appears. Your letter is pending review. |

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

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.

### User Level

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

**1. User Level:** Use this processing option to specify whether this program will be used by an employee, an HR clerk, or an HR administrator. Values are:

Blank: Employee

*1:* Employee

*2:* HR clerk

*3:* HR Administrator (This option does not send a request through Workflow.)

---

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

---

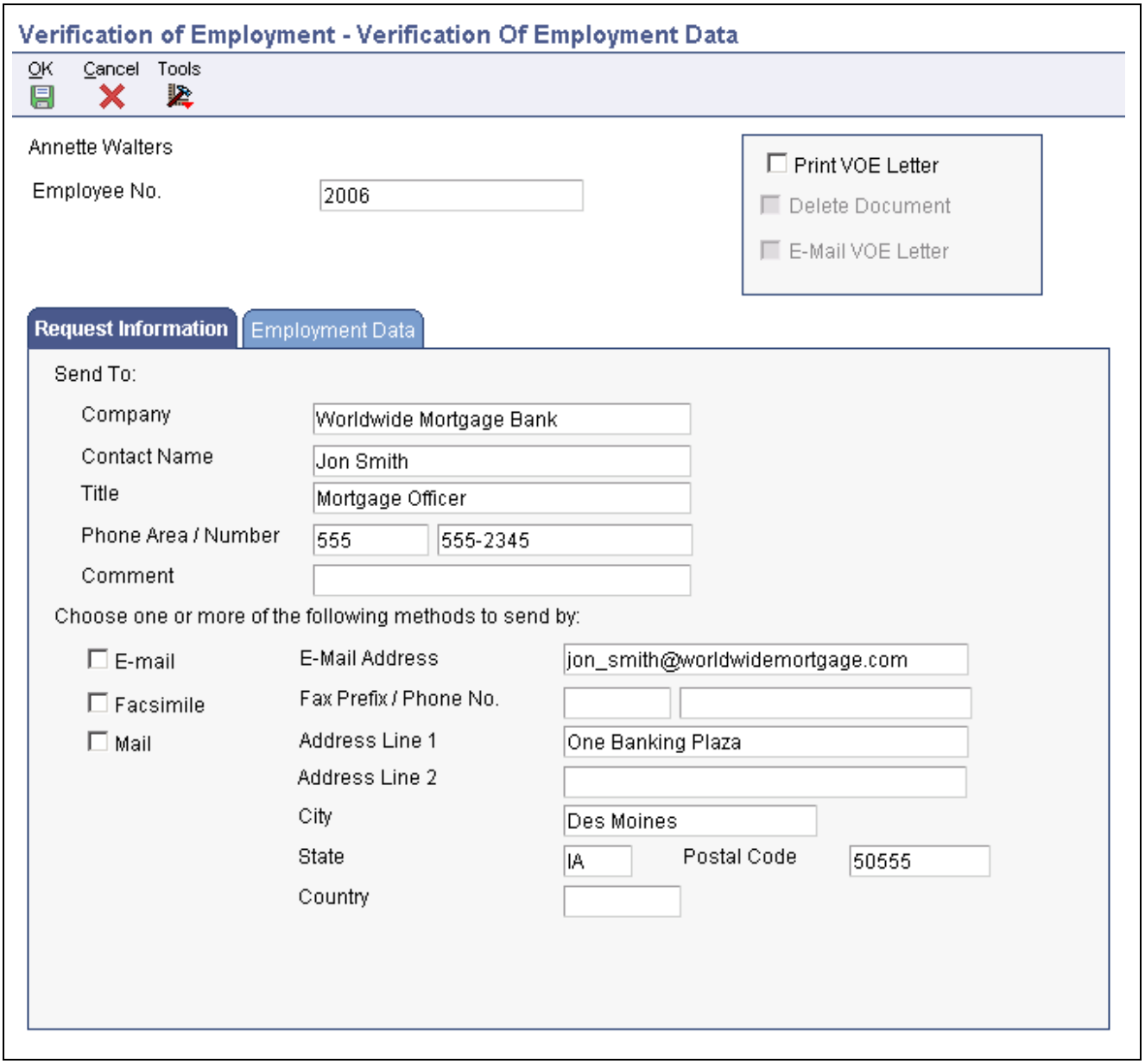
### Workflow Setup

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

**1. Address Number of VOE request processor (HRM):** Use this processing option to specify the address number of the HR person (or a distribution list) who processes VOE requests.

## Requesting a Verification-of-Employment Letter

Access the Work With Verification Of Employment Requests form.




Verification of Employment Data form

To request a verification-of-employment letter: :

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

2. On Verification Of Employment Data, complete the Contact Name field on the Request Information tab.
3. Complete the optional fields:
   - Company
   - Title
   - Phone Area / Number
   - Comment
4. Choose one or more of these contact method options:
   - Email
   - Facsimile
   - Mail
5. Complete these fields that apply to the contact method option you have chosen:
   - E-Mail Address
   - Fax Prefix / Phone No.
   - Address Line 1
   - Address Line 2
   - City
   - State
   - Postal Code
   - Country
6. Click the Employment Data tab.
7. Review these pay information fields:
   - Date Started
   - Job Type/Step Description
   - Continued Employment
   - Pay Frequency
   - Pay Class(H/S/P)
   - Date Of Last Raise
   - Amount Of Increase
   - Date of Next Raise
   - Pay Period Salary
   - Comment
8. Review these pay information fields for the current year, one year prior, and two years prior:
   - Base
   - Overtime
   - Commission
   - Bonus

- Other

9. Click OK.
10. To review the status of your request, click Find.
11. Review the Revd Flag field for the request.

**Contact 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.

**Company** Enter the company name up to 40 characters in length.

**Title** Enter the professional title of a Who's Who person.

**Phone Area / Number** Enter the first segment of a telephone number. In the United States, the prefix is the three-digit area code.

**Comment** Enter a comment, description or remark. This entry can be up to 40 characters in length.

**E-mail** Enter a value that indicates whether you want the verification-of-employment letter to be sent by email. Values are:

*1:* Yes, the letter can be sent by email.

*0:* No, the letter cannot be sent by email. This is the default.

**Facsimile** Enter a value that indicates whether you want the verification-of-employment letter to be sent by facsimile (fax).

**Mail** Enter a value that indicates whether you want the verification-of-employment letter to be sent by mail (postal service).

**E-Mail Address** Enter an E-mail address.

**Fax Prefix / Phone No.** Enter the prefix for telephone number 2. 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.

**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 non-blank address lines plus the city, state, and postal code.
- On 1099 returns, the system prints only the last non-blank address line plus the city, state, and postal code.
- On other U.S. federal magnetic media, the system prints only the last non-blank address line plus the city, state, and postal code.

**Address Line 2** Enter the second line of the mailing address for an employee, customer, or supplier in the Address Book system.

**Note.** 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 non-blank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last non-blank 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 non-blank address line plus the city, state, and postal code.

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

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

**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.

**Country** Enter a user defined code (00/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.

**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.

**Job Type/Step Description** Enter the description associated with the job type and job step. This description is stored in the Job Information table email

**Continued Employment** Enter a field that indicates the employee's potential for continuing employment with the organization. Valid values are stored in the user defined code table email

**Date Of Last Raise** Enter the date of the employee's last raise. For the email HR system, this is the date when you update salary and wages. If you also have the Payroll system, this date is automatically updated when a payroll is run. You define pay effective dates using the Pay Rate Information screen.

**Amount Of Increase** Enter an amount. Amount of increase is the difference between two values. A negative value indicates a decrease.

A monetary increase as a result of a raise occurring on the Date of Last Raise.

**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.

**Pay Period Salary** Enter a valid amount. Pay Period Salary is calculated by dividing the annual salary by the number of pay periods.

**Comment** Enter a comment, description or remark. This entry can be up to 40 characters in length.

**Base** Enter an amount paid from all pay types considered to be base salary for the current year.

**Overtime** Enter an amount paid from all pay types considered to be overtime pay for the current year.

**Commission** Enter an amount paid from all pay types considered to be commission pay for the current year.

**Bonus** Enter the amount of bonus pay that the employee earned, year-to-date in the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.

Note: When you set up a pay type, you use the Pay Type Category field (PACT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list PC.

**Other** Enter an amount paid from all pay types considered to be other pay for the current year. Other pay is anything other than base salary, overtime, commission, and bonus.

**Revd Flag** Enter a user defined code (05/V2) that indicates the progress of your verification of employment letter. Values are:

*0:* Pending.

The administrator has not yet reviewed your request. You can change your request information if you need to.

*1:* Reviewed.

The administrator has reviewed your request. Changing your request information is not advisable.

*2:* Processed.

The administrator has processed your verification of employment letter.

# Reviewing Personal Information Using Self Service

This section provides an overview of personal information and discusses how to:

- Set the processing options
- Review personal information

# Understanding Employee Personal Information

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

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

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

The information in this location is for review only; you cannot change any of the fields.

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

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

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

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

# Prerequisite

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

# Forms Used to Review Personal Information

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Employee Profile and Job Information | W060116C | Employee Self Service (G05BESS1), Employee Personal Profile | Review information on each of the form tabs.<br>If necessary, use the text area of the form to communicate detailed information that you want to provide to HR and then click OK. |

# Setting Processing Options for Employee Profile (P060116)

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.

## Enrollment

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

**Benefits Enrollment** Use this processing option to specify whether to enroll an employee with eligibility for benefits or with overrides. Values are:

*0:* Enroll with overrides (default).

*E:* Enroll with Eligibility.

## Human Resource

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

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

## Versions

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

**1. Address Book Version** Use this processing option to specify the Address Book version. If left blank, the system uses ZJDE0001

**2. Enrollment with Eligibility Version** Use this processing option to specify the Enrollment with Eligibility version. If left blank, the system uses ZJDE0001

**3. Enrollment with Overrides Version** Use this processing option to specify the Enrollment with Overrides version. If left blank, the system uses ZJDE0001

**4. Employee DBA Instructions Version** Use this processing option to specify the Employee DBA Instructions version. If left blank, the system uses ZJDE0001

## Personal Information Review

Access the Employee Profile and Job Information form.

To review employee personal profile information:

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

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

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

**Subject** Enter a short description or subject of the message.

**Phone Number** Enter the phone number of the individual who is sending the message.

# Reviewing Pay Stubs Using Employee Self Service

This section provides an overview of pay stubs and discusses how to review pay stubs.

## Understanding Pay Stubs Review

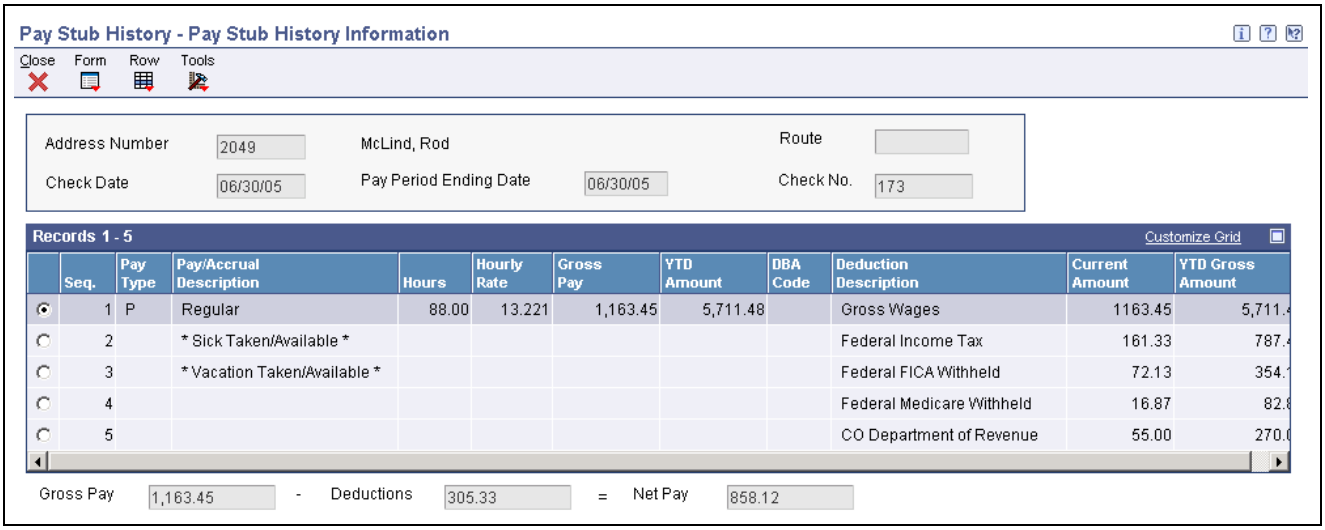
Employees can use employee self service to review the accuracy of their pay stubs and ensure that they are complete. If the portal component for the Stub Information History program (P07186) exists on your organization intranet portal, employees can click the link to review their personal pay stub history.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

# Forms Used to Review Pay Stubs

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Pay Stub History | W07186C | Client portal access: Pay Stub History<br>HR access: U.S. History Inquiries (G07BUSP14), Pay Stub History<br>Click Select. | Enter identification information and click Find.<br>When you access this program from an organization portal, the system reads the employee login identification, disables this field, and displays pay stub records for the current user.<br>Select a pay stub record. |
| Work With Pay Stub History Information | W07186A | Piecework Stub, Row menu | Review information. |
| Work With Employee Piece Work Stub Detail | W071861A | Click Cancel. | Review piecework detail. |

# Reviewing Pay Stub Information

Access the Work With Pay Stub History form.




Pay Stub History Information form

To review pay stubs using employee self service:

1. On Work With Pay Stub History, to display entries for previous pay periods, complete these fields and then click Find:
   - Employee Identification
   - From Check Date
   - Through Check Date
2. Choose a pay stub record and click Select.
3. On Work With Pay Stub History, review the copy of the pay stub.

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

| | |
|---|---|
| **Employee Identification** | No entry required. 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 Check Date** | No entry required. This is the check or item date. |
| **Through Check Date** | No entry required. This is the check or item date. |

# Entering Automatic Deposit Information

This section provides an overview of automatic deposit information and discusses how to enter new information.

## Understanding Automatic Deposit Information

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

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

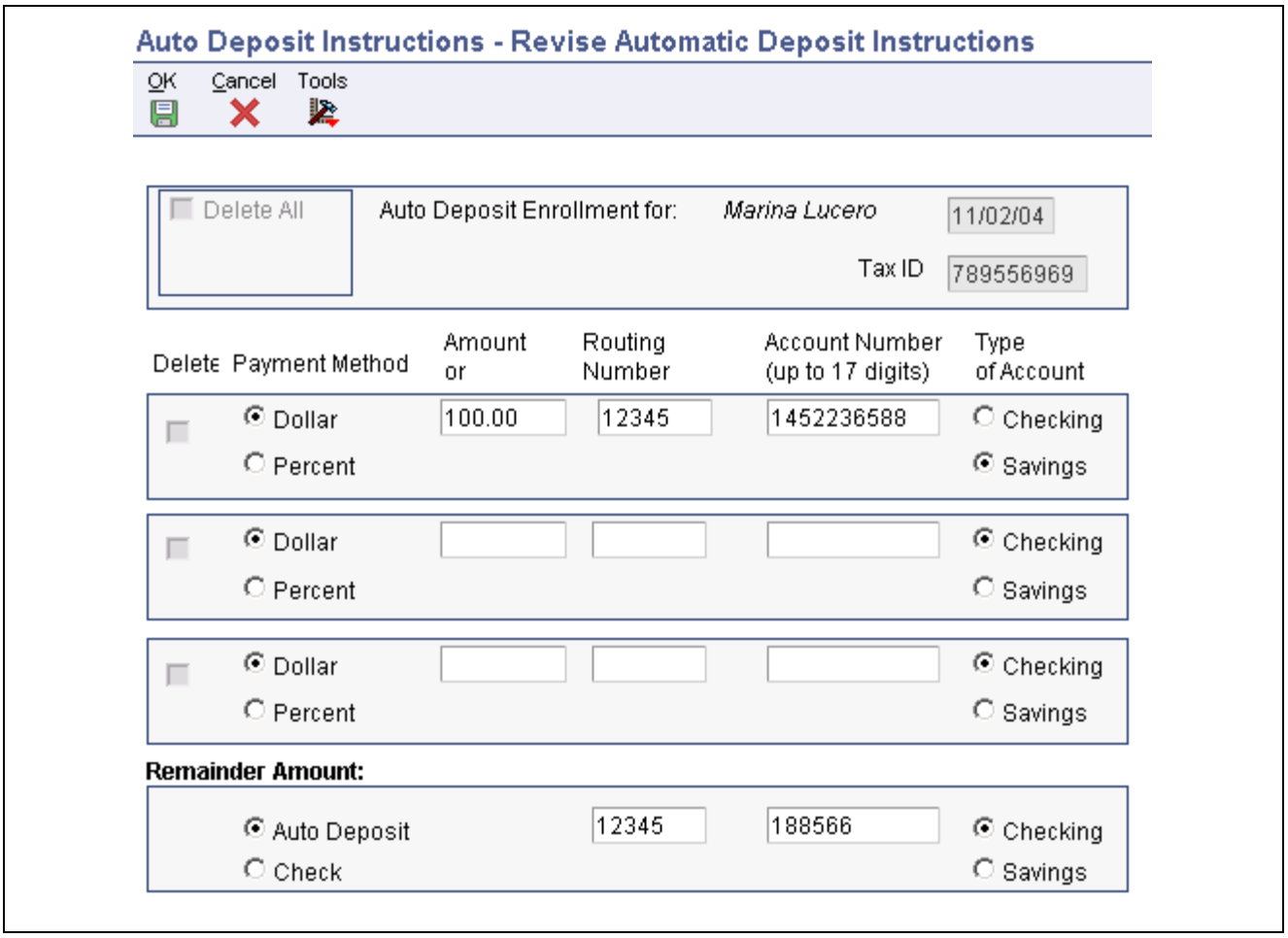
When employees use self-service to enter or update automatic deposit information, the new deposit information is processed in the next payroll cycle, and the prenote test is eliminated.

## Forms Used to Enter Automatic Deposit Information

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Revise Automatic Deposit Instructions | W055011A | Employee Self Service (G05BESS1), Auto Deposit Instructions<br>Click OK. | Review existing data and enter new information as necessary.<br>The system displays a message that indicates that the information employees entered has been submitted to a payroll representative for approval. |

## Entering Automatic Deposit Information

Access the Revise Automatic Deposit Instructions




Revise Automatic Deposit Instructions form

To enter automatic deposit information:

1. On Revise Automatic Deposit Instructions, click one of these options:
   - Dollar1
   - Percent1
2. Complete these fields:
   - Amount or Percent
   - Bank Trnst No.
   - Bank Account
3. To indicate the type of account, click one of these options:
   - Checking1
   - Savings1
4. Repeat steps 1-3 for as many accounts as you want to have a portion of your payment deposited.
5. If, after completing steps 1-4, any additional portion of your payment is unallocated, click one option:
   - Remainder Auto Deposit
   - Remainder Check

6. Complete the Routing Number and the Account Number
7. Click one of these options in the Remainder Amount group box:
   - RemChecking
   - RemSavings
8. Click OK.

**Dollar1** Enter an option that specifies the type of processing for an event.

**Percent1** Enter an option that specifies the type of processing for an event.

**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).

**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.

**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.

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**Note.** 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

---

| | |
|---|---|
| **Checking1** | No entry required. This is a generic field used for video constants display. |
| **Savings1** | No entry required. This is a generic field used for video constants display. |
| **Remainder Auto Deposit** | Enter an option that specifies the type of processing for an event. |
| **Remainder Check** | Enter an option that specifies the type of processing for an event. |
| **RemChecking** | Enter an option that specifies the type of processing for an event. |
| **RemSavings** | Enter an option that specifies the type of processing for an event. |

# Entering Competency Information Using Self Service

This section provides an overview of Self Service Competency information and discusses how to:

- Set processing options.
- Enter a training competency.
- Enter a skill competency.
- Enter an accomplishment competency.
- Enter a certification competency.
- Enter an education competency.
- Enter a language competency.
- Revise competency information.

## Understanding Self Service Competency Information

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

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

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

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

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

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

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

## See Also

Chapter 27, “Employee Self Service,” Entering Competency Information Using Self Service, page 231

## Forms Used to Enter Competency Information

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Competency Self Service | W05130A | Employee Self Service (G05BESS1), Employee Competency Self Service | Use this form to access a competency type form. |
| Skills | W05132B | Employee Self Service (G05BESS1), Employee Competency Self Service | Add a skills competency. |
| Accomplishment | W05133B | Employee Self Service (G05BESS1), Employee Competency Self Service | Add an accomplishment competency. |
| Certifications | W05134B | Employee Self Service (G05BESS1), Employee Competency Self Service | Add a certifications competency. |
| Education | W05135B | Employee Self Service (G05BESS1), Employee Competency Self Service | Add an education competency. |
| Language | W05136B | Employee Self Service (G05BESS1), Employee Competency Self Service | Add a language competency. |
| Competency Self Service | W05130A | Employee Self Service (G05BESS1), Employee Competency Self Service<br>Choose one or more options, View. | Use search and select to locate the desired record. |
| Work With Training/Development, Work With Skills, Work With Accomplishments, Work With Certifications, Work With Education, Work With Language | W05132B, W05133B, W05134B, W05135B, W05136B | Select | Complete the Competency Code field. Complete other fields to narrow search.<br>Choose a record. |
| Training/Development, Skills, Accomplishments, Certifications, Education, Language | W05132B, W05133B, W05134B, W05135B, W05136B | Click OK. | Enter changes. |

## Setting Processing Options for Competency Self Service (P05130)

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.

### Display

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

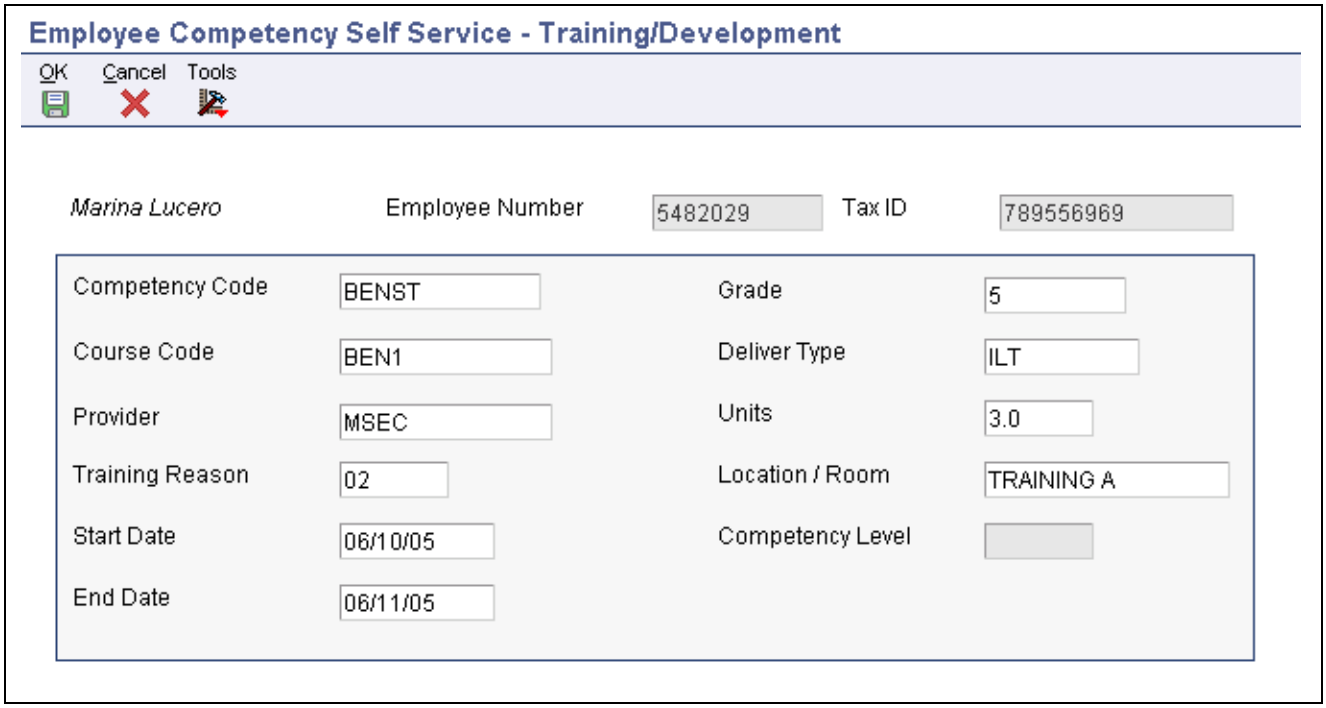
**Display Manager Information** Use this processing option to specify whether the system will display the status, verification information, and competency level on the forms. Values are:

Blank: Do not display the information.

*1:* Display the information.

## Entering a Training Competency

Access the Training/Development form.




Training/Development form

To enter a training competency:

1. On Competency Self Service, choose the Training/Development option and click Add.
2. On Training/Development, complete these fields:
   - Competency Code
   - Course Code
   - Provider
   - Training Reason

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

**Training/Development** Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03:* Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Competency Code** Enter a code that specifies a competency within a competency type. For example, a competency for the competency type Skill might be C programming or Driving a forklift.

**Course Code** Enter a code that represents a training course.

**Provider** Enter a person or institution that provides training.

**Training Reason** Enter a user defined code (05/TN) that indicates the reason for the training.

**Start Date** Enter the date on which the training course started.

**End Date** Enter the date on which the training course ended.

**Grade** Enter the grade that the employee received for the course.

**Deliver Type** Enter a code that specifies the way in which a course is delivered or presented.

Examples of delivery type include classroom training and computer-based training.

**Units** Enter a unit of measure for calculating student credits for training courses.

**Location / Room** Enter the classroom or location where the training course is held.

## Entering a Skills Competency

Access the Skills form.

To enter a skill competency:

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

**Skills** Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03*: Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Competency Code** Enter a code that specifies a competency within a competency type. For example, a competency for the competency type Skill might be C programming or Driving a forklift.

**Skill Description** Enter a user defined name or remark.

**Date Acquired** Enter the date on which the employee acquired the skill.

**Status** Enter a user defined code (05/CR) that indicates the progress that the employee has made toward a level of proficiency in a particular competency. For example, for certification competencies, you might define a status, Pending, to indicate that the employee has completed a certification test but has not yet received his or her test scores.

## Entering an Accomplishment Competency

Access the Accomplishments form.

To enter an accomplishment competency:

1. On Competency Self Service, choose the Accomplishments option and click Add.
2. On Accomplishments, complete these required fields:

- Competency Code
- Accomplishment Type

3. Complete these optional fields and click OK:
   - Date Achieved
   - Awarding Organization
   - Date Awarded
   - Status
4. Repeat steps 2 and 3 for each accomplishment competency you want to enter.

**Accomplishments** Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03:* Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Accomplishment Type** Enter a code that indicates an accomplishment. For example, you could define an accomplishment for Network Administration as Certification. It is a user defined code (05/AT).

**Date Achieved** Enter the date on which the employee achieved the accomplishment.

**Awarding Organization** Enter the name of the organization that awards the certification or other documentation for the competency.

**Date Awarded** Enter the date on which an accomplishment was formally recognized by the awarding organization.

## Entering a Certification Competency

Access the Certifications form.

To enter a certification competency:

1. On Competency Self Service, choose the Certification option and click Add.
2. On Certifications, complete these required fields:
   - Competency Code
   - Licensing Body
   - Renewal Code
   - Expiration Date

3. Complete these optional fields and click OK:
   - Licensing Number
   - Score Rating
   - Status
   - Issue Date
4. Repeat step 2 and 3 for each certification competency you want to enter.

**Certification** Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03:* Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Licensing Body** Enter a user defined code (05/LB) that represents the name of the organization that grants the professional license or certification.

**Renewal Code** Enter a user defined code (05/RC) that indicates the requirements that the employee must complete to renew the license.

**Expiration Date** Enter the date on which the employee's professional license expires.

**Licensing Number** Enter the identification number of the employee's professional license.

**Score Rating** Enter the score that the employee receives when attaining a professional license or certification.

**Issue Date** Enter the date on which the professional license was issued to the employee.

## Entering an Education Competency

Access the Education form.

To enter an education competency:

1. On Competency Self Service, choose the Education option and click Add.
2. On Education, complete these required fields:
   - Competency Code
   - Institution Code
3. Complete these optional fields and click OK:
   - Location

- Degree Date
- GPA Rating
- GradeBase
- Honorary

4. Repeat steps 2 and 3 for each education competency you want to enter.

**Education** Enter a code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03:* Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Institution Code** Enter a user defined code (05/IC) that represents an educational institution from which employees obtained their degrees.

**Location** Enter the city or region where the educational institution is located.

**Degree Date** Enter the date on which the employee graduated and earned a degree.

**GPA Rating** Enter the overall grade or scale on which a student's grade point average is based.

**GradeBase** Enter the mathematical average of all of the grades that a student earns in a class.

**Honorary** Enter a value that indicates whether the student graduated with honors.

## Entering a Language Competency

Access the Language form.

To enter a language competency:

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

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

**Language** A code that identifies a competency table or category for which you can track employee competencies. Values are:

*01:* Training

*02:* Skill

*03:* Accomplishment

*04:* Certification

*05:* Degree

*06:* Language

This is a user defined code (05/CY), but the values 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 customizations.

**Status Date** Enter the effective date of the status.

## Revising Competency Information

Access the Competency Self Service form.

To revise competency information:

1. On Competency Self Service, choose one or more of these options that correspond to the type of competency that you need to revise, and then click View:
   - Training/Development
   - Skills
   - Accomplishments
   - Certification
   - Education
   - Language
2. On Work With Training/Development, Work With Skills, Work With Accomplishments, Work With Certifications, Work With Education, or Work With Language, complete the Competency Code field.
3. To narrow your search, complete any of the other fields and then click Find.
4. Choose a record in the detail area, and then click Select.
5. On Training/Development, Skills, Accomplishments, Certifications, Education, or Language, make the necessary changes and then click OK.

# Self Service Time Entry

This section provides an overview of self-service time entry and discusses how to:

- Enter timecards using self-service.
- Delete or modify self-service timecards.

# Understanding Self Service Time Entry

You can streamline and simplify the process of entering and reviewing employee timecard information by using self-service features. You can use the self-service approach for time entry to eliminate, or greatly reduce, the need for paper time sheets. You can also increase the accuracy and efficiency of your data entry by eliminating the need for a time entry clerk to manually transfer data from paper timesheets into the system.

Self-service time entry applications allow you to configure the user interfaces that employees use to enter timecards. You can create multiple interfaces to accommodate the different business requirements of employee groups within your organization.

When employees use self-service time entry, the system displays a welcome form called a director. You can configure this form to include user instructions for the time entry process, or to include information that employees need to complete their timecards for the specified pay period. The director form also includes links to the Employee Daily Time Entry (P051127) and Employee Summary Time Entry (P051128) programs, and a link to the Manager Review and Approval program (P051129) that managers or delegates can use to review and approve employee timecards.

When employees choose the appropriate link from the director form, the system displays a time entry form where they can enter their timecard information. You can configure this form to include only the fields that you want employees to complete. Using the ESS Time Entry Setup program (P051123), you can choose from over 50 predefined fields to appear on the employee time entry form. This program allows you to quickly and easily create custom time entry forms to meet your business requirements. You can also define the pay types that each employee can use to enter timecards, which helps to ensure the accuracy of the timecard data.

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**Note.** Employees can enter timecards only for themselves using self-service time entry programs. Similarly, employees who are not managers are able to review only their own timecards. Managers can review their own timecards and those of their employees. If it is necessary for an employee to enter timecards for another employee, these timecards must be entered using standard time entry programs.

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See *PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook*, “Entering Timecards for Employees”.

After an employee enters timecards into the system, those timecards can be reviewed and then approved, changed, deleted, or rejected by the employee’s manager. You can also set up manager delegates to perform the review and approval process in the event that an employee’s manager is unavailable. Manager delegates are employees that are assigned permission to review and approve timecards on behalf of a manager. In addition, you can generate email messages directly from the Manager Review and Approval program, which allow managers to automatically notify employees about the status of their timecards during the approval process.

When employees enter timecards using self-service applications, the system stores the timecards in the Employee Transactions - Batch File table (F06116Z1), which is a temporary workfile. After the timecards have been reviewed and approved, you can run the Time Entry Batch Processor program (R05116Z1I) to transfer the timecards from the workfile into the Employee Transaction Detail File table (F06116). When the timecards are in the Employee Transaction Detail File table, they can be included in payroll cycle processing.

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**Note.** Because the timecards that are entered using self-service time entry applications are stored in the Employee Transactions - Batch File table (F06116Z1), employees can enter timecards while the payroll cycle is being processed without affecting that payroll cycle. Only timecards that have been moved into the Employee Transaction Detail File table (F06116) are included in the payroll cycle.

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The Time Entry Self Service Director program (P051125) serves as the entry point for employees and managers to access self-service time entry applications. You can customize the text that appears on this form and automatically complete the Pay Period Ending Date field so that employees can easily enter timecard information using self-service features.

Employees access the time entry applications by clicking links that appear on Time Entry Self Service Director. Employees can click the Summary Time Entry link or the Daily Time Entry link. In addition to the time entry application links, a link to the timecard review and approval application is provided for managers who must review and approve timecards.

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**Note.** The Summary Time Entry, Daily Time Entry, and Manager Review/Approval links always appear on Time Entry Self Service Director. The Summary Time Entry and Daily Time Entry links are always active for all employees; however, the Manager Review and Approval link is active only for managers and their active delegates who can review employee timecards.

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When you click the Daily Time Entry link from Time Entry Self Service Director (P051125), the system displays Employee Daily Time Entry (P051127). The fields that employees must complete are determined during the setup process. The format of the form is determined by the pay frequency of the employee who accesses the program. For example, when an employee who is paid weekly accesses Employee Daily Time Entry, the system displays summarized information for the seven days for which the employee can enter timecards. Similarly, when an employee who is paid biweekly accesses the form, the system displays summarized information for the 14 days for which the employee can enter timecards.

To enter timecard information, employees use a time entry grid that contains a column for each day in the pay period. Employees can enter all timecards for the same pay type on one line in the grid for the entire pay period. A separate line in the grid must be used for each pay type used during the pay period. For example, if an employee works eight hours of regular time each day and also works two hours of overtime each day, two lines of time entry are required to accurately track the time for the pay period. The employee must enter one line and designate the pay type as regular pay. The employee then enters normal hours worked for each day of the pay period on the same line. The employee must also enter a second line and designate the pay type as overtime pay. The employee then enters overtime hours worked for each day of the pay period on the same line.

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**Note.** Only employees who are paid weekly, biweekly, or semimonthly can enter self-service timecards using Employee Daily Time Entry. Employees who are paid monthly must use Employee Summary Time Entry (P051128) to enter self-service timecards.

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When an employee enters or updates timecards and clicks Save, the system stores the timecards in a temporary workfile called the Employee Transactions - Batch File table (F06116Z1). The system automatically assigns a status of 0 - Waiting for Approval to the timecard records that allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. When a manager approves a timecard, users can no longer update the information.

After the timecards are approved, the Time Entry Batch Processor program (R05116Z1I) is used to move timecards from the Employee Transactions - Batch File table into the Employee Transaction Detail File table (F06116). After timecards from the workfile are stored in the Employee Transaction Detail File table, they can be processed in a payroll cycle.

# Prerequisite

Set up the self-service time entry features.

See Chapter 6, “Setting Up Self Service Time Entry,” page 49.

## See Also

*PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook*, “Entering Timecards for Employees,” Entering Daily Timecards for Employees

## Forms Used to Enter Timecards Using Self Service

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Time Entry Self Service Director | W051125C | Client portal: Time Entry Self Service Director<br>Click the Daily Time Entry link. | Use the search and select form to access the time entry form. |
| Employee Daily Time Entry | W051127A | Click Save. | Complete time entry information.<br>The fields that the system displays in the detail area are determined during self-service time entry setup. |
| Time Entry Self Service Director | W051125C | Client portal: Time Entry Self Service Director | Use the search and select form to access the time entry form. |
| Employee Daily Time Entry | W051127A | Click Save. | Click the Select option next to the records that you want to delete.<br>To modify records, change any of the fields in the detail area of the form.<br>When a manager approves a timecard, you can no longer delete or modify the information. |

## Self Service Timecard Entry

Access the Employee Daily Time Entry.

To enter self-service timecards using daily time entry:

1. On Time Entry Self Service Director, verify that the date in the Pay Period Ending Date field is correct, and then click the Daily Time Entry link.
2. On Employee Daily Time Entry, click a blank line in the time entry area at the bottom of the form.
3. Enter a value in the Pay Type field.
4. Enter the number of hours that are associated with the pay type that you entered in step 3 for each day of the pay period.
5. Complete any additional fields in the detail area.
6. Click Save to save the record and to display a new line in the time entry area.

   When you click Save, the system updates the totals in the review sections of the form.
7. Complete steps 2 through 6 until you have entered all timecard information. You must enter a separate line for each pay type.
8. Click Back to return to Time Entry Self Service Director.

| | |
|---|---|
| **Pay Period Ending Date** | Enter the last day of a processing period (pay period, month, quarter or year). |
| **Pay Type** | Enter a code that defines the type of pay, deduction, benefit, or accrual.<br>Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999. |

## Delete or Modify Self Service Timecards

Access the Employee Daily Time Entry form.

To delete or modify self-service timecards using daily time entry:

1. On Time Entry Self Service Director, click the Daily Time Entry link.
2. On Employee Daily Time Entry, to delete timecards, click the Select option next to the records that you want to delete, and then click Delete.
3. To modify timecards, change any of the fields in the detail area of the form and then click Save.
4. Click Back to return to Time Entry Self Service Director.

# Managing Self Service Timecards Using Summary Time Entry

When you click the Summary Time Entry link from Time Entry Self Service Director (P051125), the system displays two sections on Employee Summary Time Entry (P051128) where employees can enter timecard information. In the Quick Entry section of the form, employees can enter lump sum amounts for regular, sick, vacation, and holiday hours that they worked during the pay period.

For example, if an employee uses 40 hours of vacation time during the pay period, they can enter the total vacation time in the Quick Entry section of the form. The pay types that are included in the Quick Entry section are specified in a processing option for the Time Entry Self Service Director program.

Additionally, employees can enter timecard records in the time entry grid at the bottom of the form. The fields that appear in the time entry grid are determined during the self-service time entry setup process.

---

**Note.** Employees whose pay frequency is monthly must use Employee Summary Time Entry to enter self-service timecards. Only employees whose pay frequency is weekly, biweekly, or semimonthly can enter self-service timecards using either Employee Daily Time Entry or Employee Summary Time Entry.

---

When an employee enters or updates timecards, the system stores them in a temporary workfile called the Employee Transaction - Batch File table (F06116Z1). These timecard records are assigned a status of 0 - Waiting for Approval, which allows managers to easily identify timecards that must be reviewed and approved. Users can enter or update their own timecard records using this form. However, if a manager has already approved a timecard, the user cannot update the timecard.

After the timecards are approved, the Time Entry Batch Processor program (R05116Z1I) is used to move the timecards into the Employee Transaction Detail File table (F06116). After the system moves the timecards from the workfile into the Employee Transaction Detail File table, they can be processed in a payroll cycle.

### See Also

*PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook*, "Entering Timecards for Employees"

## Forms Used to Manage Self Service Timecards

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Time Entry Self Service Director | W051125C | Client portal: Time Entry Self Service Director<br>Click theSummary Time Entry link | Use the search and select form to reach the summary time entry form. |
| Summary Time Entry | W051128A | Click Save. | Enter time entry information.<br>The fields that appear in the detail area are determined during self-service time entry setup.<br>If you click Close without first saving the timecard, the system displays a Save Any Unsaved Records? dialog so you can choose to save any unsaved changes or cancel the Close request. |
| Time Entry Self Service Director | W051125C | Client portal: Time Entry Self Service Director | Use the search and select form to reach the summary time entry form. |
| Employee Summary Time Entry | W051128A | Click Save. | Enter changes as required.<br>You cannot delete or modify a timecard if a manager has already approved it.<br>To select or remove a selected status for all of the timecard records that are displayed, you can use the Select All or Clear All options.<br>The system displays a confirmation dialog that you must use to confirm the delete action. The dialog indicates the number of records that are selected and provides Yes and No options so that you can proceed with the delete action or stop the delete action and return to Employee Summary Time Entry. |

## Managing Self Service Timecards

Access the Summary Time Entry form.

To enter self-service timecards using summary time entry:

1. On Time Entry Self Service Director, verify that the date entered in the Pay Period Ending Date field is correct, and then click the Summary Time Entry link.
2. On Summary Time Entry, complete these fields in the Quick Entry (Totals Only) section of the form to enter lump sum amounts:
   - Reg.
   - Vac
   - Sick
   - Holiday
3. To enter timecards in the detail area of the form, click a grid line and enter a pay type in the Pay Type field.
4. Complete any additional fields in the detail area.
5. Click Save to save the record and display a new line in the time entry area.
6. Complete steps 2 through 5 until you have entered all timecard information.
7. Click Back to return to Time Entry Self Service Director.

| | |
|---|---|
| **Reg.** | Enter the number of hours associated with each transaction. |
| **Vac** | Enter the number of hours associated with each transaction. |
| **Sick** | Enter the number of hours associated with each transaction. |
| **Holiday** | Enter the number of hours associated with each transaction. |

## Delete or Modify Self Service Timecards

Access the Employee Summary Time Entry form.

To delete or modify self-service timecards using summary time entry:

1. On Time Entry Self Service Director, click the Summary Time Entry link.
2. On Employee Summary Time Entry, to delete timecards, click the Select option next to the records that you want to delete, and then click Delete.
3. To modify timecards, change any of the fields in the detail area of the form and then click Save.
4. Click Back to return to Time Entry Self Service Director.

# CHAPTER 28

# Manager Self-Service

This chapter provides an overview of manager self-service and describes how to:

- Use the Managers Workbench program.
- Change an employee status.
- Review an employee status change.
- Assign delegates.
- Review upcoming employee reviews.
- Enter data for verification-of-employment letters.
- Run managers reports.
- Set up information for new employees.
- Approve employee self service information.
- Create organization charts.
- Enter competency information.
- Manage self-service timecards using summary time entry.
- Review and approve self-service timecards.

## Understanding Manager Self-Service

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

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

- Requesting employee status changes
- Running managerial reports
- Assigning delegates
- Generating a graphic organizational chart and reviewing the hierarchical structure of the jobs within an organization
- Reviewing jobs and job competencies in an organization
- Performing a gap analysis of employee and job competencies

- Entering employee competency information
- Reviewing employee profiles
- Reviewing employee information, such as name and address, time entry, emergency contacts, paid time off balances, and skill competencies

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

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

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

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

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

### Compensation Management Self Service Considerations

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

### See Also

Chapter 5, "Setting Up Manager Self-Service," page 29

# Managers Workbench

This section provides an overview of verification-of-employment letters and discusses how to:

- Set the processing options.
- Use the Managers Workbench program.

# Understanding Managers Workbench

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

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

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

---

These options are available in the Managers Workbench:

| Manager Function | Options |
|---|---|
| Self Service | You can choose My Self Service Ap from the Form menu, and then perform these tasks:<br>• Review or change your name and address information<br>• Review your time entry<br>• Review your paid time off<br>• Review or update your emergency contacts<br>• Review and enter your competency information<br>When you first choose one of your employees and then choose Self Service Apps. from the Row menu, you can perform these tasks:<br>• Review employee name and address information<br>• Review and revise employee time entry<br>• Review employee paid time off<br>• Review employee emergency contacts<br>• Review and revise employee competency information<br>You can also review employee data, analyze employee skills, and prepare for employee coaching sessions with these self-service options. |

| Manager Function | Options |
| --- | --- |
| Status Change | Status Change includes these preset options for changing an employee's status:<br>• Requesting a promotion<br>• Changing an employee's assigned location<br>• Changing an employee's department or supervisor<br>• Changing an employee's job status<br>• Requesting a leave of absence<br>This centralized approach to managing employee changes allows you to initiate, review, and approve changes for your employees. The User Defined status change category allows your Human Capital Management department to set up an additional employee change category. For example, you might want to create a new category for compensation review. |
| Reports | These reports are available from the Managers Workbench (P08712):<br>• Managers Reports (P08740)<br>• Headcount (R081021)<br>• Organization Chart (P08713 or P08713W)<br>• Turnover Reports (R080430)<br>• Phone List (R080115)<br>• Time Entry (R053001)<br>Managers Reports (P08740) is a preset list of reports, defined by your Human Capital Management department, that you can use to meet frequent reporting requirements. Your human capital management administrator can create one or more versions that include reports that you commonly use. Adding versions is an available option only in a Windows environment. This feature cannot be used in a Web environment.<br>Use these reports to help meet your needs for organizational reporting, planning, review, and management of your employees. You can generate reports for the employee group below your job level, or you can select a subordinate management level and generate reports with that level at the top of the hierarchy.<br>You can use the Submitted Reports option on the Form menu to review the status of reports that you have previously submitted. |

| Manager Function | Options |
| --- | --- |
| Supplemental Data | Depending on what kinds of supplemental data you maintain, your human capital management administrator can set up databases for each system. You can use supplemental data to track information that is not included in the standard master tables. For example, you might want to track information such as products purchased, sales information, delivery methods, internal ratings, or work history. Supplemental database code information is stored in the Supplemental Database Setup table (F00090). |
| Gap Analysis | Use Gap Analysis to help you compare the skill competencies required for a job and the current competencies of an employee. Often used in conjunction with Job Competencies In An Organization, these functions are useful for organizational planning and in preparation for employee performance reviews. |
| Performance | Use Employee Performance to create new appraisals, review and change current appraisals, and review historical appraisal information. You can review your personal performance appraisal by choosing Performance from the Form menu.<br><br>When you are using the performance options, you can also access supplemental data from the Performance menu to record additional information that you want to track. |
| Employee Profile | Use Employee Profile to review employee data obtained from the Employee Master Information table (F060116). You can also use this function to contact your Human Capital Management department about updates to an employee record. |
| Attachments | Attachments can be added as part of the setup function to provide information for all managers who use any of the Managers Workbench applications. These can include instructions, reminders, or miscellaneous information.<br><br>You can also add attachments while using Managers Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, another manager cannot view the notes that you attach. |
| Jobs In An Organization | Use Jobs In An Organization to review how each job fits into the hierarchical levels of the organizational structure. You can use this information to plan for new jobs and to determine the competencies that are associated with each job. When you access this program from Managers Workbench, you can review information, but you cannot change it. |

| Manager Function | Options |
| --- | --- |
| Compensation Review | Use this program to review compensation data for any of your employees. The program provides you with a workbench that provides exits for:<br>• Viewing and changing salary recommendations<br>• Viewing the salary budget allocation, budget spent, and budget remaining by increase types<br>• Submitting salary recommendations up to the next level supervisor for approval<br>• Returning salary recommendations down to the previous level supervisor for salary rework<br>• Providing access for a human capital management administrator to view or change salary recommendations of a specified supervisor with the use of a processing option |
| Employee Letters | When you need to send written information to employees, you can use the mail merge features of your software to efficiently produce letters that you mail to all of your employees. For example, you can quickly generate a letter to a group of your employees who are included in a new marketing campaign. Or you can generate a mass mailing to all of your employees to explain a new benefit option. This option will allow run the Web Mail Merge application that will allow you to work with the letters you have generated. |
| Job Competencies In An Organization | Use Job Competencies In An Organization to see how job competencies are assigned to the hierarchical levels of the organizational structure. You can use this information to determine the competencies that apply to you and the employees who report to you. |
| Approvals | Use Approvals to expedite the workflow process for your employees. use this Form menu option to review all Status Change approval requests and take appropriate action. |

| Manager Function | Options |
|---|---|
| Delegates | Use My Delegates, on the Form menu, to set up subordinates who are authorized to use Managers Workbench in your absence or to enable others to perform managerial functions. After the initial setup, the delegates that you select can access Managers Workbench at your organizational level and then perform functions at an authority level that you specify to help you review, change, and approve employee information. |
| Attachments | Attachments can be added as part of the setup function to provide information for all managers who use any of the Managers Workbench applications. These can include instructions, reminders, or miscellaneous information.<br><br>You can also add attachments while using Managers Workbench applications. For example, you might want to remind yourself about information that will help you plan for reviews or record action steps that you want to remember regarding specific employees. You can also attach graphic files. The attached files are linked to your address number and an employee address number so that if either position changes, another manager cannot view the notes that you attach. |

## Form Used for Managers Workbench

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Managers Employees | W08712A | Manager Self Service menu (G05BMSS1), Managers Workbench | When a processing option is set appropriately, the system reads the address book number of the manager who is logged into the system, automatically displays that information, and then displays the list of employees who report to this manager.<br><br>You can access your personal information and follow up on previous tasks that you initiate by choosing an option from the Form menu. You can initiate and follow up on employee tasks by choosing options from the Row menu. |

# Setting Processing Options for Managers Workbench (P08712)

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.

## User Level

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

**1. User Level** Use this processing option to specify whether management, employees, or HR personnel will use the application. Values are:

Blank: Management

*1:* Employees and management

*2:* HR personnel

## Version

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

**1. Compensation Review (P08810)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**2. Status Change (P08720)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**3. Status Change Review (P087201) from Form Exit** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**4. Job Competencies In An Organization (P08006)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**5. Job In An Organization (P08007)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**6. Gap Analysis (P08008)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**7. Managers Reports (P08740) from Form Exit** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**8. Managers Delegates (P08750)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**9. Resource Competency Information (P05100)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**10. Create Performance Appraisal (P087711)** Use this processing option to specify a program version. If you leave this option blank, the system uses the default version (ZJDE0001).

**11. Current Performance Appraisals (P087712)** Use this processing option to specify a program version. If you leave this option blank, the system uses a default version:

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

**12. Historical Performance Appraisals (P087712)** Use this processing option to specify a program version. If you leave this option blank, the system uses a default version as follows:

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

## Using Managers Workbench

Access the Work With Managers Employees form.

# Changing an Employee Status

This section provides an overview of changing an employee status and discusses how to:

- Set the processing options.
- Request an employee status change.

## Understanding Employee Status Change

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

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

You can perform any of these preset tasks:

- Promoting an employee.
- Changing an employee's job status.
- Relocating an employee.
- Changing an employee department or supervisor.
- Leave of Absence.

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

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

## Forms Used to Request an Employee Status Change

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Managers Employees | W08712A | Manager Self Service (G05BMSS1), Managers Workbench<br>Status Change Request, Row Menu. | Select employee records. |
| Select Employee Status Change Request | W08720A | Click Add, Form menu. | Select a Change Type. To display notes about the Change Type, click the icon next to the option.<br>Review Change Type notes and initiate an employee status change.<br>Values can be defined for the Change Type fields to meet the needs of the organization. |
| Create Employee Status Change Request | W08720B | Enter header values.<br>Instructions tab: review.<br>Review all other tabs.<br>To save, but not submit the request, Click OK.<br>To save and submit a request for approval, click Submit. | Because there is a limited number of fields that can be placed on a form at one time, the eligibility code, user defined dates and category code fields are on a different form. When you click on the Category Codes/User Dates tab this form will automatically be displayed.<br>The system automatically generates workflow messages in the Employee Work Center for the appropriate managers. The system updates the Employee Master Information table (F060116) when the required approvals are complete.<br>If you need to change a request after you have submitted it, but before it has been approved, cancel the request and create a new one. |

## Setting Processing Options for Employee Status Change (P08720)

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. Mail Box Designator**

Use this processing option to specify the name of the mail box in the Employee Work Center where your workflow notifications and approval messages are sent. If left blank, the system uses 01, personal in-basket.

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

**2. Final Status**

Use this processing option to specify the final status for the Employee Status Change records (F08720) when the process has been successfully completed. The final status should be a numeric status code. Status Change status codes are found in the 08/S5 UDC table.

**3. Allow Delegates**

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

*0:* No

*1:* Yes

**4. Perform Employee Master Field Edits**

Use this processing option to specify whether you want the system to perform the same validation on the data as is done with the employee master applications. Values are:

### User Level

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

**1. User Level**

Use this processing option to specify whether the application is used by a manager or by HR personnel. HR personnel will be able to add a status change for any employee not just subordinates. Values are:

Blank: Manager

*1:* Manager or a manager delegate

*2:* HR personnel

### Defaults

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

**1. Status Change Type 1**

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

**2. Status Change Type 2** Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

**3. Status Change Type 3** Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

**4. Status Change Type 4** Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

**5. Status Change Type 5** Use this processing option to specify a status change type that the system uses as one of five default settings. The system displays the five default status change types on the Select Employee Status Change Request form.

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

*0:* Do not use default data

*1:* Use default data

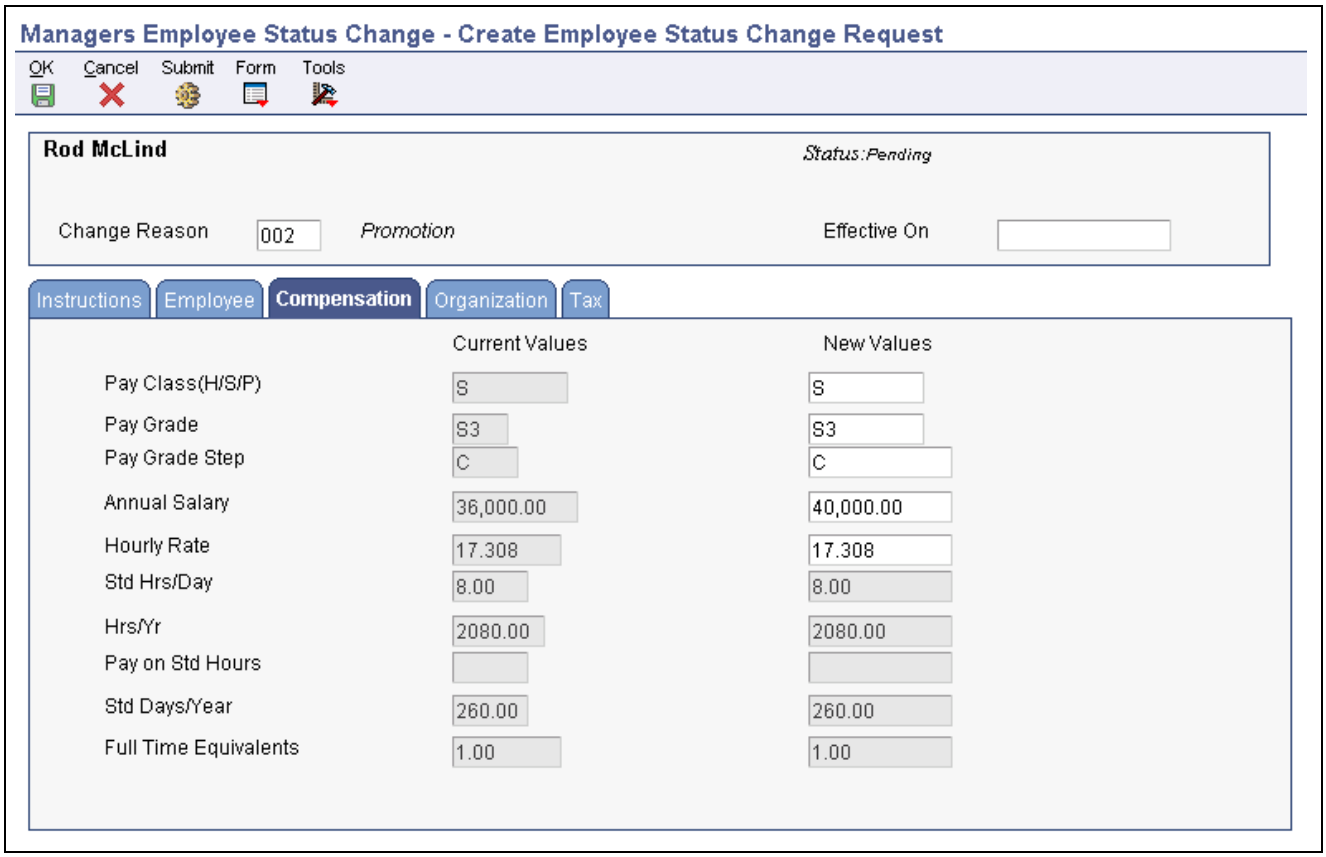
**7. Business Unit/Job ID Information Change** Use this processing option to determine whether the system automatically includes business unit and job cross-reference information from the employee record when you change a job type for an existing employee. The system automatically uses the union code,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

*0:* Do not use default data

*1:* Use default data

## Requesting an Employee Status Change

Access the Work With Managers Employees form




Create Employee Status Change Request form

To request an employee status change:

1. On Work With Managers Employees, click one of these options and click Find to display your subordinates.
   - Active Employees
   - All Employees
2. Choose the desired subordinate's record from the detail area.
3. From the Row menu, choose Status Change Req and then Status Change.
4. On Select Employee Status Change Request, choose one of these options:
   - Change1
   - Change2
   - Change3
   - Change4
   - Change5
   - User Defined
5. To display notes or instructions about the change process, click the icon next to the option.
6. Click Add.
7. On Create Employee Status Change Request, complete these fields:
   - Change Reason

- Effective On

8. Read the comments on the Instructions tab, and then click the next tab to enter appropriate changes to the active fields. Fields that are not applicable to the type of change selected are not available for changes.
9. Click each of the remaining tabs and enter changes as appropriate.
10. After you review information for all tabs and complete the changes, perform one:
    - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
    - Click Submit to save and submit the request for approval. After you submit a request, you cannot revise it except to enter a new Change Reason or to change the Effective On date.

**Change Reason** Enter a code that indicates the reason for one:

- 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.

**Effective On** Enter a future date when all changes will take effect or the date when the changes went into effect.

# Reviewing an Employee Status Change

This section provides an overview of changing an employee status and discusses how to:

- Set the processing options.
- Review an employee status change.

## Understanding an Employee Status Change Review

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

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

- Escalation monitor. Provides a report of all halted workflow processes and moves the requests to the next stage.
- Restart. Restarts a specific status change process, terminating any active process instances.

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

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

## Forms Used to Review a Status Change

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Managers Employees | W08712A | Manager Self Service menu (G05BMSS1), Managers Workbench<br>Row menu, Status Change Request, Status Change Review. | Review existing data. |
| Work With Status Change | W087201A | Click Select. | Select an employee record. |
| Modify Employee Status Change Request | W08720B | Review each tab.<br>To save, but not submit the request, click OK.<br>To save and submit the request for approval, click Submit. | The system automatically displays the required tabs and fields on the form. Depending on the pending change, a different number of tabs might appear.<br>Fields that are not applicable to the type of change selected will not be available for changes.<br>After you submit a request it cannot be revised except to enter a new Change Reason or to change the Effective On date. |
| Work With Status Change | W087201A | Form menu, Escalation Monitor | Generate a report of a move all halted processes to the next stage.<br>To restart a change process and delete pending workflow messages that are linked to the process, choose a record and then choose Restart from the Row menu. |

## Setting Processing Options for Status Change Review (P087201)

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

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

**1. Allow Delegates**

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

*0:* No

*1:* Yes

**2. Allow Escalating Halted Activities**

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

*0:* No

*1:* Yes

**3. Allow Restarting Active Processes**

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

- Payroll Lockout
- Effective date
- Delay of management approval

When the workflow has stopped for any of these reasons, performing a restart will complete the active workflow activity and delete the records in the Approval History table. The status of the Status Change record will change to pending. The workflow process will be completed but not deleted. Values are:

*0:* No

*1:* Yes

**4. Allow Aborting Active Processes**

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

*0:* No

*1:* Yes

**5. Employee Status Change Version (P08720)**

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

If no value is entered, the system uses version ZJDE0001.

## User Level

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

**1. User Level** Use this processing option to specify whether the application will be used by management, employees, or HR personnel. Values are:

Blank: Management

*1:* Employees and management

*2:* HR personnel

## Reviewing an Employee Status Change Request

Access the Work With Status Change form.

To review a status change request:

1. On Work With Managers Employees, click one of these options depending on whether you want to see only active employees who work for you or you want to include employees whose employment has been terminated.
   - Active Employees
   - All Employees
2. Choose the desired subordinate's record from the detail area.
3. From the Row menu, choose Status Change Request and then choose Status Change Review.
4. On Work With Status Change, choose the desired employee's record and click Select.
5. On Modify Employee Status Change Request, review the information on each of the tabs and enter required changes. After you have reviewed the information for all tabs and completed the changes, perform one of these actions:
   - Click OK to save, but not submit, the request. This option allows you to review the request at a later date and then submit it for approval.
   - Click Submit to save and submit the request for approval and then click OK on the Workflow Pending Review Notification.
6. On Work With Status Change, choose Escalation Monitor from the Form menu to generate a report of and move all halted processes to the next stage.
7. To move a specific request to the next stage, choose a record and then choose Escalate from the Row menu.
8. To restart a specific status change process, choose a record and then choose Restart from the Row menu.

# Assigning Delegates

This section provides an overview of assigning delegates and discusses how to:

- Set the processing options.
- Enter delegate assignments.

## Understanding Delegate Assignment

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

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

## Prerequisite

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

## Forms Used to Assign Delegates

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Managers Employees | W08712A | Manager Self Service menu (G05BMSS1), Managers Workbench<br>My Delegates, Form menu. | Select an employee record. |
| Work With Delegates | W08750A | Click OK. | Enter delegate information. Repeat Step 3 for the same employee as many times as needed, assigning an additional authorization type for each entry. |

## Setting Processing Options for Managers Delegates (P08750)

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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### Defaults

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

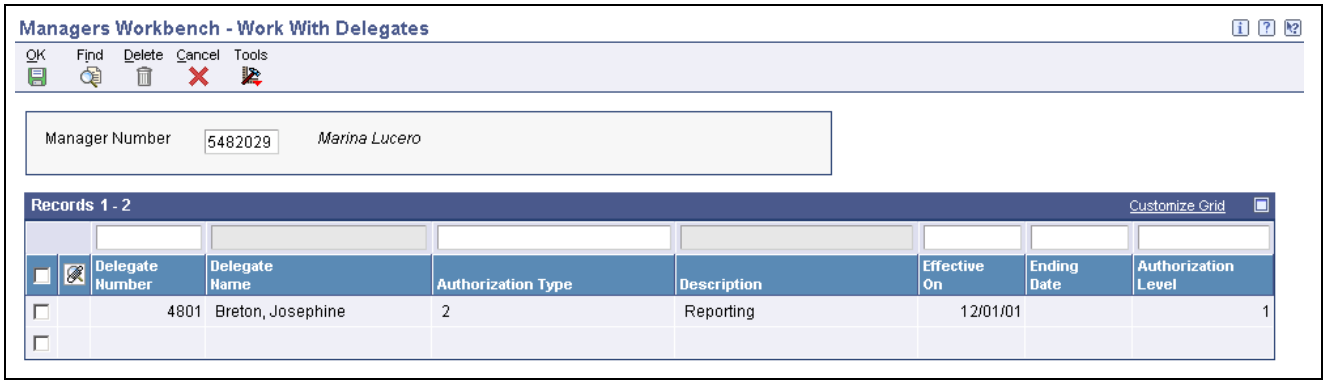
**1. User Level** Use this processing option to specify whether to see delegates for different managers or to see the delegates for only one manager. Values are:

*0:* Only see one manager delegates.

*1:* Can change managers to see everyone's delegates.

## Assigning a Delegate

Access the Work With Managers Employees form.




Work With Delegates form

To assign a delegate:

1. On Work With Managers Employees, click Find to display your organizational hierarchy and your employees' records.
2. Choose My Delegates from the Form menu.
3. On Work With Delegates, complete these fields:
   - Delegate Number
   - Authorization Type
   - Effective On
   - Ending Date
   - Authorization Level
4. Repeat step 3 for the same employee as many times as needed, assigning an additional authorization type for each entry.
5. When you are finished assigning delegates, click OK.

**Delegate Number** Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Authorization Type** Enter a code that specifies the type of authorization given to a delegate.

**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.

**Authorization Level** Enter the number of levels in the organizational structure below the delegate's manager that the delegate can review and make changes to employee records. For example, a value of 0 allows the delegate to access only employees that report directly to the delegate's manager. A value of *1* allows the delegate to access the records of employees that report to the manager's immediate subordinates.

# Reviewing Upcoming Employee Reviews by Supervisor

This section provides an overview of reviewing upcoming employee reviews by supervisor and discusses how to manage upcoming employee reviews.

## Understanding Upcoming Employee Reviews

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

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

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

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

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

## Prerequisite

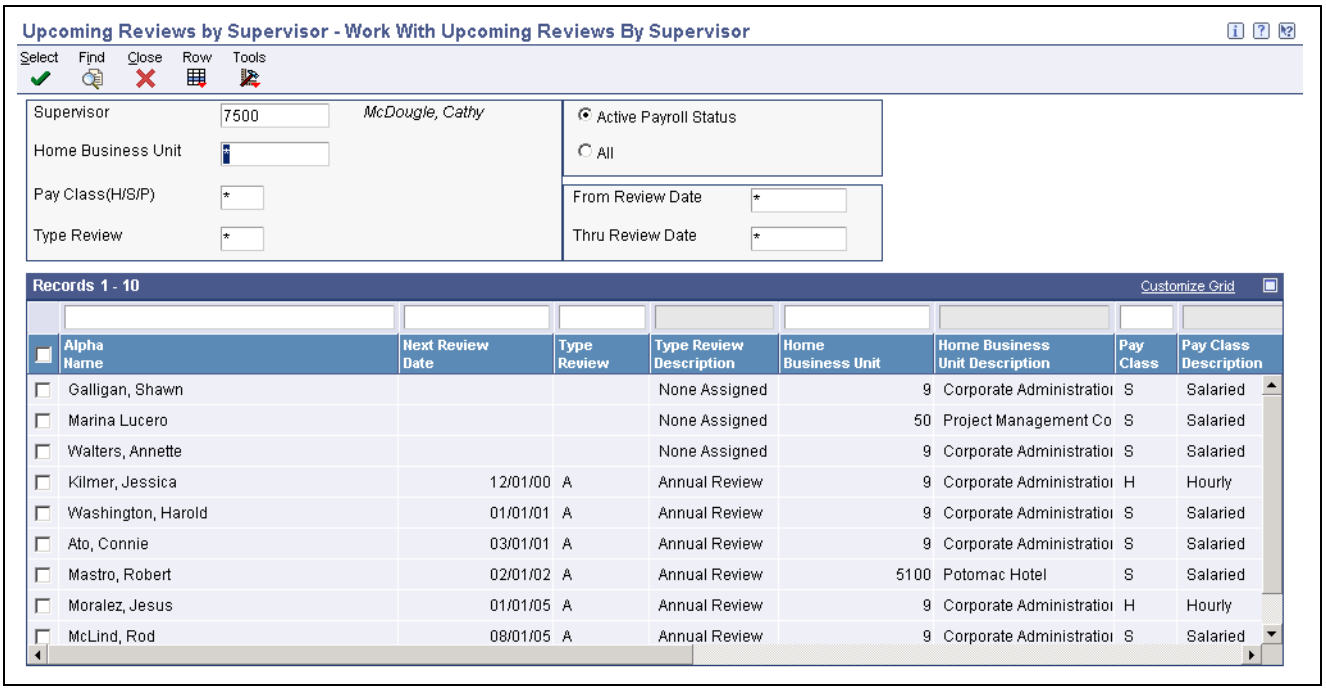
If the Upcoming Reviews program (R052202) has been run, you need to review only the information on the report that appears when you log onto your self-service site. See Running the Upcoming Reviews Report in the Human Resources Guide to further understand the procedure.

## Form Used to Review Upcoming Employee Reviews

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Upcoming Reviews By Supervisor | W052200A | Manager Self Service (G05BMSS1), Upcoming Reviews by Supervisor | Review information and then click Close.<br>If you complete the From Review Date field, but leave the Thru Review Date field blank, the system displays all employees with reviews on or after the from review date.<br>If you complete only the Thru Review Date field, the system displays employees with no specific next review date and employees with a next review date equal to or prior to the through review date.<br>The Active Payroll Status option displays only employees with an active payroll status, including employees who are on a leave of absence.<br>The All option displays all employees, including those with a terminated status and employees on a leave of absence. |

## Reviewing Upcoming Employee Review Information

Access the Work With Upcoming Reviews By Supervisor form.



Work With Upcoming Reviews By Supervisor form

To review upcoming employee reviews by supervisor:

1. On Work With Upcoming Reviews By Supervisor, complete any of these fields:
   - Home Business Unit
   - Pay Class(H/S/P)
   - Type Review
2. Complete these fields if you want to review employees who have upcoming reviews during a specific period of time:
   - From Review Date
   - Thru Review Date
3. Choose one of these options and then click Find to display your subordinates.
   - Active Payroll Status
   - All
4. Review the displayed information.

**Type Review** Enter a user defined code (06/RV) that specifies the type of performance review to be completed for the next review period.

**From 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.

**Thru 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.

**Active Payroll Status** Enter an option that specifies the type of processing for an event.

| | |
|---|---|
| **All** | Enter an option that specifies the type of processing for an event. |

# Entering Data for Verification-of-Employment Letters

This section provides an overview of reviewing upcoming employee reviews by supervisor and discusses how to:

- Set processing options.
- Enter data for verification-of-employment letters.

## Understanding Data for Verification-of-Employment Letters

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

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

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

### See Also

Chapter 27, "Employee Self Service," Requesting a Verification-of-Employment Letter, page 217

*EnterpriseOne Workflow Tools Guide*

## Prerequisite

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

## Forms Used to Review Requests for Verification of Employment

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Verification Of Employment Request | W05003A | Employee Self Service (G05BESS1), Verification of Employment<br>Click Select. | Locate an employee record. |
| Verification Of Employment Data | W05003B | Employment Data tab<br>Click OK. | Review and change information as required.<br>If you clicked the Save Document option, the system saves the letter to the C:\TEMP\ directory.<br>You can print the Verification of Employment letter that automatically appears. You can also email the letter. |

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

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.

### User Level

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

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

| Typical User | Setup Issues |
|---|---|
| Used by Employee: | Entering *1* instructs Workflow to notify the recipient of the pending request after the employe enters the request information. The recipient completes the verification-of-employment letter and can print the letter or email it to the requested contact person. This value starts the process with the employee and finishes it with the Workflow recipient. If you enter this value, you must setup your recipient in the processing option on the Workflow Setup tab. |
| Used by HRM clerk: | Entering *2* instructs Workflow to notify the recipient of the completed letter after the human resource management clerk enters the request information. The recipient approves the letter and can print or email the letter directly to the contact person that the employee requested. This value assumes that the process has already started with the employee. The HR clerk does not receive a Workflow message but sends the completed letter through Workflow to a recipient for approval. If you choose this value, you must set up your recipient in the processing option on the Workflow Setup tab. |
| Used by HRM administrator: | Entering *3* deactivates Workflow in the Verification of Employment program. Because the human resources administrator starts and completes all requests, no need for Workflow exists. The HR administrator can delete a request and also print the letter or email it directly to the contact person that the employee requested. |

**1. User Level:** Use this processing option to specify whether this program will be used by an employee, an HR clerk, or an HR administrator. Values are:

Blank: Employee

*1:* Employee

*2:* HR clerk

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

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

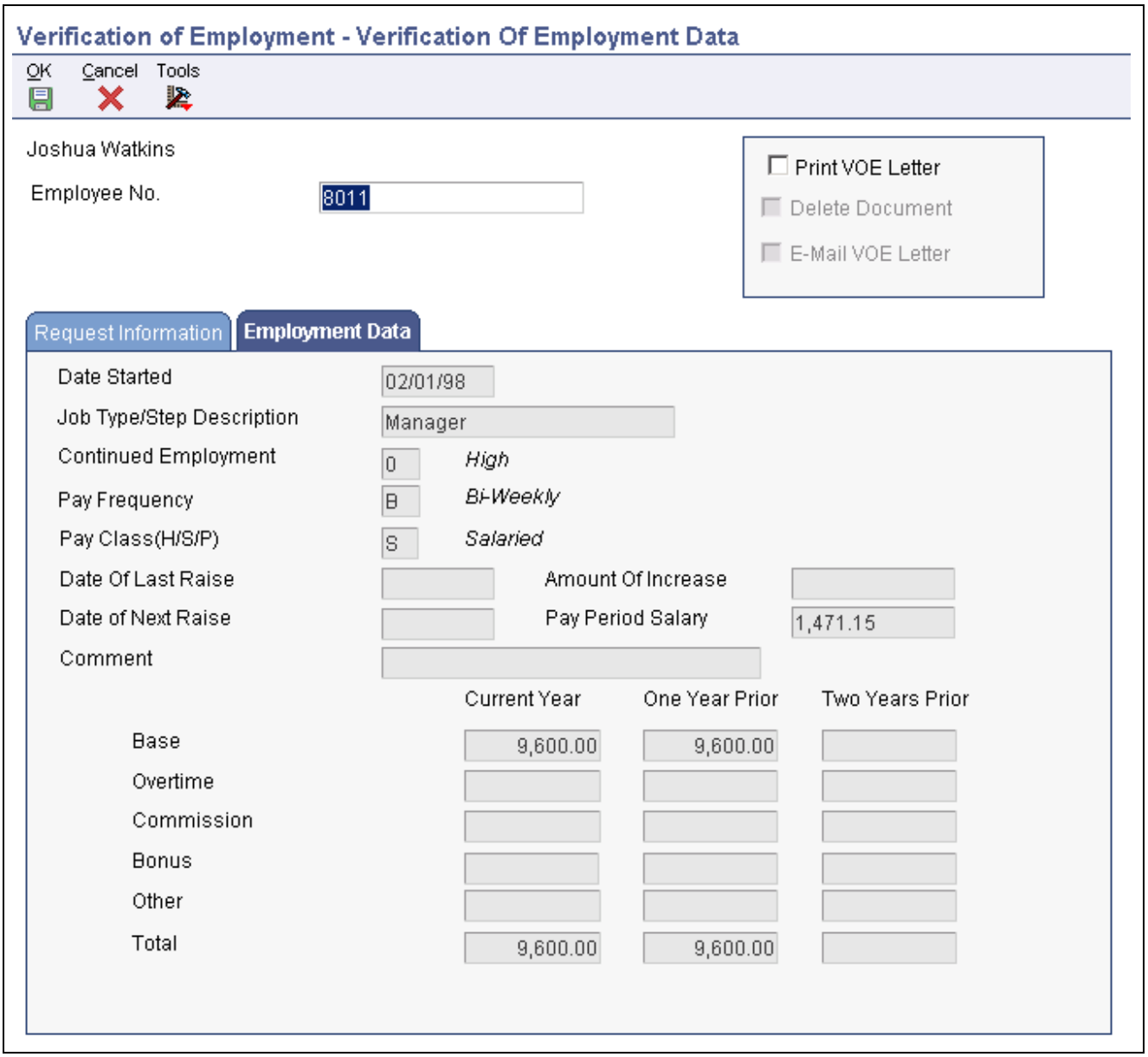
### Workflow Setup

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

**1. Address Number of VOE request processor (HRM):** Use this processing option to specify the address number of the HR person (or a distribution list) who processes VOE requests.

## Entering Verification-of-Employment Letter Data

Access the Work With Verification of Employment Requests form.




Verification of Employment Data form

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

1. On Work With Verification Of Employment Requests, complete these fields and click Find to locate an employee's request:
   - Employee ID
   - Request Date
2. If you need to delete a record, choose the record and click Delete.
3. Choose the employee's record and click Select.
4. On Verification Of Employment Data, click the Employment Data tab.
5. If your processing option is set to *3,* choose one or more of these options, depending on the contact method that the employee has checked:

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

6. Review and change these fields if necessary:
   - Date Started
   - Job Type/Step Description
   - Continued Employment
   - Pay Frequency
   - Pay Class(H/S/P)
   - Date Of Last Raise
   - Amount Of Increase
   - Date of Next Raise
   - Pay Period Salary
   - Comment
7. Review and change these compensation fields for the Current Year, One Year Prior, and Two Years Prior if necessary:
   - Base
   - Overtime
   - Commission
   - Bonus
   - Other
8. Click OK.
9. Choose Print from the Form menu.
10. If you have clicked the option to email the letter, click Send or Cancel on the E-Mail Confirmation form asking whether you want to email the request.

**Request Date** Enter the date that an item is scheduled to arrive or that an action is scheduled for completion.

If you are adding a request for a verification of employment letter, enter today's date. If you are reviewing a request, enter the date when you initially added the request.

**Print VOE Letter** Enter an option that specifies whether the system prints the verification of employment letter.

The system prints the verification of employment letter when you click OK.

**Delete Document** Enter an option that specifies whether you want the system to save the letter when you print it. If you activate this option, the letter will be deleted when the OK button on the form is pressed.

**E-Mail VOE Letter** Enter an option that specifies whether the system sends the verification of employment letter to the requested email address. Click the option to activate it.

The system sends the verification-of-employment letter when you click OK.

This option is enabled only when you activate the Print Verification-of-Employment Letter option also. You must also have the E-Mail box on the Requisition Information tab checked and a value in the E-Mail Address 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.

**Job Type/Step Description** Enter the description associated with the job type and job step. This description is stored in the Job Information table (F08001).

**Continued Employment** Enter a value that indicates the employee's potential for continuing employment with the organization. Valid values are stored in the user defined code table 05/V3.

**Date Of Last Raise** Enter the date of the employee's last raise. For the stand-alone HR system, this is the date when you update salary and wages. If you also have the Payroll system, this date is automatically updated when a payroll is run. You define pay effective dates using the Pay Rate Information screen.

**Amount Of Increase** Enter an amount of increase is the difference between two values. A negative value indicates a decrease.

A monetary increase as a result of a raise occurring on the Date of Last Raise.

**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.

**Pay Period Salary** Enter a value that represents the pay period salary. Pay period salary is calculated by dividing the annual salary by the number of pay periods.

**Comment** Enter a comment, description or remark. This entry can be up to 40 characters in length.

**Base** Enter an amount paid from all pay types considered to be base salary for the current year.

**Overtime** Enter an amount paid from all pay types considered to be overtime pay for the current year.

**Commission** Enter an amount paid from all pay types considered to be commission pay for the current year.

**Bonus** Enter an amount of bonus pay that the employee earned, year-to-date in the current year. The system calculates this amount by searching the employee's timecards for pay types that represent bonus pay. It then

calculates the amount of the employee's earnings during the year that were attributed to the bonus pay types.

**Note.** When you set up a pay type, you use the Pay Type Category field (PTCT) to identify it as part of a related group of pay types, such as regular pay, bonus pay, commissions, and so on. You define pay type categories in user defined code list 06/PC.

**Other** Enter an amount paid from all pay types considered to be other pay for the current year. Other pay is anything other than base salary, overtime, commission, and bonus.

# Running Managers Reports

This section provides an overview of managers reports and discusses how to run predetermined reports.

## Understanding Managers Reports

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

- Reports by category
- Individual reports

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

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

The Generate Graphic Org Chart program (P08713W) prints a picture of the organization, starting at the requesting manager's level.

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

Some reports are designed to run for a specific employee and allow you to pass the address book number of the employee to the report through the report data structure. When a report meets this criteria and the report data structure mapping has been setup in the Managers Reports Setup application, the DS Mapped column will contain a Yes. When you run a report that has the data structure mapped, the report will be run for the address book number in the Employee field. If the Employee field is blank the report will be run for the address book number in the Manager field.

You can also create and name your own custom list of report that contains a selection or reports from multiple categories. You can then recall is this list and submit the entire list or individual reports on the list.

### See Also

Chapter 5, “Setting Up Manager Self-Service,” Understanding Manager Self-Service Setup, page 29

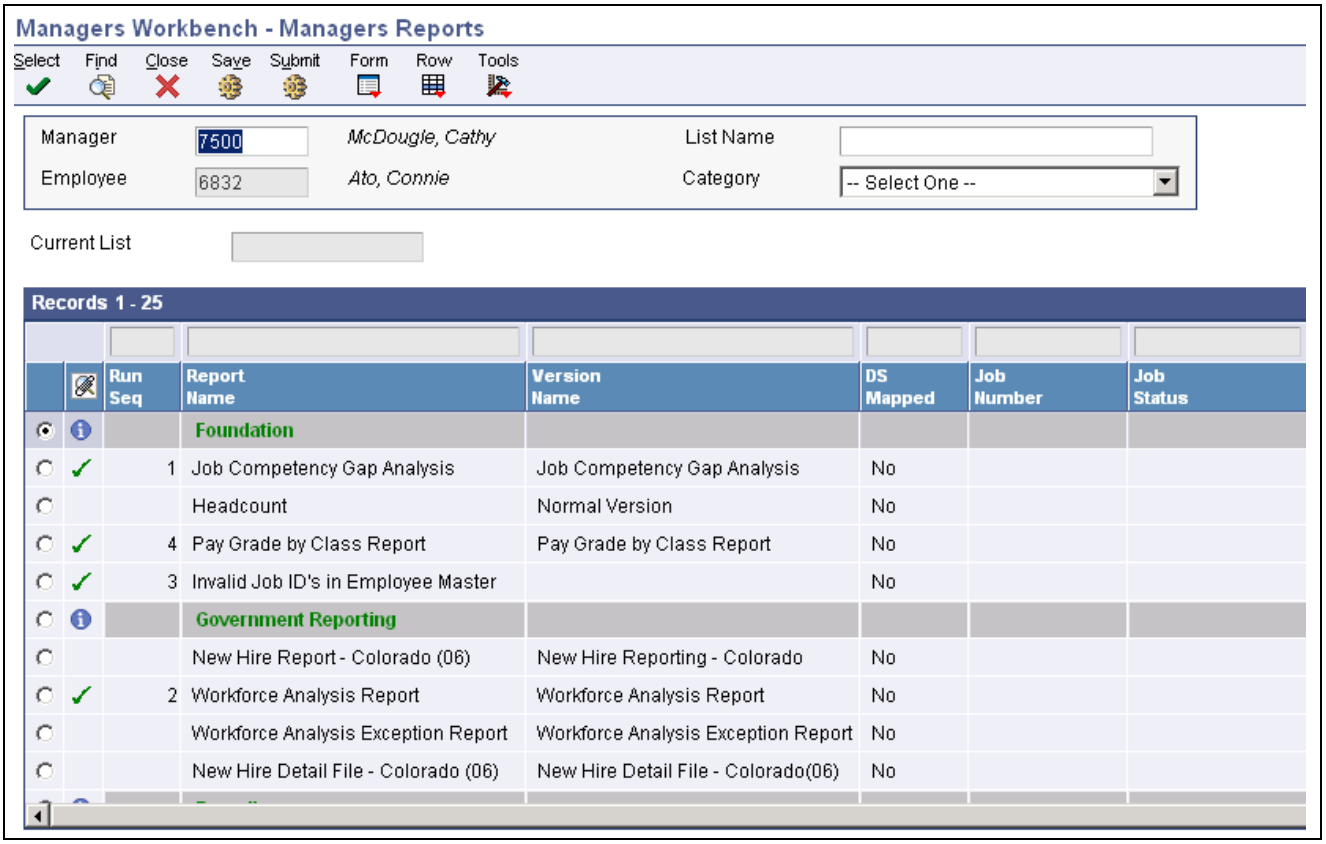
Chapter 5, “Setting Up Manager Self-Service,” Setting Up Manager Reports, page 40

## Forms Used to Run Manager Reports

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Managers Reports | W08740B | Manager Self Service Menu (G05BMSS1), Managers Reports<br>Click Submit. | To run reports without modification, select desired report(s). |
| Manager Reports Sequence | W08740A | Set Run Sequence, Form menu. | Select a report record.<br>Run reports in a particular sequence. |

## Using Managers Reports

Access the Managers Reports form.




Managers Reports form

To run manager reports:

1. On Managers Reports, complete the Category field and then click Find: To list reports in all categories leave this field blank.
2. To run the list of reports without modification, click Submit.
3. To run the list of reports in a particular order, choose Set Run Sequence from the Form menu.
4. On Manager Reports Sequence, click each row in the order in which you want the reports to run.
5. If you need to restart the sequence numbering, click Find and then click each row in the order in which you want the reports to run.
6. Click OK.
7. To run the reports in the new sequence, on Managers Reports, click Submit.
8. To run an individual report from the list, highlight the report and click the Select button.
9. To select multiple reports or to add reports to your custom list, double-click the button in the first column (or the row header) for the desired report and then click Submit. This will run all reports with a check mark in the row header column.
10. To run a report for one employee, complete the Employee field:
11. Click Submit.
12. To apply a name to your list of reports, enter a value in the List Name field and then choose Save from the Form menu.

| | |
|---|---|
| **Category** | Enter the name of a report category. Each report is associated with a category to make creating and maintaining lists of reports easier and to allow you to view or submit just the reports that belong to a particular category. |
| **Employee** | Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location. |
| **List Name** | Enter the name of a report list. You can create multiple report lists, each with a unique name. To copy an existing list, display the list to copy, change the name in the List Name field, and click Save. |

# Setting Up Information for New Employees

This section provides an overview of setting up information for new employees and discusses how to:

- Set processing options for the Employee Setup Workbench program
- Add an employee record using employee setup.
- Initiate the employee setup process.
- Approve a setup process or task.
- Review and revise the setup status.

# Understanding New Employee Setup

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

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

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

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

Setting up new employees consists of these steps:

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

## Add an Employee Record Using Employee Setup

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

When you add an employee record using the Employee Setup Workbench program (P08710), the system automatically adds an employee record to the Address Book Master table (F0101) and an employee setup record to the Employee Setup Master table (F08710). If you are adding an employee record using any of these programs, see the referenced information for adding an employee record, and then proceed to the task to initiate employee setup.

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

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**Note.** When you use one of these programs, the system does not automatically add an employee setup record to the Employee Setup Master table. An F08710 record is only added if the employee is added through Quick Hire. To add a setup record after you add an employee record, you must access the Employee Setup Workbench program and initiate the process for employee setup.

---

## Initiate the Employee Setup Process

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

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

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

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

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

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

## Approve a Setup Process or Task

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

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

If the system requires a process approval, Workflow will begin for each employee setup task but will wait until it obtains the process approval before continuing.

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

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

When specified in the processing option, the system will require a process approval for the entire setup process. . When the system requires a process approval, it sets the task status to Pending (as defined in Setup Task Status list 08/S1) until the designated manager approves the process. When the designated manager approves the setup process, the system resets the process status to Approved (this is the status in the F08710 record ) and restarts each task within the process, if a task has a future start date the task workflow process will halt and wait for the schedule activation date. The Escalation Monitor restarts halted tasks with a future Start Date on the appropriate date.

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

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

When the task has been approved, the activation date has been reached and the required location information has been entered, workflow will resume an activate the task. This will change the status of the task record (F08711) to A or Activated, and execute the predefined task activities which could be one or more of the following: send an email message, run a customized report, create a work order, and start an additional Workflow process. An email message can contain the employee's name and location information, the description of the task, a requested completion date, and an the managers comments about the task. When a report is one of the task activities, and email is sent to the task recipient that contains an active link the when selected will submit the report. You can also link a work order to the setup task.

A task remains in the Activated status until the task recipient completes working on the task and returns to the Managers Employee Setup application and click on the Completed row exit button.

### Review and Revise the Setup Process

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

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

## Prerequisites

Before you complete the tasks in this section:

- Set the processing options for Employee Setup Workbench (P08710).
- Complete the setup tasks for the employee setup process. See Setting Up the Employee Setup Process in the Human Capital Management Self Service Guide.
- Set the processing options for Employee Quick Hire (P060116Q) to activate the new hire process, which includes Employee Setup Workbench. You must also set these processing options to specify whether the system automatically updates the Employee Master Information table (F060116) or the Unedited Quick Hire Transaction File table (F060116Z) when you add a record. For more information about these processing options, see Adding Employee Records Using Employee Quick Hire in the Human Capital Management Foundation Guide.
- Review the status codes from UDCs 08/S1 and 08/S2.

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

*PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook*, "Adding Employee Records One at a Time"

*PeopleSoft EnterpriseOne Human Resources 8.11 PeopleBook*, "Tracking Applicants," Entering Applicant Information

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

*PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook*, "Adding Employee Records Using Employee Quick Hire," Adding Employee Records for Applicants, Rehires, and New Hires

## Forms Used to Set Up Information for New Employees

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work With Employee Setup | W08710C | Manager Self Service (G05BMSS1), Managers Employee Setup<br>Employee Management (G05BE1), HRM Employee Setup<br>Click Add. | If you added an employee record using a program other than the Employee Setup Workbench program, use the first navigation.<br>Locate and choose an employee record for which setup tasks are required. |
| Employee Setup Entry | W08710G | Add Default Tasks, Form menu. | If default tasks are set up for the new employee's job type and step, the system supplies the default tasks on the Employee Setup Entry form.<br>If a value is in the Lock Code field, you can change the subclass only to a level that is equal to or less than the value in the Ranking field.<br>Your new employee record displays on Work With Employee Setup and shows *Pending* in the Process Status field in the detail area. |
| Employee Setup Search and Select | W08710E | Copy Employee, Form menu.<br>Click OK. | The system supplies the detail area with tasks from the specified employee. You can copy tasks only from employees who have the same Setup Action value as the employee that you are setting up. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Activation Confirmation | W08710K | Click Yes. | The Activation Confirmation form appears asking whether you want to activate the employee setup process. |
| Work With Employee Setup | W08710C | Click OK. | Review pending status. |
| Work Center | W012503F | Workflow Management (G02), Work Item Manager | View all queues to view all employee setup messages.<br>A Workflow message might provide only change notification or change notification and approval. On Media Object Viewer, if an approval is requested, an icon exists in the left-hand pane that you can click. The system then displays a form that you can use to approve or reject the request. |
| Media Object Viewer | W012503G | Click Drag. | Click the checkbox for a pending approval message, click Drag, and then view the message in right-hand pane. |
| To Approve, or Reject a Request | Not Applicable | Click icon in the left-hand queue. | To approve or reject a request, select an option and then close Work Center. |
| Work With Employee Setup | W08710C | Manager Self Service (G05BMSS1), Managers Employee Setup<br>Alternative: Employment Management (G05BE1), HRM Employee Setup | Select a pending process record. To activate the process, choose Process Tasks, Row menu. Or, to review the status, click Select.<br>Tasks with a *Y* in the Pending Tasks column are pending. Although you previously submitted tasks with an *N,* you can also review them to track their progress. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Employee Setup Entry | W08710G | Abort Task, Row menu.<br>Click OK. | The Task Status field displays the status for an individual setup task. You can delete the task if the status is Pending. A task is pending only if you have not submitted it for processing. You can abort the task if the status is *Waiting, Approved,* or *Active.*<br>To cancel a task, choose a task, Abort Task, Row menu, OK.<br>When you cancel a task, the system sets the task status to *Cancelled by User.* When you cancel a process, the task record remains in the system.<br>When you delete a process, the task record is removed from the system.<br>When you complete a task, the system sets the task status to the value that you specified in the final Task Status field on the Work With Setup Task Details form. |

# Setting Processing Options for Employee Setup Workbench (P08710)

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

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

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

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

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

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

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

### User Level

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

**1. User Level** Use this processing option to specify whether the application will be used by a manager (including a manager's delegate) or HR personnel. Values are:

Blank: Manager

*1:* Manager or manager's delegate

*2:* HR Personnel

### Defaults

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

**1. Ending Setup Status** Use this processing option to specify the status to which you want the employee setup process changed when the process completes successfully. The status codes are listed in UDC table 08/S1. Values are:

*1:* Completed

*7:* Archive

*8:* Purge

### Work Orders

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

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

**2. Active W.O. Status Code (Required)** Use this processing option to specify the status that the system will use to identify active work orders. The system places a work order in active status when the setup task has been initiated, the effective date has been reached, and the user has entered the location information.

**3. Cancelled W.O. Status (Required)**

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

**4. Record Type used when creating Work Order instructions**

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

**5. Copy Task Description to Work Order**

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

*1:* Copy the description from the setup task record.

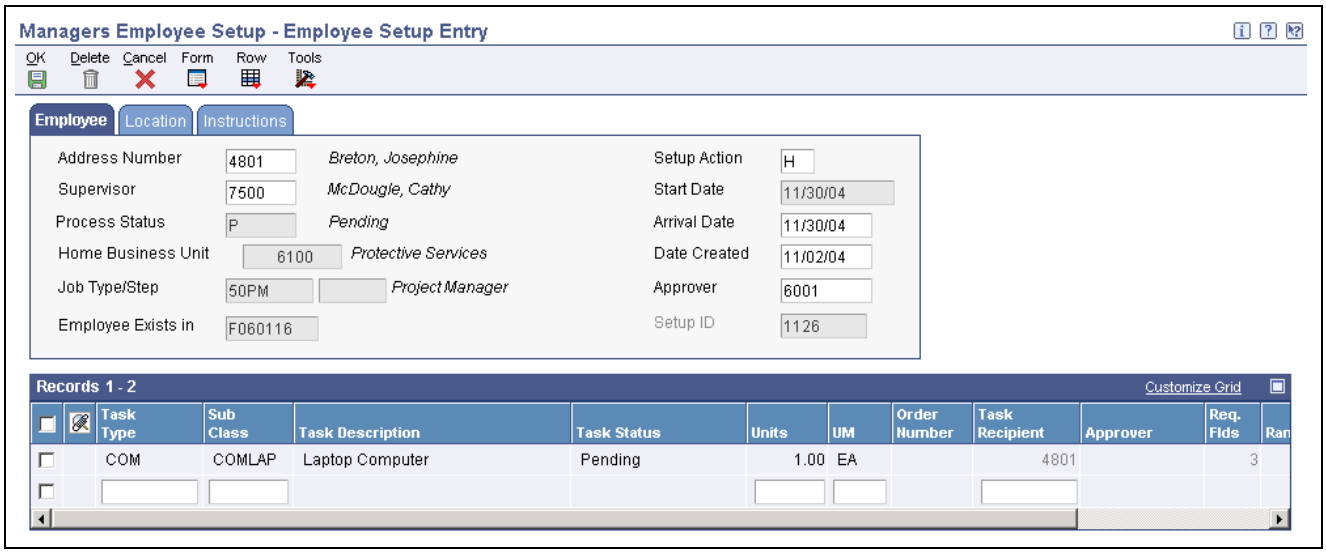
*0:* Use the description from the work order template.

# Add an Employee Record Using Employee Setup

Access the Employee Quick Hire form.

# Initiate Employee Setup

Access the Employee Setup Entry form.




Employee Setup Entry form

To initiate employee setup:

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

1. On Work With Employee Setup, if you used a program other than Quick Hire to add the employee master record (F06116) click the Add button and skip to step 4., otherwise, perform step 2.
2. Complete any of these fields and click Find:
   - Supervisor
   - Employee Number
   - Process Status

3. Choose the employee setup record and click Select.
4. If you added an employee record with a program other than Employee Setup Workbench, on Employee Setup Entry, complete these fields on the Employee tab:
   - Address Number
   - Setup Action
5. To add default tasks, choose Add Default Tasks from the Form menu.
6. To add or change the subclass for a task, review these fields:
   - Ranking
   - Lock Code

   When a task is locked you are restricted from changing the task sub class to one with a higher ranking.
7. Complete the Sub Class field. If the task is locked, the Sub Class you select must have a ranking that is equal to or less than the value in the Ranking field:
8. Complete the UM optional field:
9. If the task is an equipment-setup task and you need more than one unit, complete the Units field:
10. Review the system-supplied information in these fields:
    - Order Number
    - Task Recipient
    - Approved By
    - Req. Flds
11. Click the Location tab and review the value for Required Fields to determine the number of Location Code fields that you need to complete for this task:
12. Complete as many of these Location Code fields as are required. For example, if four fields are required, then complete Location Code 001 through 004.
13. Complete the Office Number optional field:
14. To assign an additional task, complete the Task Type field and repeat steps 6-13:
15. To copy tasks from another employee, choose Copy Employee from the Form menu. On the Employee Setup Search and Select, inquire on the setup process for the desired employee to copy from and press the Select button.
16. When you finish entering all tasks for the employee's setup, click OK.
17. On Activation Confirmation, click Yes to begin the process. If you click No, the system leaves the status of the process as Pending. You will need to activate the process from the Work With Employee Setup form by clicking the Process Tasks row exit button.

| | |
|---|---|
| **Supervisor** | Enter the address book number of the supervisor. |
| **Employee Number** | Enter the address book number of the employee being hired/setup. |
| **Process Status** | Enter a code that represents the status of the entire setup process. |
| **Setup Action** | Enter a code that represents the setup action to perform. |
| **Ranking** | Enter a code that specifies the rank of tasks within a task type. You rank tasks to restrict users from changing the subclass of a task to a subclass with a higher rank. |

**Lock Code** Enter a code that specifies whether the hiring manager can change the selected default setup task.

**UM** Enter a user defined code (00/UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

**Units** Enter the quantity of something that is identified by a unit of measure. For example, it can be the number of barrels, boxes, cubic yards, gallons, hours, and so on.

**Task Recipient** Enter the address book number of the person who is assigned to the current employee setup task.

**Approved By** Enter the address book number of the person who approves any given work. The system verifies this number against the Address Book Master table (F0101).

**Req. Flds** Enter a value that represents the number of location category codes you need to know to accomplish the current setup task.

For example, to install a telephone you might need to know the first four location codes (state, city, building, and office number). To set up a computer account, you might need to know only the first two location codes (state and city).

**Required Fields** Enter a value that represents the number of location category codes you need to know to accomplish the current setup task.

For example, to install a telephone you might need to know the first four location codes (state, city, building, and office number). To set up a computer account, you might need to know only the first two location codes (state and city).

**Location Code 001** Enter a user defined category code that defines the location of an employee. You set up this code to meet the needs of your organization. For example, you can set up a category code to represent country, city, state, campus, building, office, or other location.

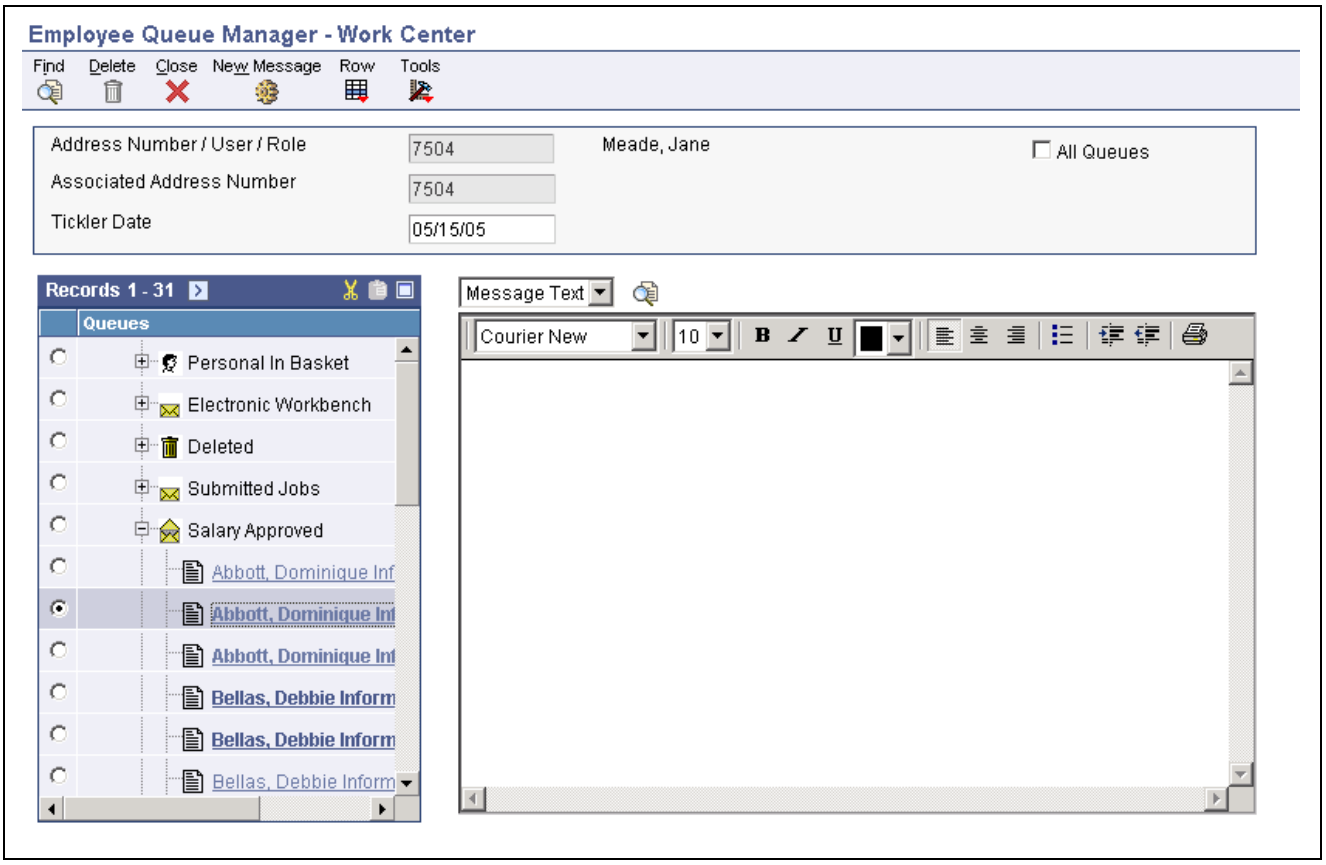
The Human Resources system provides this code to allow you to define a custom setup process for new employees based on the location where the employee will work.

**Office Number** Enter a field that uniquely identifies the physical location where an employee works. The system does not verify this information. You can enter any alphanumeric string.

**Arrival Date** Enter the date the employee arrives at the employee's desk. Setup tasks for the employee setup can be based on this date or based on the start date contained in the Employee Master table.

## Approve a Setup Process or Task

Access the Work Center form.




Work Center form

To approve the process or task for employee setup:

1. On Work Center, verify that the information in these fields is correct and then click Find:
   - Address Number / User / Role
   - Associated Address Number
   - Tickler Date
2. To view all Queues, click the All Queues option:
3. Review your messages in the left-hand pane.
4. Click the (+) icon adjacent to the queue that receives Employee Setup messages.
5. To view a message, click the checkbox that is adjacent to a pending approval entry and then click Drag.
6. On Media Object Viewer, if the message allows you to approve a task, click the icon in the left-hand pane.
7. Click the icon in the left-hand queue.
8. On To Approve or Reject a Request, choose one of these options in the Actions area and click OK.
   - Approve
   - Reject
9. On Work Center, click Close.

**Process Status** Enter a user defined name or remark.

**Address Number / User / Role**

Enter an option that filters which queues and users appear in the Work Center. You must choose one of these options:

- Address Number: All queues and users associated with the address number will appear. Address Number is the default option.
- User: All queues for the user's associated address number will appear.
- Role: All queues for the role's associated address number will appear.

All the Work Center's logic will run off of the associated address number. Therefore, all users and roles must have an associated address number.

**Associated Address Number**

Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Tickler Date**

Enter the date an activity was performed or, for promise activities, the reminder date.

**All Queues**

Select this checkbox to specify that all of the mailboxes that exist on the system will show whether there is mail in them for the address number entered or not. If this box is not checked, only those mailboxes that have mail in them for the address number entered will display.

**Approve**

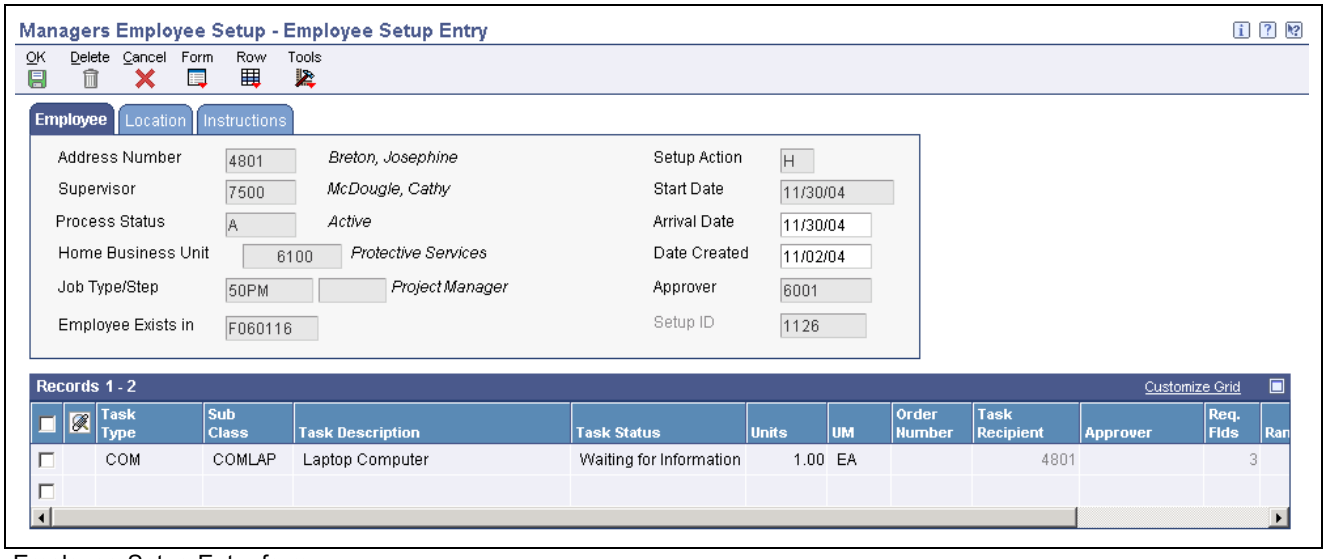
Enter an option that specifies the type of processing for an event.

**Reject**

Enter an option that specifies the type of processing for an event.

## Review and Revise the Status

Access the Employee Setup Entry form.




Employee Setup Entry form

To review and revise the status:

1. On Work With Employee Setup, complete these fields and click Find:
   - Supervisor
   - Employee Number
   - Process Status

2. If you want to cancel a process, choose a pending process record and then choose Cancel Process from the Row menu.
3. To delete the process, choose Delete. You can only delete a process that is in Pending status. Once any of the tasks have been processed you will no longer have the option to delete an entire setup process.
4. To activate the process, choose Process Tasks from the Row menu.
5. Click Select to review the status for individual setup tasks.
6. On Employee Setup Entry, review the Task Status field for each task in the detail area.
7. To cancel a task, on Work With Employee Setup click the Recipient Tasks row exit button. On Work With Recipient tasks, highlight the task to cancel and then click the Cancel row exit button.
8. To complete a task in the system after the task recipient finishes the work, on Work With Employee Setup click the Recipient Tasks row exit button. On Work With Recipient tasks highlight the task to complete and click the Complete row exit button.

**Process Status** Enter a user defined name or remark.

**Address Number / User / Role** Enter an option that filters which queues and users appear in the Work Center. You must choose one of these options:

- Address Number: All queues and users associated with the address number will appear. Address Number is the default option.
- User: All queues for the user's associated address number will appear.
- Role: All queues for the role's associated address number will appear.

All the Work Center's logic will run off of the associated address number. Therefore, all users and roles must have an associated address number.

**Associated Address Number** Enter a number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

**Tickler Date** Enter the date an activity was performed or, for promise activities, the reminder date.

**All Queues** Select this checkbox to specify that all of the mailboxes that exist on the system will show whether there is mail in them for the address number entered or not. If this box is not checked, only those mailboxes that have mail in them for the address number entered will display.

**Approve** Enter an option that specifies the type of processing for an event.

**Reject** Enter an option that specifies the type of processing for an event.

# Approving Automatic Deposit Information

This section provides an overview of approving automatic deposit information and discusses how to enter approvals.

# Understanding Automatic Deposit Information Approval

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

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

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

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

# Forms Used to Approve Automatic Deposit Information

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work Center | W012503F | Workflow Management menu (G02), Employee Work Center | Locate an automatic deposit message. |
| Review/Validate Automatic Deposit Instructions | W055011B | Review/Validate Automatic Deposit Instructions.jde link<br>Click OK. | Review and then approve or disapprove.<br>If the employee entered the incorrect routing number for the bank, you can enter a correction. |

# Automatic Deposit Approvals

Access the Work Center form.

To approve automatic deposit information:

1. On Work Item Manager, open a message queue that displays a message awaiting your review.
2. To review the message, click the checkbox next to the message that you want to review and then click Drag.
3. Review the message in the adjacent pane and, if you wish to submit an approval, click the magnifying glass icon.
4. Click Review/Validate Automatic Deposit Instructions.jde
5. Click the Review/Validate Automatic Deposit Instructions.jde link.
6. On Review/Validate Automatic Deposit Instructions, review all changes.
7. To approve or disapprove, click one of these options and then click OK.
   - Approve

- Disapprove

# Approving Bank Transit Information

This section provides an overview of approving bank information for automatic deposits and discusses how to enter approvals.

## Understanding Bank Transit Information Approval

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

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

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

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

## Forms Used to Approve Bank Information for Automatic Deposits

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work Center | W012503F | Workflow Management menu (G02), Work Item Manager<br><br>Click OK. | Choose a message, review the information, choose one of two options. |

## Approving Bank Transit Information

Access the Work Center form.

To approve bank information for automatic deposits:

1. On Work Item Manager, choose the message that you need to view.
2. Click the light bulb icon in the exit bar in the middle of the form.
3. Click the light bulb icon that appears on the right side of the form.
4. On Add Bank Transit Number, review the information in these fields and correct it, if necessary:
   - Bank Name
   - Bank Routing Number
5. Add optional information to the Payroll Clerk's Response text area

6. Choose one of these options and click OK:
   - Bank Added
   - Bank Not Added

| | |
|---|---|
| **Bank Name** | Enter a user defined name or remark. |
| **Bank Routing Number** | 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.<br><br>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.<br><br>For Canadian banks, this number contains 8 digits. Therefore, Canadian clients must enter the bank transit number with a leading zero.<br><br>If you change this number for an employee, the system creates a prenote for the employee's next auto deposit. |
| **Bank Added** | Enter an option that specifies the type of processing for an event. |
| **Bank Not Added** | Enter an option that specifies the type of processing for an event. |

# Approving Competency Information

This section provides an overview of approving competency information and discusses how to enter approvals.

## Understanding Competency Information Approval

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

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

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

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

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Foundation*

## Forms Used to Approve Competency Information

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Work Center | W012503F | Workflow Management menu (G02), Employee Work Center | Select a message and review the information. |

## Approving Self Service Competency Entries

Access the Work Center form

To approve competency information:

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

**Competency Level** Enter a code that refers to the level of proficiency that a person or asset has demonstrated for a specific competency type and competency code.

**Verified By** Enter the name or address book number of the person who verified that the employee is certified in the competency.

**Verification Method** Enter a user defined code (05/VM) that defines the methods that you use to verify employee competency levels.

# Organizational Charts

This section provides an overview of organizational charts and discusses how to:

- Set the processing options.
- Create organization charts in a Windows environment.
- Create organization charts in a Web environment.

## Understanding Organizational Charts

You can use the Generate Graphic Organization Chart program (P08713W) to create graphical organization charts that illustrate and document your organizational structure.

### Organization Charts for the Web

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

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

## Forms Used to Create Organizational Charts

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Organization Chart Parameters | W08713C | Manager Self Service (G05BMSS1), Generate Graphic Organization Chart | Define chart parameters. |
| Organization Chart | W08713WB | Manager Self Service menu (G05BMSS1), Generate Graphic Organization Chart<br>Display Options, Form menu. | This application applies for Web-based organizational charts. |
| Organization Chart Display | W08713WC | Click OK. | Enter appropriate values and generate an organizational chart. |

## Setting Processing Options for Generate Graphic Organization Chart (P08713)

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 file information that your software uses to create and view a Microsoft Visio organization chart.

**1. Fully qualified path and file name of the Visio organization chart wizard.**

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

If the wizard does not start, ensure that you have a path statement set up that specifies the correct directory location of this file, or enter a fully qualified

path and file name. Although this location might vary because of installation variables and software version, the default installation location for Visio 2002 is as follows:

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

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

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

**3. Name of the application to use to view the Visio export text file.** Use this processing option to define the program that the system uses to view the exported text file.

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

### Shape

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

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

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

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

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

### HTML

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

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

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

## Creating Organizational Charts for the Web

Access the Organization Chart form.

To create organizational charts for the web:

1. On Organization Chart, complete the Address Number field and then click Display Chart.
2. To change the top level of the chart to one level higher in the organization, click the left arrow.
3. To display the chart in a page layout format so that you can print the chart on multiple pages, choose the Page Layout option and then click Display Chart:
4. To print the chart, choose the Printable View option.
5. To display a chart for one of the employees listed in the chart, double click the employee node.
6. Single click on an employee not will place the selected employee's address number in the Employee field

# Approving Self Service Timecards

This section provides an overview of organizational charts and discusses how to approve timecards.

## Understanding Self Service Timecard Review and Approval

After employees enter self-service timecards into the system, managers must review those timecards. Using the Manager Review and Approval program (P051129), managers can review, change, reject, and approve employee timecards. Along with reviewing and approving timecards, managers can use this program to view a list of employees who are missing timecards for the pay period. You can also set up the review and approval process to be completed by manager delegates.

Managers or their delegates can review the timecards for a group of employees and approve or reject all of the timecards at once, or timecards can be approved, changed, or rejected individually. Managers can also select multiple timecards or employees to approve or reject at one time.

In addition to approving and rejecting timecards, managers also can assign the Paid - Not Approved status to timecards. This status is used for informational purposes, and the timecards that are assigned this status are processed in the same way approved timecards are processed. Managers might use this status if a timecard is incorrect but the approval deadline does not allow for the timecard to be changed and re-entered by the employee. Assigning the Paid - Not Approved status allows the system to pay the employee for the timecard. The manager would then need to follow up with the employee to ensure that the timecard information is corrected during a future pay period.

Managers also can send email messages to employees using the Send E-Mail to Employee link on Self Service Manager Review and Approval. Managers might use this function to notify employees of the reason a timecard was changed or rejected, or to remind employees who have not entered timecards for the period to enter their timecards before the deadline.

The system stores timecards that employees enter into the system in a temporary workfile called the Employee Transactions - Batch File table (F06116Z1). After the timecards are reviewed and approved or rejected, the Time Entry Batch Processor program (R05116Z1I) moves all of the timecards with an Approved or Paid Not Approved status into the Employee Transaction Detail File table (F06116). When timecards are in the Employee Transaction Detail File table, they can be processed in a payroll cycle.

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**Note.** To use the missing timecards option during the review and approval process, you must set the processing options for the Time Entry Self Service Director program (P051125) to turn on that feature. To display a list of employees who have not entered timecards for the pay period, the system must search through the entire employee database to find all of the employees that report to the specified manager; therefore, this process might take a significant amount of processing time.

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### See Also

*PeopleSoft EnterpriseOne Time and Labor 8.11 PeopleBook*, "Working with Timecards for Timecard Automation," Working with Timecard Batches

## Forms Used to Approve Self Service Timecards

| Form Name | Form ID | Navigation | Usage |
|---|---|---|---|
| Time Entry Self Service Director | W051125C | Client portal, Time Entry Self Service Director<br><br>Click the Manager Review/Approval link. | Verify the pay period ending date. |
| Self Service Manager Review and Approval | W051129A | Click an appropriate response option. | Review and then assign an appropriate status.<br><br>If you are a delegate who is reviewing and approving timecards for a manager, enter the approving manager address book number and then click Refresh to display subordinate employees.<br><br>If the employee entered timecards using daily time entry, the system displays Employee Daily Time Entry when you review timecard detail. Similarly, if the employee used summary time entry, the system displays Employee Summary Time Entry. If the employee entered timecards using both applications during the same pay period, the system displays all of the employee's timecards on Employee Summary Time Entry. |

# Timecard Approval

Access the Self Service Manager Review and Approval form.

To review and approve self-service timecards:

1. On Time Entry Self Service Director, verify that the date in the Pay Period Ending Date field is correct, and then click the Manager Review/Approval link.
2. On Self Service Manager Review and Approval, verify the values in these fields:
   - Manager Number
   - Pay Period Ending Date
3. To specify which timecards to review, click one of these options and then click Find Timecards:
   - Waiting Approval
   - Approved
   - Rejected
   - Paid Not Approved
   - Missing Timecard
4. To approve all of the timecards for multiple employees, click the Select option next to each employee for whom you want to approve timecards, and then click Approve.
5. To reject all of the timecards for multiple employees, click the Select option next to each employee for whom you want to reject timecards, and then click Reject.
6. To reject all of the timecards for multiple employees, but allow them to be processed in a payroll cycle, click the Select option next to each employee for whom you want to assign the Paid - Not Approved status, and then click Paid Not Approved.
7. To review the timecard detail for an individual employee, click the Select option next to the employee's record in the detail area of the form, and then click Detail.
8. To approve selected timecards for the employee, click the Select option next to each timecard that you want to approve, and then click Approve.
9. To reject selected timecards for the employee, click the Select option next to each timecard that you want to reject, and then click Reject.
10. To assign the Paid - Not Approved status to selected timecards for the employee, click the Select option next to each timecard for which you want to assign this status, and then click Paid Not Approved.
11. When you have finished reviewing all of the employee's timecards, click OK to return to Self Service Manager Review and Approval.
12. To send an email message to an employee, click the Select option next to the employee, and then click the Send E-Mail to Employee link.
13. On Self-Service E-Mail Message, complete the Subject field:
14. Type your message in the text box and then click Send.
15. On Manager Self-Service Review and Approval, click Previous to return to Time Entry Self Service Director.

**Pay Period Ending Date** Enter the last day of a processing period (pay period, month, quarter or year).

**Manager Number** Enter the qualifier used to identify a specific mapping structure used to process both inbound and outbound EDI transactions. This does not apply to non-EDI transactions.

**Waiting Approval** Enter a code that indicates the current status of time entry records. Values are:

*0:* Waiting for approval

*1:* Approved

*2:* Rejected

*3:* Not approved but paid

*4:* Employee with missing time card

**Approved** Enter a code that indicates the current status of time entry records. Values are:

*0:* Waiting for approval

*1:* Approved

*2:* Rejected

*3:* Not approved but paid

*4:* Employee with missing time card

**Rejected** Enter a code that indicates the current status of time entry records. Values are:

*0:* Waiting for approval

*1:* Approved

*2:* Rejected

*3:* Not approved but paid

*4:* Employee with missing time card

**Paid Not Approved** Enter a code that indicates the current status of time entry records. Values are:

0

*0:* Waiting for approval

*1:* Approved

*2:* Rejected

*3:* Not approved but paid

*4:* Employee with missing time card

**Missing Timecard** Enter a code that indicates the current status of time entry records. Values are:

*0:* Waiting for approval

*1:* Approved

*2:* Rejected

*3:* Not approved but paid

*4:* Employee with missing time card

**Subject:** Enter a short description or subject of the message.

You can send email messages to only one employee at a time. Do not choose multiple employees when sending email messages from Self Service Manager Review and Approval.

# APPENDIX A

# PeopleSoft EnterpriseOne Human Capital Management Self Service Reports

This appendix provides an overview of a Human Capital Management report and allows you to:

- View a summary table of the report.
- View details for the selected report.

## Human Capital Management Self Service Reports

The singular report for Hum Human Capital Management Self Service uses these tables:

- Job Postings (F08470)
- Job Posting Text (F08472)

You can print reports to verify accuracy and track changes to information.

## PeopleSoft Address Book Reports: A to Z

This table includes the Human Capital Management Self Service report.

| Report ID and Report Name | Description | Navigation |
|---|---|---|
| R08471<br><br>Job Postings | Use this program to print and review detailed information about job postings. | eRecruit (G08BE1), Build Job Posting Records (R08473) |

## PeopleSoft Human Capital Management Self Service Reports: Selected Report

Some reports include a more detailed description, as well as information about processing options.

### R08471 - Job Postings

Recruiters can use this report to track active job postings.

# Data Sequence for Job Postings

When creating the report, set the data sequence to sort by posting category first, then by posting number.

# Setting Processing Options for Job Postings (R08471)

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.

## Detail

This processing option specifies the level of detail that appears on the report.

**Print Job Description Detail** Use this processing option to specify whether the report includes the text of the job posting description. Values are:

Blank or *0:* Do not print detail

*1:* Print detail

# 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.<br><br>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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