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PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise 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 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.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release 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
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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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 Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

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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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

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PeopleSoft Enterprise HRMS Application Fundamentals Preface

This preface discusses:

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

Note. *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook* provides you with essential information describing the setup and design of your HRMS system. For information about how to implement and process information for specific products, see the individual PeopleBooks for the appropriate HRMS application.

PeopleSoft Products

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

Deferred Processing

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

Common Elements Used in PeopleSoft HRMS

The following common elements appear through PeopleSoft HRMS.

PeopleBooks Standard Page Element Definitions

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

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

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

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes, Naming

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

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

Person Name or Current Name

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

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

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

Last Name Enter the person's official last name.

Suffix Select a suffix, if applicable.

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

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

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

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

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

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

Displaying Japanese Names on Pages

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

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

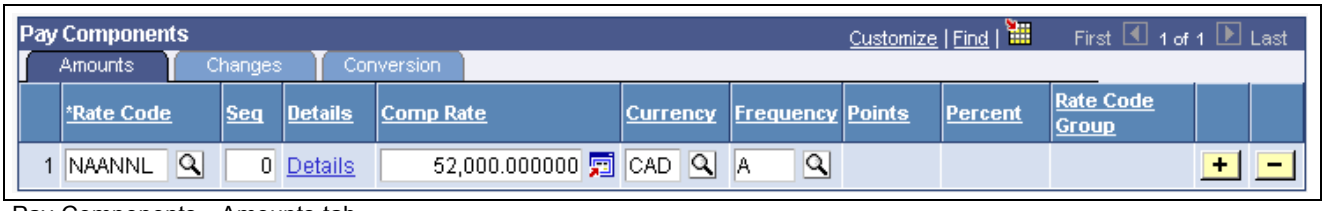
See Chapter 8, "Setting Up and Working with Languages," Working with Double-Byte Characters, page 175.

PeopleBook Standard Group Boxes, Pay Components

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

Amounts Tab

Access the Amounts tab.



Pay Components - Amounts tab

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

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

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

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

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

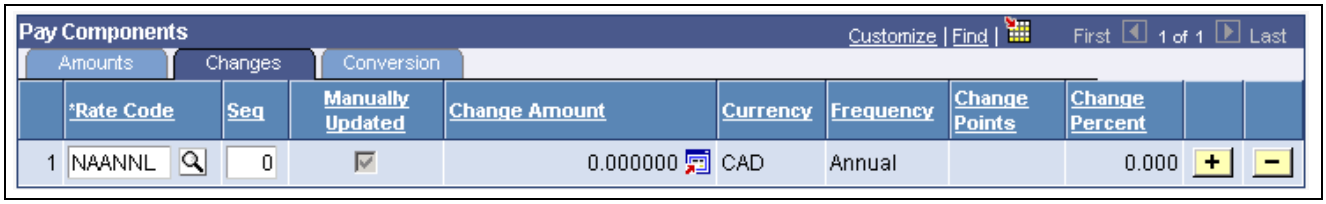
Points The salary points associated with this rate code, if any.

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

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

Changes Tab

Access the Changes tab.



Pay Components - Changes tab

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

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

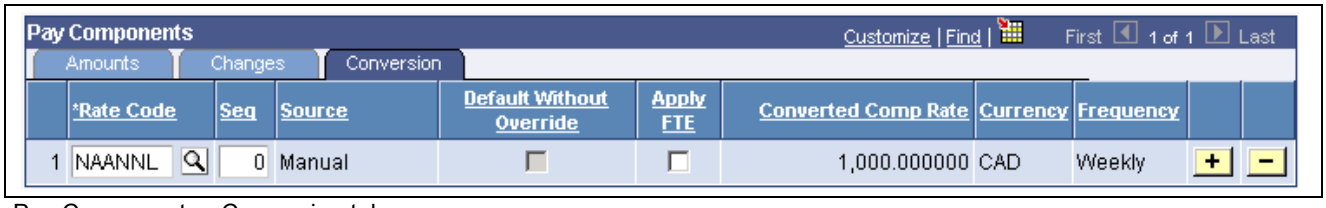
Change Amount The overall change amount to this pay component rate.

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

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

Conversion Tab

Access the Conversion tab.



Pay Components - Conversion tab

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

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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation

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CHAPTER 1

Getting Started with PeopleSoft Enterprise HRMS

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

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

PeopleSoft Enterprise HRMS Overview

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

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

PeopleSoft Enterprise HRMS Integrations

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

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

PeopleSoft Enterprise HRMS Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

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

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This table lists all of the components documented in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook* that have component interfaces:

Component	Component Interface	References
Departments component (DEPARTMENT_TBL)	DEPARTMENT_TBL	See Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments, page 267.
Establishment component (ESTABLISHMENT_DATA)	ESTABLISHMENT_DATA	See Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 243.
Job Code Task Table component (JOBCODE_TASK_TABLE)	JOBCODE_TASK_TABLE	See Chapter 13, "Setting Up Jobs," Defining Job Tasks, page 314.
Job Code Table component (JOB_CODE_TBL)	CI_JOB_CODE_TBL	See Chapter 13, "Setting Up Jobs," Classifying Jobs, page 296.
Job Task Table component (JOB_TASK_TABLE)	JOB_TASK_TABLE	See Chapter 13, "Setting Up Jobs," Defining Job Tasks, page 314.
Location component (LOCATION_ TABLE)	LOCATION_TABLE	See Chapter 11, "Setting Up Organization Foundation Tables," Establishing Locations, page 253.
FLSA Calendar Table (FLSA_ CALENDAR)	FLSA_CALENDAR	See Chapter 19, "Setting Up Pay Calendars," Setting Up FLSA Calendars, page 430.
Pay Run Table (PAY_RUN_TABLE)	PAY_RUN_TABLE	See Chapter 19, "Setting Up Pay Calendars," Creating Pay Run IDs, page 423.
Tax Location Table component (TAX_LOCATION_TBL)	TAX_LOCATION_TBL	See Chapter 20, "Setting Up Company Tax Tables for North America," Defining Tax Locations, page 450.

See Also

Enterprise PeopleTools PeopleBook; PeopleSoft Setup Manager

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

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CHAPTER 2

Understanding HRMS

This chapter discusses:

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

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

Control Tables, Transaction Tables and Prompt Tables

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

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

Control Tables

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

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

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

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

Transaction Tables

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

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

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

Prompt Tables

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

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Business Units, Tablesets and SetIDs

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

Business Units

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

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

Tablesets and SetIDs

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

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

See Also

Chapter 3, “Working with System Data Regulation in HRMS,” page 9

Effective Dates

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

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

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Person or Position Structure

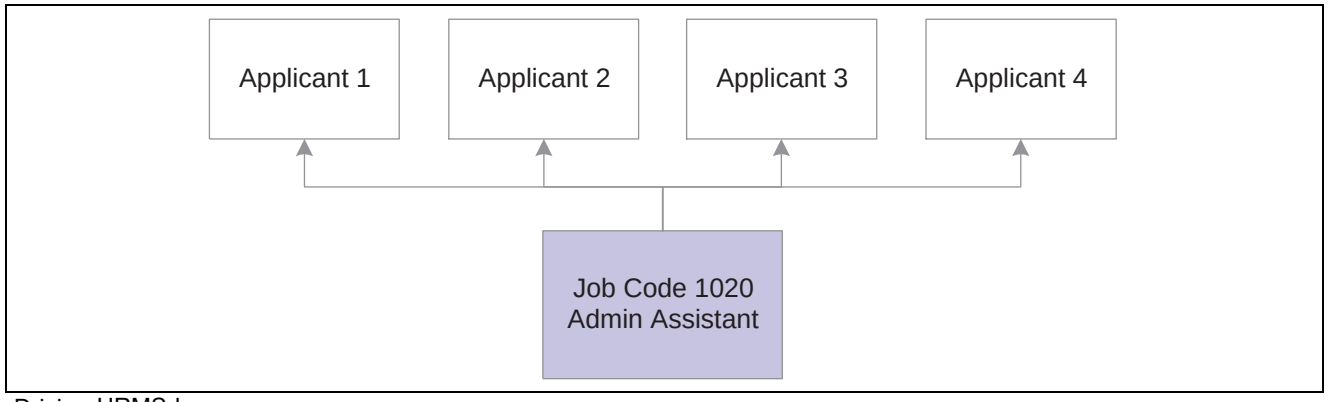
PeopleSoft HRMS enables you to structure or drive your PeopleSoft Enterprise Human Resources system by person or by position. Before you set up information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

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

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

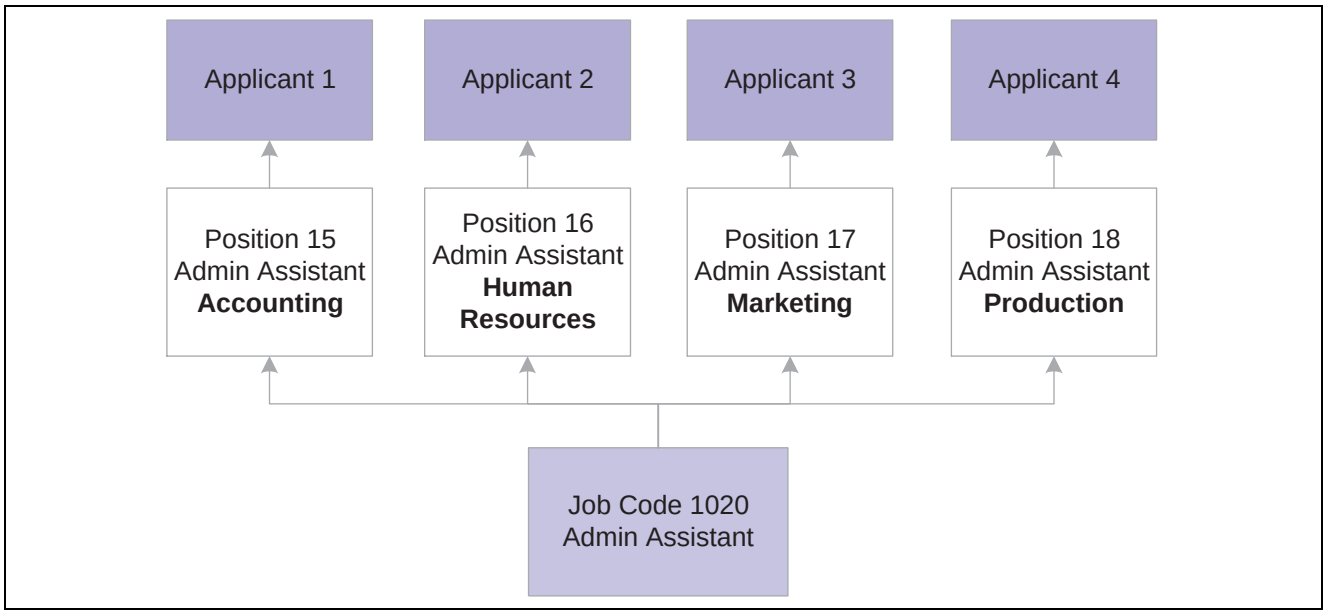
In contrast, job codes primarily have a one-to-many relationship with workers. Many workers share the same job code, even though they might perform the work in different departments, locations, or companies. You identify the job that a worker performs through the data that you enter in the worker's job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



Driving HRMS by person

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

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Driving HRMS by position

Why Does It Matter?

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

Which Method Should You Use?

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

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

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

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

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

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

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

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

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Considerations for Pension, Payroll, and Benefits Applications

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

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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce"

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CHAPTER 3

Working with System Data Regulation in HRMS

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

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

Understanding PeopleSoft HRMS System Data Regulation

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

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

Business Unit A logical organizational entity.

SetID A high-level key on many control tables.

TableSet Set of rows on a control table, grouped by setID, that is available to specific business units.

Components Used to Set Up Business Units and SetIDs

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

Component	Location
TableSet IDs component (SETID_TABLE)	PeopleTools, Utilities, Administration, TableSetIDs

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Component	Location
Business Unit component (HR_BUSINESS_UNIT) See Chapter 11, "Setting Up Organization Foundation Tables," Defining Business Units, page 213.	Set Up HRMS, Foundation Tables, Organization, Business Unit
Record Groups component (REC_GROUP_TABLE)	PeopleTools, Utilities, Administration, Record Group
Org Defaults by Permission List component (OPR_DEF_TBL_HR) See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst
Business Unit Options Defaults component (BUS_UNIT_OPT_HR) See Chapter 11, "Setting Up Organization Foundation Tables," Setting Business Unit Defaults, page 218.	Set Up HRMS, Foundation Tables, Organization, Business Unit Options Defaults
TableSet Control component (SET_CNTRL_TABLE1)	PeopleTools, Utilities, Administration, TableSet Control

Prerequisites

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

You can set up business units and tableset IDs before or after setting up the Installation Table component (INSTALLATION_TBL) and entering companies on the Company component (COMPANY_TABLE). However, you should set up the Installation Table component and Company component before continuing on to the TableSet Control component, Business Unit Options Defaults component, and Org Defaults by Permission List component.

Working with Business Units

This section provides an overview of business units and discusses how to determine your business unit structure.

Understanding Business Units

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

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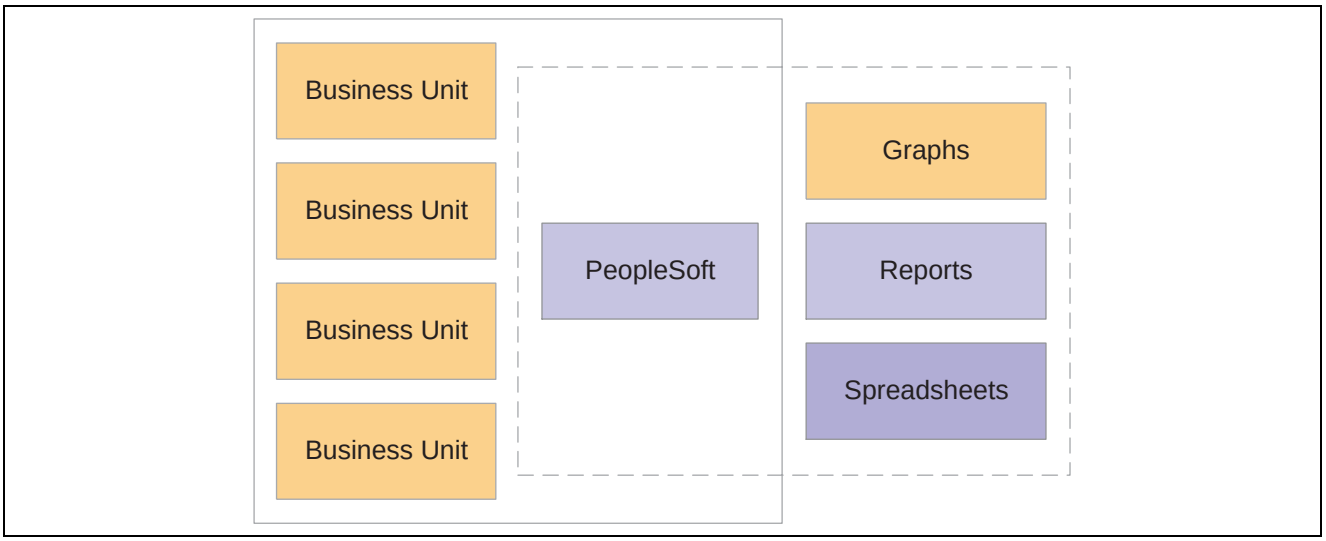
Business units share processing rules and you can create them at any level of the organization that makes sense and that reflect the needs of your internal human resources departments. If you use the same processing rules across the organization, it may make sense to have a single business unit; if you use different rules in different companies, countries, or functional areas, you may choose to create multiple business units.

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

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

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

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



Centralized data enables analysis and reporting across business units

See Also

Chapter 2, "Understanding HRMS," Control Tables, Transaction Tables and Prompt Tables, page 3

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Determining Your Business Unit Structure

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

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

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

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

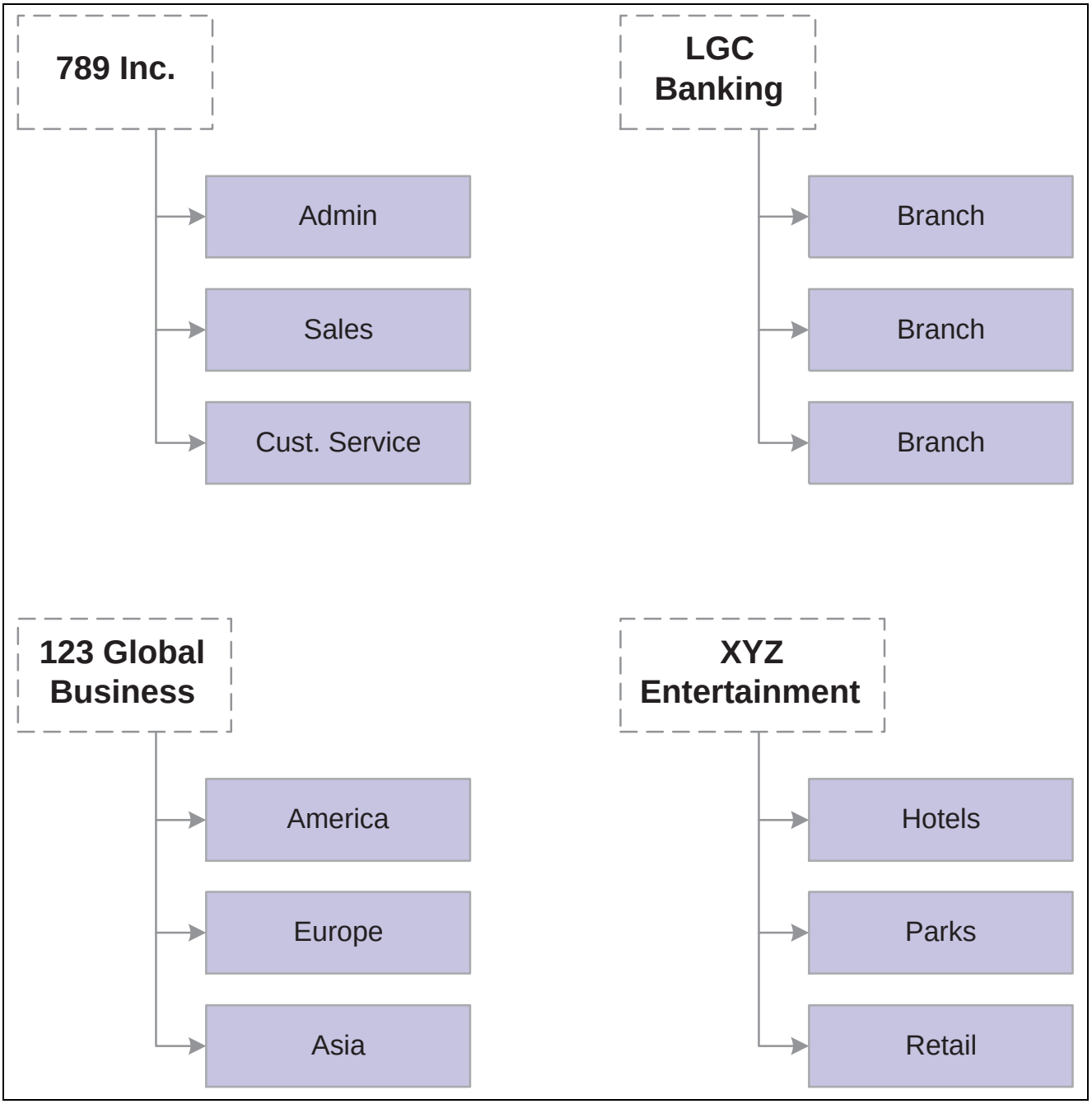
Possible Business Unit Structures

How you define a business unit depends on your industry, statutory requirements, regulatory reporting demands, or how you've organized operating responsibilities. Consider the following scenarios:

- *LGC Banking* treats each branch as a business unit, which means that the bank could do reporting for its people within each branch.
- *123 Global Business* is a multinational company that separates its operations geographically because of the necessities of conducting business abroad. What is more important to this organization may not be each office, but each location. What's happening in their American facility versus their European or Asian market? Then they can track their business requirements and business needs accordingly.
- *XYZ Entertainment* has subsidiary companies. A highly diversified organization like this one might choose to define each subsidiary company or cost center as a business unit. They might have a hotel business as well as a retail business and they might want to keep this information separate, yet still be able to roll everything up into one database and maintain it in a single location.
- *789 Inc.* chooses to organize information by functionality or purpose, such as what is going on in Sales versus Customer Service. It has created business units that reflect the administrative needs of their human resources, benefits, and payroll departments.

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You can also use a combination of all of these methods, or any other entity or entities that makes sense for your organization. You can have as many business units as you need, although the more business units you establish, the more information you need to maintain. You do, however, need to have at least one business unit in the system.



Business units can represent branches, regions, subsidiaries, functional areas.

Implementing Business Units

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

- Maintain a tree structure to facilitate organization-specific, rollup reporting.

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- Distribute administration of certain control tables, such as the Department component (DEPARTMENT_TBL) or the Location component (LOCATION_TABLE) to different business units.

  For large or multinational companies, this feature of business unit functionality in PeopleSoft HRMS is useful for controlling data flow across different parts of the enterprise.

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

Working with TableSets

This section provides overviews of tablesets and discusses how to:

- Set up tableset sharing.
- Control data sets.
- Reference multiple setIDs.

Understanding Tablesets

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

tableset A set of data rows in a control table that is identified by the same highlevel key.

setID The highlevel key that identifies a set of data rows. There are two types of setIDs:

- Physical SetIDs

  The setID of a business unit (BUSINESS_UNIT = SETID). The rows of data in a physical setID have a one to one relationship with the business unit.

- Logical SetID

  A logical setID that is generic and determined by business rules other than business unit. Logical setIDs enable you to share rows of data across multiple business units.

tableset sharing Sharing rows of data in a tableset across business units or limiting rows to a single business unit.

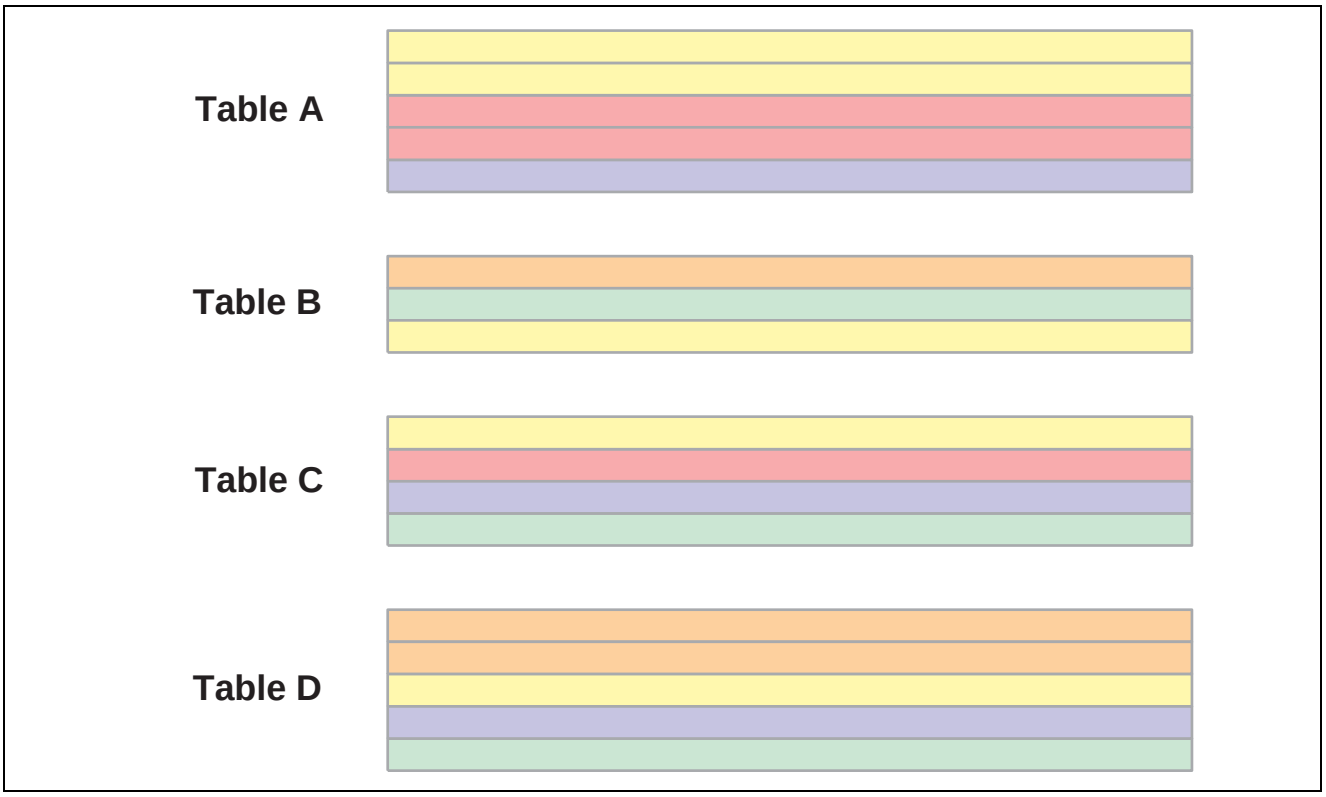
Note. The terms tableset and setID are sometimes used interchangeably. In many cases, this is correct, but it can cause some confusion.

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

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

You always have the same number of setIDs as you have tablesets. For example, the following diagram shows four control tables. Each color represents a setID, and all rows with the same color represent a tableset, for a total of five tablesets:

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Tablesets are rows of data identified by a setID.

PeopleSoft Enterprise Human Resources control tables that are keyed according to setID include the:

- Location component.
- Department component.
- Salary Plan component.
- Job Code component.

Tableset Sharing

Tableset sharing enables you to share some or all of your control table data from business unit to business unit, instead of having to enter the same data multiple times. The key to sharing that information is determining which rows of data can be shared across business units, which should be shared across some business units but not others, and which should be restricted.

For example, you can centralize redundant information such as country codes in a setID that is shared while keeping information such as departments and job codes decentralized amongst different setIDs. The goal of tableset sharing is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

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

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

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This diagram shows how one tableset is shared across all three business units in an organization for one group of records and, for another group of records, each business unit uses it's own setID. For the third group of records, one table set is shared for two business units but the third uses the values in another setID:

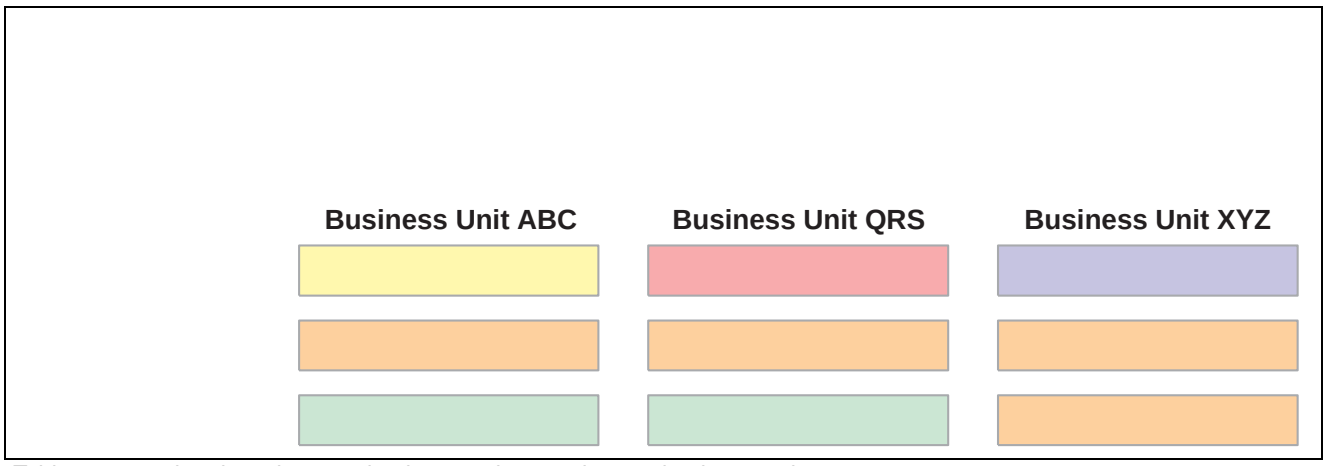


Table sets can be shared across business units or unique to business units.

See *Enterprise PeopleTools PeopleBook: Server Tools*

Record Groups and Tableset Sharing

For the purpose of tableset sharing, control tables are divided into record groups. A record group is a set of control tables and views that use the same group of setIDs in the same manner.

Record groups serve two purposes:

- They save time by enabling you to set up tableset sharing without an enormous amount of redundant data entry.
- They act as a safety net by ensuring that tableset sharing is applied consistently across all related tables and views in your system.

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

Business Units and SetIDs

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

- If you want create rows of data in the control tables that should be used only with the new business unit, create a setID for the business unit when you create the business unit.

  When you create a setID at the time you create a business unit, the system creates a record set ID on the TableSet IDs component when you save the business unit.

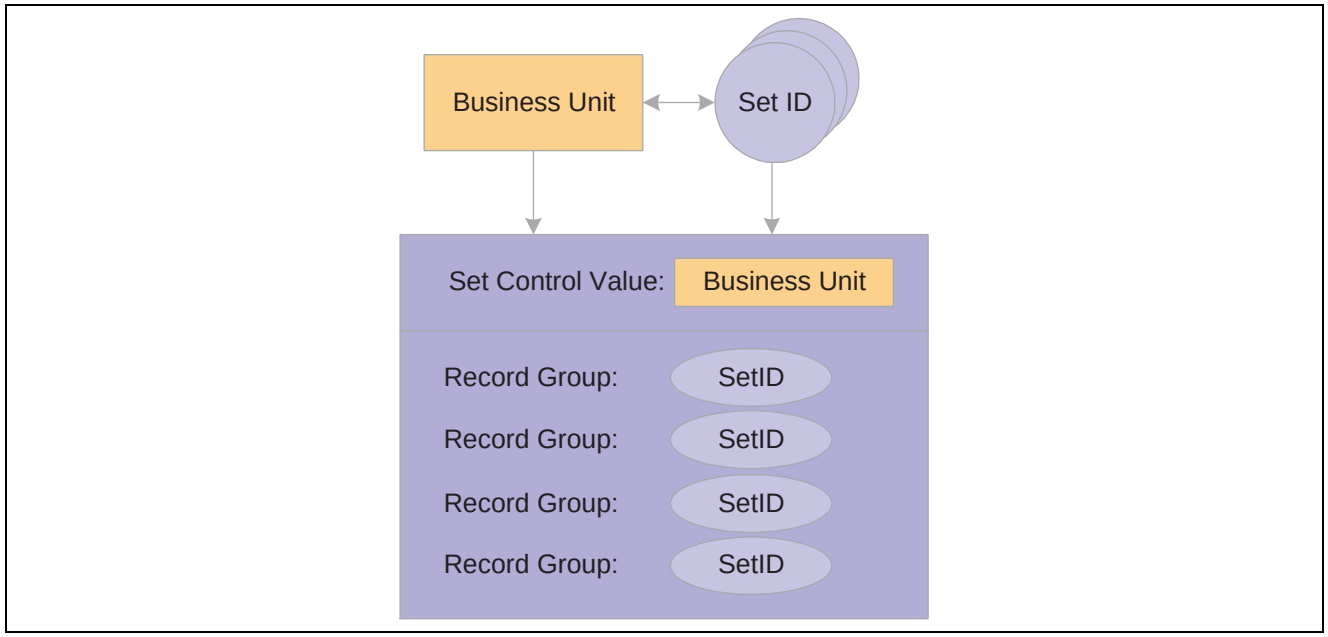
  Note. This is the best option if you are only using one business unit.

- If you want the business unit to share rows of data (tableset sharing) with other business units, select the existing setID that is or will be associated with the data rows you want to make available to this business unit.

Regardless of which option you choose, when you save the business unit the system creates a record in the Tableset Control component for the business unit, populated with every record group in the system, and associates with each record group the setID you selected for the business unit. You can change the setID assignment in the TableSet Control component.

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This diagram shows the relationship between setIDs and business units and illustrates the record the system creates for the business unit in the TableSet Control component. You can change some or all of the setID assignments in this component.



Tableset controls determine which tableset a business unit uses for which record group.

Setting Up TableSet Sharing

Setting up tableset sharing is easy. Use tableset controls to make data available across business units or restrict to certain business units. Before you set up tableset controls, create:

- Record groups
- Business units
- SetIDs

When you create and save a business unit, the system creates a record in the TableSet Control component for the business unit (the Set Control Value) and populates the setID for each record group with the setID you selected for the business unit. If you want the business unit to have access to the rows in other setIDs for certain record groups, change the default setID to the appropriate setID. This means that a lot of tableset sharing set up is done for you behind the scenes.

Controlling Data Sets

The system filters the field options available to the user in the transaction components based on the tableset controls you set up. For example, when a user is creating a job data record for a new worker and selects the drop down list for the Job Code field, the system filters the available options be determining the following:

1. What business unit is this job data record in?

   USA

2. What table controls data for this field?

   JOBCODE_TBL

3. What record group is that table in?

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HR_02

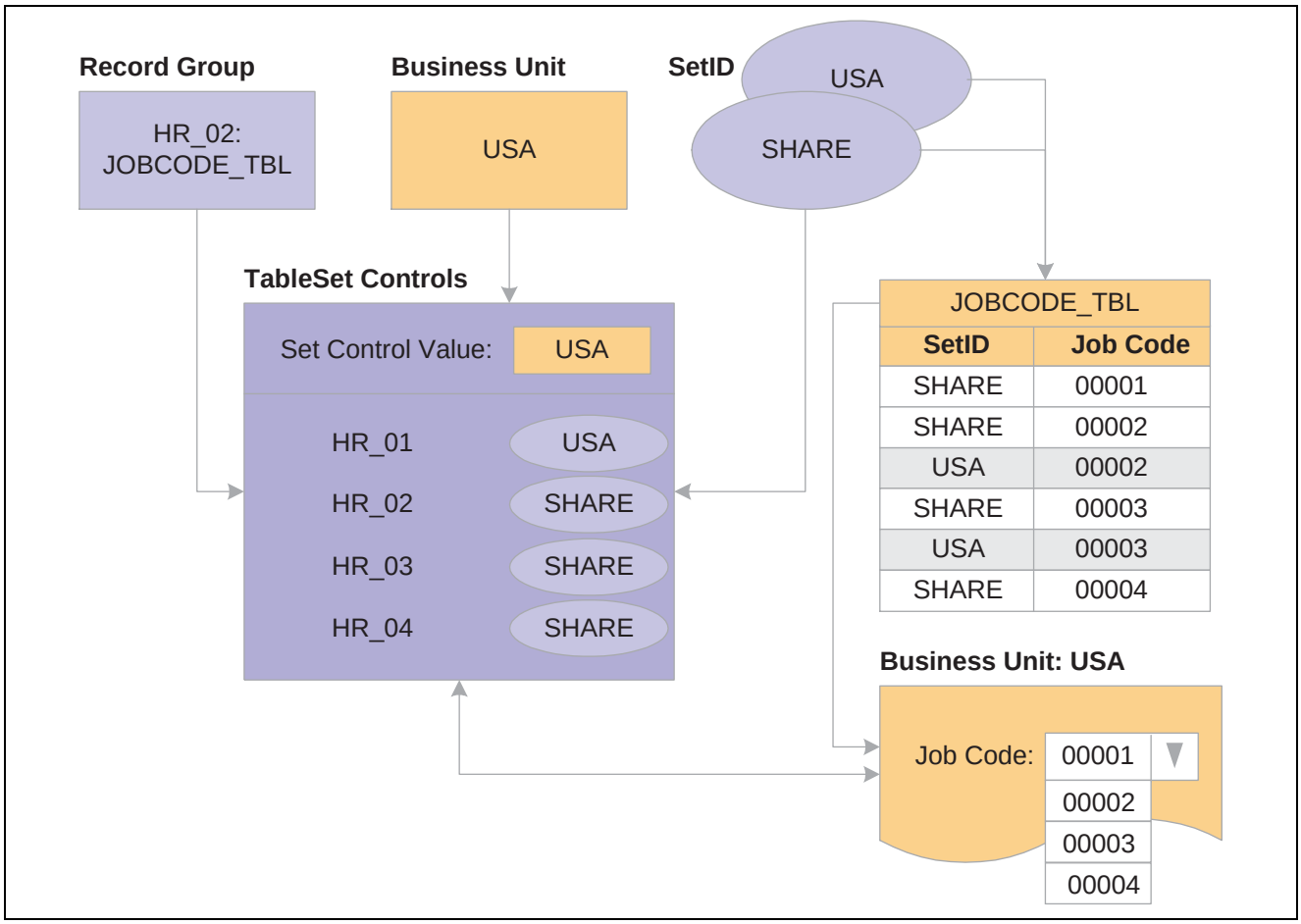
4. What SetID is assigned that record group for this business unit?

   SHARE

5. What rows in the control table are keyed by that setID?

   The system makes available to the user only the rows keyed by the USA setID.

This diagram shows the tableset controls for the USA business unit and illustrates how the system determines which job code values to display for that business unit:



Tableset sharing process

If the user were accessing a field table that was in record group HR_01, the system would display the values keyed by the setID USA. The data the system makes available depends on the setID specified in the TableSet Control component for the record group containing the table the user is accessing.

Referencing Multiple SetIDs

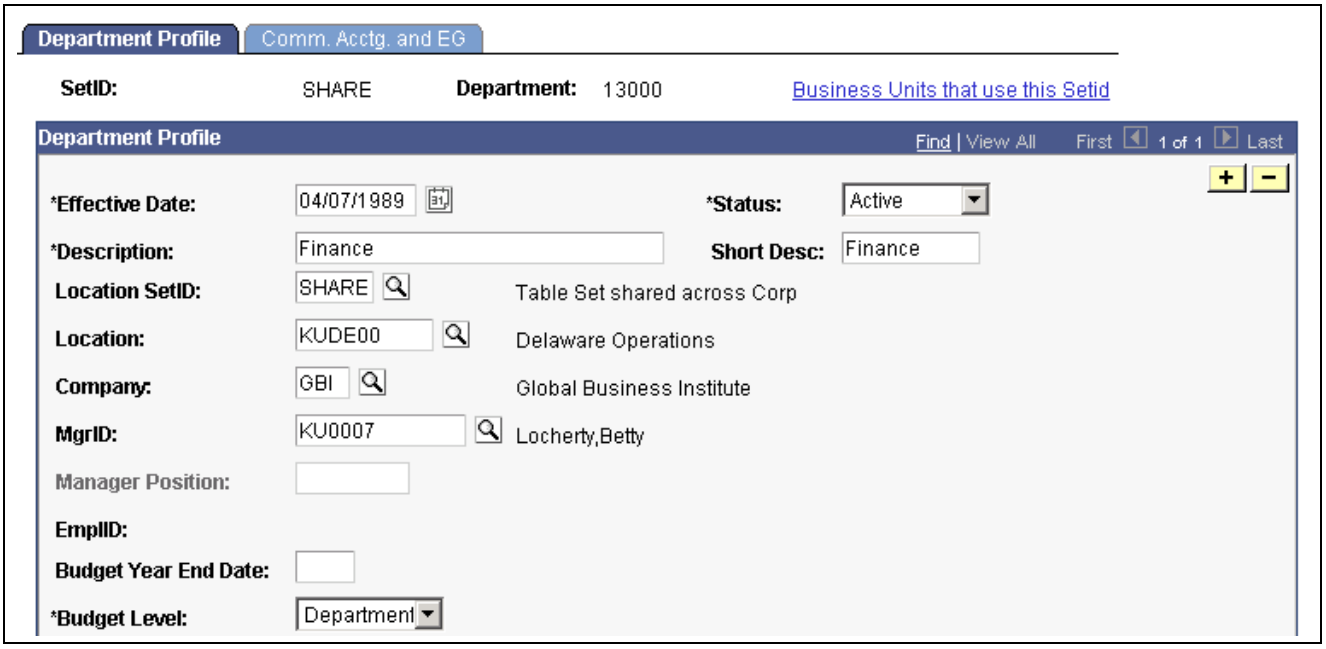
Occasionally, some pages have references to two setIDs. It's important to understand how the Page Processor works through such a situation when you're working with setID functionality. This will help you to understand how the system is making decisions about default values in the data record.

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

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

An example of a control table that has multiple setIDs is the Departments component (DEPARTMENT_TBL). The record for the component, DEPT_TBL, has two setIDs: the setID for the department and the setID for the department's location. The setID for the location prompt comes from the LOCATION_TBL record.



Department Profile page

In a situation where there are two setIDs for a prompt, you can set up the component so that the system makes available in the Location field:

- All locations in all setIDs.
- Locations only in the department's setID.

Making all locations available may cause problems if a user creates a department with a location in a setID that is not used by any business unit with access to the department's setID. Making only one location setID available could cause problems if business units with access to the department's setID use different location setIDs.

For example, an organization has the following tableset controls set up for its four business units use for the DEPT and LOCATION record groups:

Business Units:		PDEV	EURO	ASIA	RUSS
Record Groups:	DEPT	USA	EURO	USA	EURO
	LOCATION	USA	EURO	ASIA	RUSS

Note. Set up tableset controls on the Tableset Controls component.

If you limited the location setID to the set ID of the department, you would not be able to set up departments with a valid location for the *ASIA* and *RUSS* business units. If you made all locations in all setIDs available, you run the risk of users creating a department in setID *USA* with a location in setID *EURO*.

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To limit the locations available to a department, while still accommodating the different tablesharing arrangements, you could limit the location setIDs to *USA* and *ASIA* when the department setID is *USA* and to *RUSS* and *EURO* when the department setID is *EURO*.

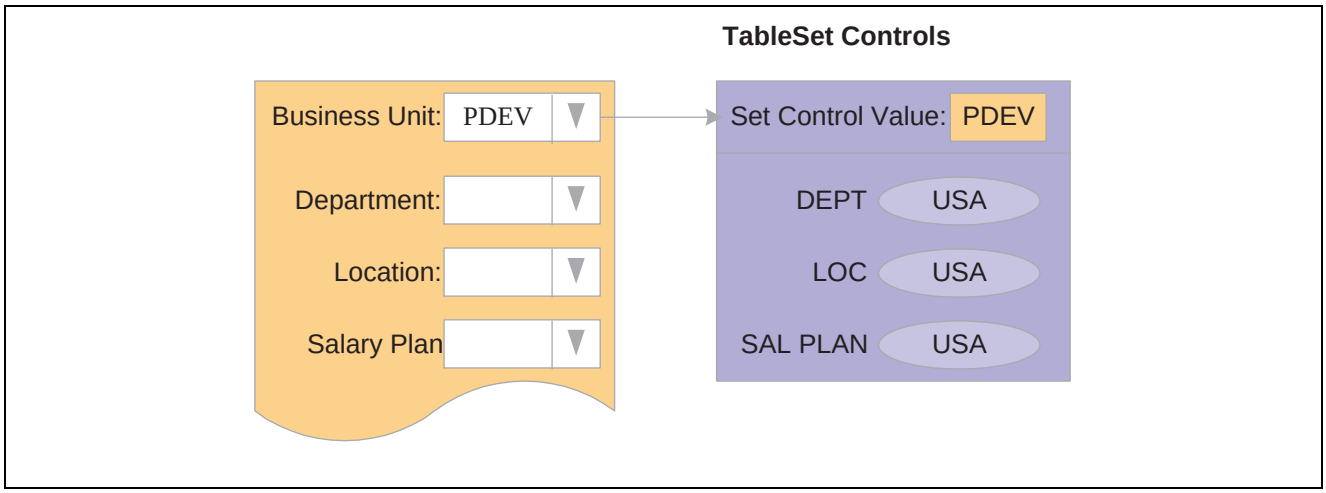
Scenario 2: A Transaction Table with Multiple SetIDs Controlling Defaults Across the Transaction Record

An example of a transaction table that has multiple setIDs controlling defaults across the record is the Job Data component (JOB_DATA).

When you create a job data record for someone, you select a business unit on the Work Location page (JOB_DATA1). The system uses the business unit's tableset controls to determine which values to make available in other fields on the component and when to use established defaults.

The system only displays departments that are in the setID selected for the business unit and defaults in the department's location only if the location is in a valid setID for the business unit. Locations have associated salary plans, and the system defaults in the location's salary plan only if the salary plan is in a valid setID for the business unit. If a default value is not in a valid setID for the selected business unit, the system leaves the field blank and the user selects a value from the options in the valid setID.

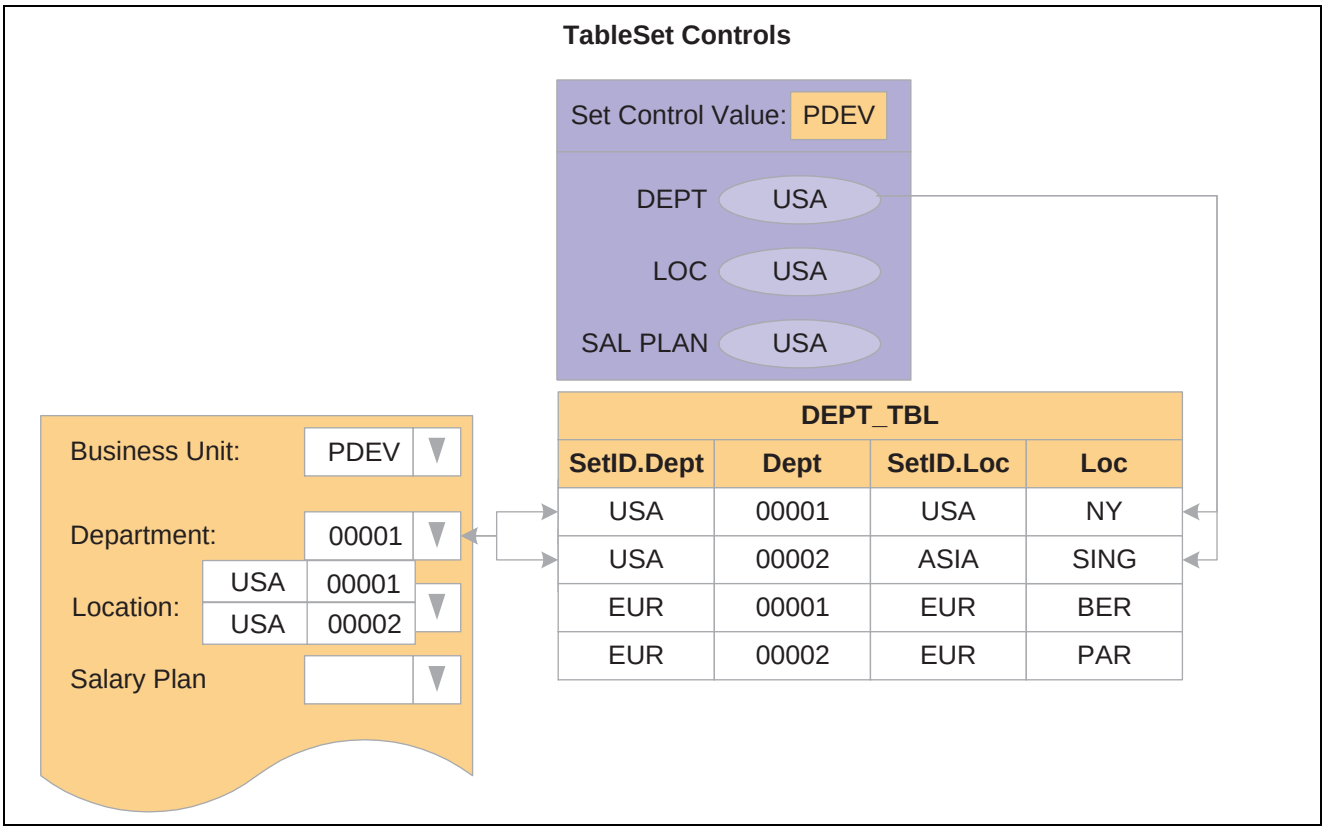
For example, on the Job Data component, select the business unit. The system references the tableset controls for that business unit to determine the valid setIDs for many of the fields on the component:



Select the business unit, which determines the valid setIDs for many fields on the page.

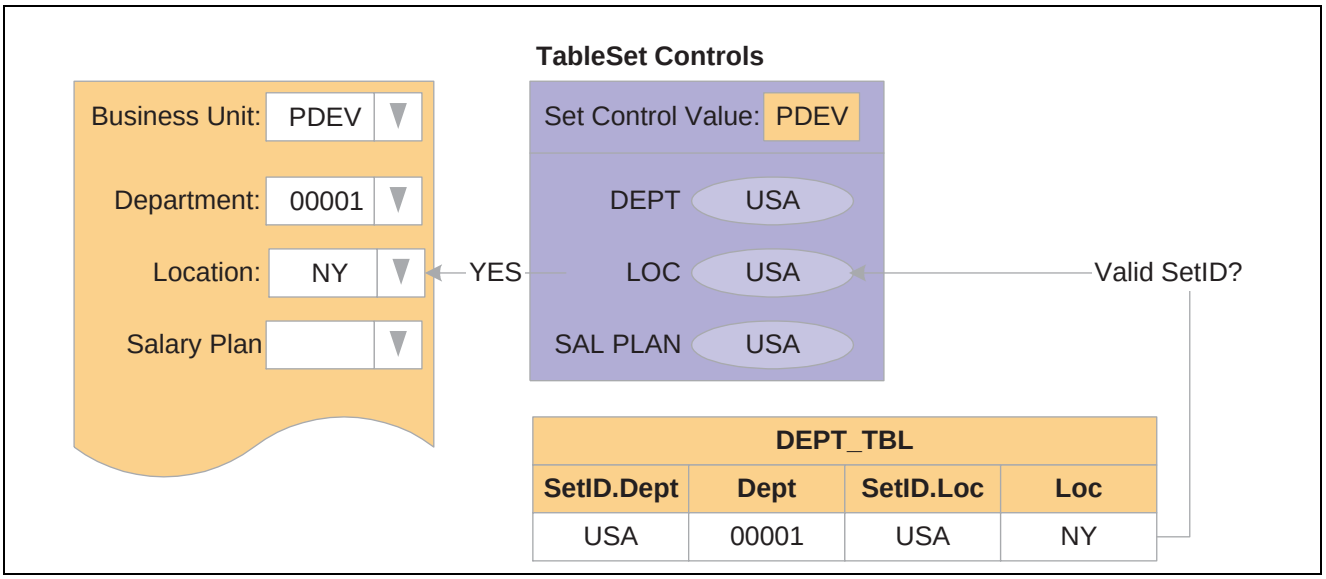
Select the department. The system only makes available departments in the DEPT setID selected for this business unit:

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The system only displays values in the setID selected for this field's prompt table for this business unit.

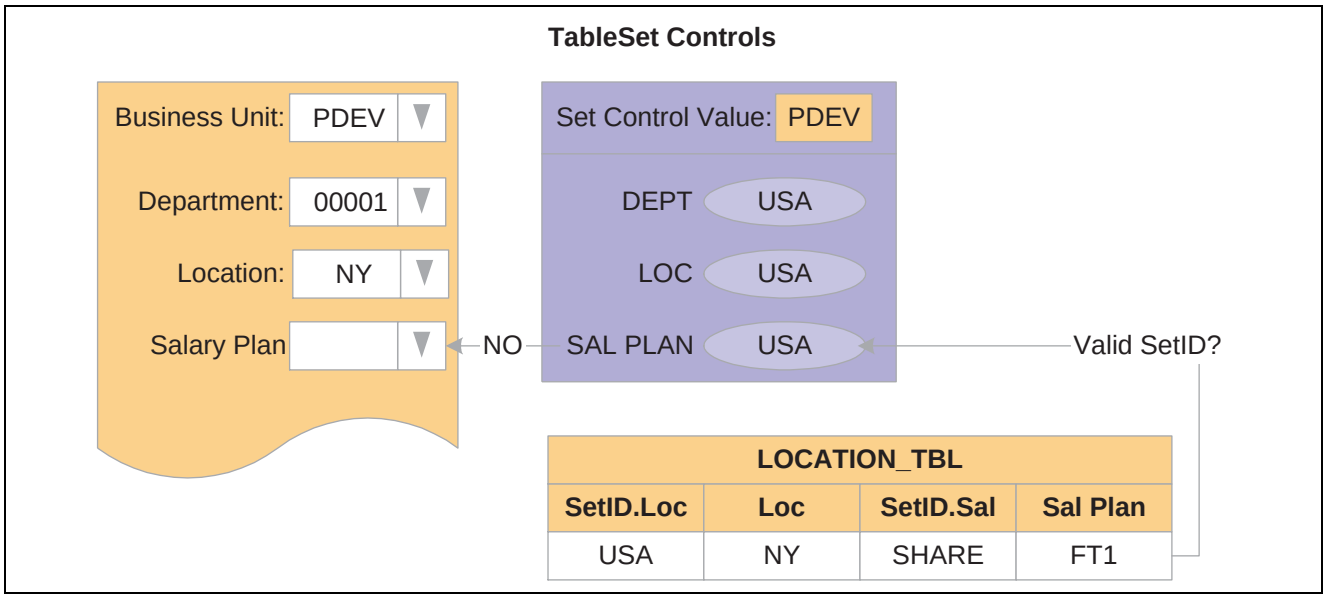
The system checks to see if the setID of the location associated with the selected department is valid for this business unit. If yes, the system enters the default location in the Location field. If not, the system leaves the Location field blank:



The system only enters the default value if it is in a valid setID for this business unit.

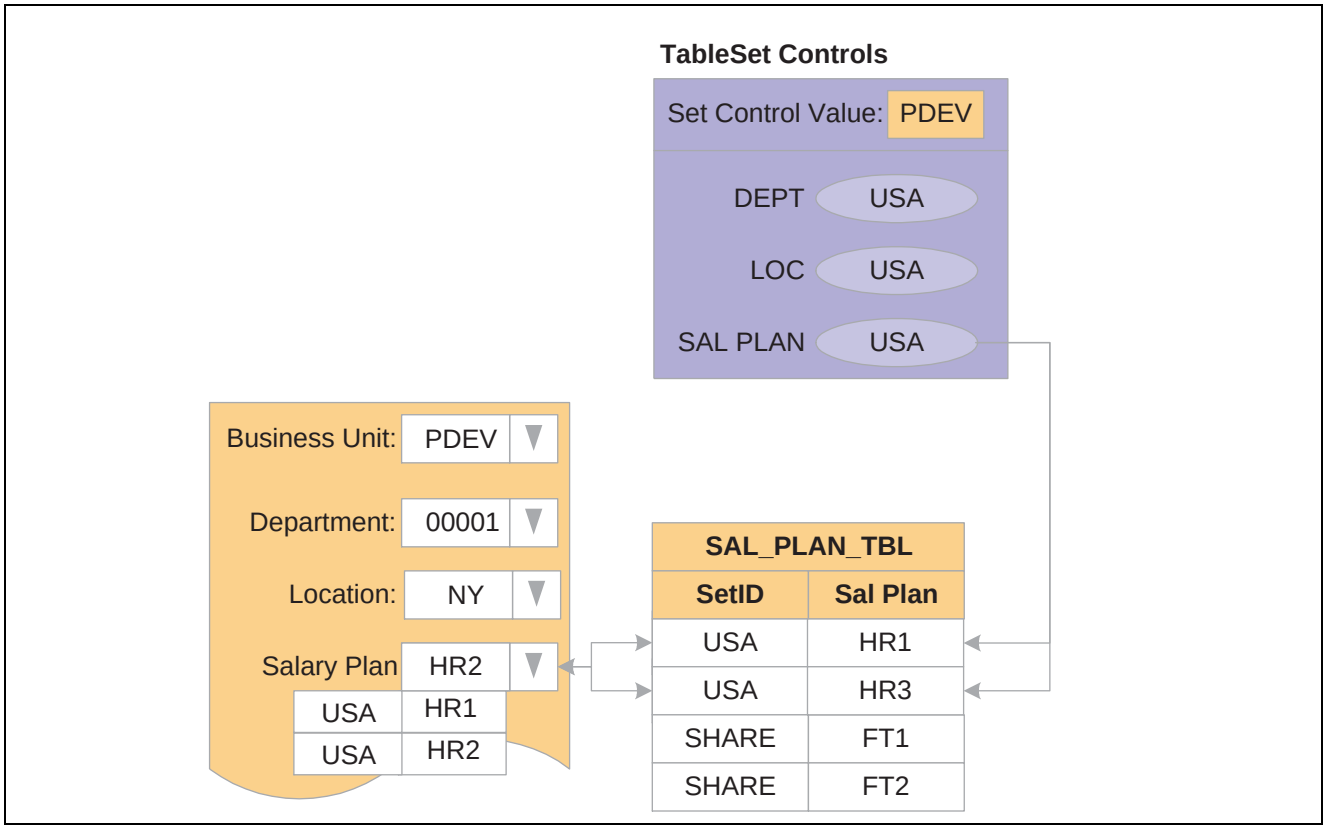
The system checks to see if the setID of the salary plan associated with this location is valid for this business unit:

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The system does not enter the default value if the value's setID is not valid for the business unit.

Select a Salary Plan that is valid for the business unit:



You can only select a value with a valid setID.

Note. Many of the setID driven control tables enable you to review which business units have access to the selected setID so that, as you set up your control values, you can confirm that they will be available to the appropriate business units.

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Working with Permissions Lists and System Defaults

This section discusses how to:

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

Linking to Permission Lists

PeopleSoft security is based on building blocks called permission lists. Permission lists grant users access to applications, functionality, menus, data, and so on. Most permission lists are grouped into roles and the roles are granted to users. However, there are four permission lists that control specific aspects of the application that are assigned directly to the user profiles.

One of these permission lists, the primary permission list, determines which default values the system enters for the user (among other things). On the Org Defaults by Permission List component (OPR_DEF_TBL_HR) set up primary permission lists with:

- Default values for the following fields:
  - Business Unit
  - SetID
  - Company
  - Country
  - Regulatory Region
  - To Currency
  - Currency Rate Type
- Application settings, such as the payroll system and industry.

When a user logs onto the system, the system references the user's primary permission list to determine which settings to apply and which values to enter as defaults on components that support primary permission list defaulting. This helps to ensure that users are entering the right information for the kind of work that they do.

Note. Not all components use the defaults from the primary permission list.

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

See Also

Chapter 5, "Setting Up and Administering HRMS Security," page 37

Enterprise PeopleTools PeopleBook: Security Administration

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Defining Business Unit HR Defaults

When users access an HCM component, the system populates some of the fields, such as business unit, company, and country using the values you associated with the user's primary permission list. You can also associate default values with setIDs on the Business Unit Options Default page (BUS_UNIT_OPT_HR).

Using the tableset controls and business unit default options you set up, the system determines the default values to enter in select fields on the transaction component. The system uses these defaults only on components where the system identifies the business unit field as a source for default values.

To set up business unit defaulting:

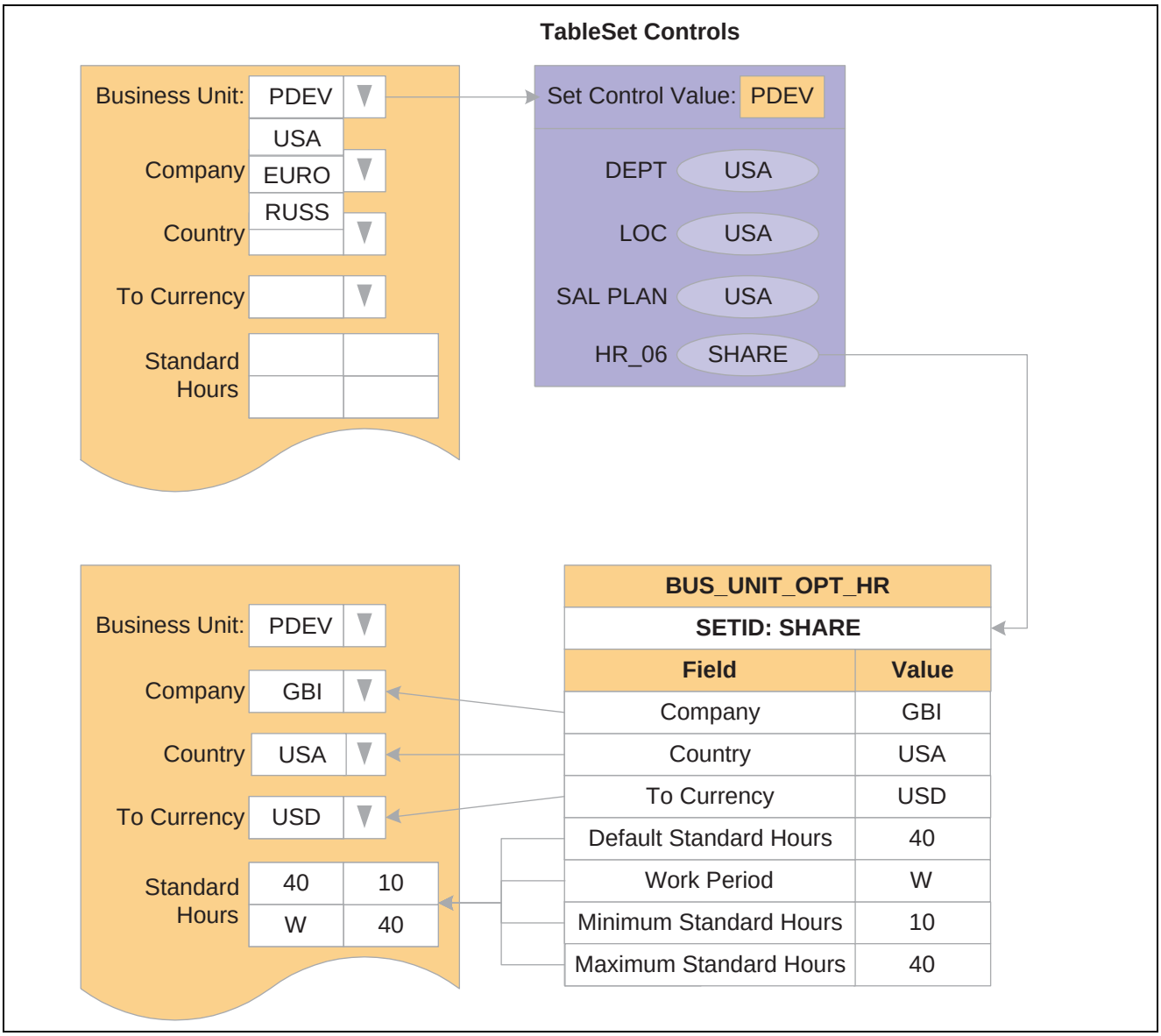
1. On the Tableset Control – Record Group page (SET_CNTRL_TABLE1), select the setID that controls business unit defaulting for this business unit.

   This enables you to share defaulting rules across business units.

2. Enter the setID's default values on the Business Unit Options Default component.

When a user accesses a component that is driven by business unit defaults and selects a business unit, the system determines which setID drives defaulting for that business unit on the Tableset Control – Record Group page. The system references the Business Unit Options Default component to retrieve the default values you set up for the selected setID and then enters those values in the transaction component. This diagram illustrates this process:

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The system determines the defaults for a selected business unit by referencing the tableset controls and the business unit default options.

Note. The record group containing the Business Units Options Default record (BUS_UNIT_OPT_HR) is HR_06.

Setting up business unit defaults on the Business Unit Options Default page makes sense when you have multiple business units that share the same kind of defaults; but shared defaults are not readily organized by permission list.

Determining System Default Values

Most of the page-level defaults in the PeopleSoft HRMS system are based on the primary permission list as opposed to business unit. Business unit defaulting generally only occurs on components that are driven by the business unit or that use EmplID as a high-level key.

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This table lists the four most common scenarios in which the system must determine which default values to use, either the defaults that you defined on the Business Unit Options Default component or on the Org Defaults by Permission List component:

On the Component	How the System Determines Defaults
Select a business unit.	The system enters the default values from the Business Unit Default Options component.
Select an EmplID value, but no business unit value.	The system determines the person's business unit by checking the person's JOB record for that EmplID/ERN combination and then enters the default values from the Business Unit Default Options component.
The component does not have either the Business Unit or EmplID fields.	The system enters the default values from the Org Defaults by Permission List component.
The component uses a setID without an associated business unit or EmplID value. (This is the situation on most setup and control components, such as the Location and Department components.)	The system enters the default values from the Org Defaults by Permission List component.

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

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

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Enterprise PeopleTools PeopleBook: Data Administration Tools

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CHAPTER 4

Working with Regulatory Regions

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

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

Understanding Regulatory Regions

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

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

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

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

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

Understanding Regulatory Region Table Relationships

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

- Regulatory Region (REG_REGION)

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- Transaction (REG_TRX)
- Regions in Transaction (REG_TRX_REGION)

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

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

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

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

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

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

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

Establishing Regulatory Regions

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

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

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

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

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

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Establishing Regulatory Transaction Types, page 144

Associating a Regulatory Region with a Transaction

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

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

Understanding Regulatory Regions and Transactions

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

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

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

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

Maintaining Regulatory Regions

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

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

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

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

Using Regulatory Regions for Transaction Processing

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

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

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

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

Establishing Default Regulatory Regions

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

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

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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Disabilities

Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 243

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Assessing the Impact on PeopleCode Transaction Processing

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

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

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

Creating Prompt Edit Transaction Views for REG_REGION

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

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

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

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

Adding REG_REGION to Human Resources Transactions

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

Example - Job Data

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

1. Add the REG_REGION field to the record JOB.
2. Make the REG_REGION field a required field.
3. After adding the field to the record, define a prompt edit from the standard view (REG_STANDARD_VW).
4. Add this field to the page JOB_DATA1.

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

Example - Health and Safety

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

Warning! All linked setup values for an incident must belong to the same regulatory region. If the Regulatory Region is altered (such as when you are operating in update/display mode), and the SetID for the new Regulatory Region is different from the original, all linked setup fields and values are deleted to prevent inconsistent data. For example, the SetID for the Regulatory Region USA is *USA,* and for GBR it is *GBR.*. If the Regulatory Region for an already established *USA* incident is changed to *GBR,* then all of the linked details on the Incident Details pages are lost. The system prompts you that the Regulatory Region is about to be changed, and you can choose whether to proceed before the values are deleted or not.

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

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

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

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

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

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

Additional Transaction Modifications for Regulatory Region

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions.

See Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 243.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Disabilities.

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CHAPTER 5

Setting Up and Administering HRMS Security

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

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

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

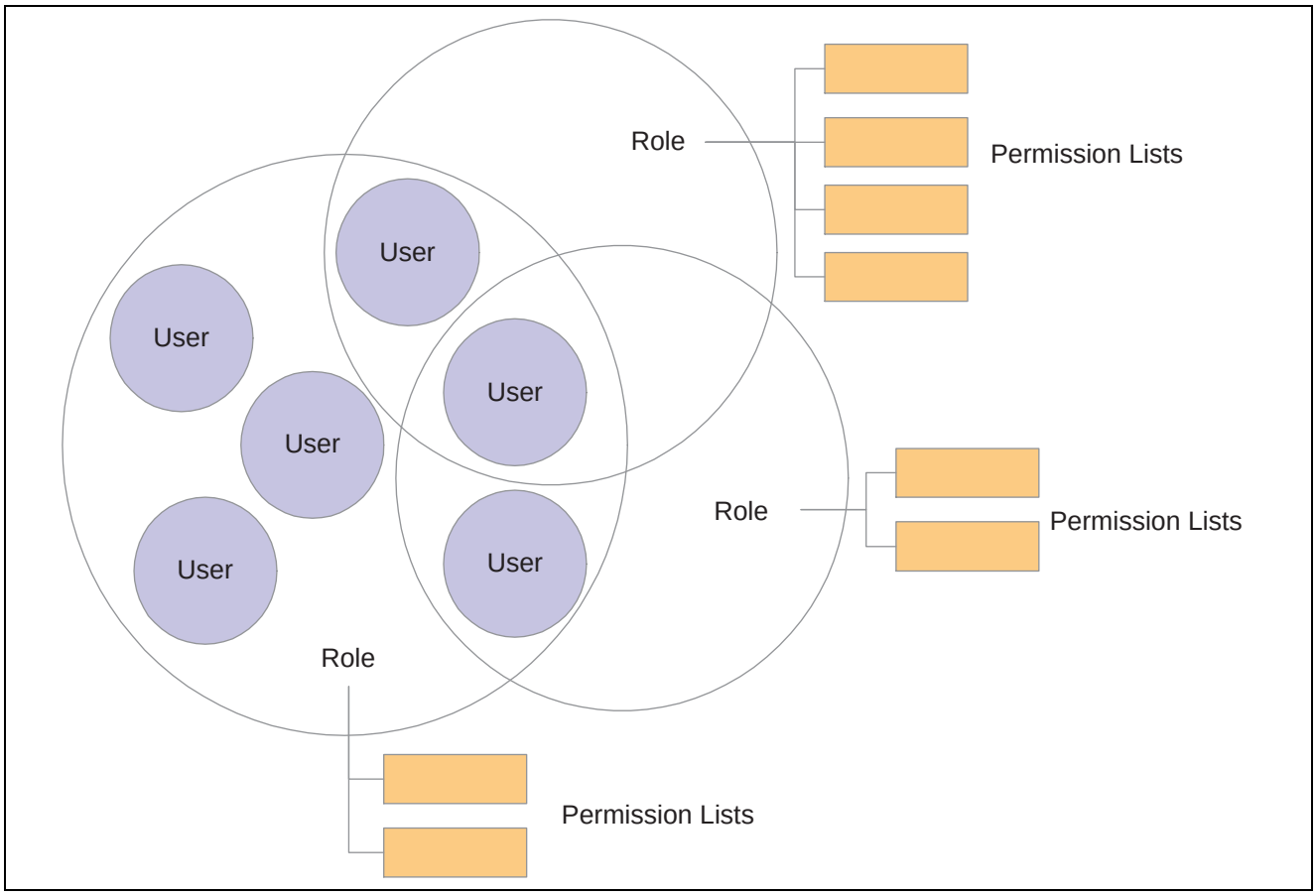
See Also

Chapter 35, "Setting Up and Working with Self-Service Transactions," page 803

Understanding PeopleSoft Security

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

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Permission Lists and Roles Create a User's Security Profile

To administer security:

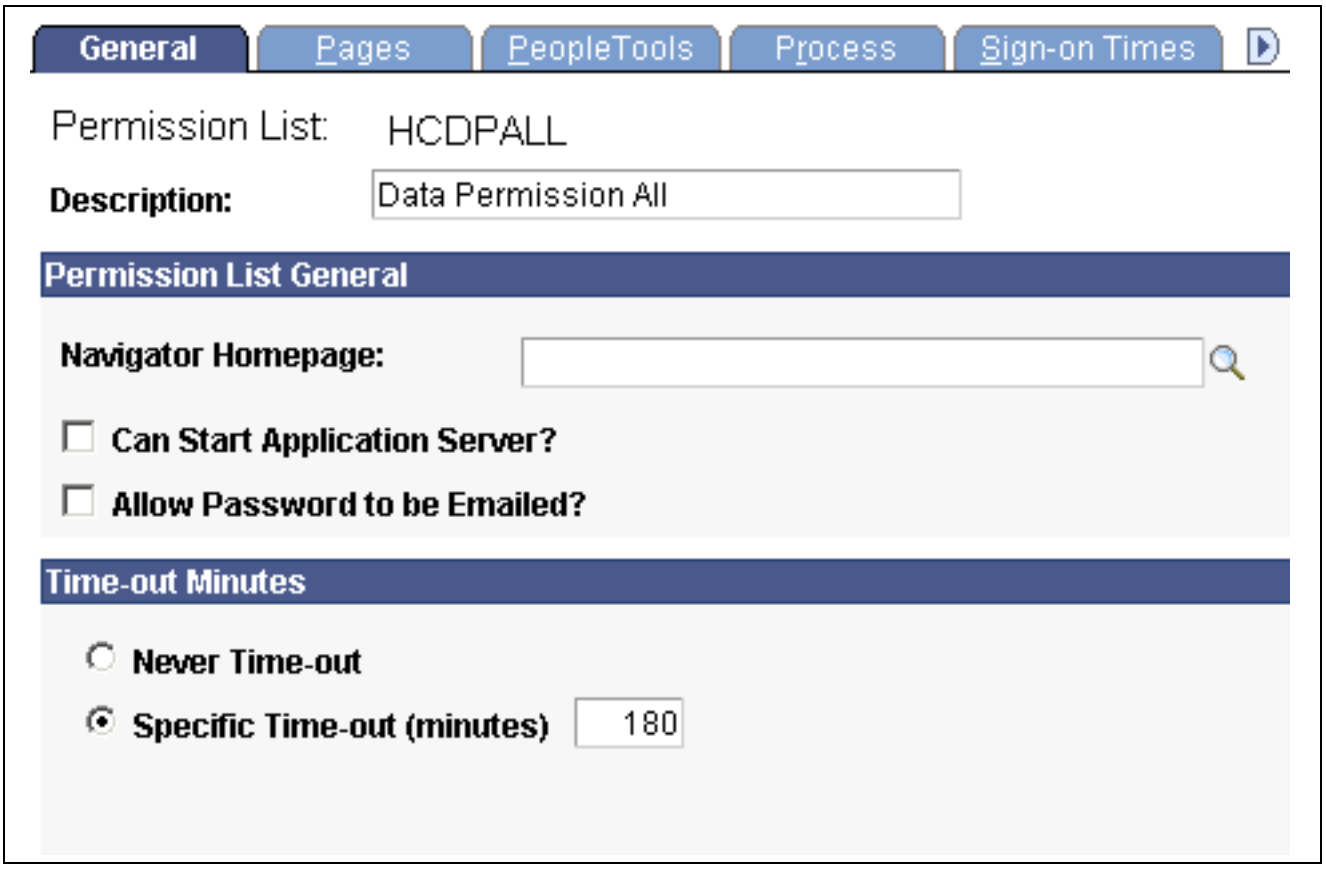
1. Create permission lists.
2. Create roles and attach permission lists to roles.
3. Create user IDs and attach permission lists and roles to user IDs.

Create Permission Lists

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

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

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

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

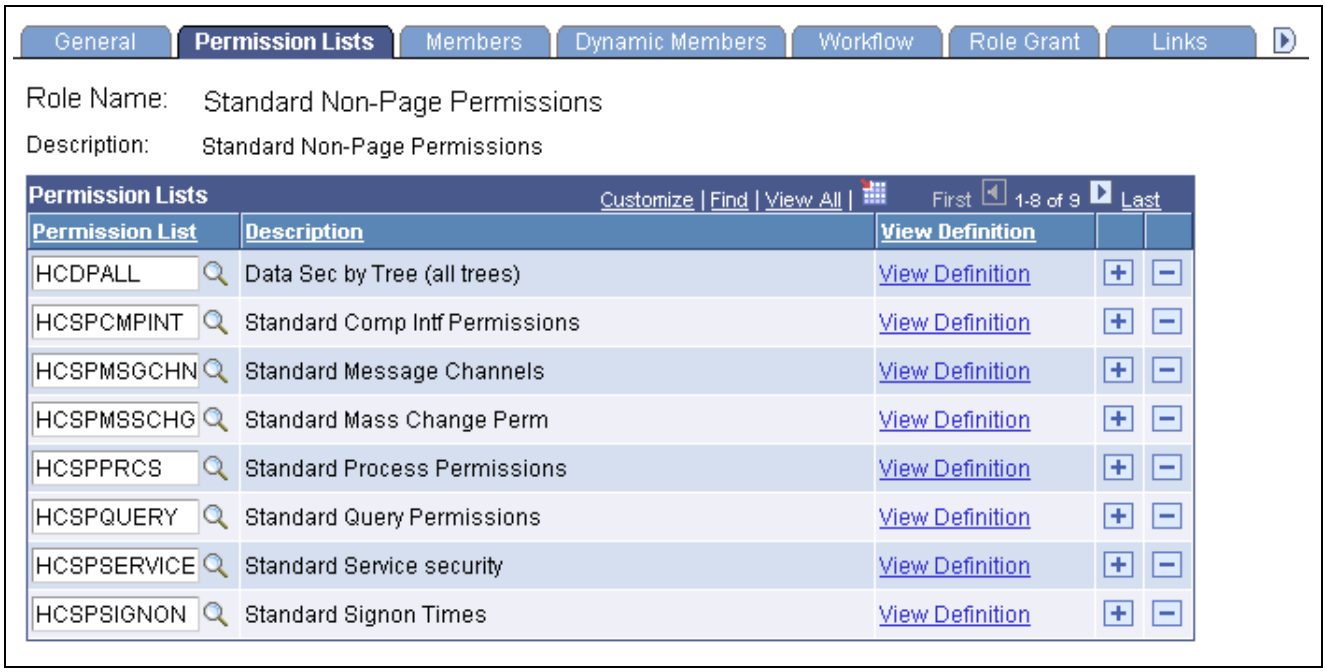
See *Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"*

Create Roles

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

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

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

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

Create User IDs

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

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

- Navigation Homepage

  Navigation homepages are used by PeopleSoft Workflow.

- Process Profile

  Process profiles contain PeopleSoft Process Scheduler authorizations.

- Primary

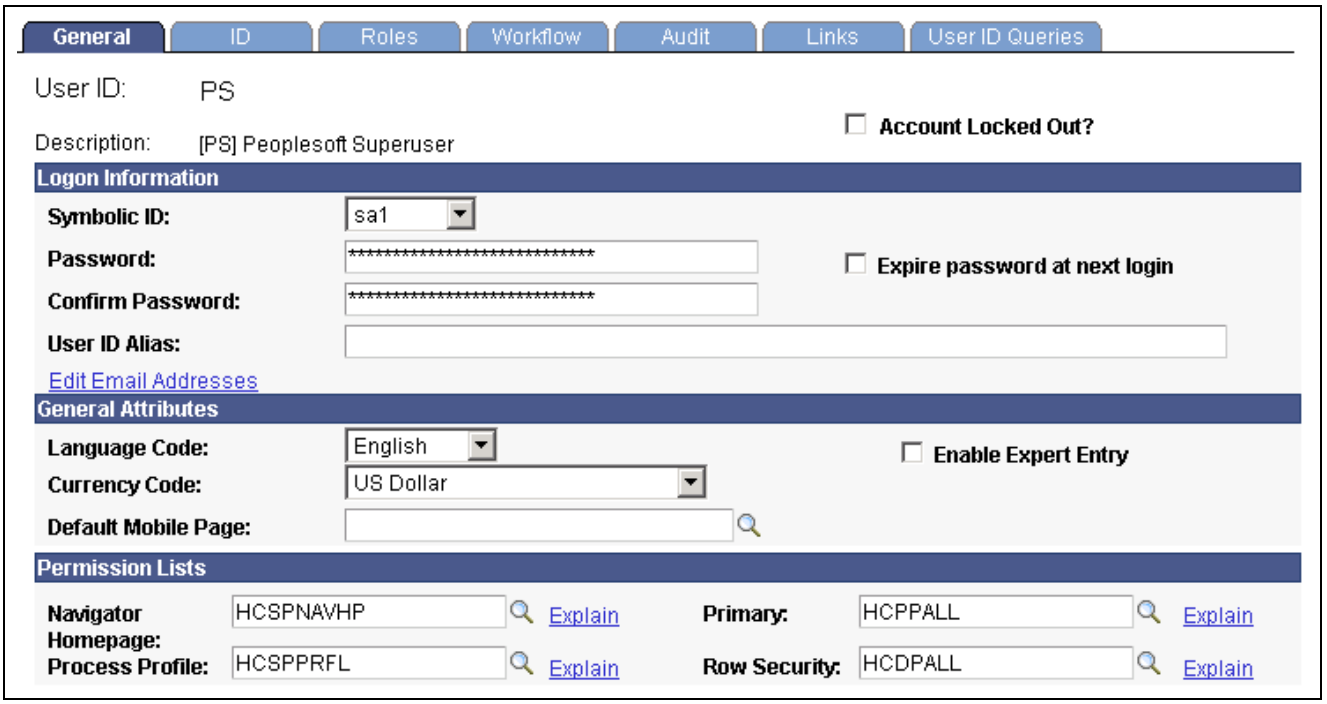
  Primary permission lists grant global security.

- Row Security

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

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

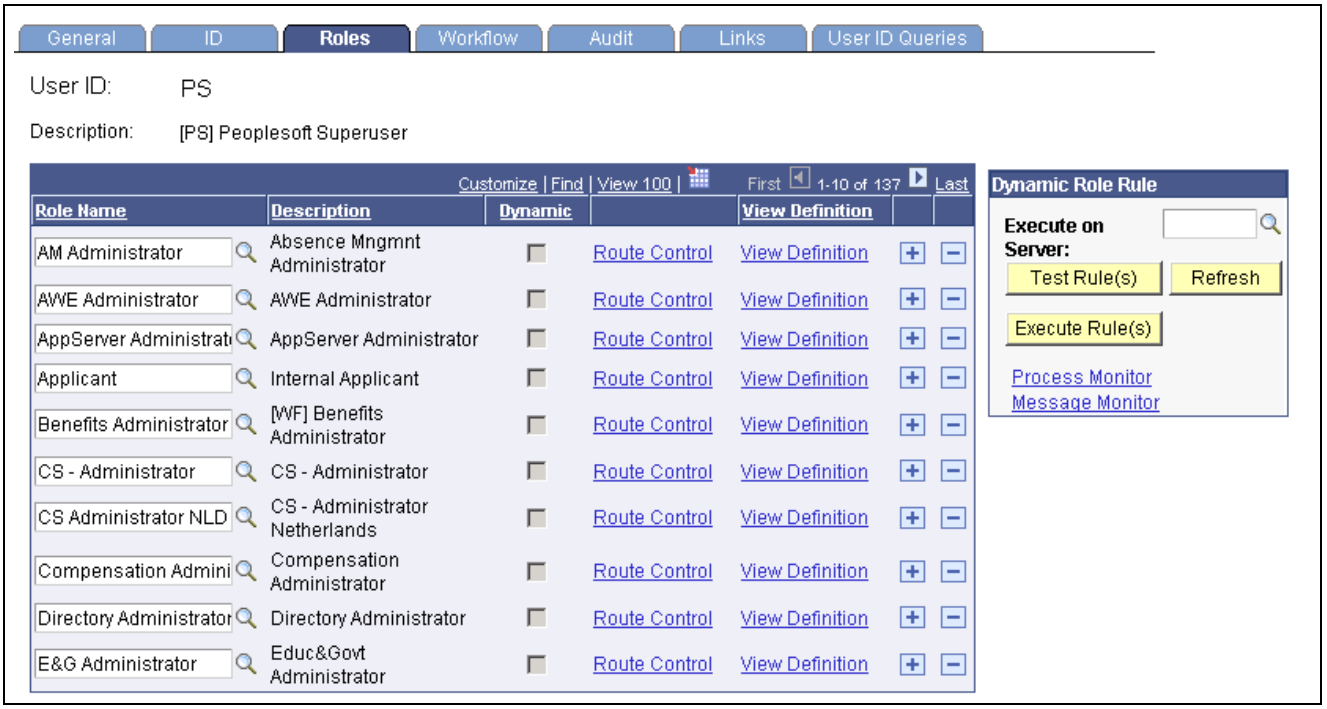
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Create user IDs on the User Profiles component and Copy User Profiles component and assign the Navigator Homepage, Process Profile, Primary, and Row Security permission lists directly to the user profile on the General page.

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

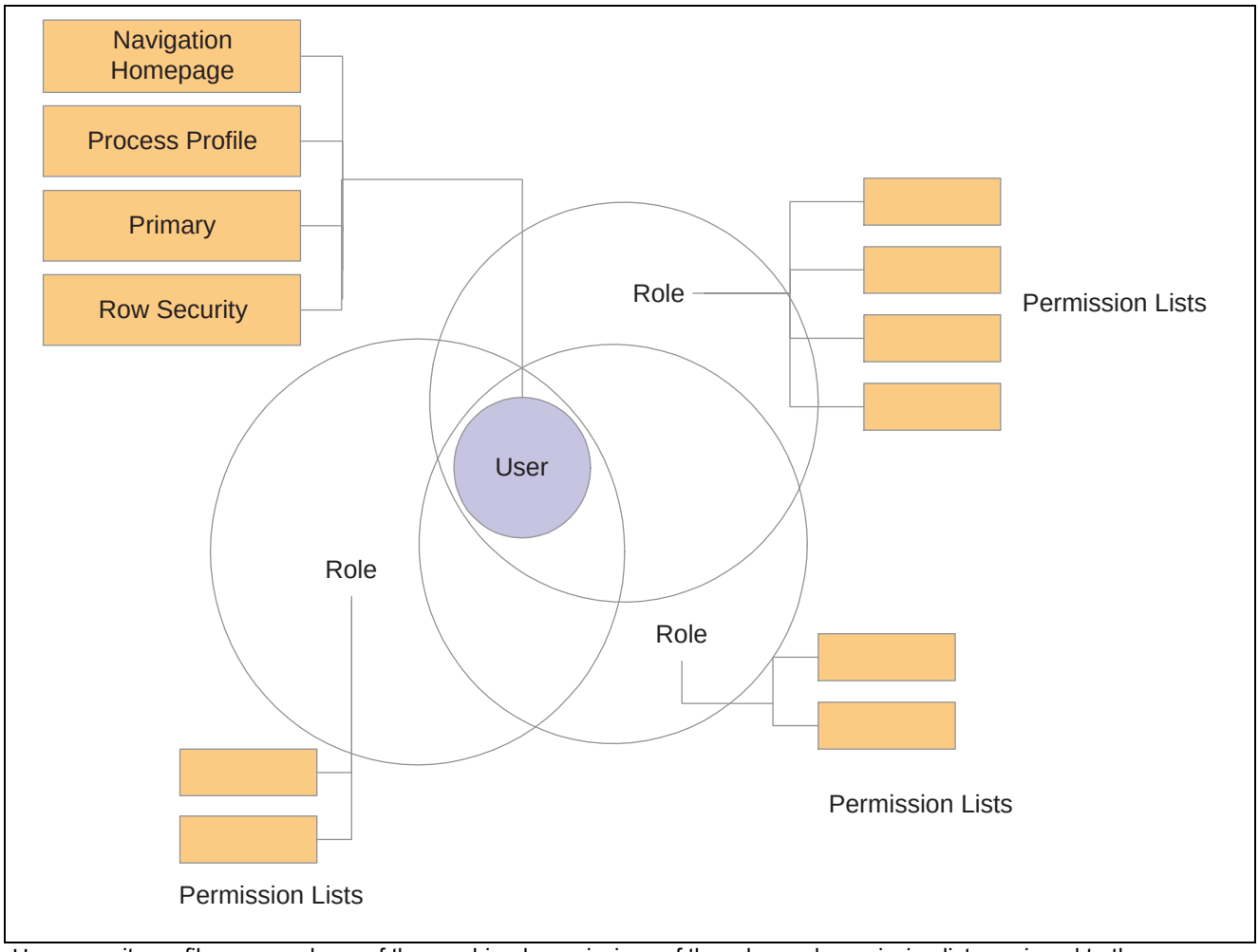
Assign roles to users using the User Profiles - Roles page (USER_ROLES):



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

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



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

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

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Data Permission Security for HRMS

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

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

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- People of interest (POIs) without jobs.

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

- Recruiting job openings.
- Departments.

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

Data Security and Data Retrieval

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

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

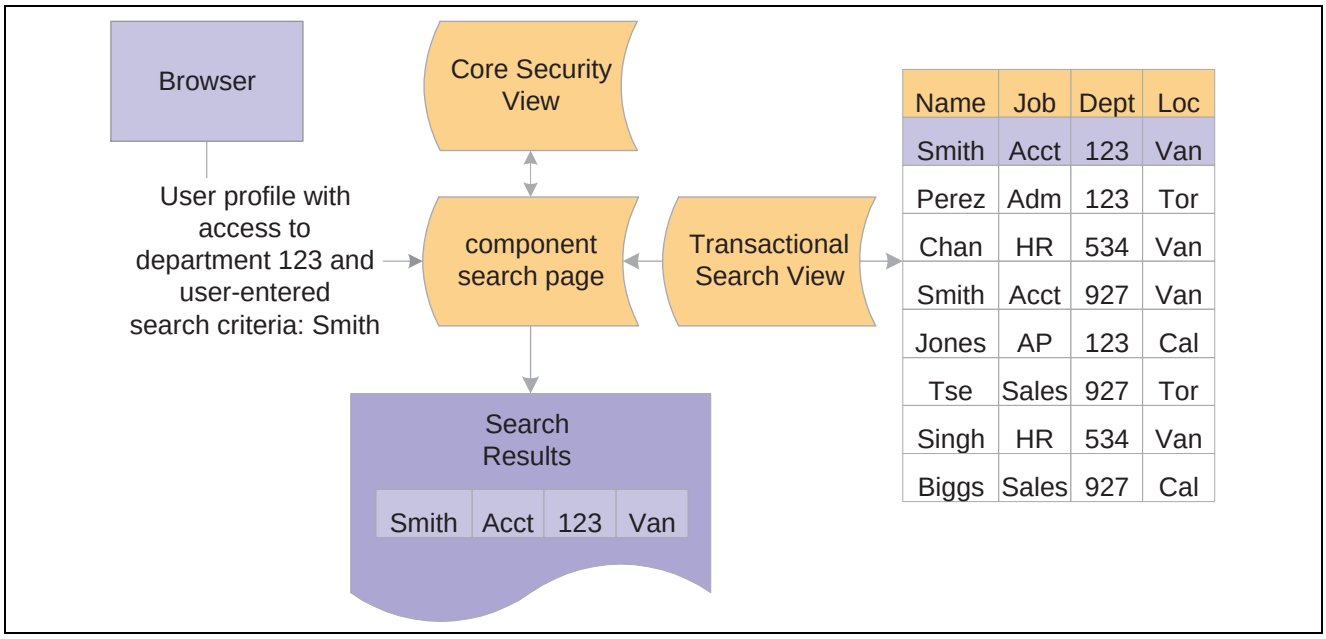
The system also uses search records to enforce data permission security. Search views for components that contain sensitive data also contain a security view to control data access.

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

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

This diagram illustrates the data retrieval process:

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

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

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

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

Core Security Views

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

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

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

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

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

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

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Security Data

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

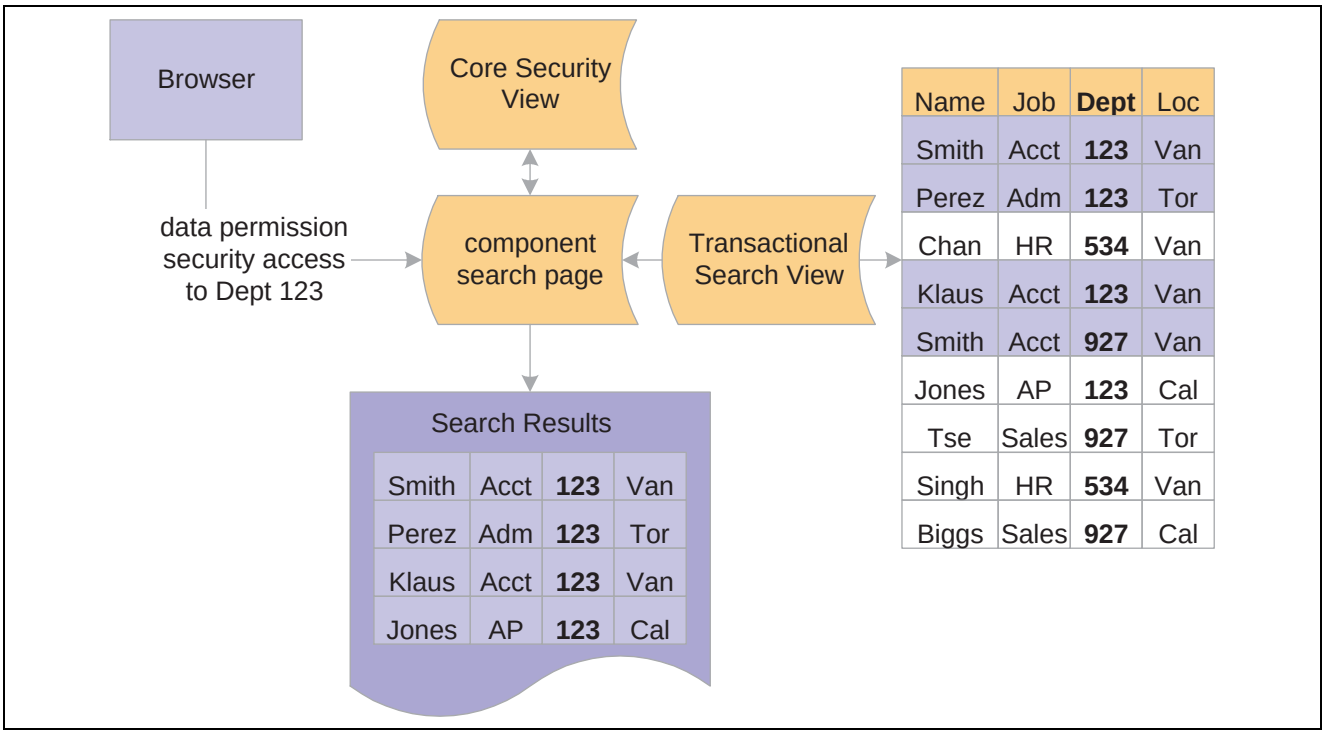
Transaction Security Data

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

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

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

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

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

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

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

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Adding a Person.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Controlling Data Access for POIs Without Jobs.

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See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

User Security Data

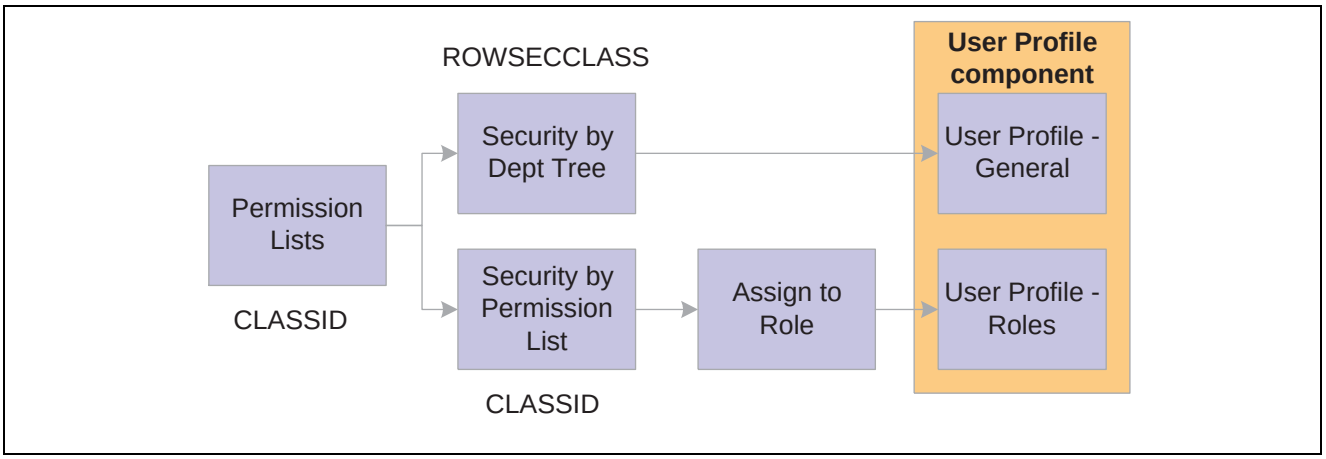
User security data is the data about a user's security access. It enables the system to ensure that users have access only to that which you have granted them access. User security data for HRMS data permission is the data permission that you assign to permission lists and the roles and users to whom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

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

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

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

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



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

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

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

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

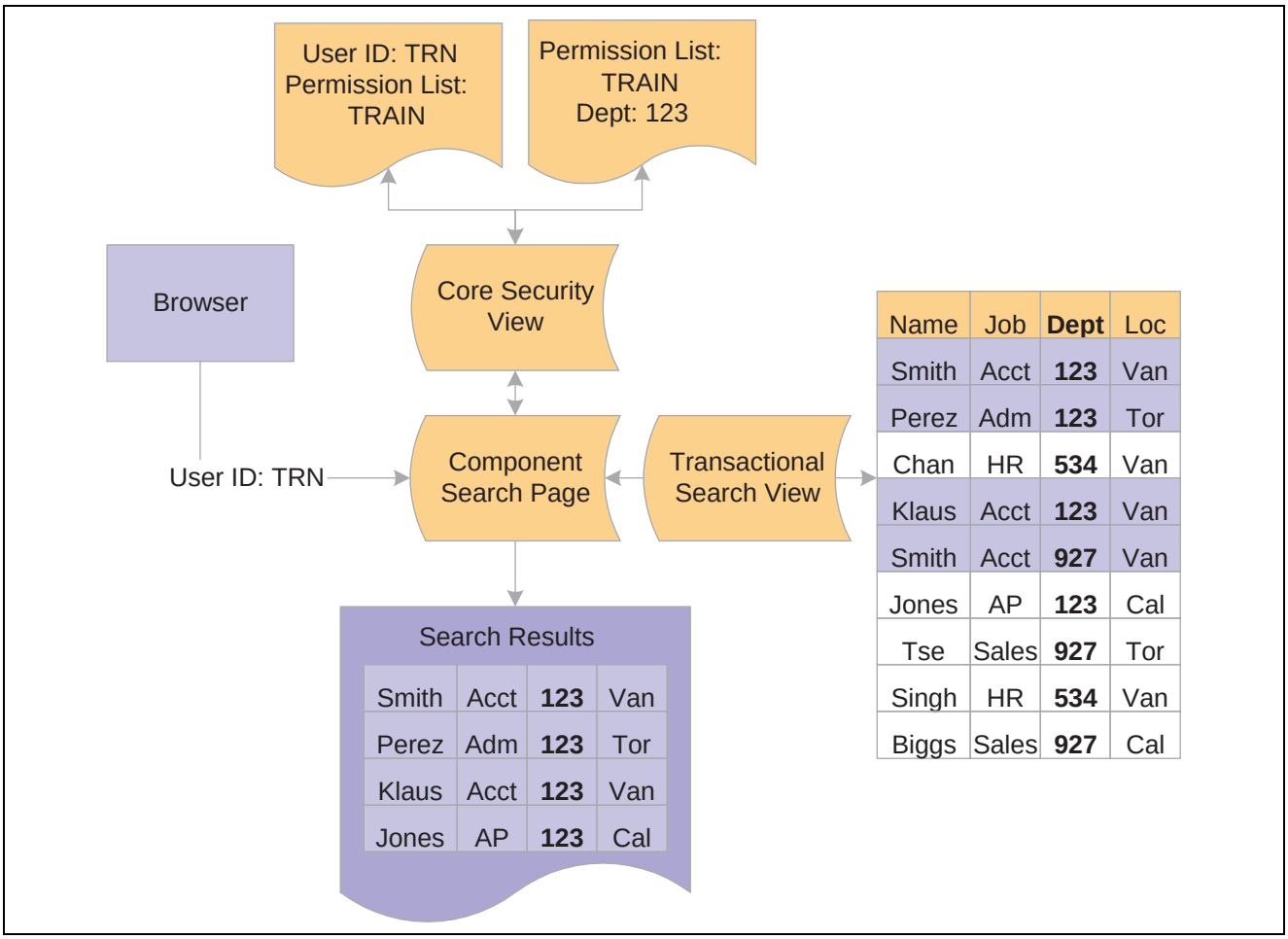
Note. You can use the same permission list as a row security permission list and a role-based permission list by adding it to both the Security by Dept Tree component and Security by Permission List component and then adding them to the user on the User Profile - General page and by way of roles.

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

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

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

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

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

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

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

Note. The data from PSROLECLASS, PSROLEUSER, and PSOPRDEFN is loaded into SJT_OPR_CLS either automatically by the system, when you enable the USER_PROFILE and ROLE_MAINT messages, or when you run the Refresh SJT_OPR_CLS process.

See Chapter 5, "Setting Up and Administering HRMS Security," Understanding PeopleSoft Security, page 37.

See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 77.

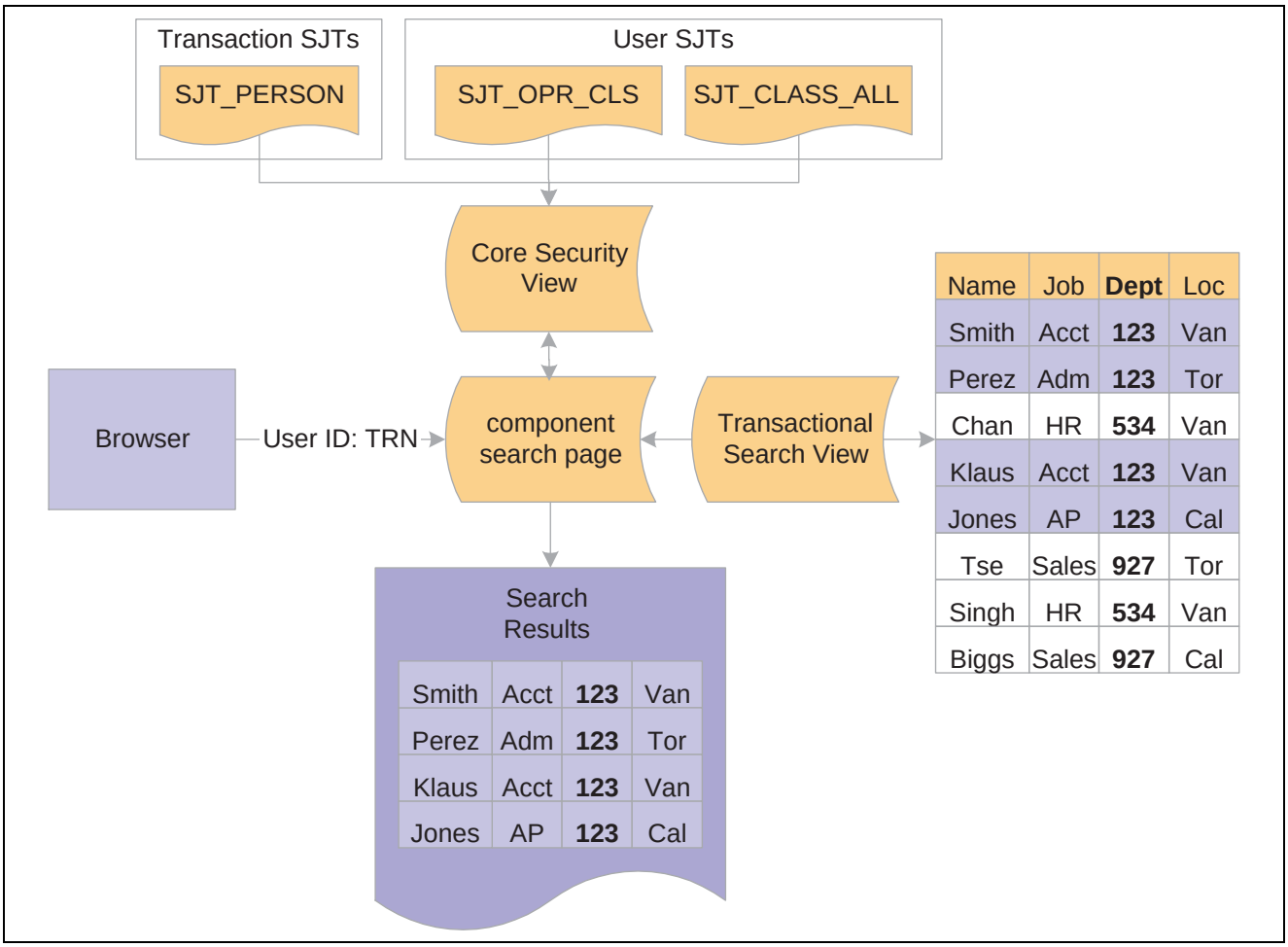
See Chapter 5, "Setting Up and Administering HRMS Security," Assigning Role-Based Data Permission Security to Permission Lists, page 85.

Security Join Tables

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

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

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

Transaction Security Join Tables

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

There are four transaction security join tables:

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

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Transaction Security Join Table	Description	Stores Data From:	Key Fields
SJT_DEPT	Contains the transaction data for the HCM departments.	DEPT_TBL	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 SETID DEPTID
HRS_SJT_JO	Contains the transaction data for the job openings in your system.	• HRS_JOB_OPENING • HRS_JO_RTEAM_VW	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 HRS_JOB_OPENING_ID

The key fields are:

- SCRTY_TYPE_CD (security access type code)

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

  Security access types are unique to a security access set.

- SCRTY_KEY1, SCRTY_KEY2, and SCRTY_KEY3 (security keys)

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

- EMPLID

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

- SETID and DEPTID

  A department's setID and department ID.

- HRS_JOB_OPENING_ID

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

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

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

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

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

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

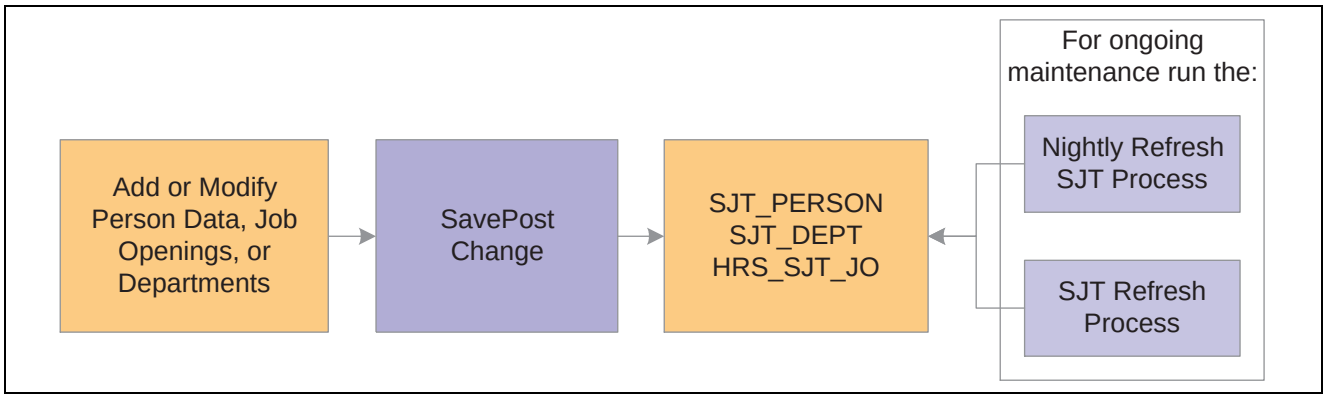
Note. Locations and departments do not need three key fields to uniquely identify them so the third security key field isn't necessary for this example.

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

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

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

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Keeping the transaction security join tables up to date

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 93.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 94.

User Security Join Tables

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

There are two user security join tables:

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

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

- SCRTY_SET_CD (security set code)

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

- OPRID

  The user's user ID.

- CLASSID

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

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

The permission list data in SJT_CLASS_ALL comes from two sources:

- SCRTY_TBL_DEPT

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

- SJT_CLASS

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

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

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

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

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

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

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

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

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	002	location business unit: FRA01	location code: PAR	N/A
PAY1	PPLJOB	002	location business unit: AUS01	location code: SYD	N/A
PAY2	PPLJOB	002	location business unit: USA	location code: KSC	N/A

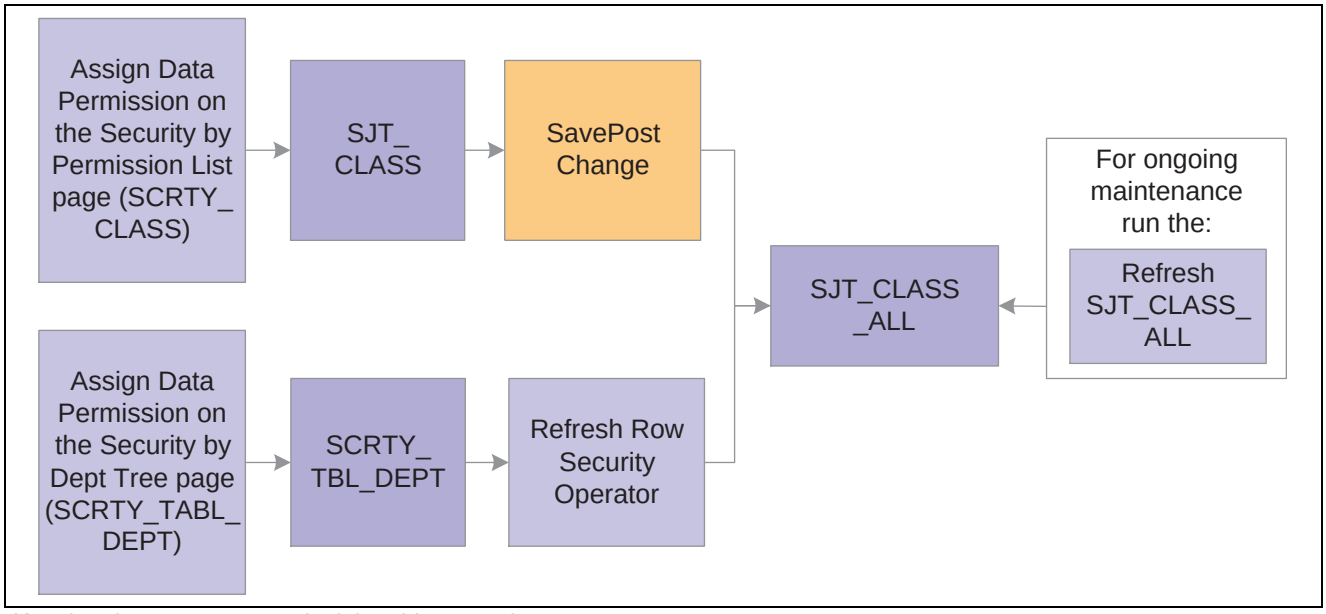
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When you save your changes on the Security by Permission List page, SavePostChange PeopleCode automatically updates the data to the security join table SJT_CLASS_ALL.

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

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

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



Keeping the operator security join table up to date.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 96.

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

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- PSOPRDEFN

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

- PSROLEUSER

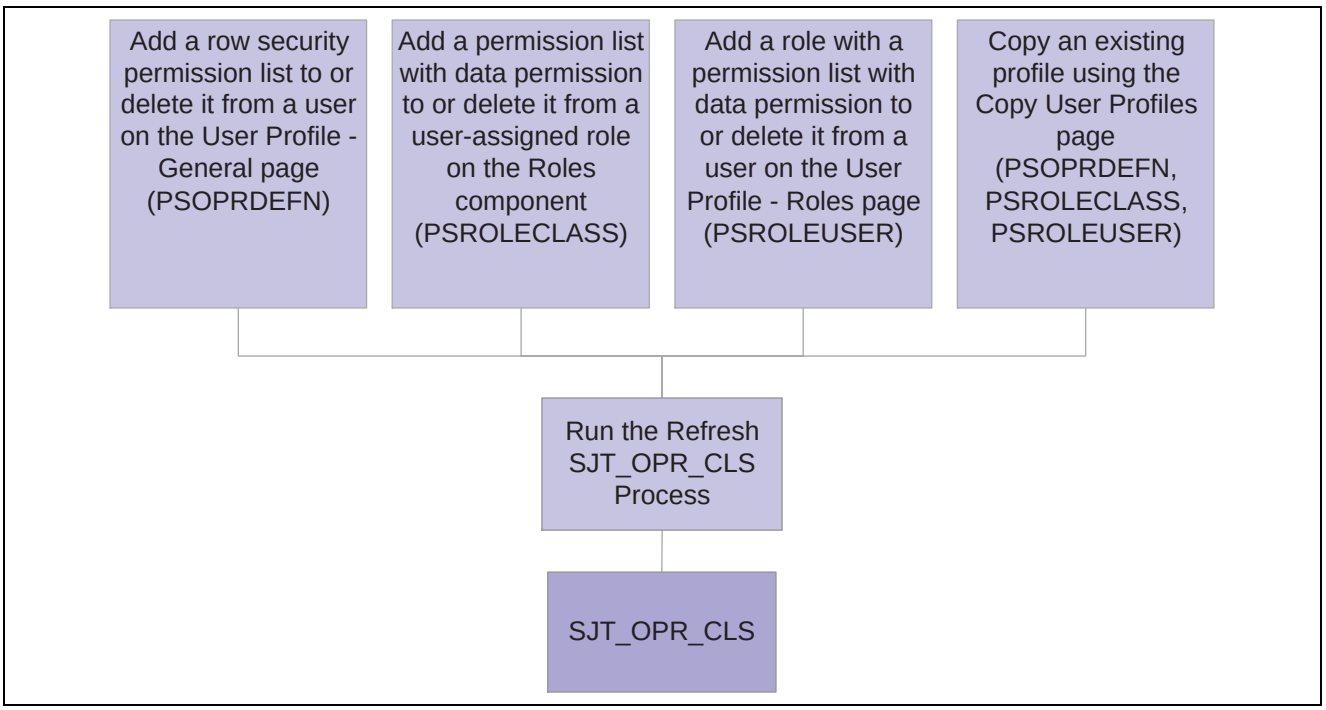
  This record contains the relationship between the User IDs and roles from the User Profile - Roles page.

- PSROLECLASS

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

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

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



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

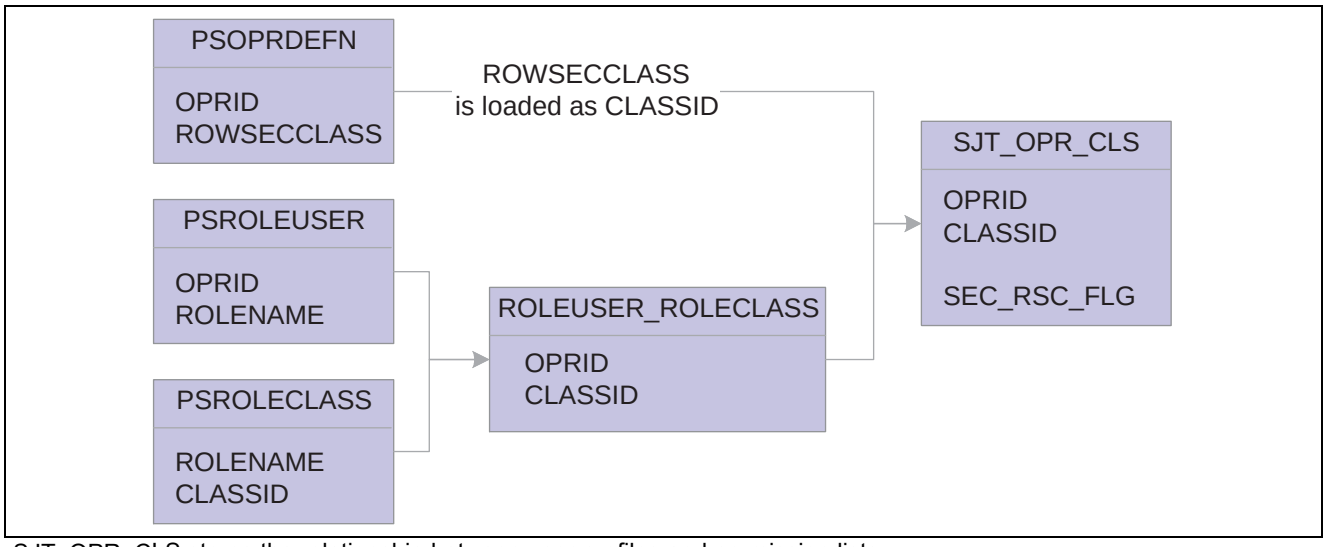
Note. You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

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

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

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



SJT_OPR_CLS stores the relationship between user profiles and permission lists

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 97.

Security Sets and Security Access Types

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

PeopleSoft delivers the following five security sets:

Security Set	Description	Security Join Table Storing Data
PPLJOB	People with Jobs Includes the data of any person who has a JOB record and all the associated data for that person.	SJT_PERSON
PPLUSF	People with Jobs for United States Federal Government Includes the data of any person who has a GVT_JOB record and all the associated data for that person.	SJT_PERSON_USF

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Security Set	Description	Security Join Table Storing Data
PPLPOI	People of interest without jobs Includes the data of any person who does not have a JOB record and all the associated data for that person.	SJT_PERSON
DEPT	Departments Includes department budgets and positions.	SJT_DEPT
RSOPN	Job Openings Includes the data of job openings, including the data of applicants associated with a job opening.	HRS_SJT_JO

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

See See the security white paper posted on Customer Connection:*Human Capital Management Row Level Security in HRCS 9.0*

See Chapter 5, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 72.

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

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

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

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

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

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Security Set	Security Access Types
PPLJOB	• Job Department Tree (001) • Job Location (002) • Job Business Unit (003) • Job Company (004) • Job Reg Region (005) • Job Salary Grade (014) • Person Organization (015) • Job – Deptid – non Tree (025) • Job — Company/Paygroup (032)
PPLUSF	• US Federal Department Tree (016) • US Federal Location (017) • US Federal Company (018) • US Federal Business Unit (019) • US Federal Salary Grade (020)
PPLPOI	• POI Business Unit (006) • POI Location (007) • POI Institution (008) • Person of Interest (009)
DEPT	• Departments by Tree (021) • Departments - non Tree (022) • Departments by Setid (023)
RSOPN	• RS Company (010) • RS Business Unit (011) • RS Dept Id (012) • RS Location (013) • Recruiting Team (031)

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Enabling Security Types, page 74.

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Enabling and Using Multiple Security Access Types

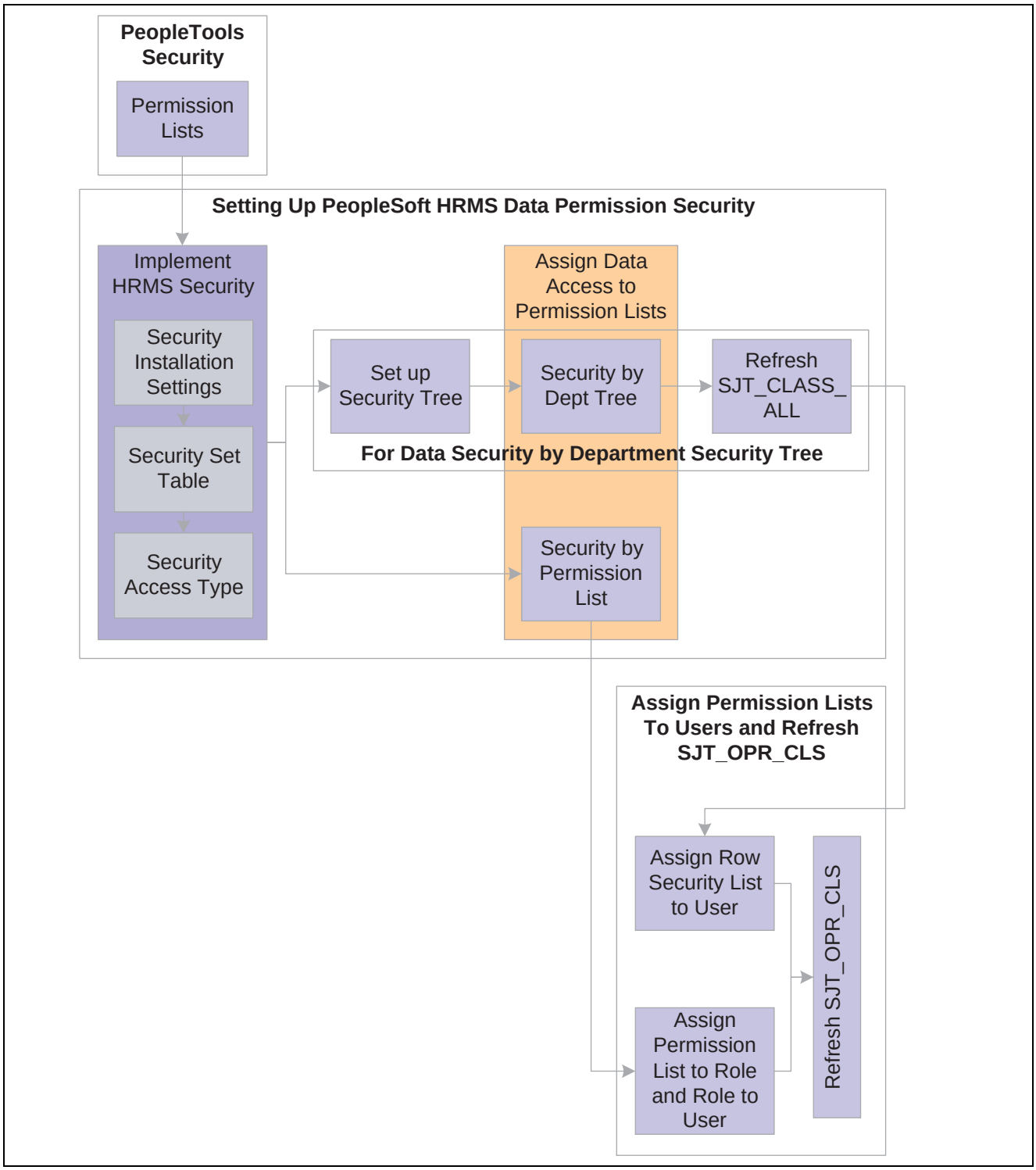
When you grant a permission list access to data in a security set using more than one security access type the security access creates a union, not a join or an intersect, with the two types. For example, if you enable the Job Company and Job Business Unit security access types for the PPLJOB security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

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

HRMS Security Process Flow

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

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Setting up PeopleSoft HRMS data permission security

To set up HRMS data permission:

1. Set up permission lists in the PeopleTools pages.
2. Set the security installation settings on the Security Installation Settings component.
3. Review security sets on the Security Set Table component.

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4. Enable security access types on the Security Access Type component.
5. Assign data permission to permission lists:
   - If you are using security tree-based security access types, set up a security tree, assign data permission on the Security by Dept Tree component, and refresh SJT_CLASS_ALL.
   - If you are using non-tree based security access types, assign data permission on the Security by Permission List component.
6. Assign permission lists to users (by way of roles if you are using role-based permission lists or directly to the user profile if you are using row security permission lists).
7. Refresh SJT_OPR_CLS.

Example of HRMS Data Permission

Grant the following security to these permission lists:

Permission List	Page	Security Access Type	Security Value
JobByDept	Security by Dept Tree page	Job Department Tree (001)	department 10100 (you must select setID SHARE as the first key)
JobByLoc	Security by Permission List page	Job Location (002)	location UK1 (you must select business unit GBR01 as the first key)
MyJobs	Security by Dept Tree page	Job Department Tree (001)	department 11000 (setID SHARE)
	Security by Permission List page	Job Location (002)	location USA (business unit GBL01)

Grant the permission lists to the following roles:

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

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

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

Implementing Data Permission Security

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

This section discusses how to:

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

Understanding Future-Dated Security

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

  - Julie can access Kenny's data until June 30, 2006 and Barry can access it starting July 1, 2006.
- If you *have* selected it:

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- The SavePostChange PeopleCode creates a new row in SJT_PERSON with the future-dated transaction security data. The system identifies this row as future-dated.

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

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

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

Understanding Special Job Security Options

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

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

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

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

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

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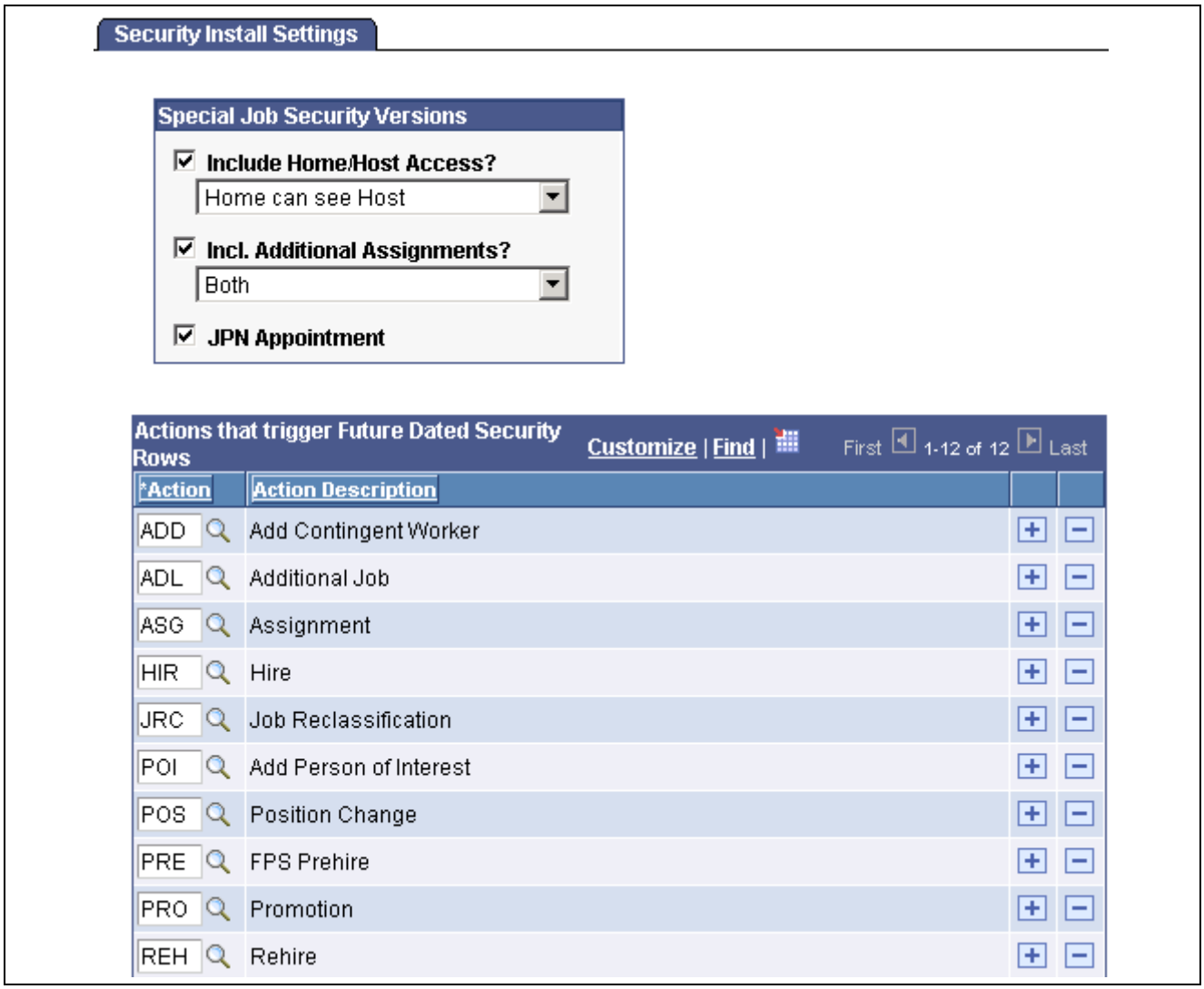
Pages Used to Implement Data Permission Security

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

Installing HRMS Security

Access the Security Install Settings page.

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Security Install Settings page

Special Job Security Versions

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

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Global Assignments*, "Tracking Assignments".

Incl. Additional Assignments?

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Additional Assignments.

Jpn Appointment

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments.

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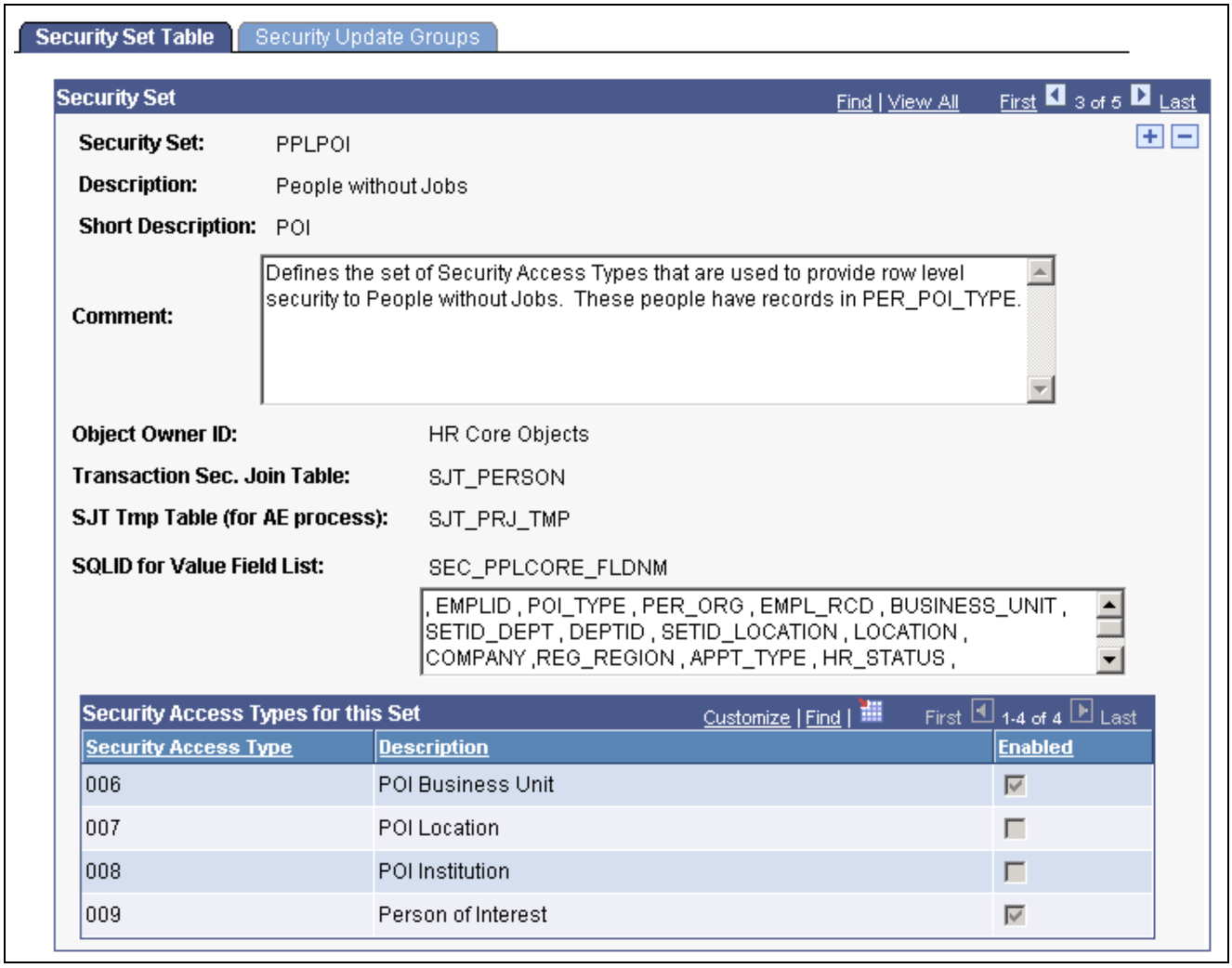
Actions that trigger Future-Dated Security Rows

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

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

Viewing Security Sets

Access the Security Set Table page.



Security Set Table page

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

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

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

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

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

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

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

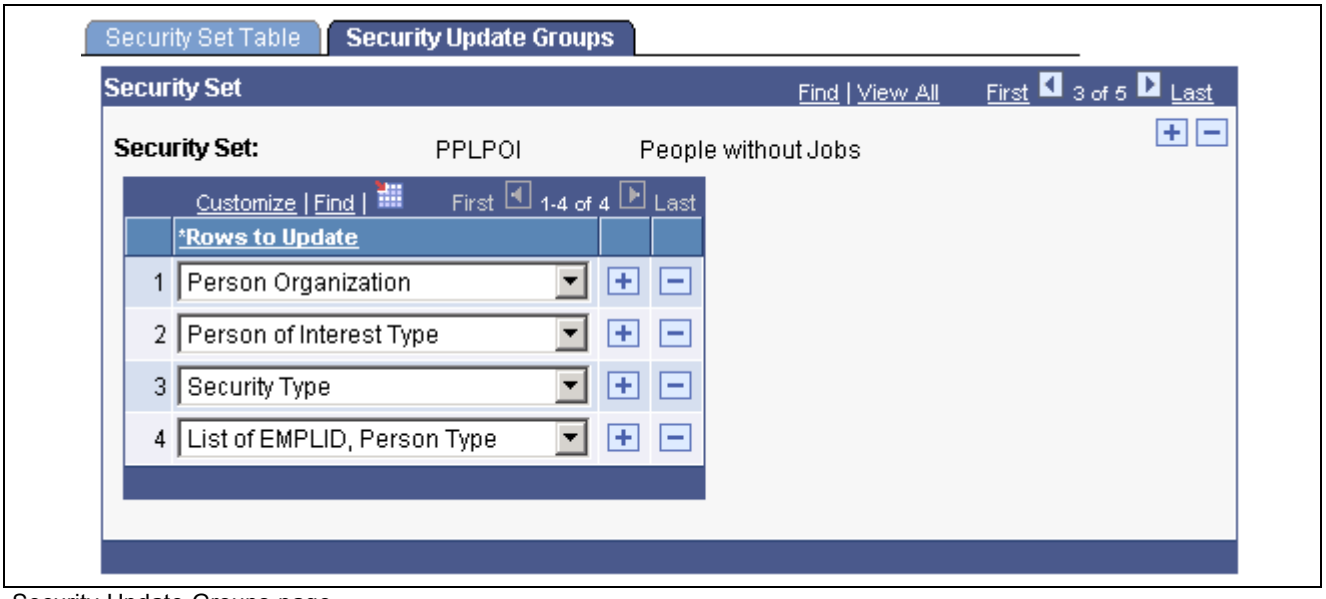
Security Access Types for this Set

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

See Chapter 5, "Setting Up and Administering HRMS Security," Enabling Security Types, page 74.

Setting Up Security Update Groups

Access the Security Update Groups page.



Security Update Groups page

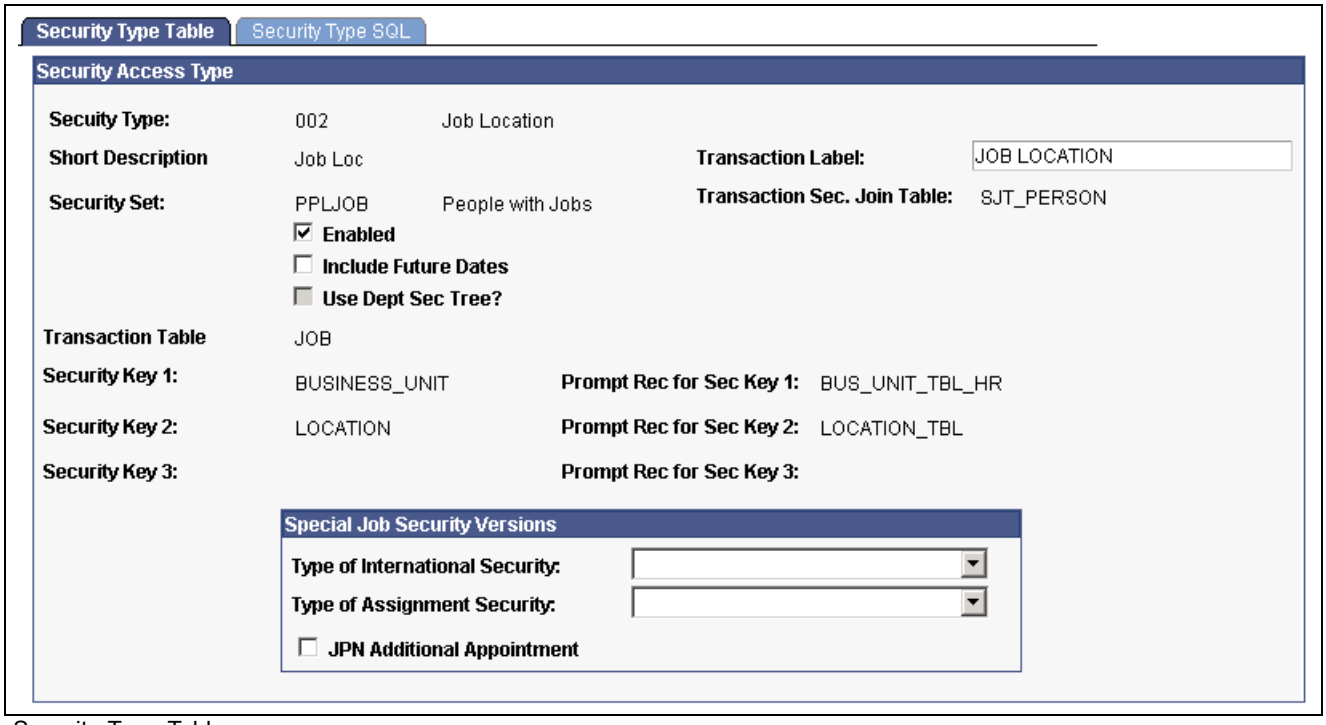
Select which refresh options to make available when updating the security set using the SJT Refresh process. The system makes the options you select here available for this security set on the Refresh SJT page, enabling you to select portions of the security join table to update.

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

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Enabling Security Types

Access the Security Type Table page.



Security Type Table page

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

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

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

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

Security Type — The system automatically numbers new security types.

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

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

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

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	See Chapter 5, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 72.
Enabled	Select to enable the security type.
Include Future Dates	Select to enable the security join tables to store future-dated security rows for this type. The system will only update the security join tables with the future-dated rows that have the actions you selected on the Security Install Settings page.
Use Dept Sec Tree? (use department security tree?)	Select if this security type uses the department security tree. You can only create department security trees for departments and can only grant data permission based on department security trees to row security permission lists.
Transaction Table	The transaction table that stores the field or fields that will control security for this type.
Special Job Security Versions	If you enable special job security versions on the Security Install Settings page, enable the options for this security access type. See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 69.
Prompt Rec for Sec Key 1 (prompt record for security key 1), **Prompt Field for Sec Key 1** (prompt field for security key 1), **Prompt Rec for Sec Key 2** (prompt record for security key 2), **Prompt Field for Sec Key 2** (prompt field for security key 2), **Prompt Rec for Sec Key 3** (prompt record for security key 3), and **Prompt Field for Sec Key 3** (prompt field for security key 3)	Define the security data fields for this type. The fields need to be on the Transaction Table record. The prompt record is the record the prompt field values come from when you are assigning values to a permission list. You must select all the records and fields necessary to make a unique qualification here. For example, to select a location (key 2), you first need to select a business unit (key 1). The prompt record for the BUSINESS_UNIT field is BUS_UNIT_TBL_HR and the prompt record for the LOCATION field is LOCATION_TBL.

Refreshing the Transaction Security Join Tables

You should refresh the transaction security join tables whenever you:

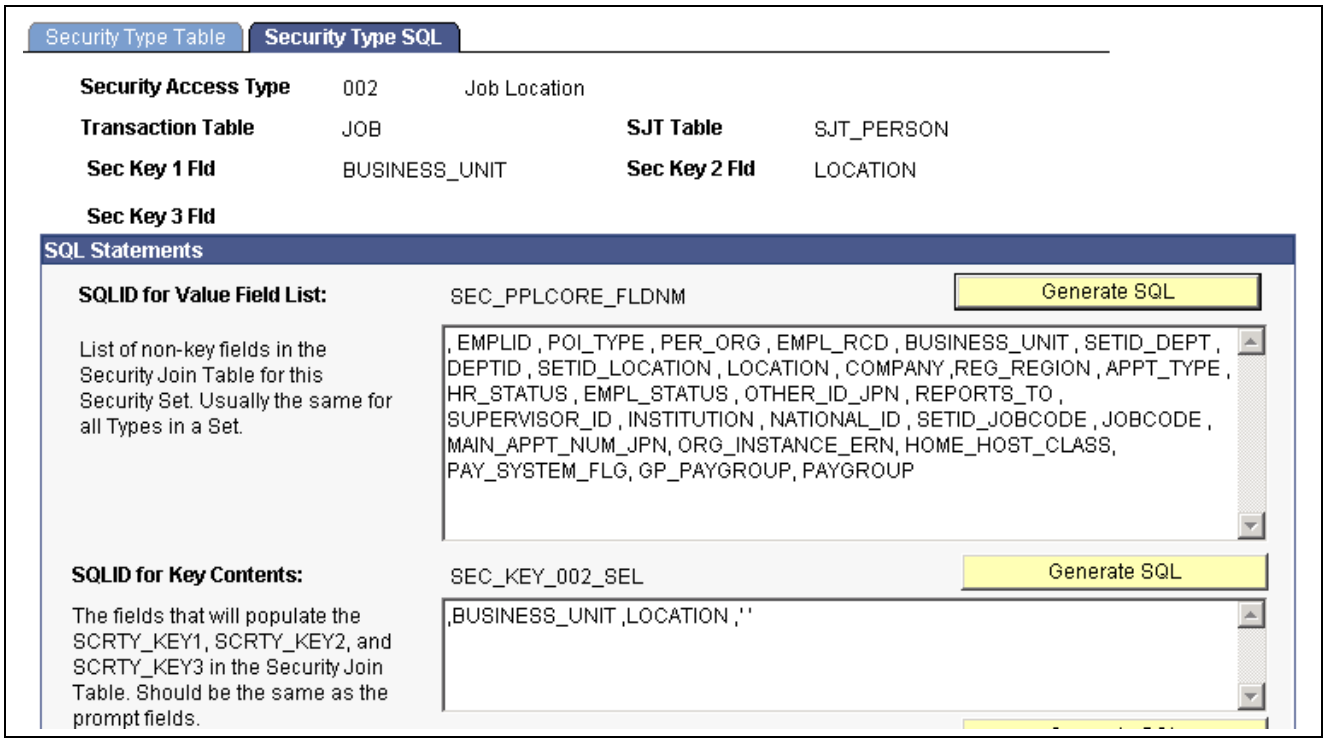
- Enable or disable a security access type.
- Enable or disable a future-dated security for an enabled security access type.
- Change the special job security versions for an enabled security access type.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 94.

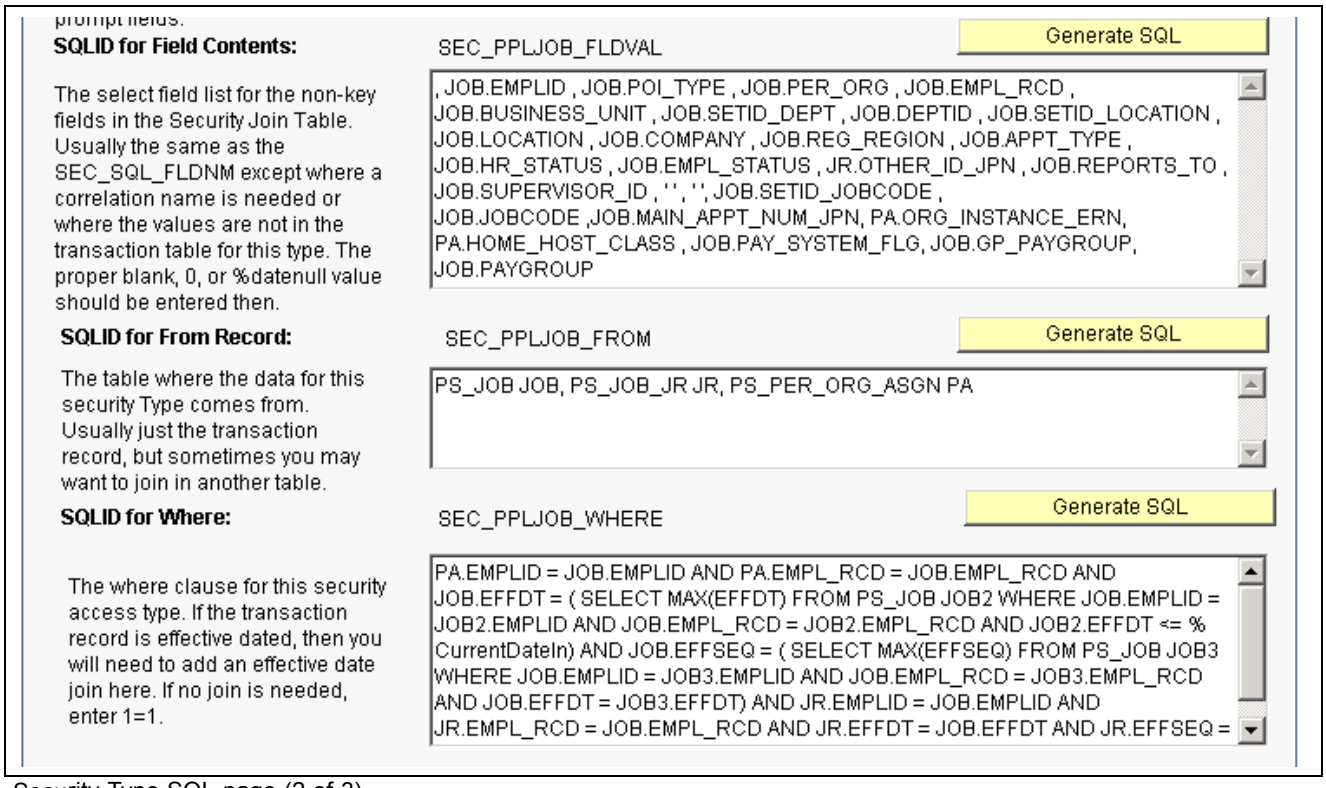
Entering SQL Statements

Access the Security Type SQL page.

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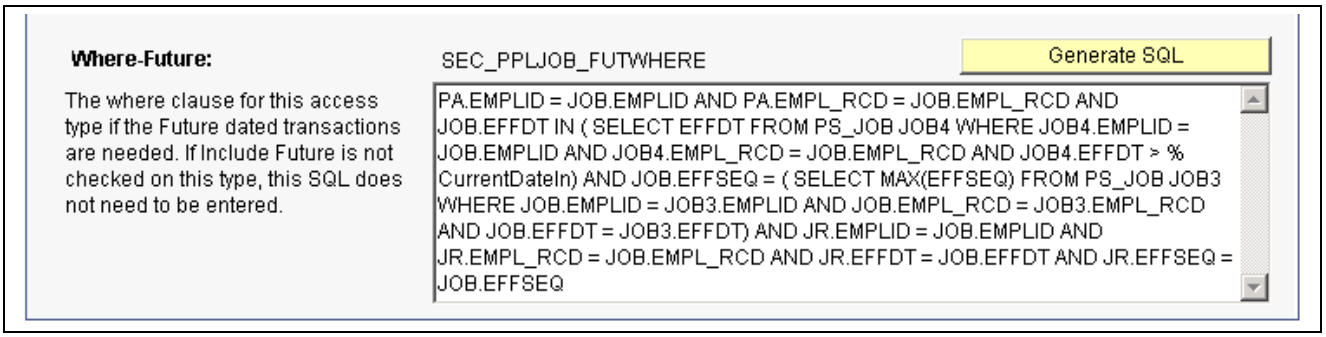


Security Type SQL page (1 of 3)



Security Type SQL page (2 of 3)

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Security Type SQL page (3 of 3)

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

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

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

Setting Up and Assigning Tree-Based Data Permission

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 97.

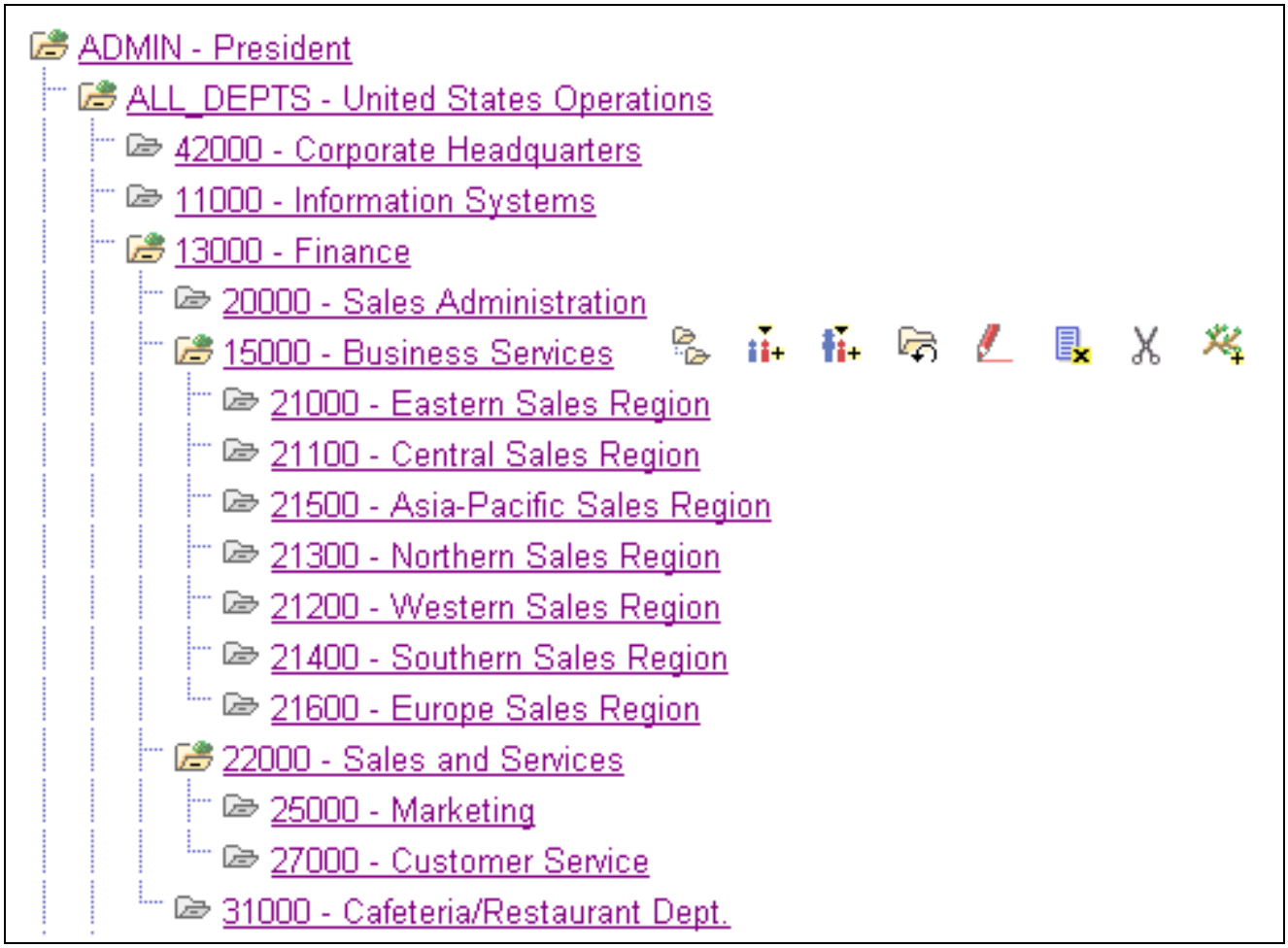
Understanding Data Permission Security by Department Security Trees

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

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

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



Portion of the SHARE department security tree

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

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 77.

See Chapter 5, "Setting Up and Administering HRMS Security," Assigning Role-Based Data Permission Security to Permission Lists, page 85.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Security Trees and Departments

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

Trees are built with levels and nodes:

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

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

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

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

See Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments, page 267.

Security Trees and Effective Dates

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

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

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

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

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

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

Pages Used to Set Up and Assign Tree-Based Permission

Page Name	Object Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager, Tree Manager	Use to set up or modify department security trees. You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.
Department Tbl & Departmental	RUNCTL_PER506	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Report, Department Tbl & Departmental	Use to create a list of discrepancies between the data you've entered in the Departments component and the departments you've added to the current security tree.
Security by Dept Tree	SCRTY_TABL_DEPT	Set Up HRMS, Security, Core Row Level Security, Security by Dept Tree, Security by Dept Tree	Grant tree-based department data access to row security permission lists.
Refresh Row Security Operator	SCRTY_OPR_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh Row Security Operator	Run the Refresh SJT_CLASS_ALL process when you create or modify a security tree or when you create or modify a row security permission list to update SJT_CLASS_ALL with the user security data.

Creating and Modifying Security Trees

You can create a security tree automatically or manually.

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Creating Security Trees Manually

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

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

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

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

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

Creating Security Trees Automatically

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

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

1. Import the entity data.

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

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

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New Column	Description
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

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

3. Build the department security tree.

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

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

4. Transfer department data into the department component.

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

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

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

Modifying Security Trees

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

See Chapter 5, "Setting Up and Administering HRMS Security," Refreshing SJT_CLASS_ALL with Tree and Row Security Permission List Data, page 85.

Renumbering Gaps in Security Trees

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

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

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

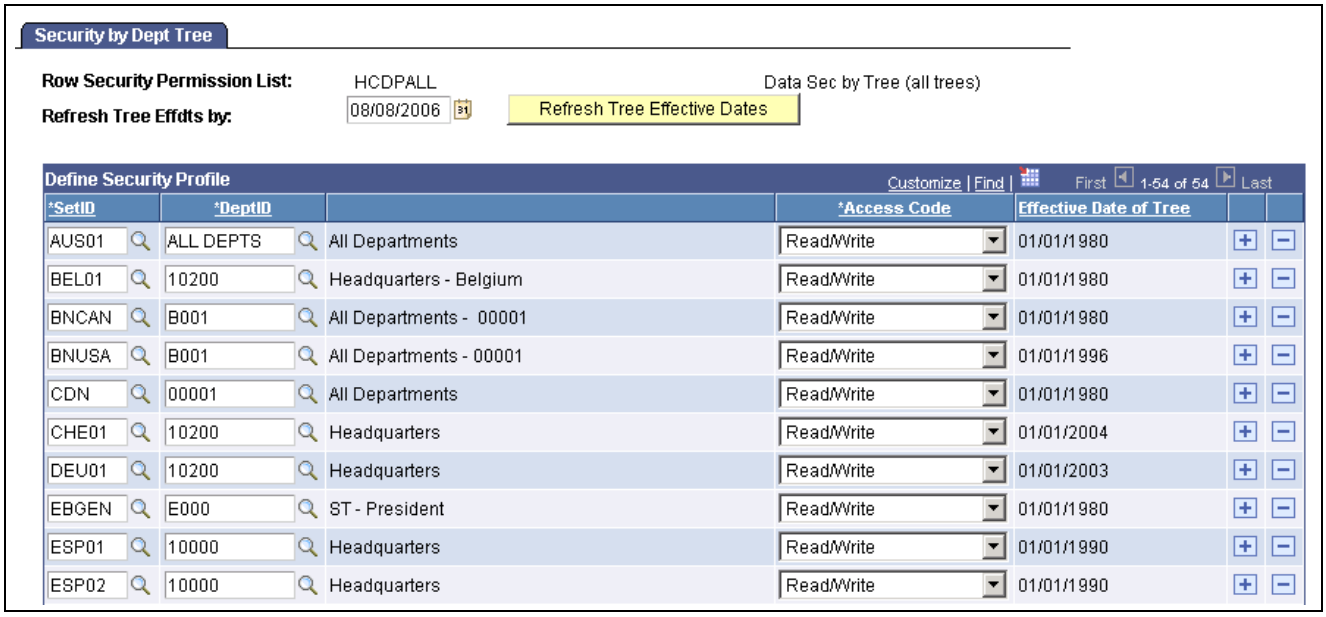
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Auditing Security Trees

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

Assigning Tree-Based Data Permission to Row Security Permission Lists

Access the Security by Dept Tree page.



Security by Dept Tree page

As of Date for the Trees

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

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

Refresh Tree Effective Dates

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

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

Define Security Profile

SetID and **DeptID** (department ID)

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

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

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

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

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

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

Refreshing SJT_CLASS_ALL with Tree and Row Security Permission List Data

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 96.

Assigning Role-Based Data Permission Security to Permission Lists

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

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

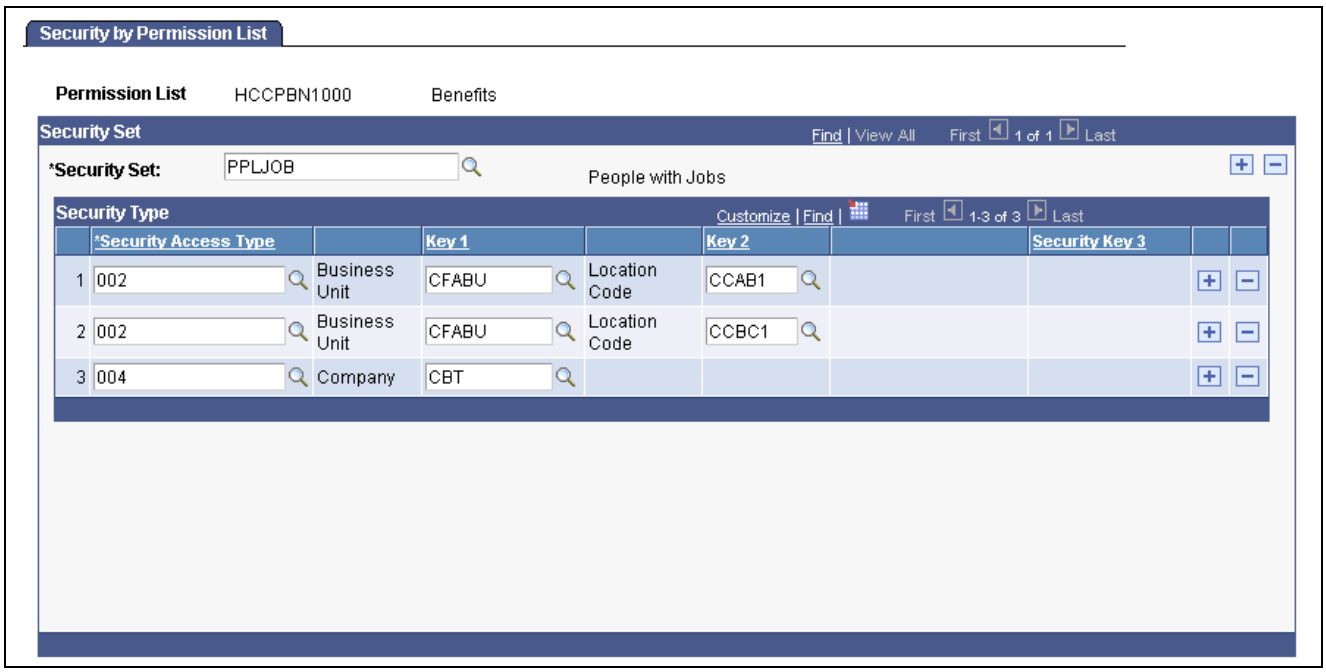
Page Used to Assign Role-Based Data Permission Security to Permission Lists

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

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Granting Data Access to Permission Lists by Field Value

Access the Security by Permission List page.



Security by Permission List page

Security Set

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

Security Type

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Activating Additional Security for Recruiting Solutions, page 114.

Key 1 , **Key 2** , and **Security Key 3** Select the transaction security value to which this permission list has access. You may have to select one, sometimes two, key prompts before you can select the transaction value.

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

Add more rows to select more locations.

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

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

Refreshing Security Join Tables

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

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

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

Understanding When to Run the Refresh Processes

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

Important! The refresh processes are designed to refresh each row included in the process definition in sequence, causing the system to take an exceptionally long time to run the process when there are a large number of rows. To improve performance, we recommend clearing the Refresh All Rows check boxes on the run control pages and creating more defined run controls to run concurrently. (For example, create a run control for each permission list and run them simultaneously, rather than refreshing all permission lists under a single run control). You can save the run controls and use them as often as necessary.

Nightly Refresh SJT

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 93.

SJT Refresh

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

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

- Enable or disable a security access type.

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

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 94.

Refresh Row Security Operator

Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL.

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

- Modify a security access type.

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 96.

Refresh SJT_OPR_CLS

Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS.

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

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

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

You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS.

PeopleSoft does not deliver the system with these messages enabled in order to prevent unnecessary publishing. If you would like to use them, follow these steps:

1. Uncomment the following PeopleCode found in the USERMAINT.GBL SavePostChange PeopleCode.

```
/*
If %Mode="A" Then
 %MSG.CopyRowset(&USERPROFILECHANGE);
 &MSG.Publish();
Else
 &MSG.CopyRowsetDelta(&USERPROFILECHANGE);
 &MSG.Publish();
End-If,*/
```

2. Use PeopleSoft Application Designer to activate the USER_PROFILE and ROLE_MAINT messages by:
    a. Opening each message.
    b. Click on the Properties icon.
    c. Select the User tab.
    d. Select the Active check box.
3. Use PeopleSoft Application Designer to activate the handler/application class for the USER_PROFILE and ROLE_MAINT messages:
    a. Open each message.
    b. Under Message Subscriptions, select HCM_Refresh_SJT_OPR_CLS (for USER_PROFILE) or HCM_ROLE_REFRESH_SJT_OPR_CLS (for ROLE_MAINT), right click, and select Message Subscription Properties.
    c. Select the Active check box.
4. Confirm that the queues are running:
    a. Select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
    b. On the Monitor Message - Channel Status page (AMM_CHNL_STATUS), scroll down until you locate both the USER_PROFILE and ROLE_MAINT channels.
    c. Confirm that both channels have a status of *Running*.
5. Make the USER_PROFILE and ROLE_MAINT messages active on the HRMS node by:
    - Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
    - On the Node Definitions - Transaction page (IB_NODETRXLIST), change the status of each message to *Active*.

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See Chapter 39, "Working with Integration Points in Enterprise HRMS," Working with HRMS Local Integrations, page 872.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 97.

Refresh Processes by Action

This table indicates which refresh processes you should run when implementing HRMS security:

Action	Refresh SJT_CLASS_ALL	SJT_Refresh
Make changes to the implementation settings on the Security Install Settings page.	Run	Run
Enable a security access type.		Run
Disable a security access type.	Run	Run
Modify an enabled security access type (for example, by selecting or clearing the Include Future Dates check box).	Run	Run

This table indicates which refresh processes you should run when using security trees and creating and modifying row security permission lists:

Action	Refresh SJT_CLASS_ALL
Create a department security tree.	
Create a new effective-dated version of an existing tree. **Note.** You do not need to refresh SJT_CLASS_ALL yet because you'll have to update the data permission lists to reference the new tree. You'll run the SJT_CLASS_PROCESS then.	
Modify a department security tree *without* changing the effective date.	Run
Add a new permission list to the Security by Dept Tree page and add to it data permission.	Run
Modify the data permission of a permission list on the Security by Dept Tree page.	Run
Refresh the effective date of the trees on the Security by Dept Tree page because you created a new effective-dated version of an existing tree.	Run

This table indicates which refresh processes you should run when creating and modifying row security permission lists:

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Action	Refresh SJT_CLASS_ALL
Add a new permission list to the Security by Permission List page and add to it data permission. **Note.** The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	
Modify the data permission of a permission list on the Security by Permission List page. **Note.** The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	

This table indicates which refresh processes you should run when you add, delete, or modify a user's data permission:

Note. This table assumes that you have not enabled the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

If these messages are enabled, the system updates SJT_OPR_CLS and you do not need to run the refresh process following any of these actions.

Action	Refresh SJT_OPR_CLS
Add a row security permission list to a user profile on the User Profile – General page.	Run
Delete a row security permission list from a user profile on the User Profile – General page.	Run
Change a row security permission list on a user profile on the User Profile – General page.	Run
Create a new user profile by copying an existing profile that has permission lists with data permission (whether by the Copy User Profiles page, the Create Users process, or the Create Row Security - Dept Mgr process).	Run
Add a role-based permission list (one that has data permission from the Security Permission List page) to a role that is already assigned to a user.	Run
Delete a role-based permission list (one that has data permission from the Security Permission List page) from a role that is already assigned to a user.	Run
Add a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) to a user profile.	Run
Delete a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) from a user profile.	Run

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Action	Refresh SJT_OPR_CLS
Add a permission list that is already assigned to a user (by way of a role) to the Security by Permission List page and give it data permission.	
Add a permission list that is already assigned to a user on the User Profile – General page to the Security by Dept Tree page and give it data permission.	

This table indicates which refresh processes you should run when you add, delete, or modify the following transaction security data:

- Job data record for a person.
- Person of interest record for a person.
- Department.
- Job opening.

Action	SJT Refresh process
Add, delete, or modify an existing transaction record.	
Create a future-dated transaction record.	
Using a mass update process that triggers the component interfaces, create, delete, or modify multiple transaction records	
Using a mass update process that does not trigger the component interfaces (or otherwise bypass the component interface on the transaction record), create, delete, or modify multiple transaction records.	Run

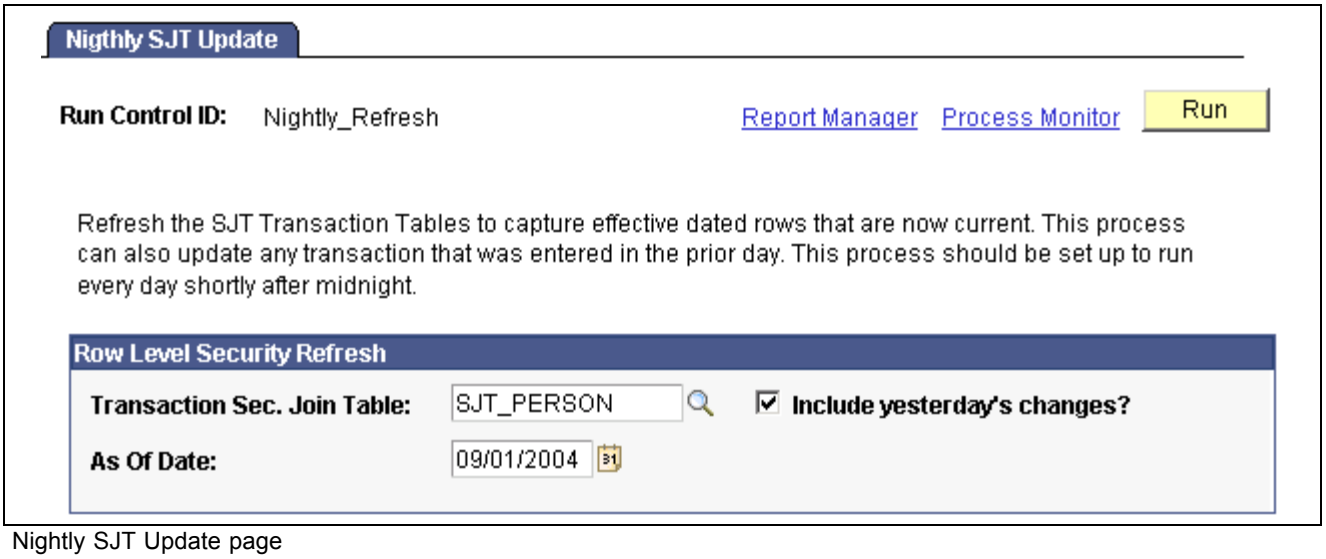
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Pages Used to Refresh Security

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

Running the Nightly Refresh Process

Access the Nightly SJT Update page.



Nightly SJT Update page

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

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

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

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

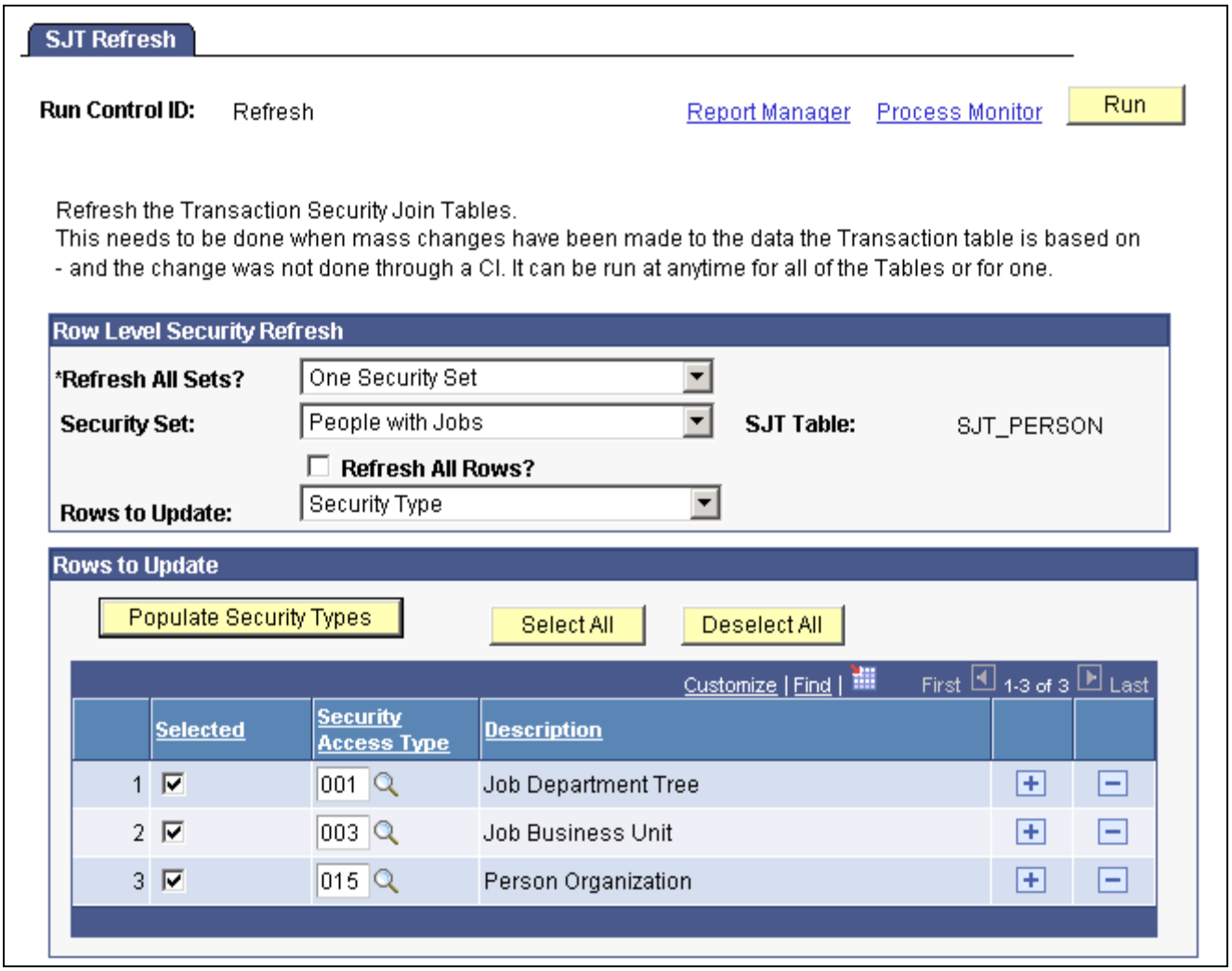
If you do not select this check box, the process will only update the transaction security join tables with the changes made on the As Of Date.

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

Running the Transaction Security Join Table Refresh Process

Access the SJT Refresh page.

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SJT Refresh page

Refresh All Sets?

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

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

Security Set and **SJT Table**

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

Refresh All Rows?

Select to refresh every row in the security join table.

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

Rows to Update

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

Rows to Update

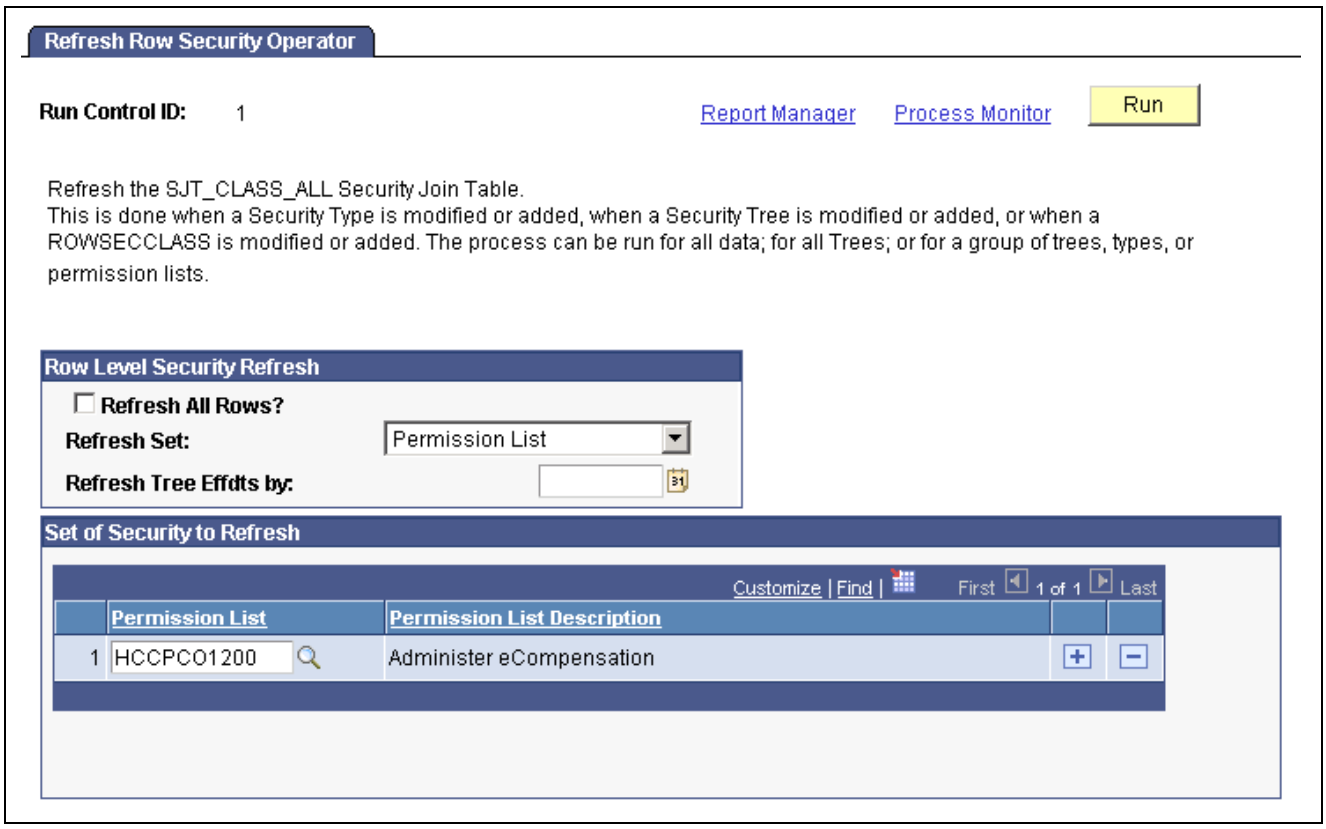
The fields and buttons in the Rows to Update grid will vary depending on the rows you select to update in the Rows to Update field. Enter the rows of data you want to update.

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

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Running the Refreshing SJT_CLASS_ALL Process

Access the Refresh Row Security Operator page.



Refresh Row Security Operator page

Row Level Security Refresh

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

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

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

You can select to refresh:

- *All Trees*.
- *Permission List*
- *Security Type*
- *Specific Tree*

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

Set of Security to Refresh Select the values to refresh.

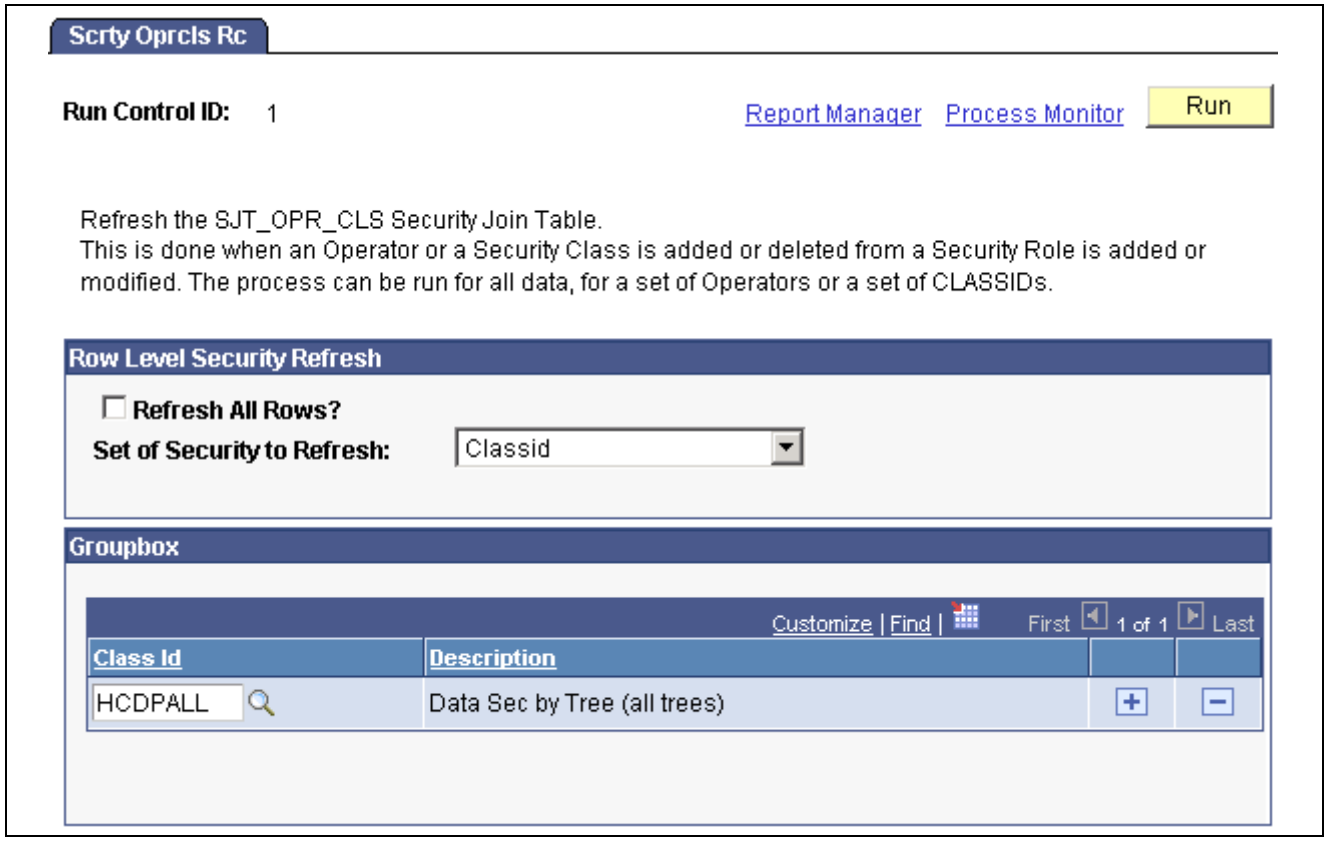
For example, if you've modified a row security permission list, rather than refreshing the entire table, select *Permission List* in the Refresh Set field and select the permission list you modified here.

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If you've modified a specific tree, select *Specific Tree* in the Refresh Set field and select the setID's to refresh for that tree.

Running the Refresh SJT_OPR_CLS Process

Access the Scrty Oprcls Rc page.



Scrty Oprcls Rc page

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

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

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

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

You can select to refresh:

- *Classid*

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

- *Orpid*

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

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Querying Data Permission Security

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

This section discusses how to:

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

Understanding Data Permission Queries

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

Page	Description
Find Search View	Use this page to review details about the security search view used by a component. There are a number of different search views and even the same component can use a different view, depending on which menu it is on. The security view text tells you which security set the data in the component falls into and if there is any special selection criteria. To use query search views you need to know the: • Component name. • Market. • Menu name. • Access mode the user was attempting: (either add or update). - If they were trying to add a record, you want to query the add search view (the system displays this in the Add Search field). - If they were trying to update or review a record, you want to query the search view displayed in the Search Record Name or Override Search Record field.

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Page	Description
Display Security Data	Use this page to review security data for the selected security set and security access type. You can further refine the query by selecting a user ID, permission list, or security key value, or a combination of the three. Review both the permission list access and the transaction data secured by the parameters. For example, you can review the data permission assigned to the permission list MyJobs for security set PPLJOB and security access type 001 (department 11000). Or you can review the transaction data available to permission list MyJobs for security set PPLJOB and security access type 002 (112 people with jobs). To compile a list of access for more than one access type, download the data in the grids to Microsoft Excel
User Security Data	Review a user's data permission profile, including his or her roles, role-based permission lists, and row security permission lists, and the data permission associated with them. The query only includes the roles and role-based permission lists that contain data permission security.
• Find in SJT_PERSON • Find in SJT_DEPT • Find in SJT_PERSON_USF • Find in HRS_SJT_JO	Use this page to review the access to transaction data. You can review: • The data securing transaction records. • Which permission list has data permission access to selected records. • Which users are assigned the selected permission lists.

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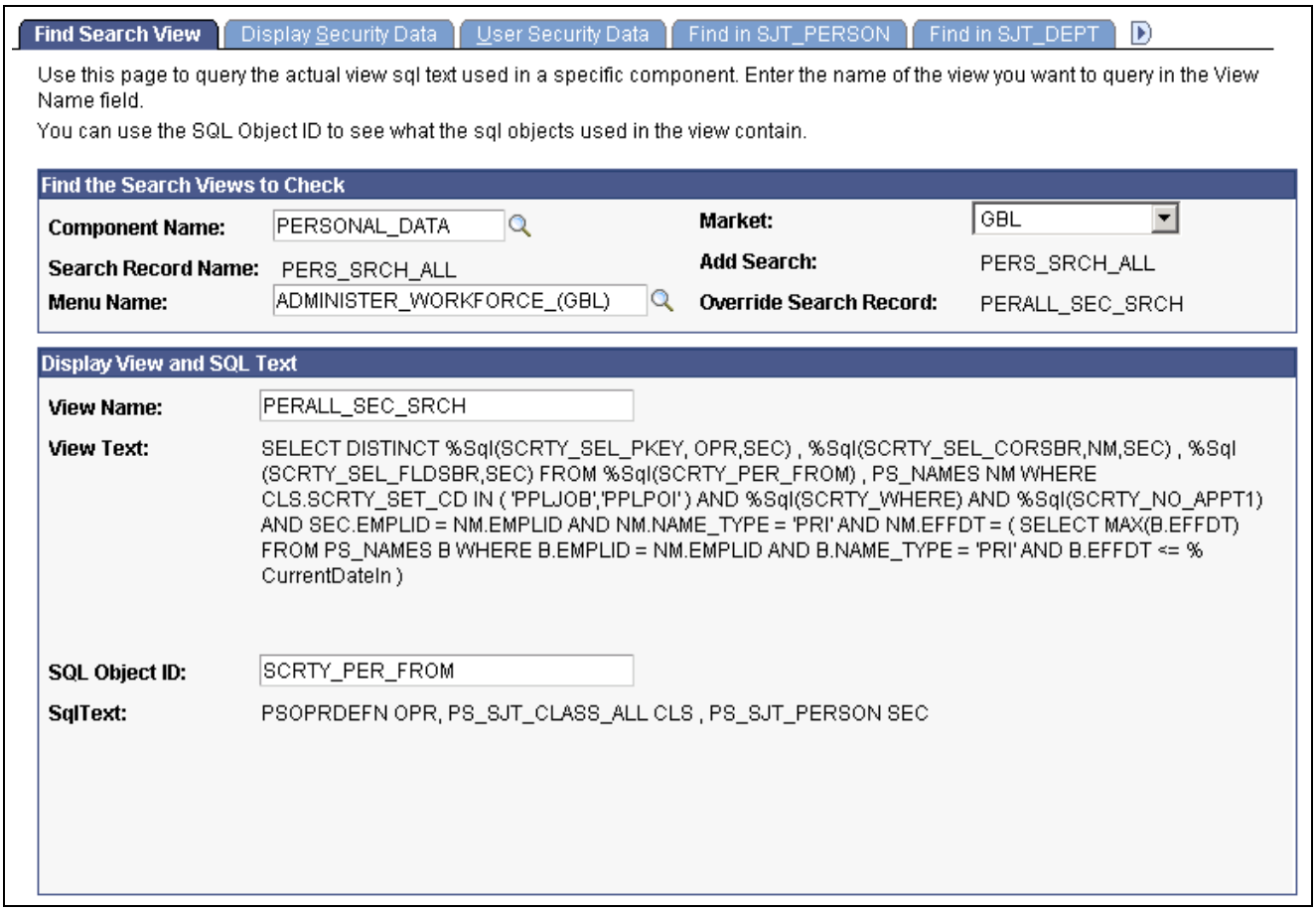
Pages Used to Query Data Permission Security

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

Finding Search Views

Access the Find Search View page.

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Find Search View page

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

- Component name.
- Market
- Menu name

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

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

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

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

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

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

Note. SQL objects are used to store common SQL.

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

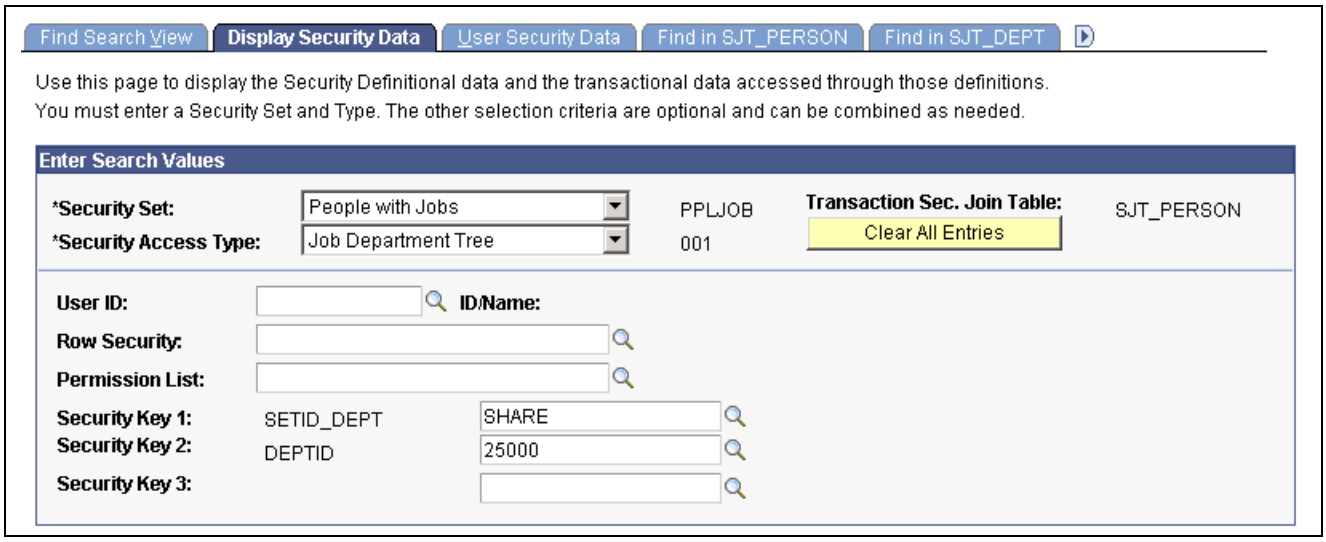
You can use this information to review the security data in greater detail. Perhaps to see what data is secured in security set PPLPOI or if the record a user is trying to access in this component has an appointment type value equaling 1 and that is why the record is unavailable.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

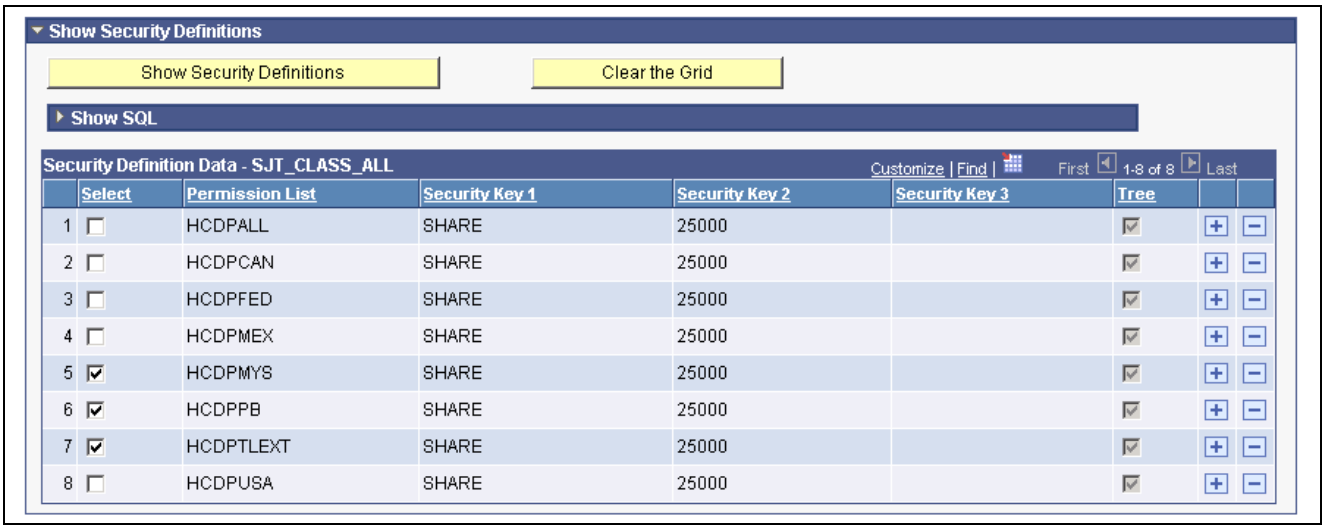
Searching Security Data

Access the Display Security Data page.

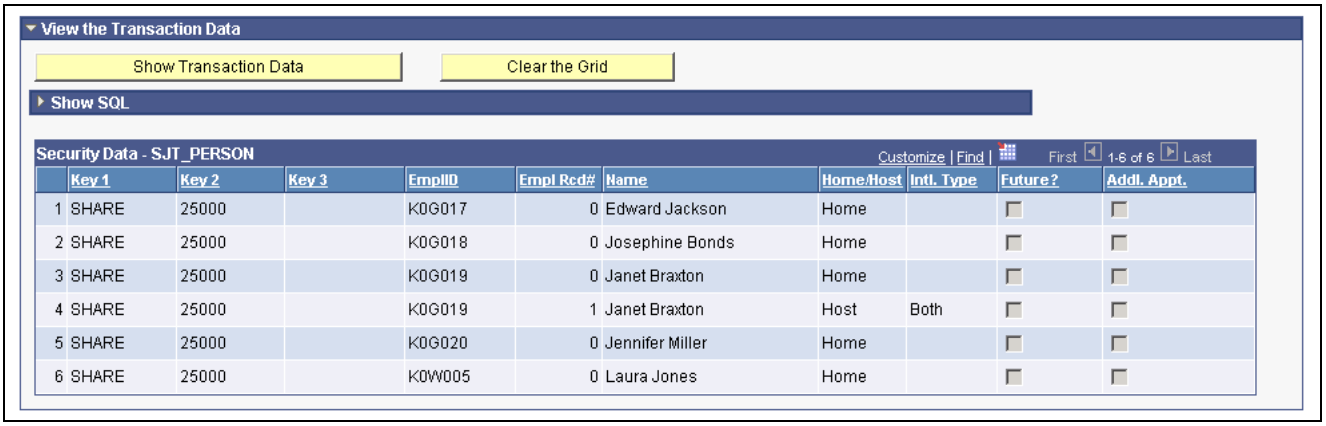


Display Security Data (1 of 3)

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Display Security Data (2 of 3)



Display Security Data (3 of 3)

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

Enter Search Values

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

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

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

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

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

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Understanding Data Permission Security for HRMS, page 42.

Show Security Definitions

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

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

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

View the Transaction Data

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

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

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

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

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

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

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

See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 69.

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

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See Chapter 5, "Setting Up and Administering HRMS Security," Understanding Special Job Security Options, page 68.

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

See Chapter 5, "Setting Up and Administering HRMS Security," Understanding Future-Dated Security, page 66.

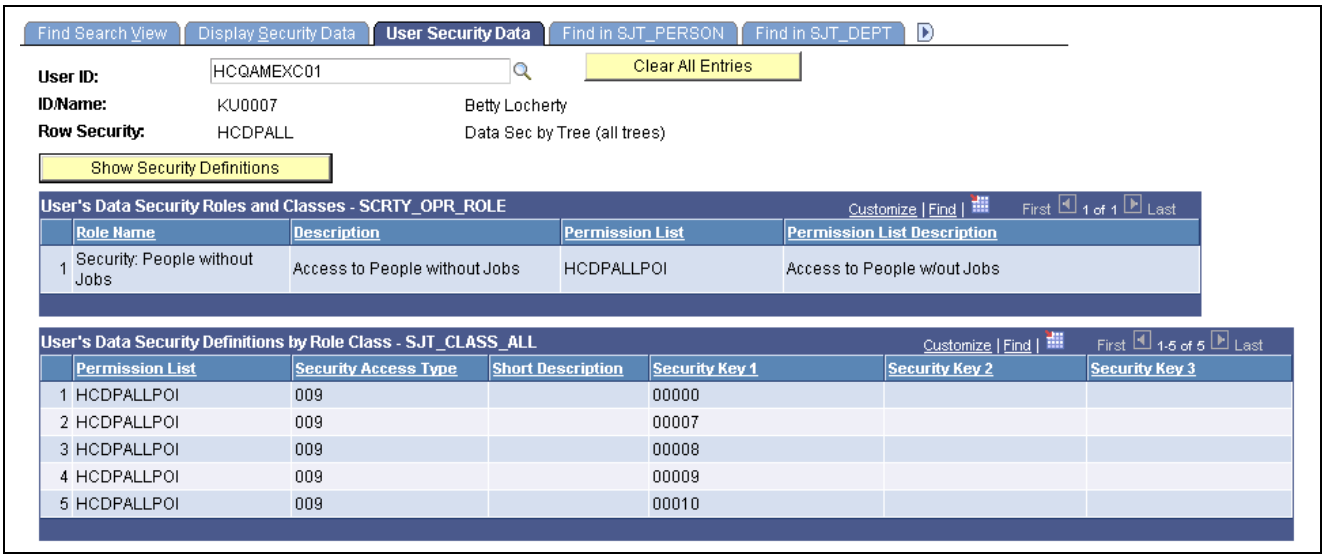
Addl Appt. (JPN) Indicates if this is an additional appointment transaction row.

See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 69.

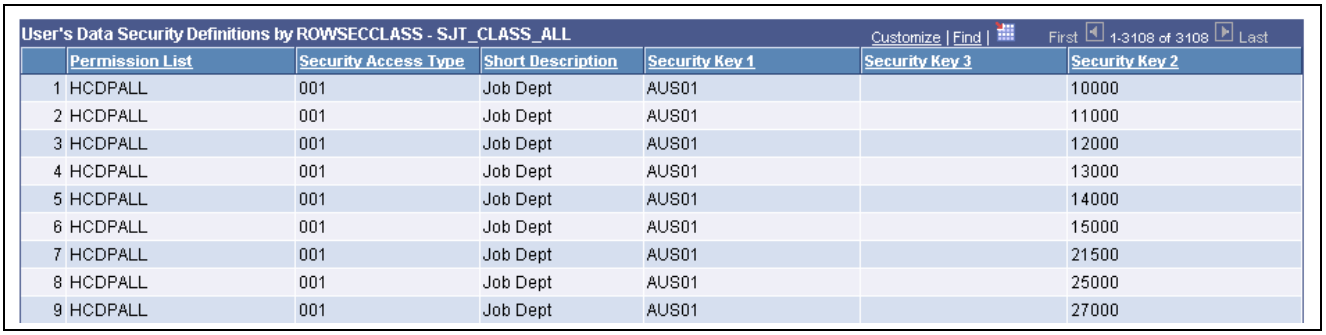
WIP Status , **Retirement** , **NOA Code** , and **Stat Type** (USF) displays additional information about the job data row. These values are not used to secure data.

Searching User Security Data

Access the User Security Data page.



User Security Data page (1 of 2)



User Security Data page (2 of 2)

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

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

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

User's Data Security Roles and Classes – SCRTY_OPR_ROLE

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

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

User's Data Security Definitions by Role Class – SJT_CLASS_ALL

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

User's Data Security Definitions by ROWSECCLASS – SJT_CLASS_ALL

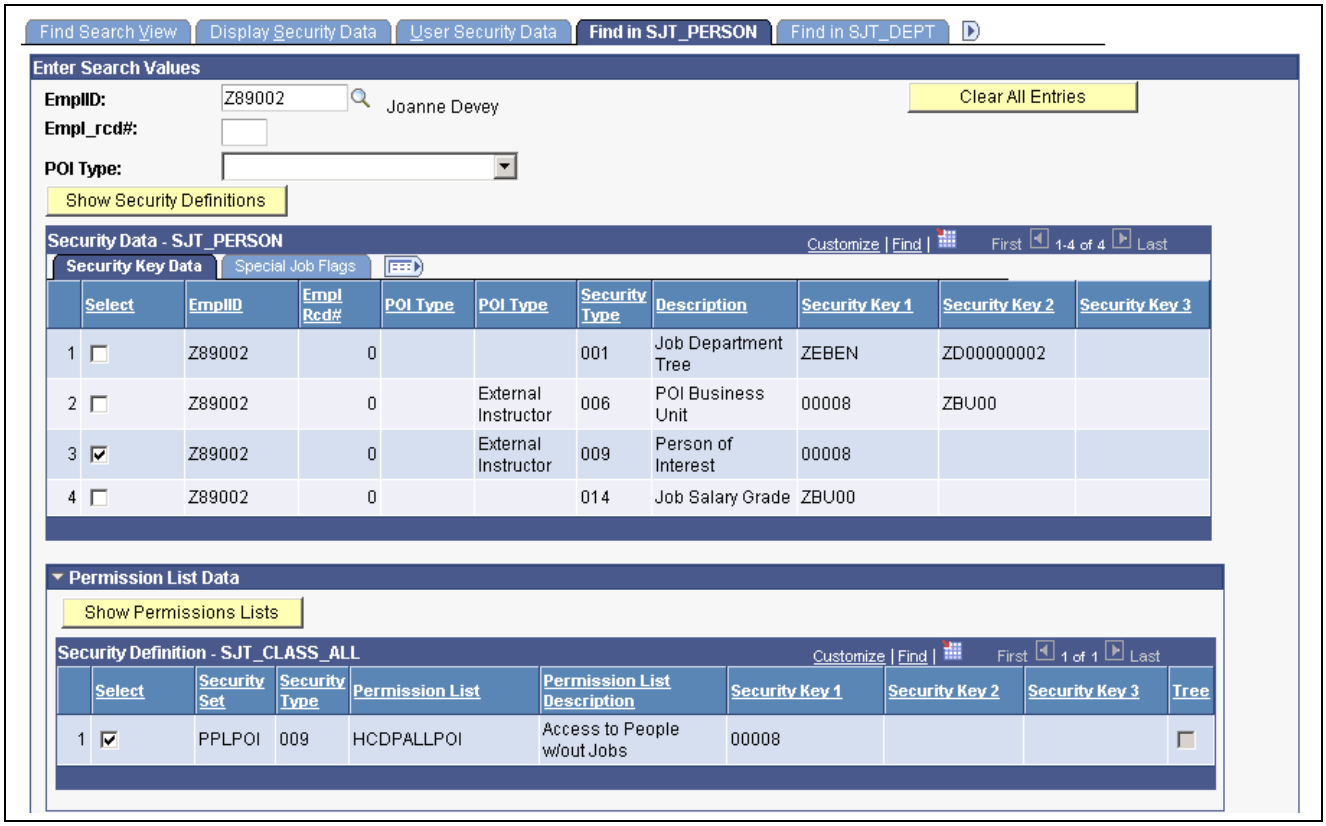
Displays the permissions of the row security permission list assigned to this user.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," Security Data, page 46

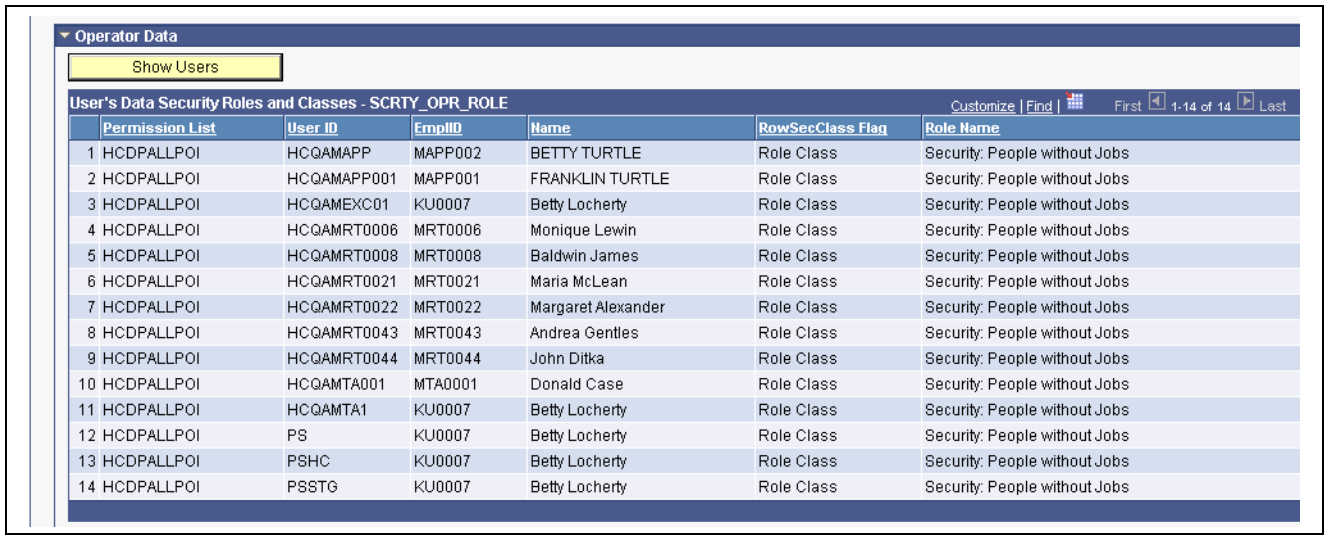
Searching Transaction Security Data in SJT_PERSON and SJT_PERSON_USF

Access the Find in SJT_PERSON page or Find in SJT_PERSON_USF page.



Find in SJT_PERSON page (1 of 2)

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Operator Data

Show Users

User's Data Security Roles and Classes - SCRTY_OPR_ROLE

Customize | Find | First 1-14 of 14 Last

	Permission List	User ID	EmplID	Name	RowSecClass Flag	Role Name
1	HCDPALLPOI	HCQAMAPP	MAPP002	BETTY TURTLE	Role Class	Security: People without Jobs
2	HCDPALLPOI	HCQAMAPP001	MAPP001	FRANKLIN TURTLE	Role Class	Security: People without Jobs
3	HCDPALLPOI	HCQAMEXC01	KU0007	Betty Locherty	Role Class	Security: People without Jobs
4	HCDPALLPOI	HCQAMRT0006	MRT0006	Monique Lewin	Role Class	Security: People without Jobs
5	HCDPALLPOI	HCQAMRT0008	MRT0008	Baldwin James	Role Class	Security: People without Jobs
6	HCDPALLPOI	HCQAMRT0021	MRT0021	Maria McLean	Role Class	Security: People without Jobs
7	HCDPALLPOI	HCQAMRT0022	MRT0022	Margaret Alexander	Role Class	Security: People without Jobs
8	HCDPALLPOI	HCQAMRT0043	MRT0043	Andrea Gentles	Role Class	Security: People without Jobs
9	HCDPALLPOI	HCQAMRT0044	MRT0044	John Ditka	Role Class	Security: People without Jobs
10	HCDPALLPOI	HCQAMTA001	MTA0001	Donald Case	Role Class	Security: People without Jobs
11	HCDPALLPOI	HCQAMTA1	KU0007	Betty Locherty	Role Class	Security: People without Jobs
12	HCDPALLPOI	PS	KU0007	Betty Locherty	Role Class	Security: People without Jobs
13	HCDPALLPOI	PSHC	KU0007	Betty Locherty	Role Class	Security: People without Jobs
14	HCDPALLPOI	PSSTG	KU0007	Betty Locherty	Role Class	Security: People without Jobs

Find in SJT_PERSON page (2 of 2)

Note. The Find in SJT_PERSON_USF page does not have the option to search for POIs.

Select the EmplID of the person whose transaction security data you want to review. To limit the search to a single job data record, enter the employee record number. To limit the search to a specific person of interest type, select the type.

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid with the transaction security data securing this person's record or records.

Security Data – SJT_PERSON

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid.

The system lists the rows in SJT_PERSON that match the search criteria you entered. Review the security keys on the Security Key Data tab. Click the Special Job Flags tab to review special security job option data, such as if a row is a future-dated row or if it was created to enable home/host access or additional assignment access.

To review which permission lists have data permission access to one or more of these rows, select the rows and click the Show Permission Lists button.

Permission List Data

Click the Show Permission Lists button to populate this grid

For each security set and security access type, the system lists the permission lists that can access the transaction rows you selected.

To review which users are assigned to one or more of these permission lists, select the rows and click the Show Users button.

Operator Data

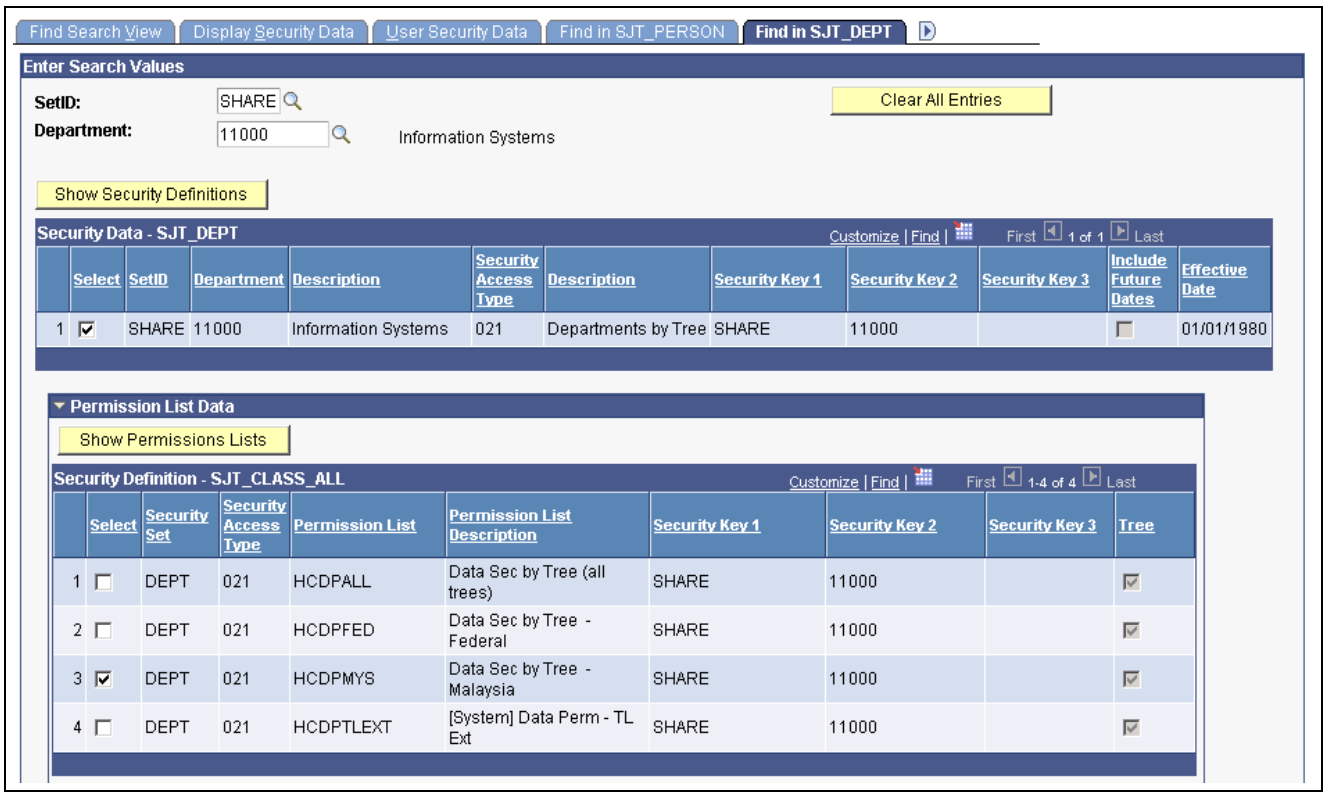
Click the Show Users button to populate the grid.

The system displays each user assigned to the permission list or lists that you selected and indicates if the permission list is assigned to the user as a row security permission list or role-based (role-class) and, if the permission list is role-based, which role it is assigned to on the user's profile.

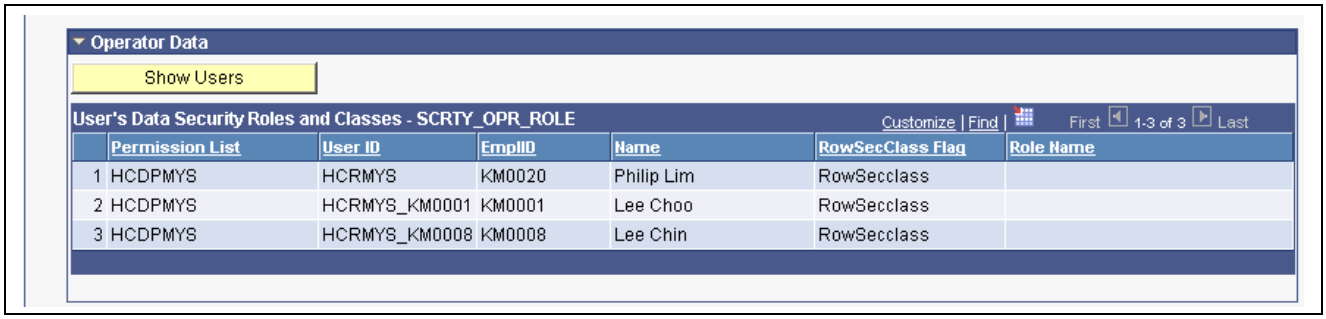
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Searching Transaction Security Data in SJT_DEPT

Access the Find in SJT_DEPT page.



Find in SJT_DEPT page (1 of 2)



Find in SJT_DEPT page (2 of 2)

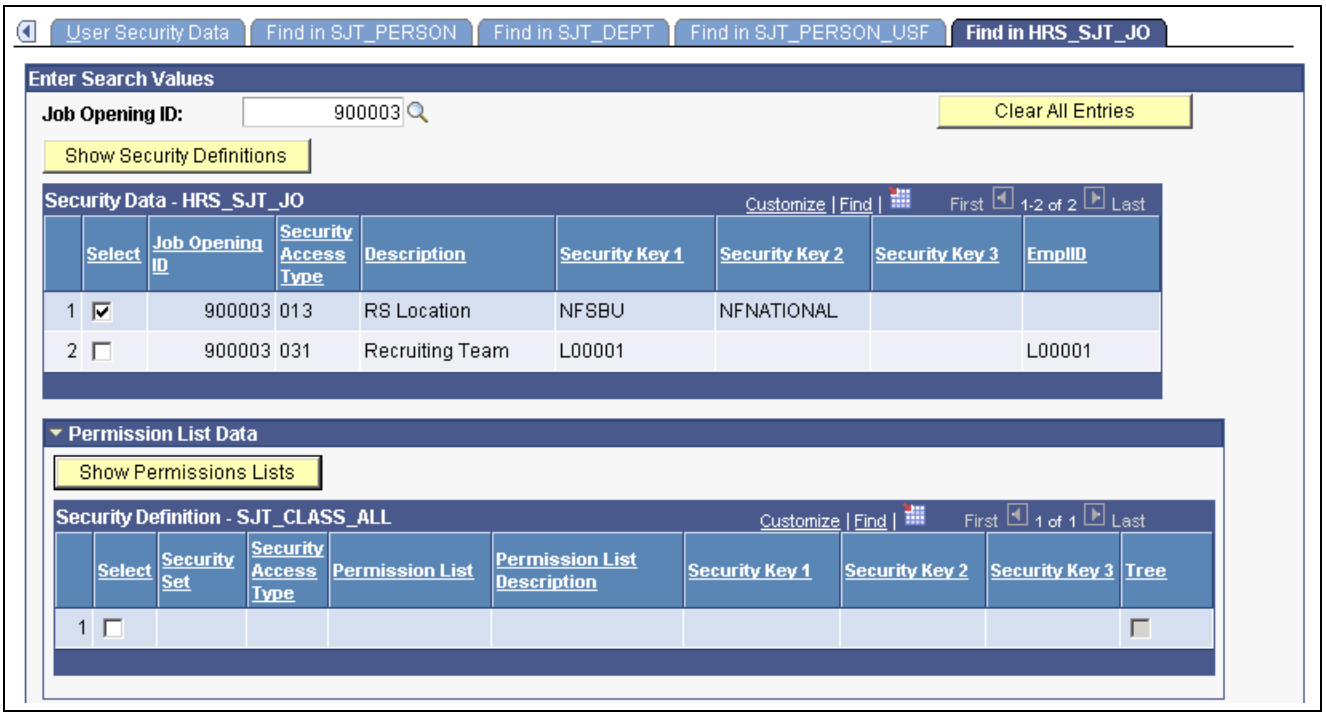
Select the setID and department ID of the department whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - SJT_DEPT grid with the transaction security data securing this department's record or records.

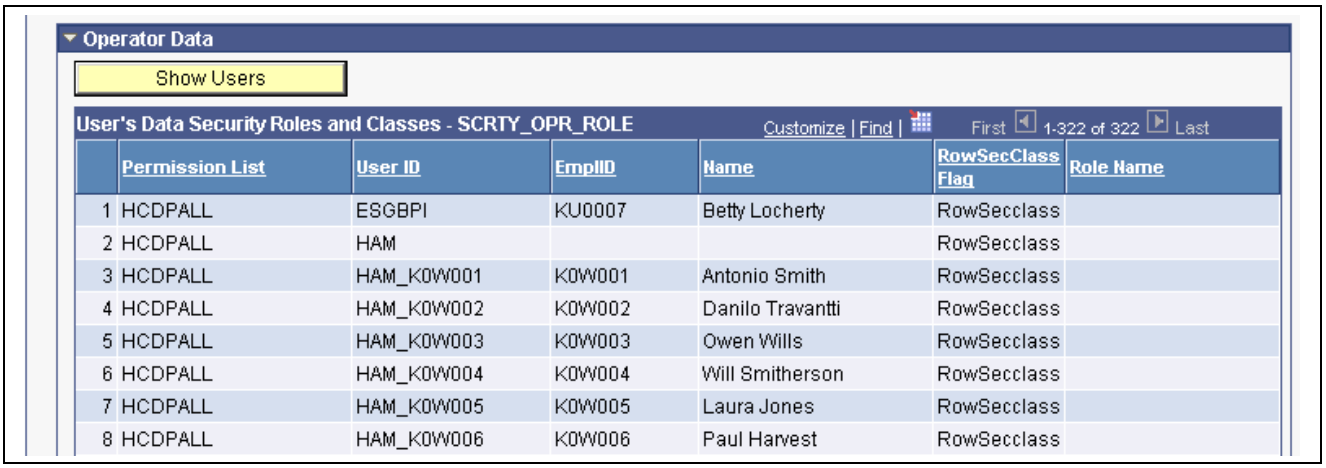
Searching Transaction Security Data in HRS_SJT_JO

Access the Find in HRS_SJT_JO page.

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Find in HRS_SJT_JO page (1 of 2)



Find in HRS_SJT_JO page (2 of 2)

Select the ID of the job opening whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - HRS_SJT_JO grid with the transaction security data securing this job opening's record or records.

Creating Data Permission Security for Managers

To create data permission security for managers, use the Create Manager Users and Sec. component (RUN_PER510).

This section provides an overview of data permission for managers and discusses how to create data permission for managers.

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Understanding Data Permission for Managers

Use the Create Row Level Security for Dept Managers process to grant the appropriate data permission security access for department managers. The process will:

- Create a user profile if the manager is new and has no user profile.
- Create or update an existing row security permission list for each department manager, giving them access to the data in the departments that they manage.
- Delete the row security permission list for a user if it is obsolete (for example, the employee is no longer a manager).

The system uses the MgrID value from the Department Profile page (DEPARTMENT_TBL_GBL) to determine a department's manager. Managers will be given access to every department for which their ID is listed in the MgrID field.

Since you can list only one department manager per department, you will have to manually update the profiles of additional department managers. You can do this by assigning the row security permission list the system creates for the official manager to the unofficial manager's profile. Remember that the system will remove this list every time you run the Create Row Security for Mgr process.

Note. The Create Row Security for Mgr process uses the managers' EmplID as their user ID and uses the following naming convention for row security permission lists: HCDP_DEPT_MGR_[manager's EmplID]

Before You Begin

The Create Row Security for Mgr process uses tree-based security to create row security permission lists for managers. Before you run this process, you must have set up a department security tree.

The hierarchy rules of the department security tree apply to these permission lists. If a manager's department has departments reporting up to it on the security tree, the manager will have access to the people in those departments as well as his or her own.

Refresh User Security Join Tables

The Create Row Security for Mgr process creates and modifies row security permission lists and assigns row security permission lists to, or deletes them from, user profiles. Both of these actions require that you:

- Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL with the row security permissions list data.
- Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS with the new user profile and row security permission list pairings from the User Profile - General page.

The system will not enforce the new data permission set up by the process until you run these refresh processes.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 96.

See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 97.

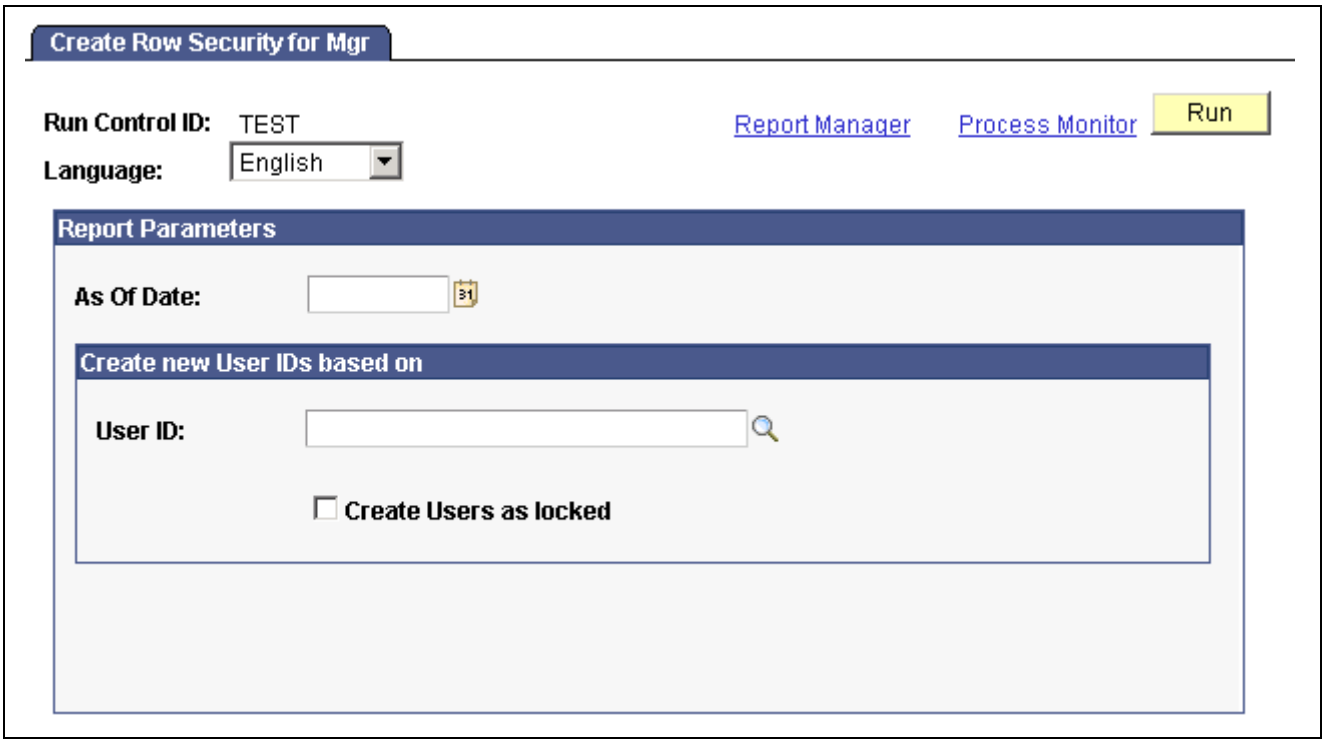
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Pages Used to Process Row Security for Managers

Page Name	Object Name	Navigation	Usage
Create Row Security for Mgr (create row security for manager)	RUNCTL_PER510	Set Up HRMS, Security, User Maintenance, Create Manager Users and Sec., Create Row Security for Mgr	Use to create and update manager row security permission lists.

Processing Data Permission for Managers

Access the Create Row Security for Mgr page.



Create Row Security for Mgr page

As Of Date Select the date as of which the row security list permission list should become effective.

User ID Select a default User ID. The system will base the new user IDs on this default.

Create User as Locked? Select to lock all the new user IDs.

The Create Row Security for Mgr process consists of two PeopleSoft Application Engine processes and one SQR report:

1. HR_PER510.

   Determines the changes required in order to maintain data-permission for department managers.

2. HR_PER510_CI

   Applies to the database the changes determined by HR_PER510.

3. SQR report PER510

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Lists the changes determined by HR_PER510 and applied by HR_PER510_CI and their status.

Note. You must select each process individually and wait for it to complete successfully before selecting and running the next process.

Creating and Locking User IDs

To create and lock user IDs, use the Create Users component (CREATE_USERS) and Lock Users component (LOCK_USERS).

This section provides an overview of security for user IDs and discusses how to:

- Create users.
- Lock users.

Understanding Security for User IDs

Create user IDs for your workforce using Group Build and the Create Users page. Create and populate a group using Group Build and then use the Create Users page to create User IDs for each group member.

Use the Lock Users page to lock user IDs until you are ready to use them.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," page 475

Common Elements Used in This Section

Group ID Select the ID of the group whose members require user IDs.

Populate Group Click to populate the page with the group members.

EmplID and **Name** Displays the EmplIDs and names of the individuals in the selected group.

User ID Displays the user IDs of the individuals once you've clicked the Create User IDs button. The system uses the EmplID as the User ID.

Account Locked Out? The system selects this option if the user ID account is locked out.

Pages Used to Create and Lock User IDs

Page Name	Object Name	Navigation	Usage
Create Users page	CREATE_USERS	Set Up HRMS, Security, User Maintenance, Create Users, Create Users	User to create user IDs for a group of individuals.
Lock Users page	LOCK_USERS	Set Up HRMS, Security, User Maintenance, Lock Users, Lock Users	Use to lock or unlock groups of user IDs.

Creating Users

Access the Create Users page.

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Create Users page

User ID Select a default User ID. The system will base the new user IDs on this default. Once created, you can modify individual profiles on the User ID pages.

If the user ID upon which you are basing the new users has data permission, you will need to run the Refresh SJT_OPR_CLS process. Otherwise the system will not recognize the data permission on the new user profiles.

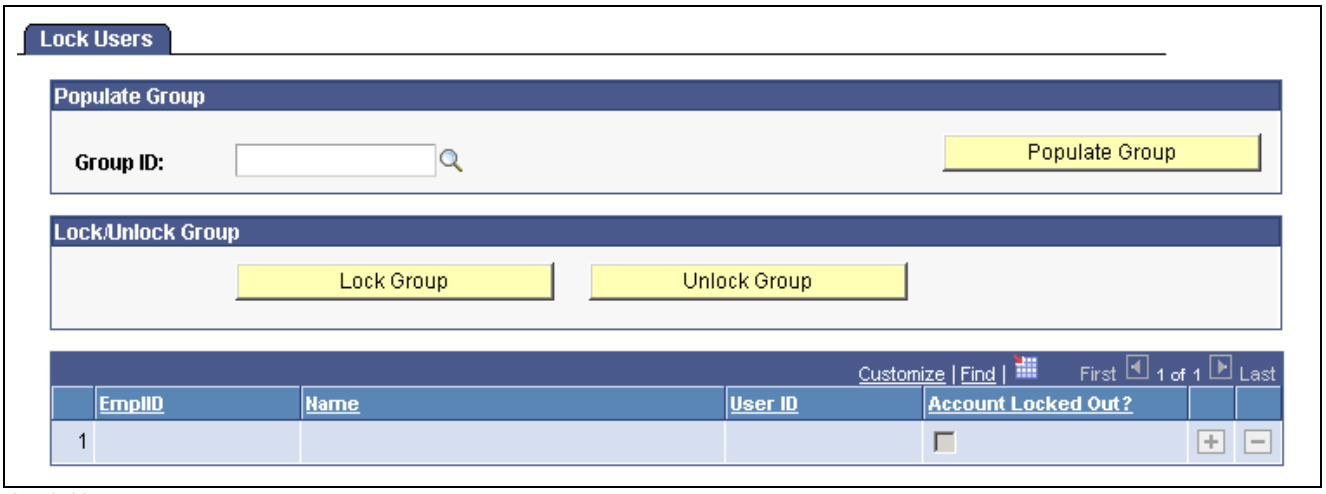
See Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 97.

Create User as Locked? Select to lock all the new user IDs.

Create User IDs Select to run the process.

Locking Users

Access the Lock Users page.



Lock Users page

Lock Group Click to run the process and lock the user IDs of the entire group.

Unlock Group Click to run the process and unlock the user IDs of the entire group.

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Activating Additional Security for Recruiting Solutions

To activate additional security for PeopleSoft Enterprise Recruiting Solutions, use the Recruiting Row Level Security component (HRS_SEC_TBL).

This section provides an overview of data permission security for job openings and discusses how to activate additional security for recruiting solutions.

Understanding Data Permission Security for Recruiting Solutions

You can secure access to job openings at three points. The following people have access to job openings:

- The creator of a job opening, as indicated on the Create New Job Opening component (HRS_JO_LAUNCH).
- Users with standard data permission access to the transaction data in the job opening.
- The recruiting team.

Recruiting Team Access

In some circumstances, the members of your recruiting team may not have standard data permission access to the transaction data in the job opening. To set up data permission to job openings for recruiting team members:

1. On the Security by Permission List page:
    a. Select the security set RSOPN.
    b. In the Security Type group box, select the type *031* (Recruiting Team).

       The system displays EmplID for the Key 1 field. Leave this field empty. This security access type has hardcoded key values so you do not need to specify any EmplID values.
2. Assign the permission list to one or more roles and assign the roles to those users who need recruiting team access.
3. Assign users to a job opening in the Assignments group box on the Job Opening component (HRS_JOB_OPENING).

When a recruiting team member accesses the job opening, the system will determine if the user has a permission list with recruiting team access and if he or she is listed in the assignments group box when granting access to the opening.

See Chapter 5, "Setting Up and Administering HRMS Security," Granting Data Access to Permission Lists by Field Value, page 86.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Creating Job Openings," Creating Job Openings.

Applicant Data Access

The data of applicants associated with job openings is available to those with access to the job openings. Applicants not assigned to a job opening are available to anyone with access to the applicant components. To restrict access to applicant data use application security to restrict which users have access to the applicant components.

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Recruiting Administrator Privileges

You can also grant recruiting administrator privileges to row security permission lists on the Recruiting Row Level Security page by selecting the Recruiting Administrator check box. Privileges include being able to change the status of draft applicants or overriding the status of a job opening.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, "Entering Applicants"

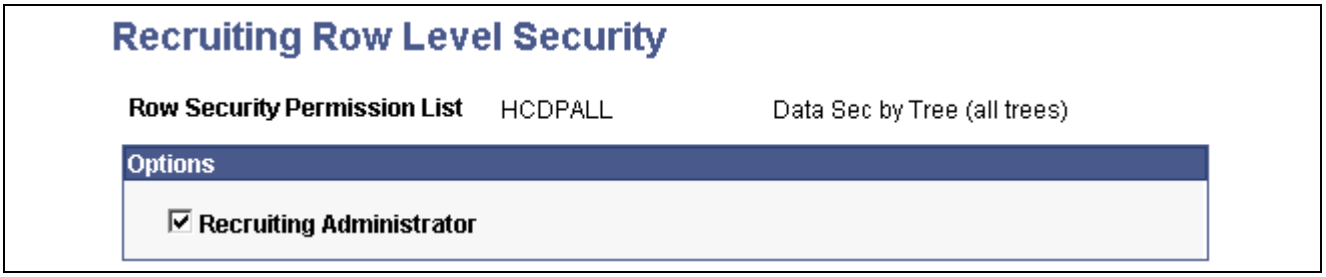
PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, "Managing Job Openings"

Page Used to Set Up Security for Recruiting Solutions

Page Name	Object Name	Navigation	Usage
Recruiting Row Level Security	HRS_SEC_TBL	Set Up HRMS, Security, Core Row Level Security, Recruiting Row Level Security	Grant advanced recruiting solutions privileges to row security permission lists, which are assigned to users in the User Profile component. **Note.** A user can only have one row security permission list.

Setting Up Security for Recruiting Solutions

Access the Recruiting Row Level Security page.



Recruiting Row Level Security page

Note. You do *not* need to run the Refresh SJT_CLASS_ALL process when you modify a row security permission list on this page.

Setting Up Security for Local Functionality

This section provides an overview of security for local functionality and discusses how to:

- Grant access to local country functionality.
- Restrict access to local country functionality.

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Understanding Security for Local Functionality

Local functionality refers to functionality that is specific to a country. Country-specific functionality is in collapsible sections marked by the country's flag, in the global components. To grant access to local components, you use component permission. To grant access to the local functionality on global components, you use the Global Panels page in addition to component permission.

To grant users access to local country functionality on the global menus:

1. Use the Country Specific - Installed HR Countries page (INSTALLATION_SEC) to select the local country functionality that is installed as part of your PeopleSoft HRMS system.

   If you do not specify a country here, its local functionality can't be accessed.
2. Grant the primary permission lists access to country-specific functionality using the Global Panels page.
3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See Also

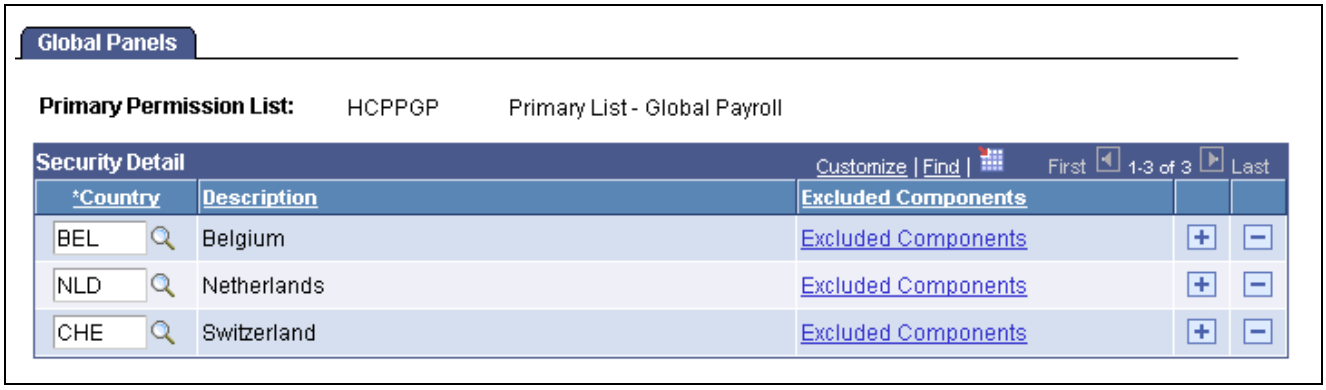
Enterprise PeopleTools PeopleBook: Security Administration

Pages Used to Grant Access to Local Country Functionality

Page Name	Object Name	Navigation	Usage
Global Panels	SCRTY_TBL_GBL	Set Up HRMS, Security, Component and Page Security, Setup Global Security, Global Panels	Select which country functionality a primary permission list can access on global components.
Global Panels - Excluded Panelgroups	SCRTY_GBL_SEC	Click the Excluded Components link on the Global Panels page.	Restrict access to local functionality on selected components.

Granting Access to Local Country Functionality

Access the Global Panels page.



Global Panels page

Primary Permission List Users assigned to this permission list can access the country-specific sections on global components of the countries that you indicate on this page.

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Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

Country Select the country or countries whose local functionality users assigned to the primary permission list can access in global components.

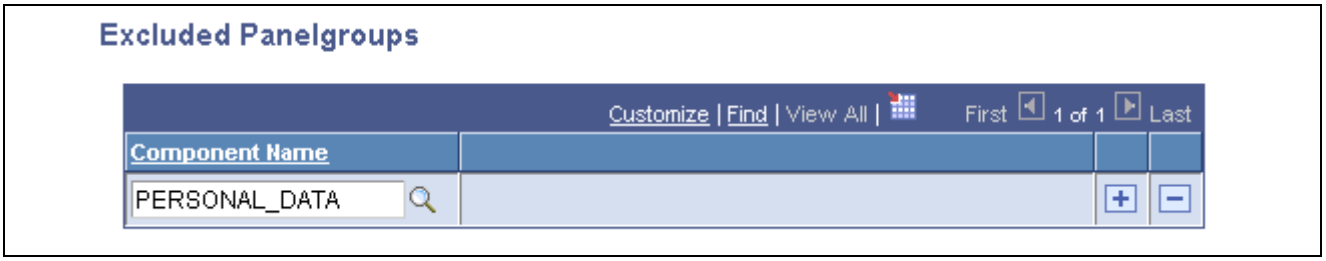
Excluded Components When you click Excluded Components, the system displays the Restricting Access to Local Country Functionality page. Using this page, you can restrict access to country-specific functionality in select components.

For example, you can grant a permission list access to Italian sections on all global components except for Personal Data.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

Restricting Access to Local Country Functionality

Access the Global Panels - Excluded Panelgroups page.



Excluded Panelgroups page

Component Name Select the name of the component for which global functionality for this country is being restricted. For example, to restrict access to Italian-specific functionality in the Personal Data component, select the Personal Data component.

Modifying Data Permission Security

This section discusses how to:

- Modify security for hiring and transferring people.
- Allow people to update their own data.

Modifying Security for Hiring and Transferring Workers

PeopleSoft HRMS enables users to assign workers into departments that they can't access for updates. To prevent a user without access from transferring a worker into a department, PeopleSoft HRMS contains a view, DEPT_SEC_VW, that shows only the department IDs that the user is authorized to access.

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If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_SEC_VW. You may also want to change the security view on the DEPARTMENT_TBL component to this view if you want users to only be able to access departments they have access to. This is defined using the Department Security Sets.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Allowing Workers to Update Their Own Data

PeopleSoft HRMS doesn't allow users to update their own data except in the self-service internet applications. However, sometimes you might want them to update some of their own data in other components. To allow users to update their own data, you implement the PeopleCode function Allow EmplIDChg (allow emplID change). The function looks for a single Boolean parameter. When the parameter is set to true, workers can update their own data; when it is set to false, they cannot.

For example, to allow workers to change their own personal data, you enable the PeopleCode function for PERSONAL_DATA, the underlying record definition for the Personal Data component. Then workers can change their personal data, but not their job information.

To enable the Allow EmplIDChg function:

1. Open the record PERSON in PeopleSoft Application Designer.
2. Open the RowInit PeopleCode on the EMPLID field.
3. Insert new code after this line:

   ```
   /************ START OF ROW INIT PEOPLECODE *************/
   ```

4. Insert a row and enter the following code after the first line (a comment) of existing code:

   ```
   if %Component = Component.PERSONAL_DATA then
      AllowEmplidChg(true);
   end-if;
   ```

5. Save your changes and exit the PeopleCode page.

Workers can now update their own data using the Personal Data page.

To allow workers to update their own data in other places in PeopleSoft HRMS, enter this PeopleCode function in the underlying record definition for each page where you want to allow updates.

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CHAPTER 6

Setting Up and Installing PeopleSoft HRMS

This chapter discusses how to:

- Set up implementation defaults.
- Set up HRMS options on the PeopleTools Options page.
- Administer country codes.
- Set up regulatory regions.
- Establish regulatory transaction types.

Setting Up Implementation Defaults

To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

This section provides an overview of implementation defaults and discusses how to:

- Select PeopleSoft applications for your installation.
- Select HRMS options.
- Enter application and industry-specific installation information.
- Enter country-specific installation information.
- Select local country functionality.
- Specify the starting number for system-assigned numbers.
- Define parameters for using third-party applications.
- Enter alternate character types.

Understanding Implementation Defaults

For each site where you implement PeopleSoft HRMS, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is *required.*

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Warning! You must complete the information on the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) for each primary permission list. Most of the defaults in PeopleSoft HRMS come from the Org Defaults by Permission Lst component and not the Installation Table pages. Other PeopleSoft HRMS applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Enterprise Human Resources, all defaults are based on the settings that you make on the Org Defaults by Permission Lst component. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

When you access the Installation Table pages for the first time, you'll see that PeopleSoft has already entered information for a sample company that you can use as a guide. After you enter your installation information, log off to save your changes.

Pages Used to Set Up and Report on Implementation Defaults

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Specify the PeopleSoft applications for your installation.
Global Payroll Country Extensions	INSTALL_GP_SEC	Set Up HRMS, Install, Installation Table, Products Click the Installed GP Countries link on the Products page.	Select the PeopleSoft Enterprise Global Payroll country extensions you are implementing.
Installed Integration Packs	INSTALL_PIP_SEC	Set Up HRMS, Install, Installation Table, Products Click the Installed Integration Packs link on the Products page.	Select the payroll integration pack you are using, if applicable.
HRMS Options	INSTALLATION_TBL1B	Set Up HRMS, Install, Installation Table, HRMS Options	Specify how to drive your system: by person, by position, or both. Enter the PeopleSoft HRMS defaults that are related to your organizational policies.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Enter product- and industry-specific installation information.
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table, Country Specific	Enter country-specific installation information.

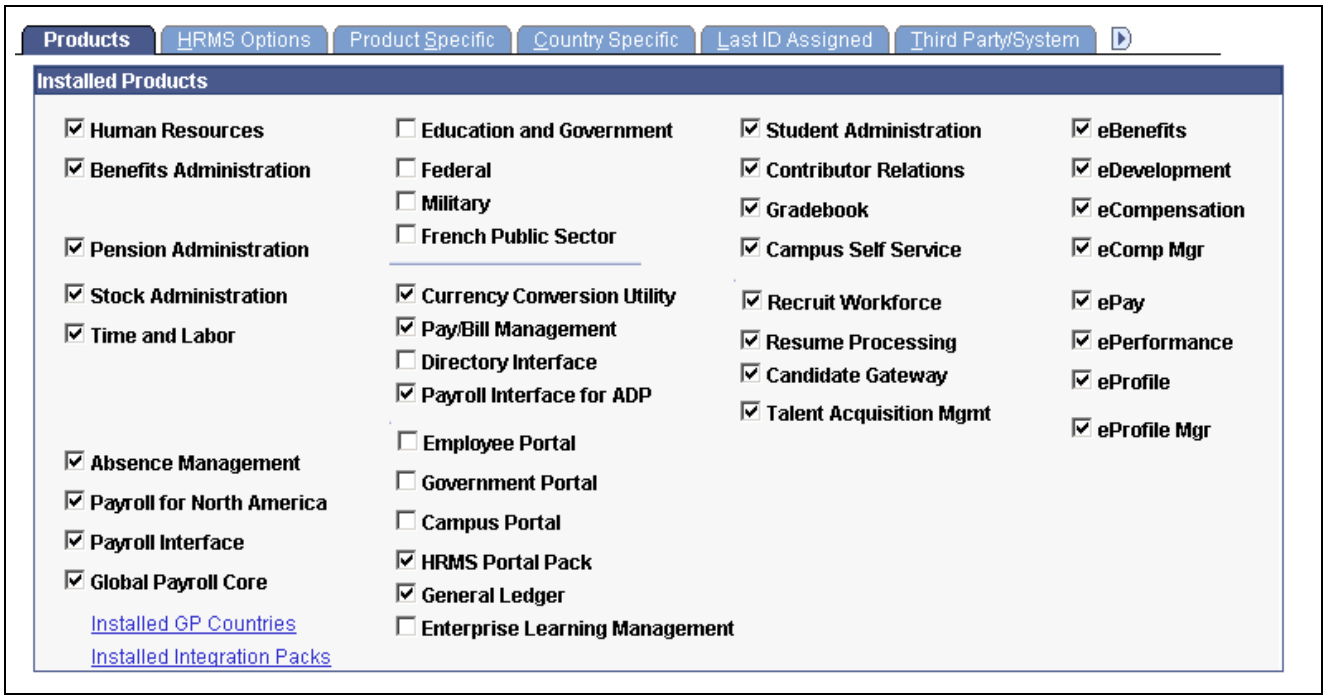
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Page Name	Object Name	Navigation	Usage
Installed HR Countries	INSTALLATION_SEC	Set Up HRMS, Install, Installation Table, Country Specific Click the Installed HR Countries link on the Installation Table - Country Specific page.	Specify which local country functionality to activate for users in PeopleSoft Enterprise Human Resources.
Last ID Assigned	INSTALLATION_TBL2	Set Up HRMS, Install, Installation Table, Last ID Assigned	Specify the number that the system uses to start assigning numbers.
Third Party/System	INSTALLATION_TBL4	Set Up HRMS, Install, Installation Table, Third Party/System	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HRMS. Define parameters for using third-party applications such as Visio.
Alternate Character	ALT_CHAR_TBL	Set Up HRMS, Install, Installation Table, Alternate Character	Specify the language code and alternate character type.
Installation Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Installation Table Report, Run Control	Run the Installation Table report (PER702). This report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Selecting PeopleSoft Applications for Your Installation

Access the Products page.

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Products page

Select the applications you are installing. To access that application's functionality, you must select it on this page.

If you are implementing PeopleSoft Global Payroll, select the Installed GP Countries link to select the Global Payroll country extensions you are implementing.

If you are implementing an integration pack, select the Installed Integration Packs link to select the integration pack.

(USF) Setting Up PeopleSoft HRMS for Federal Functionality

To set up your database for U.S. federal government functionality, select *Federal* on the Installation Table - Products page and update the Org Defaults by Permission Lst component to point to the U.S. federal government industry and sector.

To set up your database for military functionality, select *Military*on the Installation Table - Products page.

Make your primary permission list preference changes on the Settings page of the Org Defaults by Permission Lst component. To set up a federal database, select an Industry of Government and an Industry Sector of *US Federal.*

Selecting HRMS Options

Access the HRMS Options page.

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HRMS Options page

Company Select the default company code. The system uses this default in several tables in PeopleSoft Human Resources.

For a single-company organization, enter the code for that company; for multicompany environments, determine which company is most appropriate.

Standard Hours

To use this functionality to control payroll input in PeopleSoft Global Payroll, review your payroll and make sure that the elements reference the appropriate PeopleSoft Human Resources items. The system does not use them automatically.

Min Standard Hours (minimum standard hours) and **Max Standard Hours** (maximum standard hours) Enter the minimum and maximum standard hours that workers are expected to work in the standard work period. The system enters this information as default values but you can override the values on either the Job Code component (JOB_CODE_TBL) or Position Data component (POSITION_DATA).

Default Standard Hours Enter the number of hours in a standard work period at the company. This is a required field. When you define preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table component and the default standard hours value in the Salary Plan Table component (SALARY_PLAN_TABLE).

PeopleSoft Human Resources uses standard hours to compute a full-time equivalency (FTE) value to prorate holiday hours and pay for part-time and hourly workers.

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Work Period Select a standard work period (the time period in which workers must complete the standard hours). Values are stored on the Frequency table.

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE.

See Chapter 13, "Setting Up Jobs," Classifying Jobs, page 296.

Position Management Option

To drive part or all of the system by position, change the setting in this group box.

If you use PeopleSoft Enterprise Pension Administration, don't use position management for your retiree organization. If you use position management for your workers, select Partial to exclude retiree departments.

Note. Using position management substantially alters the way that the system processes your data, and requires you to maintain data differently.

Full The system expects that you track position data for all people in your organization and that you drive your human resource system by position, not by person.

Partial The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Select to use the business process on a trial basis or for selected departments.

None You drive your system by person. You can still assign position numbers to people, but the system doesn't use position data for job records, such as work phone or mail drop ID. This is helpful for tracking only certain positions, such as those above a particular management level.

Compensation Rate Codes

Default Comp Frequency (default compensation frequency) Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.

See Chapter 13, "Setting Up Jobs," Classifying Jobs, page 296.

Use Rate Code Groups Select if your organization bundles rate codes to apply percentages when calculating compensation.

Use Salary Points Select if your organization uses rate codes that have the rate code type points.

Multi-Step Grade Select if your organization uses a multistep/grade salary plan. This causes the system to use the Salary Step Components page (SALARY_PLAN_T3GBL) to determine compensation rates.

Currency

Multi-Currency Select if you use different types of currency to pay people. This option affects only PeopleSoft Enterprise Payroll for North America. PeopleSoft Global Payroll uses a separate multicurrency in the payroll system.

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Note. Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS).

Base Currency Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE). The code you select is the default currency that the system uses to calculate compa-ratios (percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft Payroll for North America, regardless of the currency that is used for individual line items.

For example, if the U.S. dollar is your base currency, but your global salespeople submit expense reports in French francs, the system calculates the expense total in U.S. dollars by internally converting all line item amounts to U.S. dollars and displaying the total in U.S. dollars.

Note. All currency defaults in PeopleSoft Human Resources are based on the base currency that you indicate on the Installation Table page, not the Org Defaults by Permission Lst component. The Org Defaults by Permission Lst component doesn't affect the currency defaults on the local country pages.

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook: "Currencies"*

Rate Type Identify the default rate type on which your currency conversion is based. Do this only if you haven't specified a default rate type for a primary permission list on the Org Defaults by Permission Lst component. The system checks the Org Defaults by Permission Lst component for a default rate type first; if none is specified, it looks at this value.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Chapter 2, "Understanding HRMS," Person or Position Structure, page 5

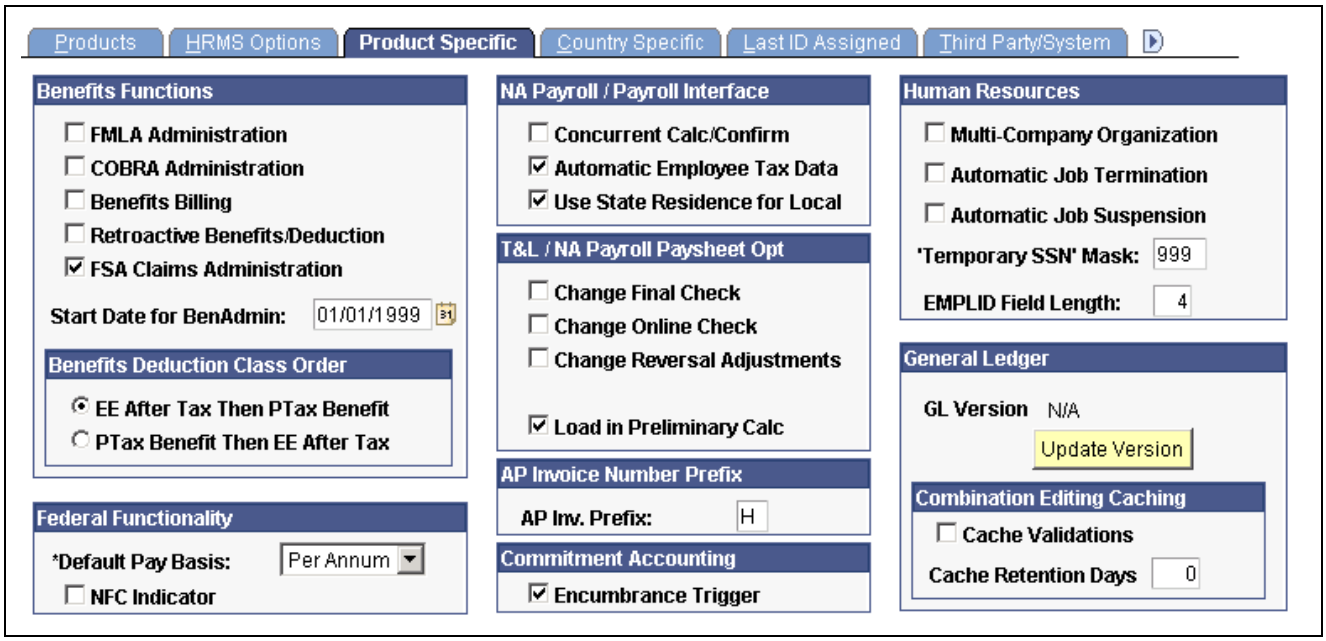
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Managing Base Compensation and Budgeting

Chapter 9, "Setting Up and Working with Currencies," page 183

Entering Application- and Industry-Specific Installation Information

Access the Product Specific page.

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Product Specific page

Benefits Functions

FMLA Administration (Family Medical Leave Act), **COBRA Administration** (Consolidated Omnibus Budget Reconciliation Act administration), **Benefits Billing,** , **Retroactive Benefits / Deductions** and **FSA Claims Administration**

Select to activate these different types of benefits functionality.

Start Date for BenAdmin (start date for Benefits Administration)

Enter the start date in PeopleSoft date format: MM/DD/YYYY.

Benefits Deductions Class Order

When the 415(c) limit is met, the deduction classes are limited in the following order: Employee Before-tax contribution , Employee After-tax contribution, Ptax Benefit (Employer Before tax Match), & then the Nontaxable Benefit (After Tax Employer Match). The user can change the deduction class order when the limit is met by selecting PTax Benefit then EE After Tax — Employer Before Tax Contribution is limited first then the Employee After Tax Contribution. The deduction class order will then be Employee Before-tax contribution , Ptax Benefit (Employer Before tax Match), Employee After-tax contribution & then the Nontaxable Benefit (After Tax Employer Match).

NA Payroll / Payroll Interface (North American Payroll and Payroll Interface)

Concurrent Calc/Confirm (concurrent calculation and confirmation)

Select to enable the system to run a calculation and confirmation at the same time. It is possible for a person to be in two concurrent runs; this could cause a deadlock situation where the process ends abnormally.

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Automatic Employee Tax Data Select to enable the system to create employee federal, state, and provincial tax records automatically whenever the following criteria are met:

- You hire an employee.
- An employee has a job change requiring a new work tax location.
- You add a concurrent job that requires a new work tax location for an employee.
- You hire an employee from the Applicant Tracking System.
- A person transfers to a new company.

Use State Residence for Local Automatically selected when you select Automatic Employee Tax Data. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, clear this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck.

Human Resources

Multi-Company Organization Select if your organization comprises more than one company. Select if you use PeopleSoft Pension Administration, because you set up companies specifically to house your pension payees.

Automatic Job Termination Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.

Automatic Job Suspension Select to activate substantive job suspension for workers working in temporary assignments where the substantive job requires suspension for the duration of the assignments.

'Temporary SSN' Mask (temporary Social Security number mask) Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.

EMPLID Field Length Enter the number of characters to be used for EmplIDs.

(USF) Federal Functionality

Default Pay Basis For the Default Pay Basis, select the value to use for quoting and reporting salaries. This field is required if you selected Federal on the Products page.

NFC Indicator Select this check box to expose National Finance Center (NFC) fields on impacted components and run the associated Peoplecode logic.

AP Invoice Prefix (accounts payable invoice prefix)

AP Inv. Prefix (accounts payable invoice prefix) (Optional) Enter a prefix to be used for accounts payable invoices that are generated through HRMS.

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T&L/NA Payroll Paysheet Opt (Time and Labor and Payroll for North America paysheet options)

Change Final Check, Change Online Check, and **Change Reversal Adjustments**

Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Enterprise Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.

Load in Preliminary Calc (load in preliminary calculation)

The Pay Calculation process uses the value of the Load in Preliminary Calc field to determine whether to load new available time (additional time that was worked before the job change but not previously loaded on paysheets):

- If you select this check box, the system loads all valid available time to the new paysheets, including new available time.
- If you clear this check box, the process does not load any new available time to paysheets, except as noted below.

Note. If an employee had a Job data change that caused paysheets to be rebuilt, the Pay Calculation process attempts to reload all valid time and rejects time that is no longer valid as a result of the Job data change. This is true regardless of the setting of the Load in Preliminary Calc field. In this case, the process first rejects all previously loaded time, then it reloads the available time. If Load in Preliminary Calc is not selected, some new time might be loaded, but only for the employee being processed due to the Job data change.

Commitment Accounting

Encumbrance Trigger

Select to enable pre-encumbrance and encumbrance triggers to be processed from various online events. Each event cause the system write a record to the Encumbrance Trigger table (ENCUMB_TRIGGER), which is then used as input for the Nightly Encumbrances batch process (RUNCTL_ENC_NHT).

General Ledger

GL Version

Displays the version of PeopleSoft Enterprise General Ledger that is interfacing with PeopleSoft HRMS. Click the Update Version button if you change versions. The system will automatically update the GL Version.

Note. Full chartfield functionality is only available when you use PeopleSoft General Ledger 8.4 or higher.

Update Version

Click to test the integration with PeopleSoft Enterprise Financials and display the latest version of Financials.

Cache Validations

Select to cache the results of your validations. This improves performance by enabling you to cached validations.

Cache Retention Days

Enter the number of days to store validation results. The system will delete anything in the cache older than this.

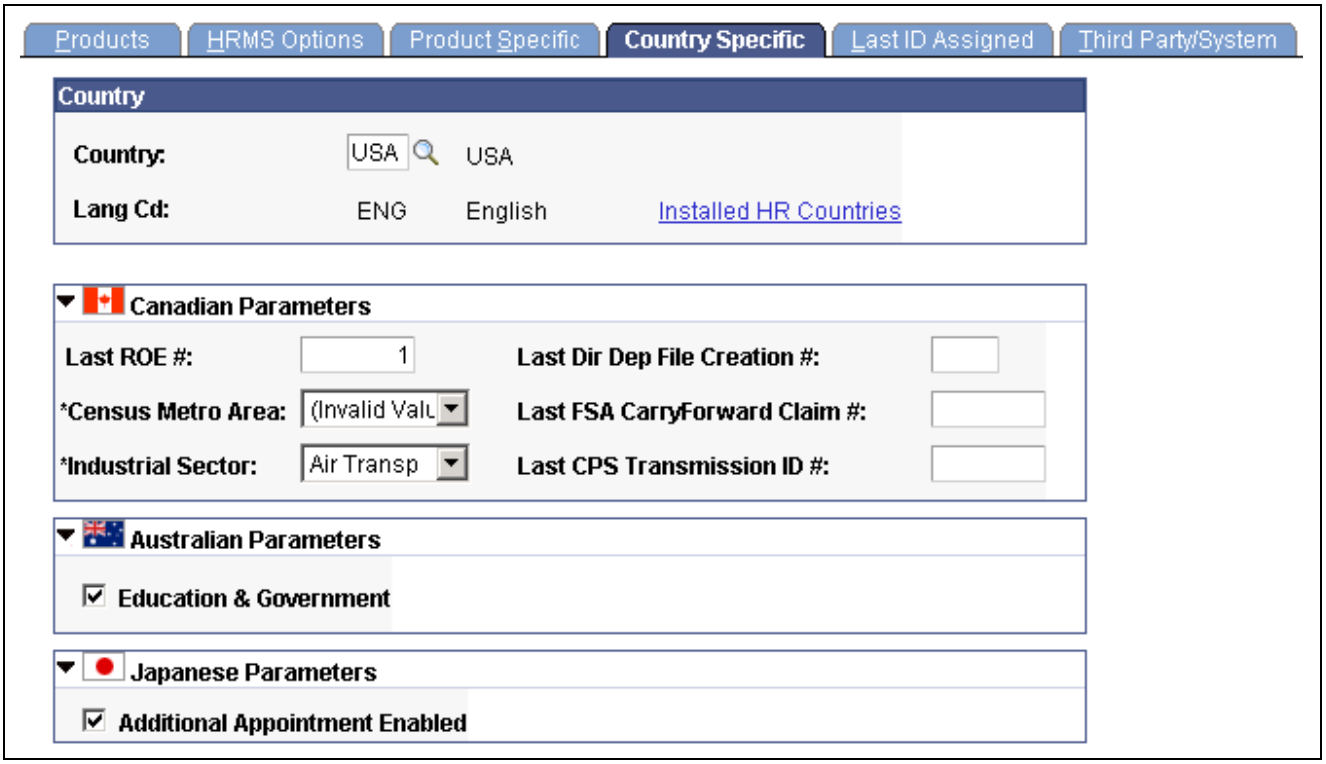
See Also

PeopleSoft Enterprise Benefits Administration 9.0 PeopleBook, "Understanding Benefits Administration," Benefit Information Automation

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Entering Country-Specific Installation Information

Access the Country Specific page.



Country Specific page

Country

Country Select a country for the system to enter as a default value.

Lang Cd (language code) The system displays the default base language for the database.

Installed HR Countries Select this link to go to the Installed HR Countries page, where you can select which local country functionality is installed in the system.

(CAN) Canadian Parameters

Last ROE # (last record of employment number), **Last Dir Dep File Creation #** (last direct deposit file creation number), **Last FSA CarryForward Claim #** (last flexible spending account carry-forward claim number), and **Last CPS Transmission ID #** (last CPS transmission ID number)

Enter the last ROE, direct deposit file, flexible spending account carry-forward claim, and CPS transmission ID numbers that were used.

The system increases each number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. These values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Census Metro Area (census metropolitan area) Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Org Defaults by Permission Lst

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component. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

Industrial Sector Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Org Defaults by Permission Lst component. This value is used as the default for the Canadian Industrial Sector field in the Department component; and it identifies the industrial sector with which people in a given department are associated. This field is required.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

See Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments, page 267.

(AUS) Australian Parameters

Education & Government Select this check box for Australian public service organizations.

(JPN) Japanese Parameters

Additional Appointment Enabled Select if you will be implementing Additional Appointment tracking *(Kenmu)*. Selecting this check box activates functionality to create a dummy additional appointment job code when you create a new business unit.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)".

Selecting Local Country Functionality

Access the Installed HR Countries page.

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Installed HR Countries page

The system displays a flag for each country that has special local functionality in PeopleSoft Human Resources:

- Select a check box to activate local functionality for that country. Users who have security access can see and work with that country's local functionality.
- Clear a check box to hide that local functionality from your users.

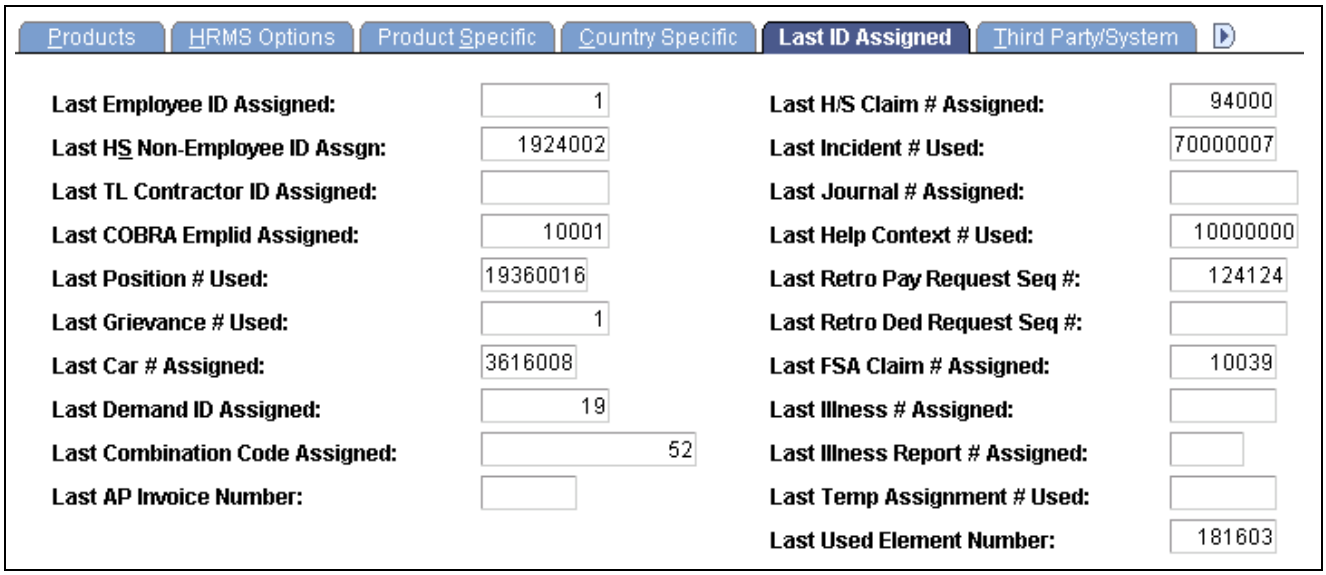
If the check box for a country is selected on this page, but you don't grant country access to the users' primary permission list on the Setup Global Security – Global Panels page (SCRTY_TBL_GBL), users will not see local country functionality.

See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 115.

Specifying the Starting Number for System-Assigned Numbers

Access the Last ID Assigned page.

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Last ID Assigned page

In PeopleSoft HRMS, there are several fields where you can either enter numbers manually or let the system assign them.

The following table lists auto-numbering fields.

Field	Application	Business Process
Last Employee ID Assigned	PeopleSoft Human Resources	Administer Workforce Recruiting Workforce
Last HS Non-Employee ID Assgn	PeopleSoft Human Resources	Monitor Health and Safety Administer Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor	Administer Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Administering COBRA
Last Position # Used	PeopleSoft Human Resources	Manage Positions Plan Successions
Last Grievance # Used	PeopleSoft Human Resources	Manage Labor Administration
Last Car # Used	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training

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Field	Application	Business Process
Last Combination Code Assigned	PeopleSoft Human Resources PeopleSoft Payroll for North America	Commitment Accounting
Last AP Invoice Number	PeopleSoft Human Resources	
Last H/S Claim # Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last Incident # Used	PeopleSoft Human Resources	Monitor Health and Safety
Last Journal # Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Help Context # Used	PeopleSoft HRMS	Customizing Windows Online Help
Last Retro Pay Request Seq #	PeopleSoft Payroll for North America	Manage Retroactive Pay
Last Retro Ded Request Seq #	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Manage Retroactive Benefits/Deductions
Last FSA Claim # Assigned	PeopleSoft FSA Claims Administration	Administer FSA
Last Illness # Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness # Report Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Profiles

To let the system assign numbers for the fields on this page, enter the last number that you used in the field. The system increases that number by one when it assigns a new number. The system updates the Installation Table every time it assigns a number.

Note. To avoid maintaining two different sets of numbers, either always assign numbers manually or always let the system do it.

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ID Considerations

When you convert ID data to PeopleSoft Human Resources from another system, enter the highest number that was used in your previous system so that you don't duplicate IDs. If the last ID you assigned in your previous system was 1000, enter *1000* in the Last Employee ID Assigned field. When you add a person in PeopleSoft Human Resources, the system assigns an ID of *1001* and updates the Last Employee ID Assigned field accordingly.

To always enter IDs manually, enter *999999999* (nine 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

If you use Social Security or insurance numbers as IDs, change the formatting for the Employee ID field using PeopleSoft Application Designer.

Zero-filled Numbers

To make data entry faster and more accurate on several pages when you enter a number that the system has assigned, the system enters zeros before the number. For example, when you enter *4,* you see *00000004,* a total of 8 characters per number. This occurs in the following fields:

- Job Opening
- Requirements Search
- Grievance
- Incident
- Claim
- Position

Note. If you have already assigned numbers that aren't zero-filled, change their numbering so that the system can accurately track them when you convert the data to PeopleSoft Human Resources.

For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

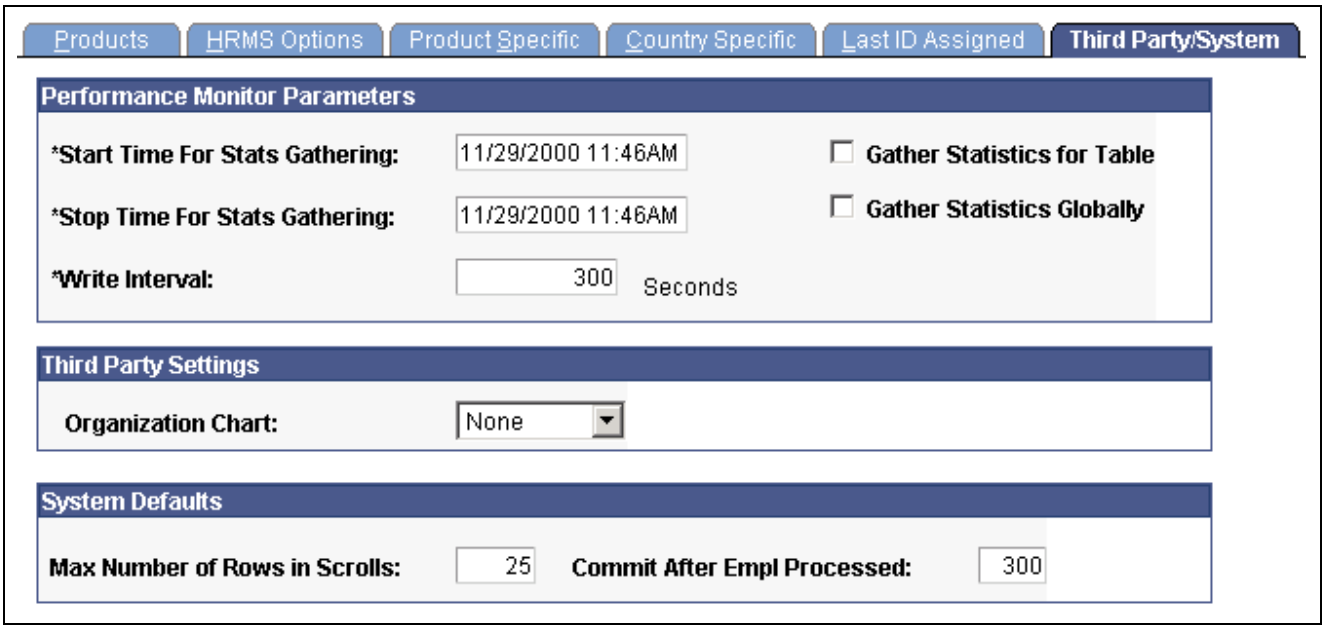
See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Defining Parameters for Using Third-Party Applications

Access the Third Party/System page.

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Third Party/System page

Performance Monitor Parameters

Start Time For Stats Gathering (start time for statistics gathering) and **Stop Time For Stats Gathering** (stop time for statistics gathering) — Enter the date and time of the start and stop.

Gather Statistics for Table — Select to gather statistics locally.

Gather Statistics Globally — Select to gather statistics globally.

Write Interval — Enter the number of seconds for gathering the statistics.

Third Party Settings

Organization Chart — Enter the type of third-party program you use to create organizational charts with your human resources data.

System Defaults

Max Number of Rows in Scrolls (maximum number of rows in scrolls) — Enter the maximum number of rows in a scroll-controlled data box for third-party systems.

Commit After Empl Processed (commit after employee processed) — Enter the maximum number of people that a third-party system processes before committing.

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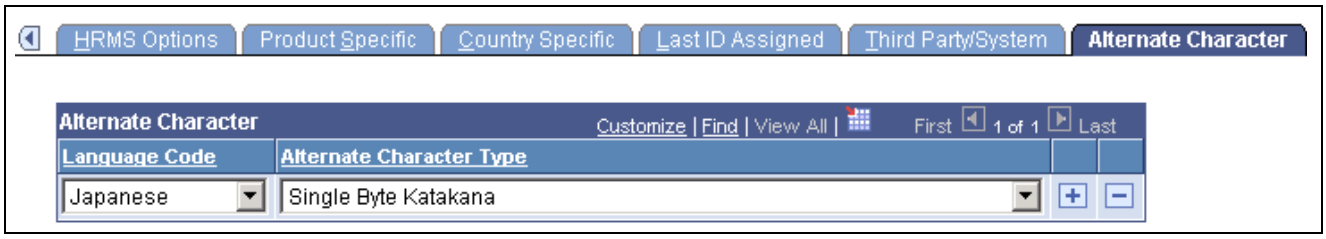
See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools

Chapter 26, "Setting Up and Building Organization Charts," page 593

Entering Alternate Character Types

Access the Alternate Character page.



Alternate Character page

Note. Because you are setting the alternate character code on the Installation Table, the setting affects your entire HRMS application configuration. Make sure that you account for all language codes for your installation.

If you don't specify an alternate character type for a language code that a user is working with, and the user tries to enter characters in an Alternate Character field, a warning message appears.

If you specify an alternate character type for a language code, and a user enters any other character type in an Alternate Character field, a warning message appears.

Note. You can ignore the warning message and enter the data in another character set, but problems can occur when data is sorted in multiple alternate character sets.

Setting Up HRMS Options on the PeopleTools Options Page

To set up HRMS options on the PeopleTools Options page, use the PeopleTools Options component (PSOPTIONS).

This section discusses how to set up HRMS options on the PeopleTools Options page.

You use the PeopleTools Options page to set a variety of values that are related to:

- Multi-company organizations.
- Organizations that conduct business using more than one currency.
- Multiple jobs functionality.

Access the PeopleTools Options page on the PeopleTools, Utilities, Administration menu.

See *Enterprise PeopleTools PeopleBook: Data Administration Tools*

Select the following check boxes, as applicable, to activate these kinds of functionality:

Multi-Company Organization Select if your organization comprises more than one company or if you use PeopleSoft Pension Administration to set up companies specifically to house your pension payees.

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Multi-Currency Select to enter data in more than one currency. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and Italian lira. If you select *Multi-Currency,* the system displays a Currency Code field on pages where amount fields appear.

Note. *Multi-Currency* doesn't affect PeopleSoft Global Payroll, which has its own multiple currency functionality.

Multiple Jobs Allowed PeopleSoft delivers PeopleTools with this option selected. Leave it selected to take full advantage of PeopleSoft HRMS.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Administering Country Codes

To administer country codes, use the Country Table component (COUNTRY_TABLE), the Country Table – HR component (HR_COUNTRY_TABLE), and the State/Province component (STATE_DEFN).

This section provides an overview of country codes and enterprise integration points and discusses how to:

- View and update country information.
- Specify the address format for a country.
- Specify the county, state, and city for a country.
- Define additional information for HRMS reporting purposes.
- Add the state, province, or equivalent entity for a country.

Understanding Country Codes

On many pages in PeopleSoft Human Resources, a country appears as part of the address for a person, a company, or an office. Countries are represented as codes, such as CAN for Canada, and they are listed in the Country Table component. In the Country field on any page, the system displays a default country code, which you can change. The Org Defaults by Permission Lst component and the Business Unit Options Defaults component (BUS_UNIT_OPT_HR) can affect this default code. You can define the information that users should capture for addresses in specific countries using the Address Format page (ADDR_FORMAT_TABLE) in the Country Table component.

You need codes for all the countries where your organization does business and where the people in your system live. The Country Description page (COUNTRY_DEFN) includes an extensive list of predefined countries and codes. The page is updated with each version of PeopleSoft Human Resources according to the countries that are recognized by the International Standards Organization (ISO).

If you need a new country code, notify your PeopleSoft account manager so that we can add it to the Country Table for the next version of PeopleSoft Human Resources.

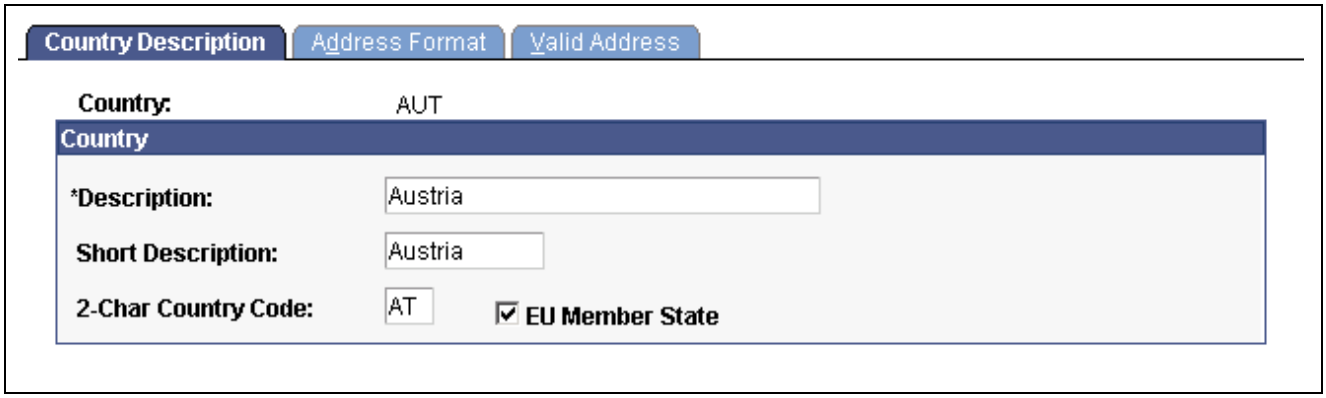
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Pages Used to Administer Country Codes

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table, Country Description	View or update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.
Valid Address	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table, Valid Address	Specify the county, state, and city for the country that is selected from the Country Table.
Country Table - HR	HR_COUNTRY_DEFN	Set Up HRMS, Install, Product and Country Specific, Country Table - HR	Specify additional information about a country for HRMS reporting purposes.
State or Province Table	STATE_DEFN	Set Up HRMS, Install, State/Province, State or Province Table	Add a state, province or equivalent entity for the country that is selected from the Country Table.
Country Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report, Run Control	Run the Country Table report (PER708) that prints a list all country character codes.

Viewing or Updating Country Information

Access the Country Description page.



Country Description page

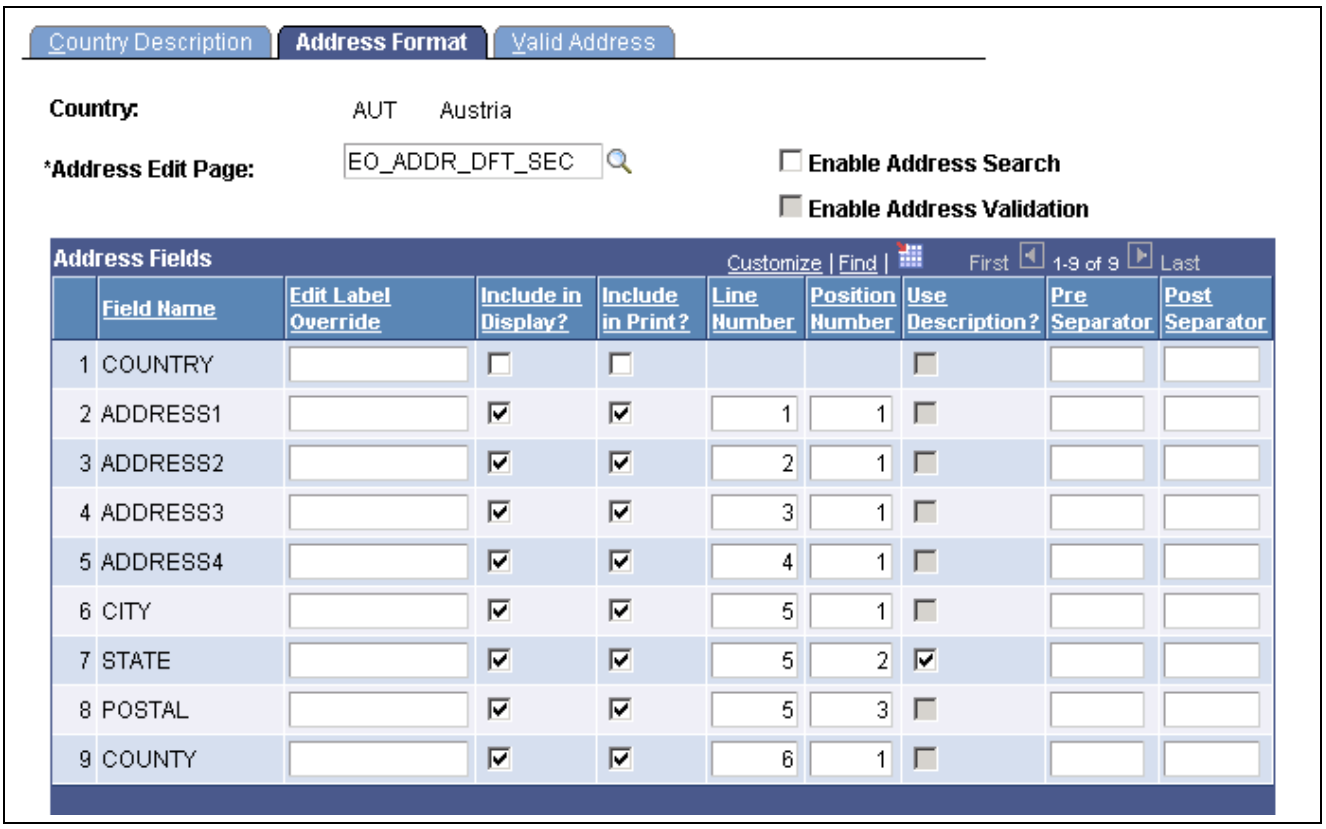
2-Char Country Code (Two-character country code) Enter the code that the U.S. government assigned to the country, if applicable.

EU Member State (European Union member state) Select if this is an EU member state. This field is for your reference only and doesn't impact system processing or reporting.

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Specifying the Address Format for a Country

Access the Address Format page.



Address Format page

Address Edit Page Select an address page from the list of available options. The system will display the list of fields on that page in the Address Fields group box.

Enable Address Search Select to enable the address search.

Enable Address Validation Select to enable the system to validate address entries for state or province and city as shown on the Valid Address page.

Address Fields

Field Name The Field Name column displays the address fields available in the PeopleSoft HRMS.

Edit Label Override Enter a different label to override the displayed Field Name, if required for this country.

Include in Display? Select to have the system display this field whenever an address in this country needs to be entered in the system.

Include in Print? Select to have the system print this field whenever an address in this country will be printed.

Line Number Enter the line on the page on which this field should appear.

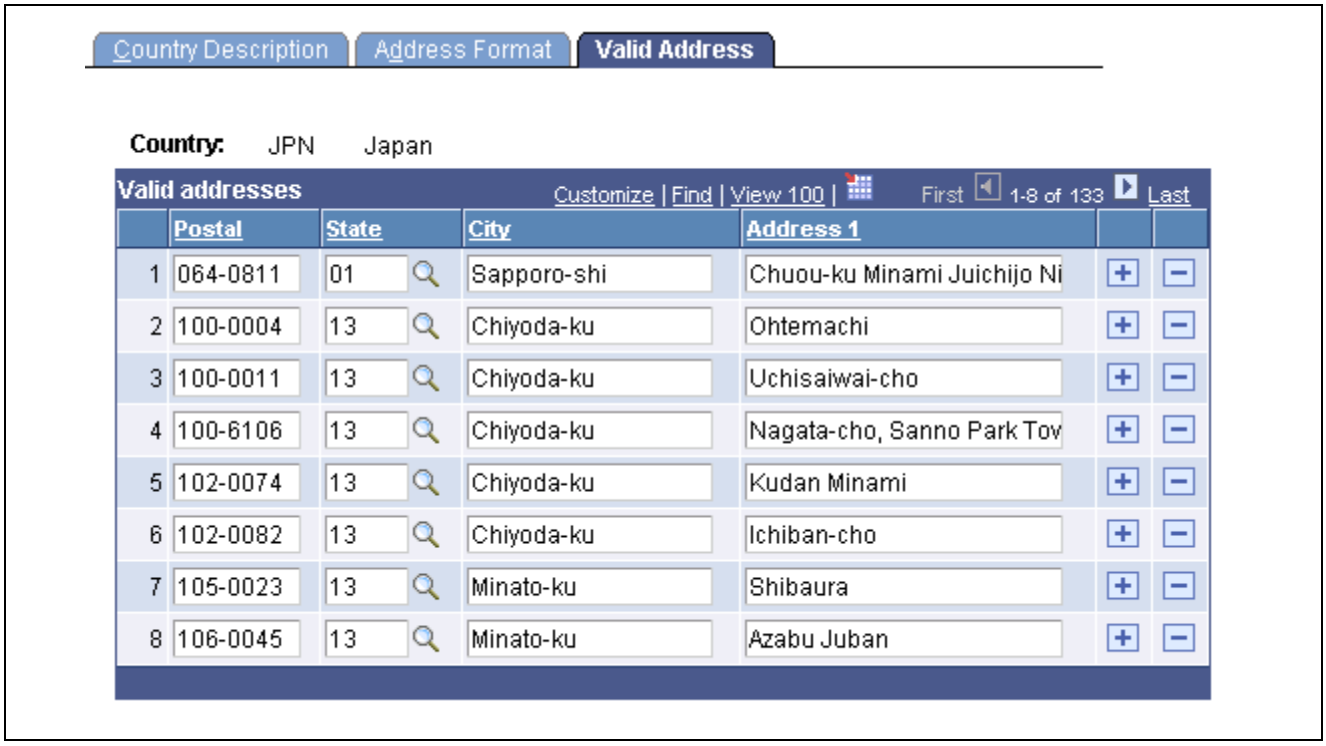
Position Number Indicate this field's position in the selected line.

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Use Description?	Select to have the system display a full description for this field.
Pre Separator and **Post Separator**	Enter separator characters for the address elements if applicable (for example and em dash).

Specifying the County, State, and City for a Country

Access the Valid Address page.



Valid Address page

Valid Addresses

The Valid Address page stores state/province codes with corresponding cities, as entered on the State or Province Table page. When you select *Enable Address Validation* on the Address Format page, the system checks address entries against the values stored on the Valid Address page to verify that the city and state or province match.

Note. (JPN) Japanese postal data is stored in both the Postal Code Table and the Valid Address table (EO_ADDR_VALIDAT). To keep the Valid Address table in sync with the Postal Code Table, you must enter new postal data in the Postal Code Table page. The system will not update the Postal Code Table with values you enter on the Valid Address page.

See Also

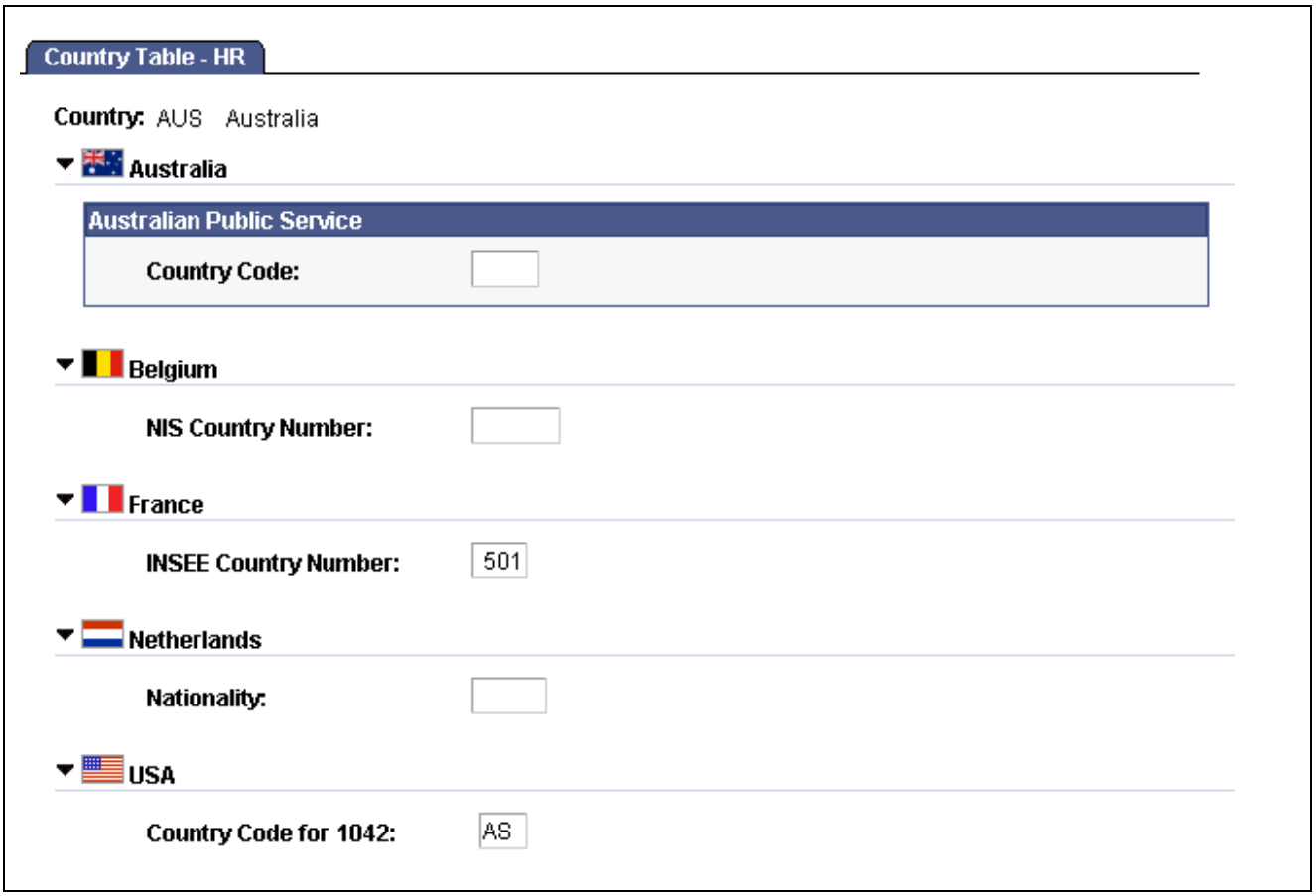
Chapter 17, "Setting Up Local Country Functionality," (ITA) Setting Up Italian City Codes, page 389

Chapter 17, "Setting Up Local Country Functionality," Maintaining the Postal Code Table, page 394

Defining Additional Information for HRMS Reporting Purposes

Access the Country Table - HR page.

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Country Table — HR page

(AUS) Australia

Australian Public Service Enter the Australian Public Service four digit country code here.

(BEL) Belgium

NIS Country Number (National Institute for Statistics country number) Enter the NIS Country Number for reporting hires and terminations to the Social Insurance.

(FRA) France

INSEE Country Number (National Institute for Statistical and Economic Studies country number) INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(NLD) Netherlands

Nationality Enter the four-digit nationality code for the country. Nationality codes are defined by the Netherlands coding standard (NEN) and are used in wage declarations for the Netherlands. The system uses the Country code specified for an employee on the Citizenship/Passport page to determine which nationality code applies to the employee.

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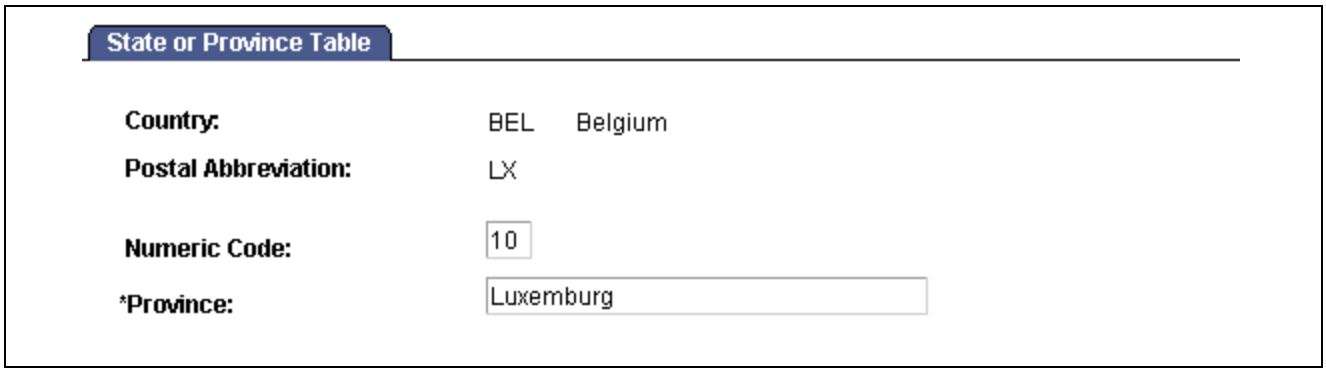
(USA) USA

Country Code for 1042 (USA) Enter the country code used when reporting wage and tax data to federal and state government agencies in the MMREF format.

(E&G) Enter the country code for nonresident alien processing

Adding the State, Province, or Equivalent Entity for a Country

Access the State or Province Table page.



State or Province Table page

PeopleSoft delivers the State or Province Table with all states, provinces, and equivalent geographical entities (such as Dutch communities and French departments) for all supported countries. The codes are based on standard postal codes. PeopleSoft updates this table with each version.

You need these state or province codes for all countries where your organization does business. You use this information in many address fields in the system.

Postal Abbreviation The state or province code is automatically displayed.

Numeric Code Enter the numeric code, if applicable. The U.S. federal government assigns a numeric code to each state for reporting purposes. You don't need to enter numeric codes for new Canadian provinces.

Setting Up Regulatory Regions

To set up regulatory regions, use the Regulatory Region component (REG_REGION).

This section provides an overview of enterprise integration points and discusses how to define regulatory regions.

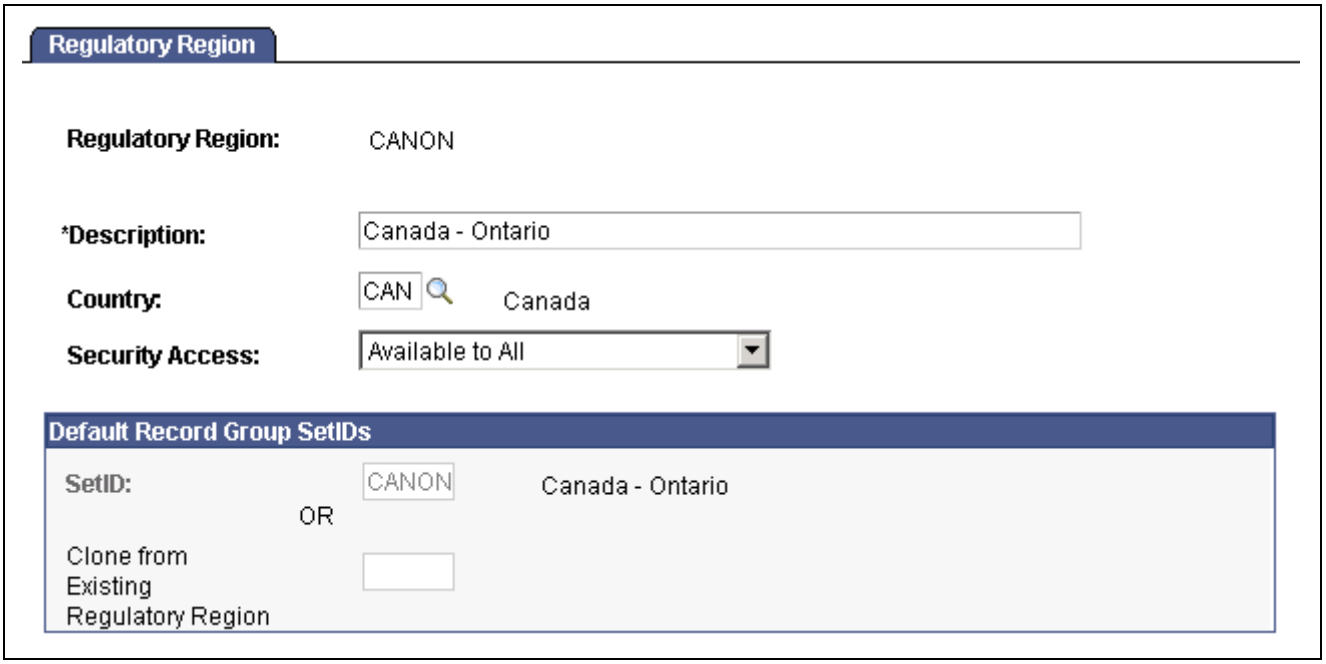
Page Used to Set Up Regulatory Regions

Page Name	Object Name	Navigation	Usage
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region, Regulatory Region	Set up a regulatory region.

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Defining Regulatory Regions

Access the Regulatory Region page.



Regulatory Region page

Country Select a country from the list. When you create a regulatory region, you must specify the country to which the region belongs. This enables country-specific edits even when a state-level or provincial-level region is used in a system transaction. If the country you want to add isn't in the list of values, add that country to the system using the Country Table.

Security Access Select a security access level from the list. Because many companies have users working with only one, limited set of regulatory regions, this feature enables you to hide the other regulatory regions from the user. The values are stored on the Translate table. The Regulatory Region prompt edit views use these values to limit the user's Regulatory Region choices to the regions to which the user has access. Values are as follows:

- *Available To All:* Users can select this region.
- *Not Available To Anyone:* No users can select this region.
- *With Global Security Only:* Only users who have access to that region's country functionality assigned to their primary permission list can select that region.

See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 115.

Note. If you choose not to maintain the country-level data security, then select *Available to All* or *Not Available to Anyone* to provide universal access to regulatory regions. To simplify maintenance, availability is established only once for each regulatory region and is used for all transactions.

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Default Record Group SetIDs

Use this group box to specify the SetIDs that make up this regulatory region. Since Regulatory Region is used to drive set processing in some applications, such as Health and Safety, Regulatory Region is a set control value. The default record group SetIDs establish an initial set processing relationship for this new regulatory region.

SetID

When you add a regulatory region, the SetID field is available for entry, and the Clone From Existing Regulatory Region field is unavailable for entry. The system places a default setID in the SetID field that bears the same name as the Regulatory Region Code that you just defined. If you haven't defined a SetID that matches this code, select another applicable SetID for your regulatory region from the list of valid values. The SetIDs in the list were set up using the TableSetID table. You can select only from those SetIDs.

Note. Before you can specify SetIDs, you must define SetIDs, record groups, set control values, and TableSet record group controls, using the components on the PeopleTools, Utilities, System Administration menu.

See Chapter 3, "Working with System Data Regulation in HRMS," page 9.

Clone from Existing Regulatory Region

You can clone the SetIDs attached to this new regulatory region from an existing regulatory region. Use this option if the new regulatory region that you're defining requires the same default record group SetIDs as those that you've already created for another region.

Enter the regulatory region that you want to clone.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," page 37

Enterprise PeopleTools PeopleBook: Data Administration Tools

Establishing Regulatory Transaction Types

To establish regulatory transaction types, use the Regional Transactions component (REG_TRX_REGION).

This section provides an overview of regulatory transactions and discusses how to add regulatory regions to a transaction.

Understanding Regulatory Transactions

Two sets of regulatory transactions are already defined in the system as shown in the following table:

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Regulatory Transaction	Countries or Regions Included	Reason
STANDARD	All countries that are supported in the system.	Most applications apply regulatory and legislative edits at the country level.
HANDS (Health and Safety)	All countries that are included in the system, plus the Canadian provinces.	Most applications apply regulatory and legislative edits at the country level, but Canada has specific provincial laws governing their Health and Safety reporting.

Use the two pages in the Regional Transactions component (REG_TRX_REGION) to assign new regulatory regions to these transaction types (if you have added countries or regulatory regions to the system) and to establish new regulatory transactions.

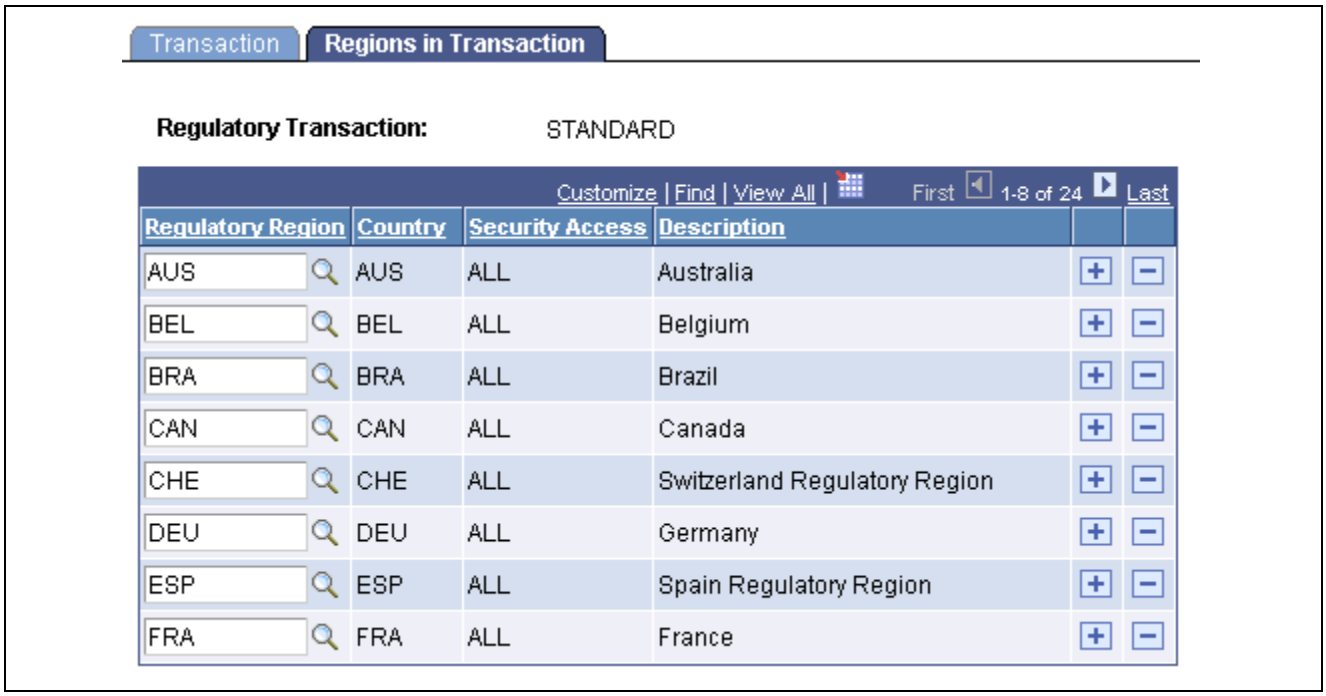
Pages Used to Update or Add Regulatory Transactions

Page Name	Object Name	Navigation	Usage
Regional Transactions - Transaction	REG_TRX	Set Up HRMS, Install, Regional Transactions, Transactions	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction	REG_TRX_REGION	Set Up HRMS, Install, Regional Transactions, Regions in Transaction	Define the regulatory regions that make up a regulatory transaction type.

Adding Regulatory Regions to a Transaction

Access the Regions in Transaction page.

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Regions in Transaction page

Regulatory Region Select the regulatory regions that belong to this transaction.

Installing Person Objects

To install person objects, use the Person Object Installation component (INSTALL_PERSON).

This section discusses how to install person objects.

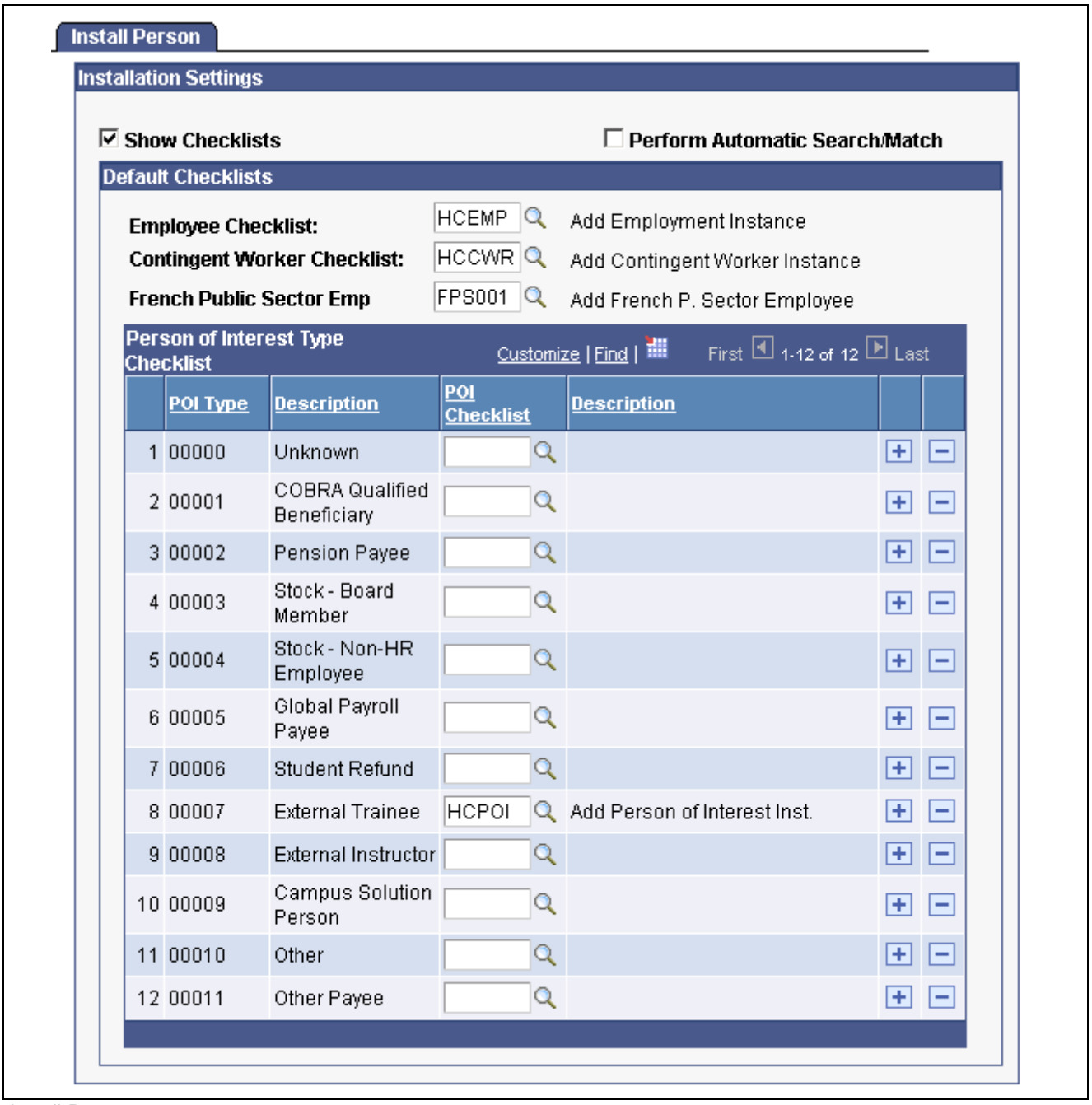
Page Used to Install Person Objects

Page Name	Object Name	Navigation	Usage
Install Person	INSTALL_PERSON	Set Up HRMS, Install, Person Object Installation, Install Person	Select installation settings for the Add a Person component (PERSONAL_DATA).

Selecting Personal Data Installation Settings

Access the Install Person page.

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Install Person page

Installation settings for PERSONAL_DATA functions

Show Checklists Select to show the Checklists Code field on the Organizational Relationships page (PERSON_DATA4), enabling users to select a checklist for the person they are adding and create a record in the Person Checklist component (PERSON_CHECKLIST).

Perform Automatic Search/Match Select to perform an automatic search and match when you add a person to the PERSONAL_DATA component. The system will search the database to determine that you are not entering a duplicate record.

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Default Checklists

Select the default checklists that the system will display in the Checklist Code field on the Organizational Relationship page when you add to add one of the following relationships for the new person:

- Employee.
  - In the Employee Checklist field, select the default checklist for commercial employees.
  - In the French Public Sector Emp field, select the default checklist for French public sector employees.
- Contingent worker.

  In the Contingent Worker Checklist field, select the default checklist for contingent workers.
- Person of Interest

  For each POI type listed in the Person of Interest Type Checklist grid for which you want a default checklist, select the checklist.

The system will create a record in the Person Checklist component with this checklist if you select the Go to Person Checklist link on the Organizational Relationship page when you first create the person.

Set up checklists on the Checklist component (CHECKLIST_TABLE).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process,” Creating Checklists.

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CHAPTER 7

Setting Up and Working with Search/Match

This chapter provides an overview of PeopleSoft Search/Match and discusses how to:

- Set up Search/Match.
- Work with Search/Match.

Understanding Search/Match

To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data into your system, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

- Person (EmplID)
- Applicant (HRS_PERSON_ID within PeopleSoft Enterprise Talent Acquisition Manager)

Note. PeopleSoft delivers these ID types as translate values inside the SM_TYPE field. They are delivered as *Active,* but you can inactivate them depending on the applications that you license. Do not, however, add or delete ID type values.

For each of these ID types, departments or business areas can, based on user security roles, define their own search criteria to perform a search. The criteria can include defining search rules and placing them in the desired order within a search parameter. Each department or business area can also set what data to display in the results to identify a possible matching ID. Departments and business areas can set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security to perform ad hoc searches without the constraints of predefined criteria.

Data returned in a search result can contain sensitive information. You can control whether to entirely or partially mask a field or display the entire field. The masking configuration can be controlled with user security access. With search results and display controls defined, users can perform Search/Match to determine if a record already exists before adding one.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID by transferring the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and reenter the data to determine whether the ID exists.

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You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

Also, if you use multiple search rules, you should order the rules from the most restrictive to the least restrictive. For example, rule 1 could return matching IDs when first name, last name, phone number and national ID exactly match. Rule 4 could return matching IDs when only the first and last name match. In this example, rule 4 could return more potential matching IDs than rule 1. The search rule used by Search/Match could therefore be used as an indicator to users of how significant the returned results are.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.

Use search result codes to specify the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.

Some search rules, search parameters, and search results are delivered with your system. You can use these as they are, modify them, or add as many as you need.

Warning! Adding new search fields require significant programming effort and is not recommended.

See Also

Chapter 7, "Setting Up and Working with Search/Match," Automatic Search, page 150

Automatic Search

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

If the component name is associated with a search parameter code and a search result code, Search/Match displays the search results inside a grid on the Search Results page. This enables users to review the potential duplicate IDs without having to manually navigate to the Search/Match page. After reviewing the results on the Search Results page, the user clicks Return and is instructed to either click OK to continue saving the new ID or to click Cancel to avoid saving the transaction and investigate further.

Note. This setup is valid only when creating person IDs from HRS_PREP_FOR_HIRE component.

Warning! To display the Search Results page at save time, you must have a security role with access to the component interface HCR_SM_SEARCH.

See Chapter 7, "Setting Up and Working with Search/Match," Viewing Search Results, page 168.

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See *Enterprise PeopleTools PeopleBook: Security Administration*

Note. This setup is valid only when creating person IDs from the Personal Data (PERSONAL_DATA) component for commercial HRMS and the Employee Hire (EE_HIRE) component for Federal HRMS.

Enabling the Auto Search/Match Feature

You enable Automatic Search/Match processing in HRMS by selecting the Perform Automatic Search/Match check box on the Person Object Installation page (INSTALL_PERSON).

When you select the check box, the system checks to see if a Search Parameter and a Search Result code have been associated with the PERSONAL_DATA component (or the EE_HIRE component for Federal). If it finds codes, it displays these rule names. If not, the system generates a warning informing you that Automatic Search/Match processing will not occur until you associate Search Parameter and a Search Result code with the PERSONAL_DATA or EE_HIRE components.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types, page 207.

Understanding Automatic Search Conditions

Search/Match uses phone and email values to perform the search only when a phone or email value is marked as preferred. Therefore, to use PhoneRule and EmailAddressRule inside a search rule triggered automatically when you save a new ID, the ID must have a preferred phone number and preferred email address.

When Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule are inside a search rule triggered when you save a new person ID, Search/Match uses the address fields for only the home address type to perform the search. That is, if any address type other than *HOME* is entered, Search/Match does not use the address fields as search criteria.

Setting Up Search/Match

To set up Search/Match use the Search Match Rules (HCR_SM_RULE), Search/Match Parameters (HCR_SM_PARM), Search/Match Result Fields (HCR_SM_RSLT_FLDS), Search/Match Results (HCR_SM_RESULT), and Search/Match (HCR_SM_SEARCH) components.

This section discusses how to:

- Define search rule codes.
- Define search parameters.
- Define search permissions.
- View or add Search/Match result fields.
- Configure Search/Match results.
- Enter search results details.
- Define search results exceptions.
- Configure search result permissions.

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Pages Used to Set Up Search/Match

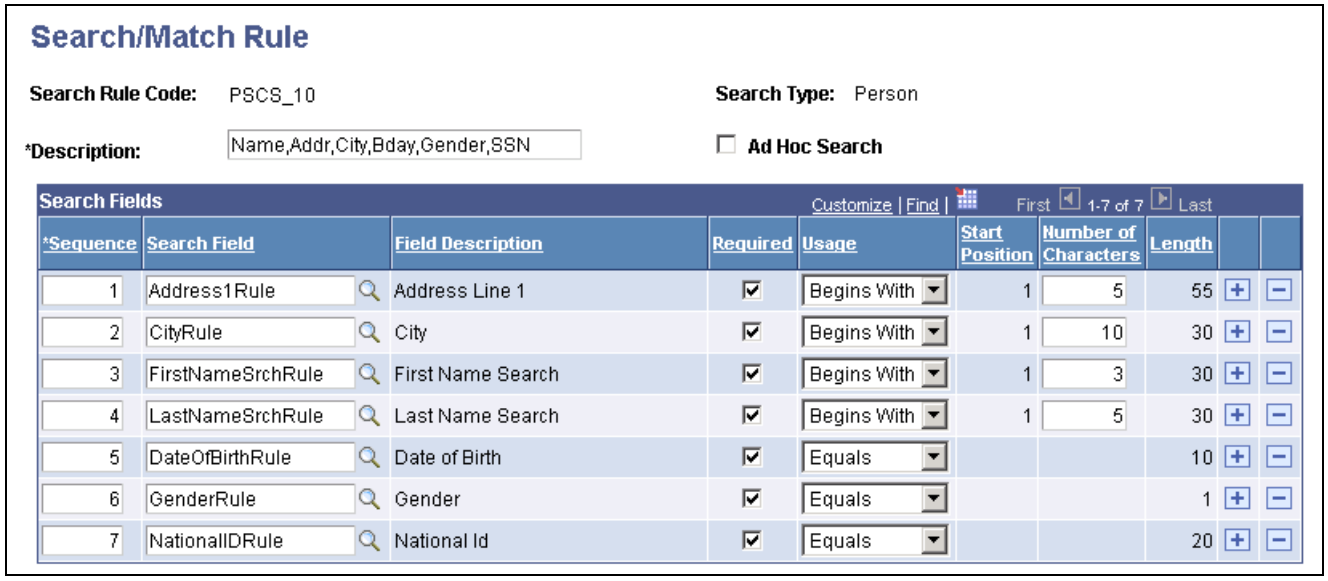
Page Name	Object Name	Navigation	Usage
Search/Match Rule	HCR_SM_RULE	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Rules	Define sets of fields to search for and identify how to search for them.
Search Parameters	HCR_SM_PARM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Permissions	HCR_SM_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Search/Match Result Fields	HCR_SM_RSLT_FLDS	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Result Fields	View or add fields that are available to define the search results.
Search Results	HCR_SM_RESULT	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Results	Specify which result fields to include in the search results and control how to display their values. **Note.** Be careful not to confuse this page with the page also called *Search Results* with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.
Search Results Detail	HCR_SM_RDTL_PG	Click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option.	Define the page to use to view more information about a specific ID returned by Search/Match.
Search Results Exceptions	HCR_SM_RESULT_EXCP	Click the Exceptions link on the Search Results page.	Define field-level security exceptions to the data display control that is set on the Search Results Permissions page

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Page Name	Object Name	Navigation	Usage
Search Result Permissions	HCR_SM_RSLT_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions	Identify who should have access to this search result code. Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

Defining Search Rule Codes

Access the Search/Match Rule page.



Search/Match Rule page

Ad Hoc Search Select to permit ad hoc searches from this search rule.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Search Fields

Search fields are delivered with your system.

Warning! Adding new search fields require significant programming effort and is not recommended.

Sequence Enter the order in which you want the search fields to appear when used inside a search parameter.

Search Field and **Field Description** Select each search field that you want to assign to this search rule code. When you exit the field, the system displays the associated description. Search fields are the fields on which users are permitted to search.

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Search fields are delivered with your system. Adding or modifying a search field value requires a significant programming effort. Do not attempt to delete a search field.

Note. When you include name, national ID, phone, email, or address fields in the rule without the types (Name Type, National ID Type, phone type, email type or address type), the system searches on all national IDs, phones, emails or addresses in the system for that individual.

Required Select this check box to require a value in the search field to find a potential match on this search rule. Selecting this check box is useful for making the rule more restrictive.

If the check box is not selected, the system accepts blank or nonexistent for this field inside this search rule. For example, if all the fields inside a search rule are marked as required, the user must provide data for each of those search fields to find a match on this rule. However, if the Required check box is not selected, for example, for Date of Birth, the user can still search on that search rule without specifying a date of birth.

Usage Identify how you want the search to evaluate the field value:

Begins With: The value must begin with this data. When you select this value, the Start Position field appears with a default value of *1,*and the Number of Characters fields are available for you to define. You cannot modify the start position default value.

Contains: The value must contain this data but can be preceded or followed by other data. When you select this value, the Start Position field appears with a default value of *1,*and the Number of Characters fields are available for to you define.

Equals: The value must be exactly equal to this data.

Not Used: Do not use this field value in this search.

Start Position and **Number of Characters** Enter the character position where you want the compare to start, and enter the number of characters from that start position to include in the compare.

For example, if the usage selected for National ID is *Contains*, and you enter a start position of 3 and the number or characters of 5, the system compares against the 3rd, 4th, 5th, 6th, and 7th characters in the field value. It will return matching IDs for which the National ID contains these 5 characters.

If the usage selected was *Begins With,* the start position is has a default value of *1*and you need to specify how many characters from the first character that Search/Match should use to perform the search.

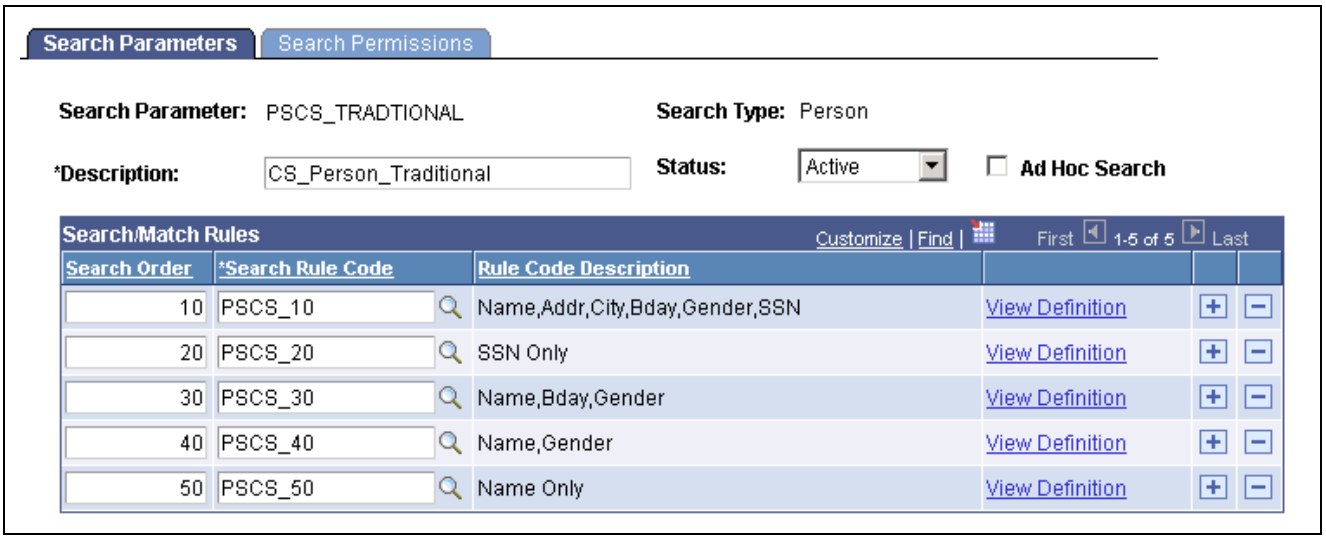
Length Indicates the number of characters in the search field. When you exit a particular field in the Search Field column, the system displays the total number of characters in the associated field.

See Chapter 7, “Setting Up and Working with Search/Match,” Understanding Search/Match, page 149.

Defining Search Parameters

Access the Search Parameters page

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Search Parameters page

Ad Hoc Search Select to permit only ad hoc searches from this search parameter.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *John*).

Note. Automatic search cannot be performed from a search parameter set to permit ad hoc searches.

Search/Match Rules

Search Order Enter the order in which to apply the search rule codes of this search parameter. Enter the most restrictive search rule in the lowest order number and the least restrictive search rule in the highest order number.

You can reorder the search rules at any time. When you reorder the rules and save the page, the system displays the rules in the most recent numerical order that you entered.

Search/Match processes the lowest order search rule first; if it finds one or more possible matches, it stops the search and returns the results. If it finds no results, it continues to the next search rule, and so on.

In the search results, the system displays the search order number that corresponds to the search rule where potential matching IDs are found.

You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when theAd Hoc Search check box is selected.

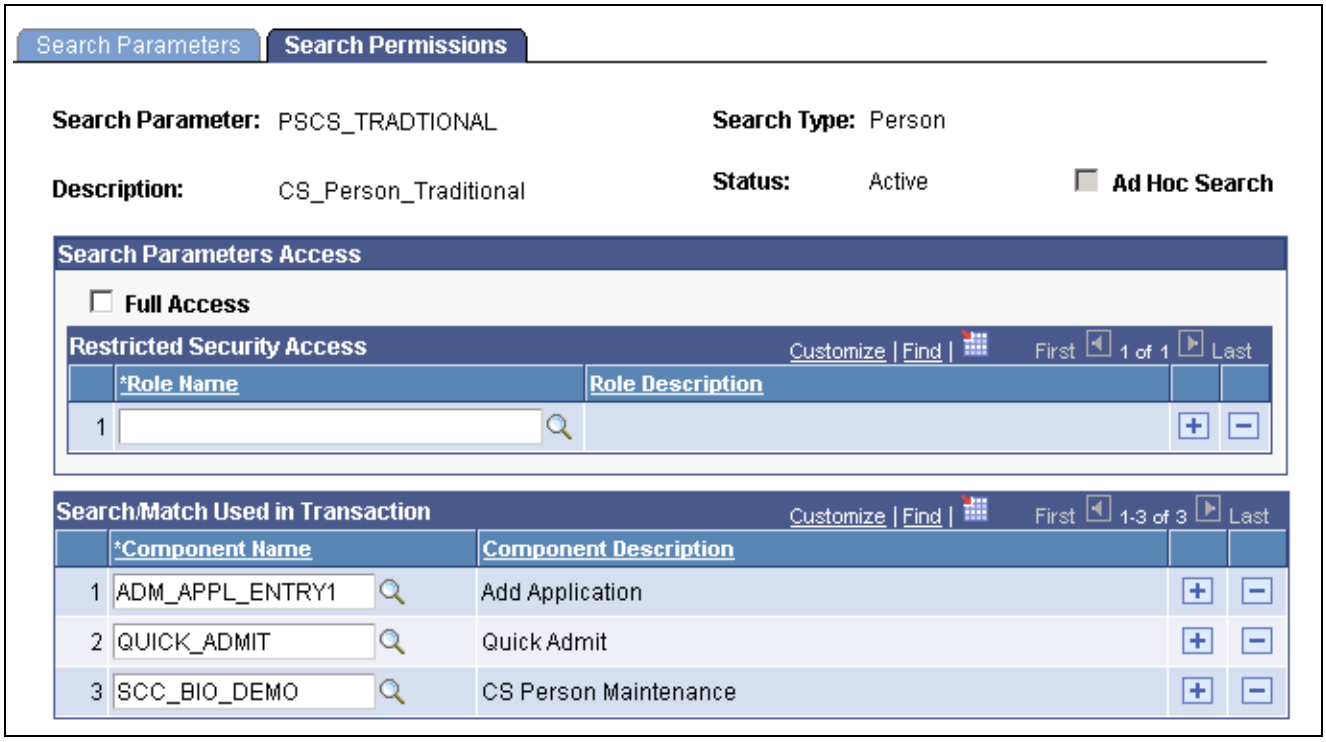
Search Rule Code and **Rule Code Description** Enter the search rule code to use. When you exit the field, the system displays the search rule description. You must enter at least one search rule to create a valid search parameter.

View Definition Click this link to access the Search/Match Rule page on which you can view or edit the rule definition.

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Defining Search Permissions

Access the Search Permissions page.



Search Permissions page

Search Parameters Access

Full Access Select to enable all users to use the search parameter code.

Restricted Security Access

This area appears only when the Full Access check box is not selected.

Role Name and **Role Description** Restrict the use of this search parameter code to users that have specific roles inside their security profile.

Search/Match Used in Transaction

Component Name and **Component Description** If you want to enforce the use of Search/Match when adding a new ID, select the component name where adding a new ID occurs. The system will then initiate Search/Match when a user enters the data to create a new ID and saves the transaction. You can restrict the search to specific components whether you give permissions to all roles or only to specific roles.

Note. A component name can be associated with only one search parameter. However, the same search parameter can be used inside several component names. Select all components where the search parameter should be used.

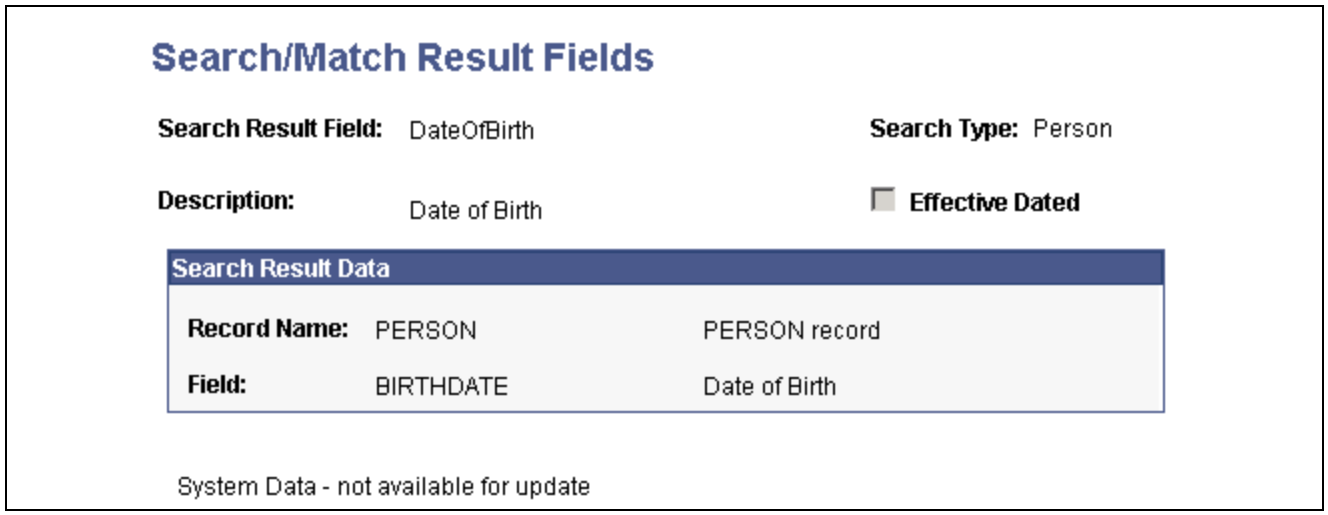
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Note. This field is available only when the Search Type is *Person* or *Organization.*

See Chapter 7, "Setting Up and Working with Search/Match," Understanding Search/Match, page 149.

Viewing or Adding Search/Match Result Fields

Access the Search/Match Result Fields page.



Search/Match Result Fields page

Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the predefined search fields. You can, however, select additional fields to make available for your search result codes.

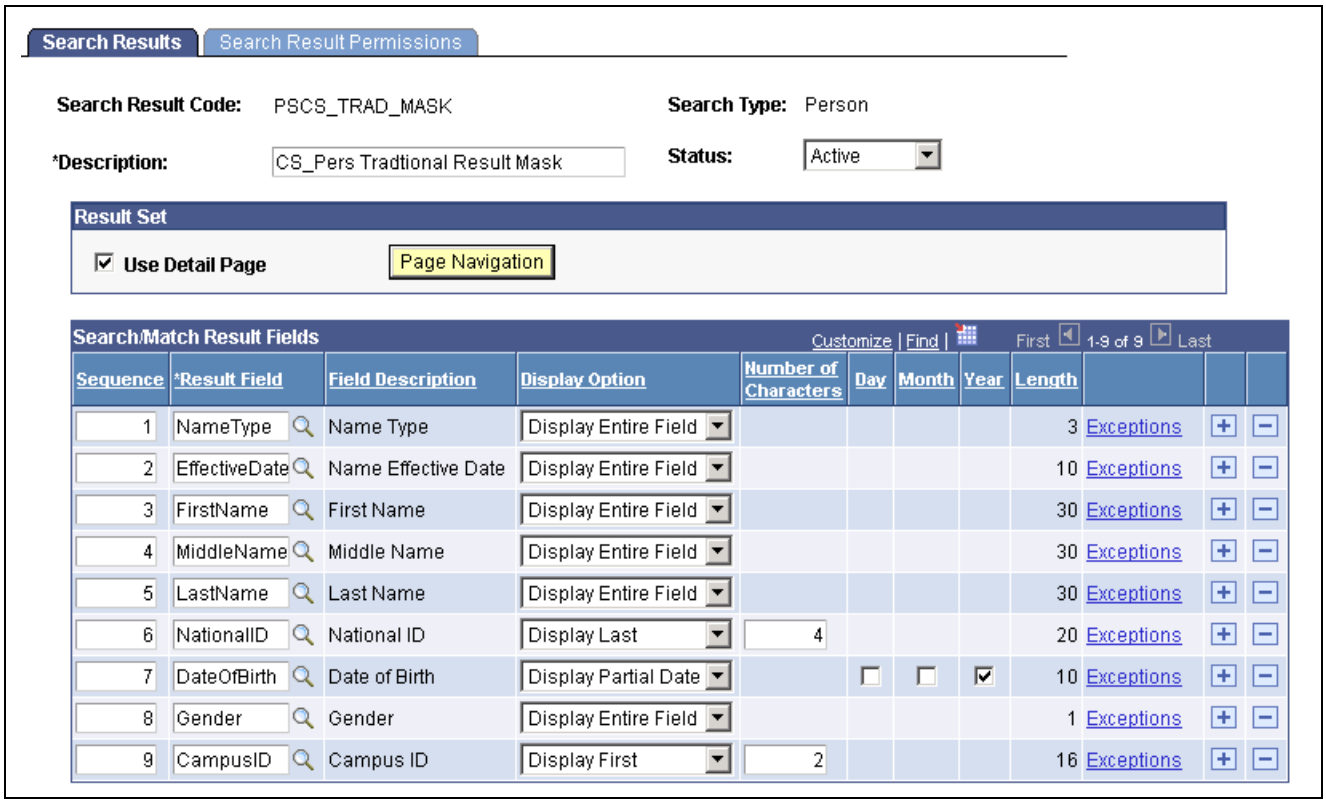
When you select *Add a New Value*and enter a name for the results field, the Search/Match Result Fields page appears with enterable fields for you to select the record and field to make available within the search results. To control how the values for a field appear in the results, use the Search/Match Results setup page.

Note. When search result fields are created based on records that are either effective-dated or type-related (such as address type, email type, phone type, and so on), Search/Match returns a row for each of the dates (historical, current and future dates) and types. For example, the field Gender is included in the PERS_DATA_EFFDT record. If you use Gender as a search result field, then a person with multiple rows on PERS_DATA_EFFDT will display multiple rows with the same gender in the search results grid. This is to make sure the evaluation of potential duplicate IDs is done across all dates and types applicable to each ID. If your organization prefers to see a limited number of rows, you can create the search result fields based on a view that could include logic to limit the effective date to display only current information or logic to return only a specific type (for example select address information where Address Type is *Home*).

Configuring Search/Match Results

Access the Search Results page.

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Search Results page

Result Set

Use Detail Page Select this check box to display a Detail link beside each ID returned from a search.

When you select Use Detail Page, the Page Navigation button appears.

Page Navigation This button appears only when the Use Detail Page check box is selected.

Click to access the Search Results Detail page, on which you can define the page to which you want users to be directed to see more details about a specific ID.

Note. To be transferred to the page that you define here, the user must have security access to the page.

Search/Match Result Fields

Sequence Enter the order by which the system displays results in the in the Search/Match results grid. You can reorder the result fields at any time. When you reorder the fields and save the page, the system displays the result fields in the most recent numerical sequence that you entered.

Result Field and **Field Description** Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields).

The result fields are defined in the Search/Match Result Fields page.

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Display Option Displays the default display control for that field. You can override this. Select *Display Entire Field* or *Mask Entire Field* to display or hide the entire field value respectively . The other options are:

Display First: Displays the first specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the beginning of the field value.

Display Last: Displays the last specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the end of the field value.

Display Partial Date: Displays the specified parts of a date field value. When you select this, the Day, Month, Year check boxes appear. You must select which parts of the date to display. For example if you select *Year,* only the year will appear.

Number of Characters Enter the number of first or last characters of a field value to display.

Day, Month, Year Select the parts of the date to display for a date value.

Length Displays the number of characters possible for the field value.

Exceptions Click this link to access the Exceptions page, on which you can define field-level exceptions to these results.

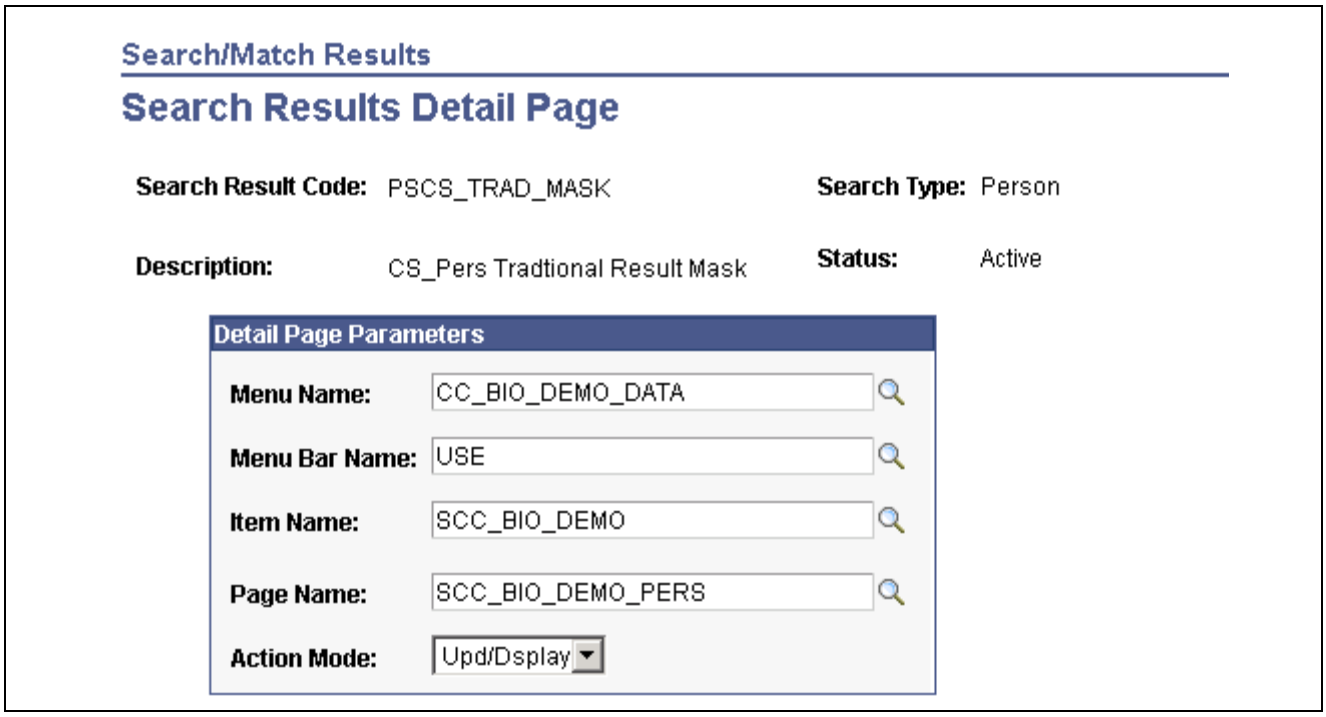
Warning! Search/Match returns all potential matching IDs regardless of data permission security. You must use field-level security to mask or partially mask sensitive data.

See Chapter 5, "Setting Up and Administering HRMS Security," page 37.

Entering Search Results Details

Access the Search Results Detail page.

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Search Results Detail page

Detail Page Parameters

Menu Name, Menu Bar Name, Item Name, and **Page Name** — Select each item that corresponds to the page that you want to use to provide more details about a specific ID.

Action Mode — Select the action mode to define in which mode you want your users to access the detail page. Options are:

Add

Correction

Data Entry

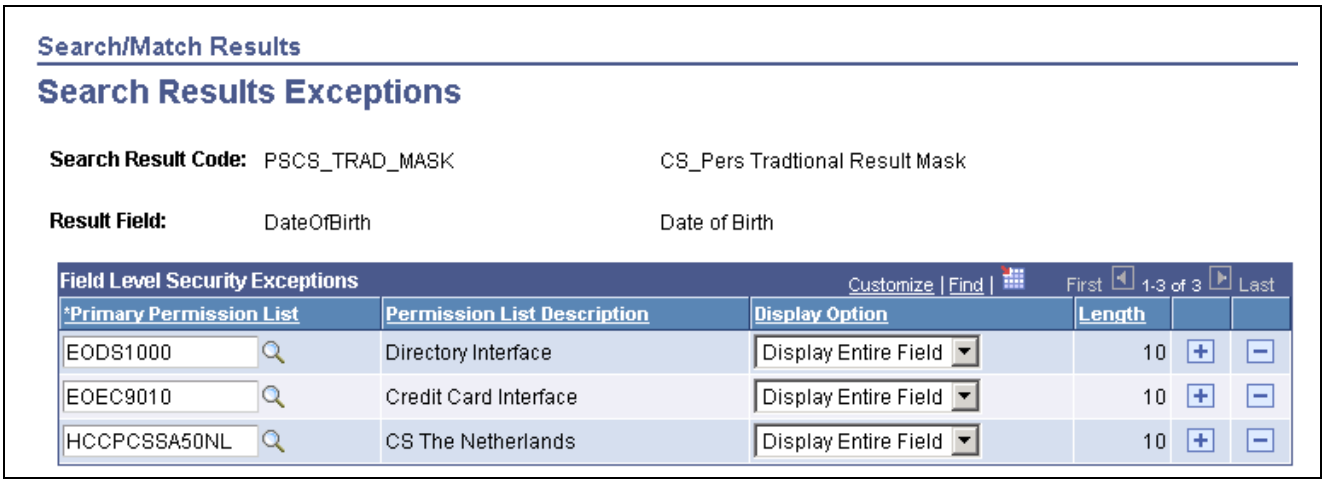
Update/Display

Update

Defining Search Results Exceptions

Access the Search Results Exceptions page.

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Search Results Exceptions page

You can define exceptions to the search results that you set up on the Search Results page. For example, you might have partially masked the birth date field in your search results, but you want the entire field to appear for those who have a need to know. Using primary permission lists, you can set those exceptions here.

See Chapter 5, "Setting Up and Administering HRMS Security," page 37.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Field Level Security Exceptions

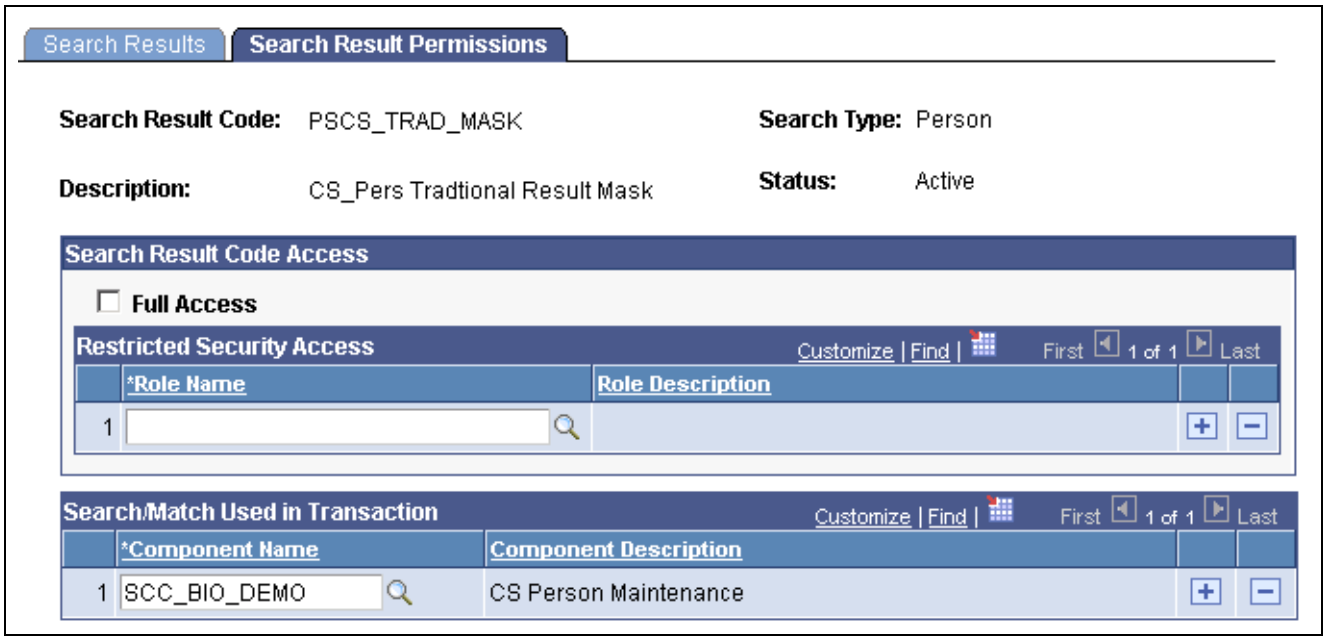
Primary Permission List and **Permission List Description** — Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.

Display Option — Select the display option to use as the exception to the display option selected on the Search Rules page.

Configuring Search Result Permissions

Access the Search Result Permissions page.

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Search Result Permissions page

Full Access Select this check box to enable all users to use the search result code

Role Name and **Role Description** Enter roles to restrict the use of this search result code to users that have this role inside their security profile.

Component This field is available only when the Search Type is *Person.*

If you use automatic search and want to display a warning message to alert users when potential duplicate IDs exist and you want to display the results of the automatic search, select the same component name or names that you selected on the Search Permissions page for the search parameter. You can restrict the search to specific components whether you give permissions to all roles or to only specific roles.

Note. A component name can be associated with only one search result code. However, the same search result code can be used inside several component names. Select all components where the search result code should be used. If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a Search Results page showing the matching IDs that were found.

See Chapter 7, "Setting Up and Working with Search/Match," Automatic Search, page 150.

See Also

Chapter 7, "Setting Up and Working with Search/Match," Viewing Search Results, page 168

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Working with Search/Match

This section provides an overview of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discusses how:

- Select criteria for a search.
- View search results.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Enterprise Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft Talent Acquisition Management) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

See Also

Chapter 7, “Setting Up and Working with Search/Match,” Automatic Search, page 150

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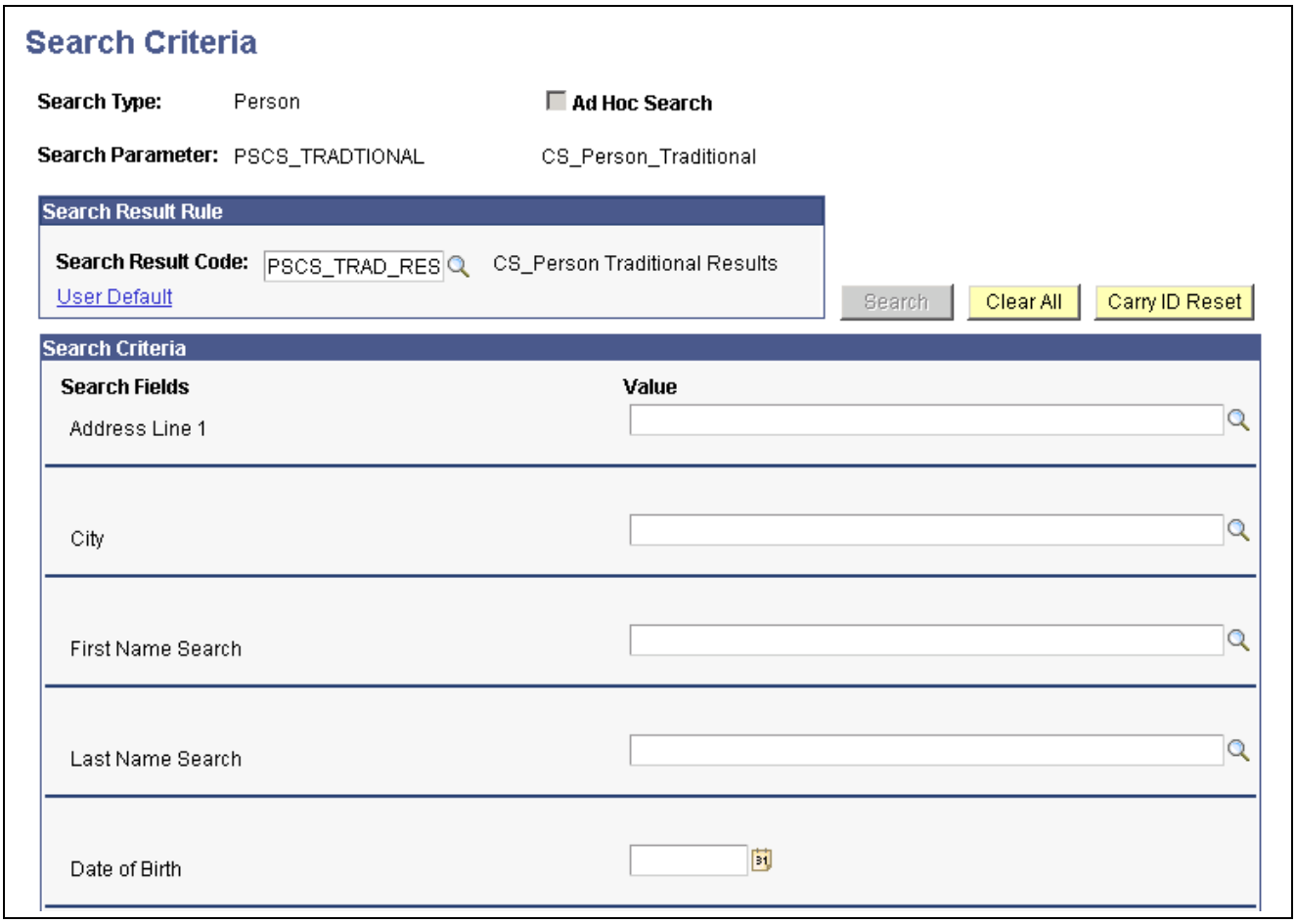
Pages Used for Search/Match

Page Name	Object Name	Navigation	Usage
Search Criteria	HCR_SM_SEARCH	• Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match, Search Criteria • Workforce Administration, Personal Information, Search for People, Search Criteria	Enter criteria to search for duplicate or multiple records.
Default Search Result	HCR_SM_USERDFLT	Click the User Default link on the Search Criteria page.	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results	HCR_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of a manual search and investigate potential duplicate IDs. **Note.** Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Selecting Criteria for a Search

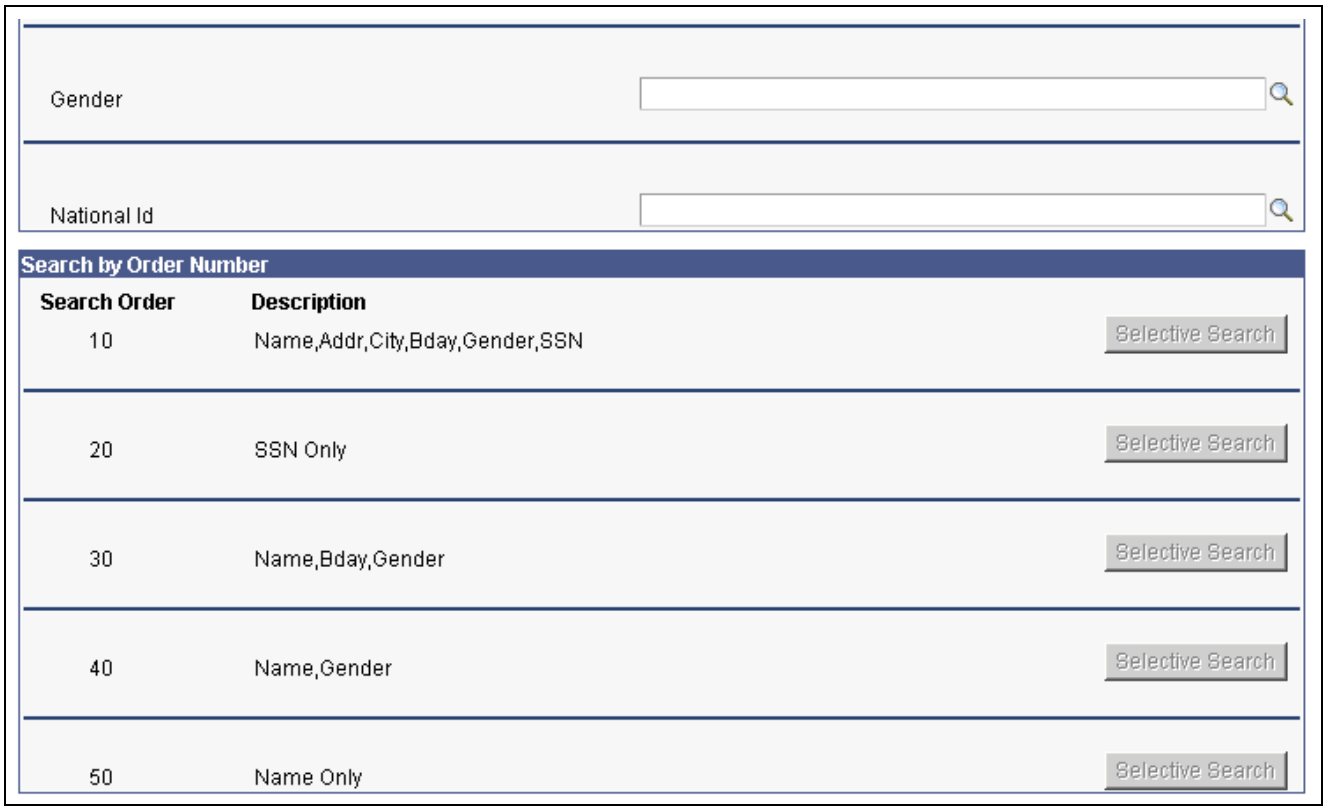
Access the Search Criteria page.

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Search Criteria page (1 of 2)

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Search Criteria page (2 of 2)

Search Type The system displays the search type *(Person)* selected to access the page. If you have licensed PeopleSoft Talent Acquisition Management, you could have selected *Applicant*, and if you have licensed PeopleSoft Campus Solutions, you could have selected *Organization.*

Search Parameter Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page enables you to select only the search parameters to which your security roles permit you access.

Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, click the Save Search Criteria link on the search dialog page to save it prior to accessing the Search/Match page. Then, in the future, you can select it from the Use Saved Searchprompt.

Ad Hoc Search The system selects this to indicate that the Search Parameter code is set to perform a ad hoc search.

An ad hoc search enables you to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John,* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an Operand field appears for each search field. The Operand field enables you to perform a search that begins with, contains, or equals the search value that you enter.

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Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear.

See Chapter 7, "Setting Up and Working with Search/Match," Defining Search Parameters, page 154.

Search Result Rule

Search Result Code Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent that you are looking for

User Default Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type.

The system permits one default search result code per search type for each user ID.

Carry ID Reset Click to reset a carried ID to *New.*

On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click Carry ID Reset, the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276.

Search Criteria

Search Fields The system displays each of the search fields associated with the search parameter that you selected.

Operand These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the Ad Hoc Search check box and hides the Search by Order Number area of the page.

Select the operand to perform the search. The valid values are *Begins With, Contains,* and *Equals.* These values are delivered as translate values and should not be changed.

Value For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

Clear All Click this button to clear all entries in the Value fields.

Search Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page.

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Note. When you click Search, the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the Selective Search button for that order number.

Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

When you enter criteria in the Value fields, the Selective Search button for the search order defined with the fields becomes available.

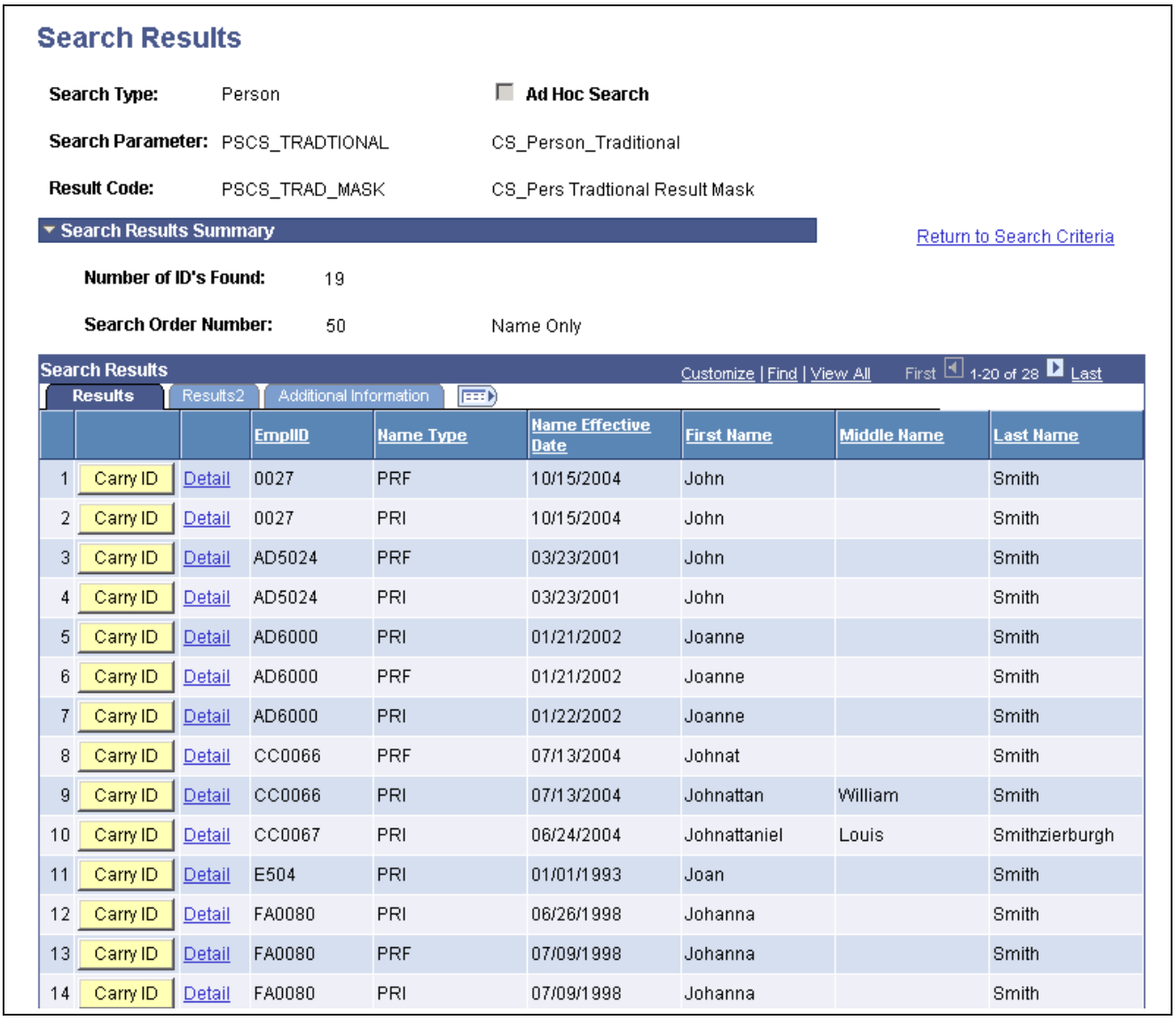
Click the Selective Search button to conduct specific searches.

When the search is complete, the system transfers you to the Search/Match Results page.

Viewing Search Results

Access the Search Results page.

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Search Results

Search Type: Person — Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_MASK — CS_Pers Tradtional Result Mask

Search Results Summary — Return to Search Criteria

Number of ID's Found: 19

Search Order Number: 50 — Name Only

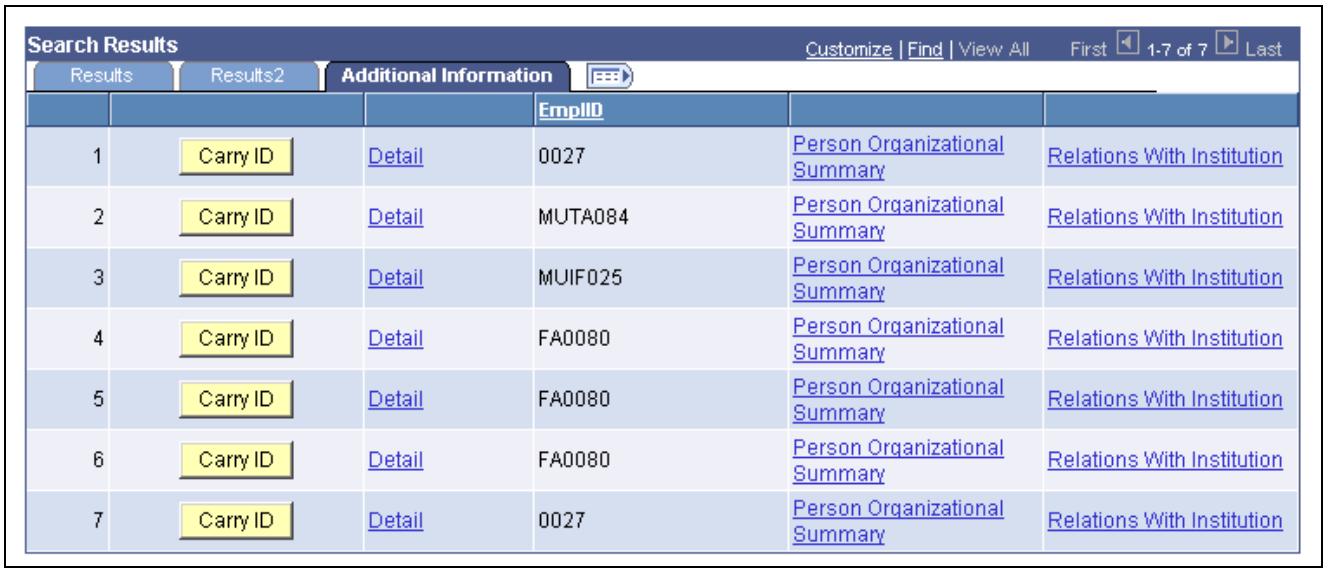
Search Results — Customize | Find | View All — First 1-20 of 28 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith
3	Carry ID	Detail	AD5024	PRF	03/23/2001	John		Smith
4	Carry ID	Detail	AD5024	PRI	03/23/2001	John		Smith
5	Carry ID	Detail	AD6000	PRI	01/21/2002	Joanne		Smith
6	Carry ID	Detail	AD6000	PRF	01/21/2002	Joanne		Smith
7	Carry ID	Detail	AD6000	PRI	01/22/2002	Joanne		Smith
8	Carry ID	Detail	CC0066	PRF	07/13/2004	Johnat		Smith
9	Carry ID	Detail	CC0066	PRI	07/13/2004	Johnattan	William	Smith
10	Carry ID	Detail	CC0067	PRI	06/24/2004	Johnattaniel	Louis	Smithzierburgh
11	Carry ID	Detail	E504	PRI	01/01/1993	Joan		Smith
12	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
13	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
14	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith

Search Results page for a manual search

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Search Results

Customize | Find | View All First 1-7 of 7 Last

Results | Results2 | Additional Information

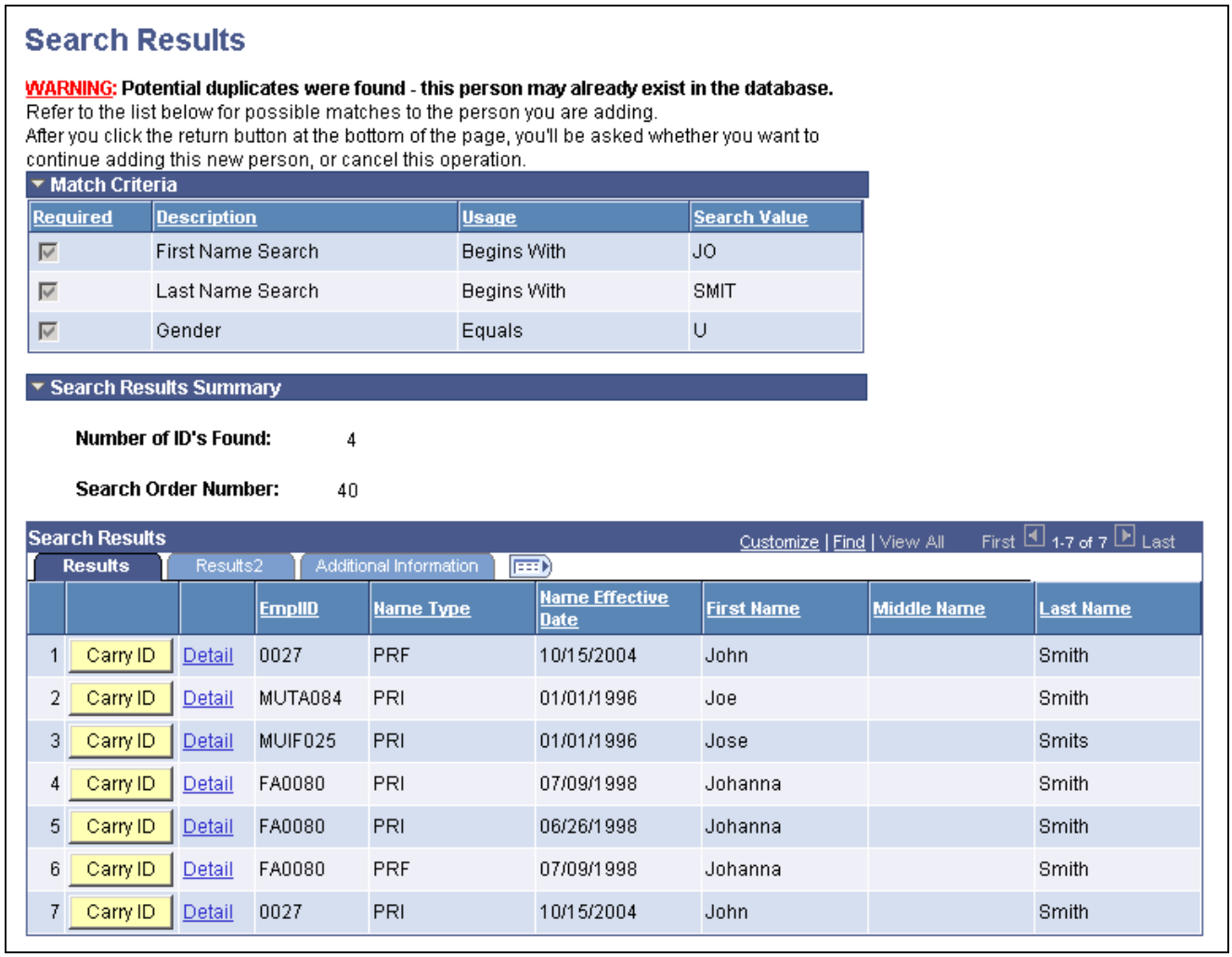
			EmplID		
1	Carry ID	Detail	0027	Person Organizational Summary	Relations With Institution
2	Carry ID	Detail	MUTA084	Person Organizational Summary	Relations With Institution
3	Carry ID	Detail	MUIF025	Person Organizational Summary	Relations With Institution
4	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
5	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
6	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
7	Carry ID	Detail	0027	Person Organizational Summary	Relations With Institution

Search Results page, Additional Information tab (for an automatic search)

When you enter criteria on the Search Criteria page and click Search or any of the search by order number Selective Search buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that enables creation of IDs. When you try to add an ID on a component that is set up that way and Search/Match detects potential duplicates at save time, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data entered to create the ID and what where the data used to perform the automatic search.

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Search Results

WARNING: Potential duplicates were found - this person may already exist in the database.
Refer to the list below for possible matches to the person you are adding.
After you click the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

Match Criteria

Required	Description	Usage	Search Value
☑	First Name Search	Begins With	JO
☑	Last Name Search	Begins With	SMIT
☑	Gender	Equals	U

Search Results Summary

Number of ID's Found: 4

Search Order Number: 40

Search Results — Customize | Find | View All — First 1-7 of 7 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	MUTA084	PRI	01/01/1996	Joe		Smith
3	Carry ID	Detail	MUIF025	PRI	01/01/1996	Jose		Smits
4	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith
5	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
6	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
7	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith

Search Results page, Results tab (automatic search)

See Chapter 7, "Setting Up and Working with Search/Match," Understanding Search/Match, page 149.

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click Carry ID to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Number of ID's Found: Displays the number of IDs that met the search criteria.

This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

Search Order Number Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

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Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Carry ID Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.

Detail The Detaillink appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results, Additional Information Tab

This tab appears only when the search type is *Person.*

Person Organizational Summary Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.

Relations With Institution Click to access the Campus Solutions Relations With Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Note. This link is used by customers who are also using PeopleSoft Campus Solutions and only shows if you have selected the Student Administration check box and/or the Contributor Relations check box on the Installation Table - Products page (INSTALLATION_TBL1).

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CHAPTER 8

Setting Up and Working with Languages

This chapter provides an overview of language support in PeopleSoft and discusses how to:

- Set language preferences.
- Work with double-byte characters.

Understanding Language Support in PeopleSoft

A key part of any multiple-country system is language support. PeopleSoft streamlines the process of using multiple languages. For example, to change from one language to another during a session, you change the contents of only one field, and the system changes to the new language. You can change from German to English to French and back to German all in one session. This section introduces you to language support in PeopleSoft.

PeopleSoft uses several methods to ensure full multilingual capabilities. PeopleTools contains built-in ways of translating field labels, page displays, and menu items. When you log in to the system, everything appears in your language of preference, assuming that it has been translated.

If you modify PeopleSoft by adding new fields, pages, or menu items, you can use the built-in PeopleTools capabilities to translate those items into your supported languages.

To maintain full language capability when you modify your application, you enter translations of any new items. If you use only one language and enter new items in that language, that's fine. However, if you use more than one language and you do not translate the new items, they appear in your original language, even when you change to another language. Then you may see more than one language on your page.

This table lists the supported languages and language codes:

Language Code	Language
CFR	Canadian French
DAN	Danish
DEU	German
DUT	Dutch
ESP	Spanish
FRA	French
ITA	Italian

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Language Code	Language
JPN	Japanese
KOR	Korean
POL	Polish
POR	Brazilian Portuguese
SVE	Swedish
ZHS	Simplified Chinese
ZHT	Traditional Chinese

Note. The translation of objects that we deliver is performed once, before we distribute the system, and includes all the pages and menu items that are in the application. However, you must translate new field labels and any data—names, comments, long descriptions, and short descriptions—for each new record that you create or in the data that you add.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Setting Language Preferences

This section discusses how to:

- Use the Language Preference page.
- Use the International Preferences page (INTERNATL_PREF).

Note. PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view a PeopleSoft application in any supported language.

Using the Language Preference Page

PeopleSoft enables you to view a Foreign Language sign-on page for each language that is supported by the system. Because you are viewing PeopleSoft pages through an internet browser, you must be sure that the browser accepts the language that you want to use. Check the language preferences of your browser to select the correct options.

Once setup is established, click the Language Name button to view the sign-on page in the specified language. The language you select determines the language in which the entire application is displayed in the PeopleSoft Internet Architecture.

Note. The Language Code used in My System Profile page (USER_SELF_SERVICE) is applied only when you run reports and produce emails.

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Using the International Preferences Page

After you log in to a PeopleSoft application, you can change your language preference anytime during your session on the International Preferences page. When you change your language preference, everything appears in the new language, assuming that it's translated. If you change your language of preference, the language code change isn't written to the database, but is stored in PeopleTools memory for the duration of the current session.

The language code you indicate is the language that the system uses for future pages that are displayed during the current session. This is the language of the session until you either log off or change your language preference. The tool set uses the language code to apply country-specific formats for numbers, dates, and currencies. If you change the language code during a session, your user profile language preference is not affected. The next time you log in, you'll see the language that is associated with your user ID.

Making a change means that everything you see—pages, menus, and field contents—appears in your new language preference.

Note. Your PeopleSoft language selection is independent of your Microsoft Windows language options. To change your Windows language parameters, select Start, Settings, Control Page.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Enterprise PeopleTools PeopleBook: Security Administration

Working with Double-Byte Characters

This section provides an overview of double-byte characters and discusses how to:

- Configure your system for alternate character functionality.
- Enter alternate character information.
- Find records using phonetic searching.
- Working with alternate character system architecture.

Understanding Double-Byte Characters

PeopleSoft HRMS uses an alternate character architecture and a related language table architecture to enable users to use both alphanumeric and double-byte character sets to enter data and to switch between a base language table and a related language table to view information in alphanumeric or double-byte characters.

The alternate character architecture accommodates languages (such as Japanese) that require the entry of proper nouns by using two-character sets to support phonetic sorting rather than binary sorting on proper nouns. For example, users who enter data in Japanese require functionality that enables them to enter proper nouns (such as names or descriptions) both in Kanji and by using a phonetic double-byte character set, such as Zenkaku Katakana. To accomplish phonetic sorting in PeopleSoft HRMS, configure your system so that the user can enter Japanese proper nouns twice: once in double-byte Kanji and once (phonetically) using Katakana or Hiragana.

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Important! (*JPN*) For Japanese users, it is important to determine a consistent method for entering phonetic character set information. The system applies a binary sort method to double-byte characters, and different characters with the same pronunciation aren't sorted together in PeopleSoft HRMS. For example, a Hiragana *Ma* character is sorted before a Hiragana *Mi* character and after a Hiragana *No* character. If a Katakana *Ma* character is included in the sort, it is sorted after a Katakana *Mi* character and appears only after all the Hiragana characters are sorted.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Understanding Alternate Character System Architecture

For certain names, addresses, and description fields in PeopleSoft HRMS, there is a corresponding alternate character field that is part of the record. This architecture enables the same field to be used differently for different language codes.

Alternate Character Fields Associated with Global Pages

The following table lists the alternate character fields and the global pages with which they are associated in PeopleSoft HRMS.

Page	Auxiliary Page	Field	Comments
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	
COMPANY_TABLE1	COMPANY_ACDESCR_SEC	DESCR_AC	
COMPANY_TABLE1	COMPANY_ACADDR_SEC	COMPANY_ACADDR_SBP	COMPANY_TBL.CITY_AC COMPANY_TBL.ADDRESS1_AC COMPANY_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
DEPEND_BENEF1	DEPENDBN_ACNAME_SEC	NAME_AC	
ESTAB_TBL1_GBL	ESTAB_ACDESCR_SEC	DESCR_AC	

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Page	Auxiliary Page	Field	Comments
ESTAB_TBL1_GBL	ESTAB_ACADDR_SEC	ESTAB_ACADDR_SBP	ESTAB_TBL.CITY_AC ESTAB_ TBL.ADDRESS1_AC ESTAB_ TBL.ADDRESS2_AC DERIVED_ GBL.POSTAL_BTN ADDR_POS_JPN_SEC
HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	
PERSONAL_DATA1 APP_PERSONAL_ DATA1	PERSDTA_ACADDR_ SEC	PERSDTA_ACADDR_ SBP	PERS_DATA_ EFFDT.CITY_AC PERS_DATA_ EFFDT.ADDRESS1_AC PERS_DATA_ EFFDT.ADDRESS2_AC DERIVED_ GBL.POSTAL_BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_ DATA1	PERSDTA_ACNAME_ SEC	NAME_AC	
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_ TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_ TBL1	TRN_INS_ACNAME_ SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_ SEC	NAME_AC	

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Search Records with Alternate Character Name Fields

The following PeopleSoft HRMS search records that have NAME_AC (alternate character name) as an alternate search key or subrecords that are included in search records, enable for Japanese input and display:

- NAMES
- NAMES_SS_TMP
- NE_INCIDNT_SRCH
- NE_PERSONAL_DTA
- OPR_ROWS_EE
- OPR_ROWS_EE2
- PERSON_NAME
- PERS_SRCH_ALL
- PHYSICIAN_SRCH
- PHYSICIAN_SRCH2
- SHS_EMPL_TAO
- SHS_EXEMPT_TAO
- SSF_PERSON_VW
- SUCCESS_TR_SRCH
- TRN_DMNDEE_SRCH
- TRN_INSTR_SRCH
- UPG_NAMES_TAO
- WCS_NAME_SCH_VW
- WF_PERSON_NAME
- WORKER_PROMPT

Note. This list includes only Human Resources system records.

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

The following reports in PeopleSoft Enterprise Human Resources sort on the Name field or on the Alternate Character Name field when the system base language and the report language are configured as shown:

Base Language Set To	Report Language Set To	Report Sorted By
English	Japanese	BASE.NAME_AC
Japanese	Japanese	BASE.NAME_AC

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Base Language Set To	Report Language Set To	Report Sorted By
English	English	BASE.NAME
Japanese	English	BASE.NAME

SQR/Crystal Reports

These SQR/Crystal reports are sorted phonetically for Japanese, based on the report and the base language configuration:

Report ID	Description
PER001	Department Action Notices
PER002	Employee Birthdays
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes
PER020	Employee Home Address Listing
PER023	Salary History
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

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Note. This list doesn't include country-specific regulatory reports that are sorted by Name.

Configuring Your System for Alternate Character Functionality

This section explains how to set up alternate character functionality in PeopleSoft HRMS.

Warning! Before you can enter double-byte characters and implement alternate character functionality in PeopleSoft HRMS, you must be using a Japanese-enabled database and a double-byte-enabled operating system. Otherwise, PeopleSoft HRMS can't validate double-byte characters in the alternate character fields.

To set up alternate character functionality in PeopleSoft HRMS:

1. Link the alternate character sets with language codes on the Installation Table - Alternate Character page (ALT_CHAR_TBL).

   These settings affect your entire PeopleSoft HRMS installation.

2. Enable the alternate character functionality for specific user IDs on the Org Defaults by Permission Lst page (OPR_DEF_TBL_HR).

   When you enable alternate character functionality for a user, the system displays the alternate character button to the right of all the fields on the Global menus that have an associated Alternate Character field.

   When you click the Alternate Character button, the system opens a page where you enter or display the field value in the alternate character set.

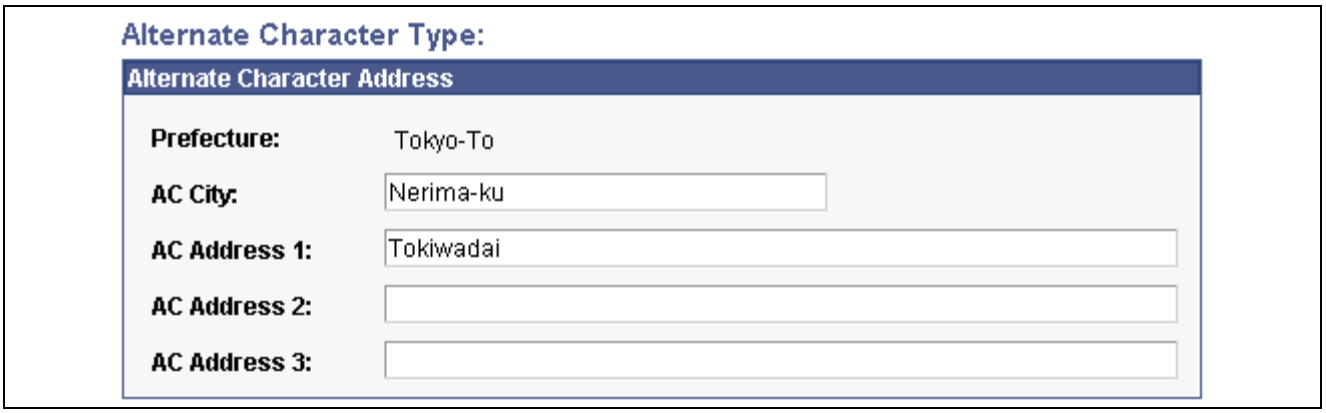
Entering Alternate Character Information

On pages on the Global menus in PeopleSoft Human Resources, you can access the alternate character fields for proper noun fields like Name, City, and Company Description. To access these fields, click the Alternate Character button that appears to the right of a field that has a corresponding Alternate Character field available.

Note. On the Name page, when the Format for Country is *JPN*, the Name and the Alternate Character Name fields appear on the page: You can enter information in both fields directly on the Name page. On the Address page, click a button to access the alternate character format. Whether the Alternate Character button appears on the Address page depends on the particular page and whether the Format for Country is set to *JPN*.

If you click the Alternate Character Address button in the Address History secondary page (ADDR_HISTORY_SEC), the system opens the alternate character Address page, such as the example that follows, where you can enter any proper noun information, such as street and city, in the designated alternate character format.

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Alternate Character Type page

Note. In the title bar, the system displays the alternate character type that is specified for the alternate character.

Once you enter alternate character information into an alternate character field and click OK to close the page, the system changes the appearance of the Alternate Character button on the page to indicate that alternate character information is available for the primary proper noun field on the main page.

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding an person and updating or adding information to the people's records in the system. If you are working with a Japanese-enabled system, you can enter a Japanese name phonetically as a search criterion.

For example, to update Japanese employee Noriko Kawamoto's Personal Data record, place the cursor in the Alternate Character Name field, enter the Japanese phonetic characters for *Kawamoto* , and click OK. The list box on the search record page displays all the names (sorted phonetically) that begin with *Kawamoto* in both Kanji and Kana.

Note. The phonetic value is the same as the base name value.

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CHAPTER 9

Setting Up and Working with Currencies

This chapter provides an overview of currency and discusses how to:

- Run currency setup reports.
- Configure currency precision.
- View multiple currencies.
- View information about current exchange rate calculations.

Understanding Currency

If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

Understanding currency in PeopleSoft is a two-part process:

- Understanding the mechanics of defining currency codes, types, exchange rates, and base currency, which are universal to HRMS.
- Understanding how some of the PeopleSoft HRMS applications use this information. For example, PeopleSoft Enterprise Global Payroll has extensive, application-specific currency functionality. For details of application-specific currency issues, see the application-specific documentation.

Note. Currency setup that is universal to PeopleSoft applications is discussed in another PeopleBook.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook, "Defining Currencies and Market Rates"

Configuring Currency Precision

This section provides an overview of currency precision and discusses how to:

- Activate currency precision.
- Report with currency precision.
- Expand a database for currency precision.

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Understanding Currency Precision

According to the ISO standard, currency precision can range from no decimals to 3 decimals. For example, U.S. dollar amounts have 2 digits to the right of the decimal; Japanese yen have none. To support this dynamic currency precision, PeopleSoft delivers all of its currency-sensitive amount fields with a standard length of 13.2; that is, 13 digits to the left of the decimal and 2 digits to the right. Optionally, with some modification, you can expand these amount fields in your system to a maximum of 15.3 digits. There is a controlled currency on the same record to control the display and processing of such amount fields.

PeopleSoft rounds all currency-sensitive amount fields to the currency precision of the controlled currency during all online or background processes. For example, in a database containing amount fields with a length of 15.3, Japanese yen are rounded to 123.000 and U.S. dollars are rounded to 123.230. The system doesn't place a nonzero amount after the decimal for a Japanese amount or after the second digit to the right of the decimal for a U.S. amount.

PeopleSoft displays the amount fields on the online pages with the proper precision. For example, it displays Japanese yen as 123 and U.S. dollars as 123.23. When entering an amount, you can't enter more than the defined precision; if you do, the system treats the entry as an online error.

PeopleCode programs and background processes round all currency-sensitive amount fields to the currency precision of the controlled currency.

Activating Currency Precision

Currency precision is a PeopleTools option; selecting this option activates all of its features. With the option turned off, the system displays amount fields as defined in PeopleSoft Application Designer and rounds them to the number of decimals defined there.

Activate the PeopleTools multicurrency option on the PeopleTools Options page (PSOPTIONS) by selecting the Multi-Currency check box. PeopleTools will then use the precision you specify in the Currency Code page (CURRENCY_CD_TABLE) for the currencies relating to monetary fields for which you have specified currency control fields. Some PeopleSoft applications are shipped with the Multi-Currency check box selected. You can change that default.

Note. Once you clear the Multi-Currency check box, selecting it again does not automatically round the existing transaction amounts. If you clear the Multi-Currency check box, PeopleSoft supports only the default amount field size of 13.2. It does not support the larger amount field size of 15.3.

See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools

Reporting with Currency Precision

Most PeopleSoft SQR reports display the currency-controlled amounts to the number of decimals that are defined by the associated currency. For example, a Japanese yen amount appears on a report as *123* and a U.S. dollar amount appears as *123.23*.

For reporting with Crystal Reports and PS/nVision (Excel), the amount appears as a 2-decimal number. You have to modify the reports if you want to show 3 decimals on these reports.

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Our third-party reporting tools don't fully support numeric fields that are greater than 15 digits. PS/nVision (Excel) uses an 8-byte float for numeric fields. This causes truncation after the fifteenth digit. Crystal Reports displays up to 16 digits correctly; for numbers that are greater than 16, Crystal Reports starts to insert nonsensical numbers into the decimal positions; however, this is a problem only with very large numbers. For any of these reporting tools, you should have accurate results up to the following amounts:

- Hundreds of trillions of yen (or lira): Precision = 0
- Trillions of dollars: Precision = 2
- Hundreds of billions of dinar: Precision = 3

For example, if you enter 2s into a 15.3 numeric database amount field, the following third-party reporting tools will display the value as:

Number of Digits	Crystal Reports	PS/nVision (Excel)	SQR
16	2,222,222,222,222.222	2,222,222,222,222.220	2,222,222,222,222.222
17	22,222,222,222,222.219	22,222,222,222,222.200	22,222,222,222,222.220
18	222,222,222,222,222.188	222,222,222,222,222.000	222,222,222,222,222.200

Expanding a Database for Currency Precision

With some PeopleSoft applications, you can expand your database from the original amount field size of 13.2 digits to 15.3 digits. For example, PeopleSoft supports the larger field size of 15.3 across the PeopleSoft Enterprise Financials, Distribution, and Manufacturing applications.

To expand your database:

1. Back up your database (optional).

   Although this step is optional, we highly recommend it. This way, you can recover your database if you experience any database integrity problems during the remaining steps.

2. Run Audit scripts.

   Run DDDAudit and SYSAudit from PeopleSoft Process Scheduler to ensure that the database is clean. Select PeopleTools, Process Scheduler, System Process Requests and enter a *Run Control ID*. Click Run. Specify the *Server* name of your environment, and select *DDDAUDIT* (and then *SYSAUDIT*) from the list of processes. Click OK to run the processes.

3. Review the script output to ensure a clean database.

   Locate the DDDAudit and SYSAudit reports in your environment, and review them to ensure that the database is clean.

4. Run FSINTLFD.DMS to populate the international field size table.

   Once the database is clean, run the script FSINTLFD.DMS to populate the international field size table INTL_FLDSIZ_TBL. Use DataMover to run this script. The system populates the international field size table with all the amount fields that have the controlled currency that is specified in Application Designer. The system calculates the new length by adding 2 digits to the left of the decimal and 1 digit to the right of the decimal. Before the system inserts new fields into the international field size table, it deletes all existing fields from the table.

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5. Verify the results by reviewing the International Field Size page.

   Select the International Field Size page. The Field Size - International column displays *15.3* for most of its fields. When compared with the Current Field Size, the values in the Field Size - International column should be 2 digits greater to the left of the decimal and 1 digit greater to the right of the decimal. In other words, a Current Field Size value of *13.2* should correspond to a *15.3* value in the Field Size - International column.

6. Run the PeopleTools process TLSINST1.SQR to change the field size on PSDBFIELD.

   Note. This SQR is also an application engine. You can access it on the PeopleTools, Utilities, International, Process Field Size page.

   Using SQRW, run PeopleTools SQR TLSINST1.SQR to change the field size on the PeopleTools table PSDBFIELD. This changes the PeopleTools definition values, but not the database field size.

   It also creates a report (TLSINST1.LIS) that lists all the pages that use Average or Maximum size page fields. As a standard of PeopleSoft Enterprise, all monetary amount fields use a Custom field size to avoid the overlapping of fields when the amount fields are expanded. Review the list of pages and make any adjustments that are necessary to preserve readability.

7. Review SQR.LOG for errors.

   The SQR log is created in C:\TEMP, unless otherwise specified. View the log to ensure that the field size value has been changed to *15.3*. Verify the result by randomly checking the field size, opening the various records containing amount fields shown in step 5. As you build the project, executing scripts to SQL alter tables, creating views, and indexing, closely monitor the execution of the scripts and review the error log.

8. Use SQL Alter all tables.

   a. Select PeopleTools, Application Designer, File, New, Project.
   b. Select File, Save Project As.
   c. Save the Project Name as *CURR_TBL*.
   d. Select Insert, Objects into Project.
   e. Select Object Type: Record and Type: Table.
   f. Click Insert under Record Name. The system displays a list of all the tables being populated.
   g. Click Select All, and click Insert again; click Close to close the page.
   h. Select Build, Project.
   i. In the Build Options group box, select Create Indexes and Alter Tables.
   j. Under Build Execute Options, be sure that the *Build* script file is selected.
   k. Review the script file with your database administrator (DBA), and execute the file using your recommended SQL query tool.

9. Use SQL Create all views.

   a. Select PeopleTools, Application Designer, File, New, Project.
   b. Select File, Save Project As. Save the Project Name as *CURR_VW*.
   c. Select Insert, Objects into Project. Select Object Type: Record and Type: View/Query View.
   d. Click Insert and then click Select All.
   e. Click Insert again; then click Close to close the page.
   f. Select Build, Project.

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g. In the Build Options group box, select Create Views.

h. Under Build Execute Options, select the Build script file.

i. Review the script file with your DBA, and execute it using your recommended SQL query tool.

10. Run Audit scripts again.

    Run DDDAudit and SYSAudit again to make sure that the database is clean.

11. Manually change reports.

    PeopleSoft has enhanced most SQR reports to accommodate 15.3 amount fields. However, some of them are too crowded, and their amount field sizes remain 13.2. If the last digits of the decimals are important to you, update the SQR to 12.3 to display 3 decimals on the report. Following is a list of reports that require manual changes by application to accommodate the third digit of the decimal:

General Ledger	GLS1001, GLS1003, GLS7000, GLS7009, GLS7010, and GLS7012
Receivables	AR30001 (9.2), AR30002 (9.2), AR30003 (9.2), and AR30004 (12.2)

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Viewing Multiple Currencies

To open the Display in Other Currency page, click the Display In Other Currency button on any page that supports multicurrency.

Many of the pages that display earnings or amounts in one currency enable you to view the amounts in another currency. This is an integral feature of the PeopleSoft Economic and Monetary Union (EMU) support and it enables you to view conversions across all currencies that are supported by the system.

Viewing Information About Current Exchange Rate Calculations

The Exchange Rate Detail page displays information about the current and historic exchange rates, the From currency, the To currency, and the Rate of exchange that you used in your currency conversion. Click Return to return to the Display In Other Currency page.

Running Currency Setup Reports

This section lists the pages used to run currency setup reports.

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Pages Used to Run Currency Setup Reports

Page Name	Object Name	Navigation	Usage
Currency Rate Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report, Run Control	Use this page to run the Currency Rate Table report (PER714) prints information about exchange rates.
Currency Code Table - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table, Run Control	Use this page to run the Currency Code Table report (PER713) prints information about each currency defined in your Currency Code table.

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CHAPTER 10

Setting Up and Working with Frequencies

This chapter provides overviews of frequency IDs, frequency for compensation conversions, frequency in PeopleSoft Enterprise Global Payroll, and frequency in PeopleSoft Enterprise Payroll for North America, and discusses how to define a frequency ID and country-specific defaults.

Understanding Frequency IDs

This section discusses:

- Frequency IDs.
- Frequency with compensation rates.
- Frequency with payroll calculations.

Frequency IDs

Frequency IDs are used in PeopleSoft Enterprise Human Resources, Global Payroll, and Payroll for North America. Frequency IDs are defined on the Frequency Table component (FREQUENCY_TBL). Each frequency ID has a frequency type and an associated annualization factor that represents the number of times that the period occurs in the course of a year.

In PeopleSoft HRMS, you use frequency IDs to define the periods of time in which compensation is quoted, standard hours are completed, and people are paid, to list a few examples.

PeopleSoft delivers a set of standard frequencies that are PeopleSoft-maintained. You can define additional, customer-maintained frequencies for nonstandard periods. For example, you could define a monthly-type frequency with a nonstandard annualization factor of 13 to represent 13 monthly periods in a year

PeopleSoft-Maintained Frequencies

PeopleSoft delivers and maintains the following frequency IDs in the Frequency Table component:

Frequency ID	Description	Frequency Type	Annualization Factor
A	Annual	Annual	1
B	Biweekly	Biweekly	26
BMX30	Biweekly Mexico Factor 30.0	Biweekly	25.7142857

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Frequency ID	Description	Frequency Type	Annualization Factor
BMX34	Biweekly Mexico Factor 30.4	Biweekly	26.0571428
C	Contract	Contract	1
D	Daily	Daily	260
D365	Diaro 365 dias	Daily	365
D426	Daily 14 Payments	Daily	426
DMX30	Daily Mexico Factor 30.0	Daily	360
DMX34	Daily Mexico Factor 30.4	Daily	364.8
F	Every four weeks	Every four weeks	13
H	Hourly	Hourly	Use Standard Hours for Annualization
HMX30	Hourly Mexico Factor 30.0	Hourly	2880
HMX34	Hourly Mexico Factor 30.4	Hourly	2918.4008
JM	Japan Monthly	Monthly	12
M	Monthly	Monthly	12
M13	Monthly 13 payments	Monthly	13
M14	Monthly 14 payments	Monthly	14
Q	Quarterly	Quarterly	4
S	Semimonthly	Semimonthly	24
SMX34	Semimonthly Mexico Factor 30.4	Semimonthly	24.32

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Frequency ID	Description	Frequency Type	Annualization Factor
W	Weekly	Weekly	52
WMX30	Weekly Mexico Factor 30.0	Weekly	51.4285714
WMX34	Weekly Mexico Factor 30.4	Weekly	52.1142857

Frequency with Compensation Rates

When you associate frequency with compensation rates, you define the time period on which the compensation is based. For example, you might state a worker's base salary as 60,000 a year (annual frequency) or 5,000 a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or individual job records, the system uses the annualization factor that is associated with this frequency to convert the compensation to other frequencies.

When you set up PeopleSoft Human Resources, you can define default compensation frequencies at several levels. You can usually change that default value when the system enters it into other pages.

This table lists important pages on which compensation frequencies are either specified or used:

Component or Page	Default Compensation Frequency Value
Default Frequencies page (DFLT_FREQUENCY)	Specify default frequencies for each country and specify the order in which the system uses them to display base pay compensation in the Pay Rates group box on the Compensation page of the Job Data component.
Compensation page (JOB_DATA3) of the Job Data component (JOB_DATA)	Displays base pay compensation information in the frequencies that are specified for the country on the Default Frequencies page
HRMS Options page (INSTALLATION_TBL1B) of Installation Table component (INSTALLATION_TBL)	Set a default compensation frequency and a default work period for your organization. The system enters these default values in the Job Code table.
Job Code Profile page (JOBCODE_TBL1_GBL) of Job Code component (JOB_CODE_TBL)	Default compensation frequency and default work period values are taken from the Installation table.
Comp Rate Code Table component (COMP_RATECD_TBL)	Specify rate code frequencies on the Comp Rate Code table. The system enters these default values when you select the rate code in a pay components group box (found on a number of pages in PeopleSoft HRMS). You can also specify here whether the FTE (full-time equivalency) calculation should be applied to the compensation associated with the rate code.

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Component or Page	Default Compensation Frequency Value
Define Salary Plan component (SALARY_PLAN_TABLE)	Specify default frequency for components of pay assigned to salary steps.
Pay Group Table component (PAYGROUP_TABLE)	Specify daily and monthly frequencies for the pay group . The system uses the frequency information to calculate pay rates.

See Also

Chapter 13, "Setting Up Jobs," Classifying Jobs, page 296

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

Frequency with Payroll Calculations

Global Payroll and Payroll for North America use frequency to define how often certain events happen.

Global Payroll uses frequency IDs when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, Global Payroll also uses frequency defined on the Generation Control Frequency page (GP_GCTL_FREQUENCY).

Payroll for North America uses frequency IDs to define pay period frequency and to calculate pay rates and proration of pay.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Global Payroll, page 197

Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 201

Understanding Frequency in Compensation Rate Conversions

This section discusses:

- Factors applied to the compensation rate.
- Conversion of compensation rates to different frequencies.
- Job Data pay rate frequencies.

Factors Applied to the Compensation Rate

PeopleSoft HRMS calculates and displays compensation rates in the hourly, daily, weekly, monthly, and other frequencies using standard frequency conversion formulas. Depending on the frequency being converted, the system performs the calculations by applying one or more of the following to the compensation rate:

- Compensation frequency annualization factor.

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- Job standard hours.
- Standard work period frequency annualization factor.
- FTE (full-time equivalency) factor.

Frequency Annualization Factor

Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in the course of a year.

See Chapter 10, "Setting Up and Working with Frequencies," Frequency IDs, page 189.

Standard Hours and the Standard Work Period

When converting hourly compensation rates, the frequency conversion calculations use the job standard hours and the standard work period. Job standard hours define how many hours the worker should work in the job. The standard work period defines the work period in which the standard hours should be completed. You define the standard work period by selecting a frequency ID (and its annualization factor) as defined on the Frequency Table component.

You define the standard hours and the standard work period on the following pages:

Component	Page	Assignment Level
Installation Table	HRMS Options	Values for an organization
Org Defaults by Permission Lst (OPR_DEF_TBL_HR)	Settings (OPR_DEF_TBL_HR2)	Values for a primary permission list
Position Data (POSITION_DATA)	Description (POSITION_DATA1)	Values for a position
Define Salary Plan	Salary Plan Table (SALARY_PLAN_ TABLE)	Values for a salary plan
Job Code	Job Code Profile	Values for a job code
Job Data	Job Information (JOB_DATA_ JOBCODE)	Values for an employee
Job Openings (HRS_JOB_OPENING)	Job Opening (HRS_JOB_OPENING)	Values for an employment application

The minimum and maximum standard hours values and the standard work period defined on the Business Unit HR Defaults page (BUS_UNIT_OPT_HR) are used for validation edits in the Job Data and Position Data components.

Defaults for Standard Hours and Standard Work Period

The system inserts the standard hours and the standard work period as default information only if both are defined. The following table describes the source of defaults in Job data under the specified conditions:

Condition	Default Source
You assign the worker a salary plan.	Salary Plan Table page
You assign the worker to a position.	Description page of the Position Data component

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Condition	Default Source
You assign the worker a job code.	Job Code Profile page of the Job Code component
You didn't indicate standard hours on the Salary Plan table, Job Code table, or Position Data table.	HRMS Options page of the Installation component

Full-Time Equivalency

Full-time equivalency (FTE) is the percentage of full time that a worker should normally work in a job. In calculating the FTE, the system uses your definition of the standard hours and the standard work period.

If you select *Apply FTE* for a compensation component, PeopleSoft Human Resources uses the standard hours and the standard work period to compute FTE to prorate holiday hours and pay for part-time and hourly workers.

Note. (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to prorate holiday hours and pay for part-time and hourly workers.

PeopleSoft Human Resources calculates FTE using the following equation:

$$FTE = \frac{\left(\text{Job Std Hrs}\right) \times \left(\text{Annualization Factor of Job Std. Work Period}\right)}{\left(\text{Default Full Time Std. Hrs}\right) \times \left(\text{Annualization Factor of Default Full Time Std. Work Period}\right)}$$

FTE Equation

In this equation, the default full-time standard hours and default full-time standard work period are from:

- The Define Salary Plan component (if a salary plan is defined for the worker, and if both standard hours and standard work period are defined for this salary plan).
- The Org Defaults by Permission Lst component (if no salary plan is defined for the worker , and if both standard hours and standard work period are defined in the Org Defaults by Permission Lst component).

Conversion of Compensation Rates to Different Frequencies

The system converts compensation rates to daily, monthly, and other frequencies using standard formulas. The formula for converting to or from an hourly rate takes the standard hours and standard work period into account.

The system performs compensation rate conversions as follows:

1. Finds or calculates the annual rate for compensation.
2. Divides the annual rate using de-annualization conversion calculations to calculate the rate at the desired frequency.
3. Multiplies the converted compensation rate by the FTE factor if Apply FTE is selected for the pay component.

Note. (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to multiply the converted compensation rate.

Annualized Rate Calculations

The system uses the following formulas to convert compensation rates to an annual frequency:

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Original Frequency	Formula for Conversion to Annual Frequency
Hourly	Annual Rate = Comprate × Job Standard Hours × Frequency Annualization Factor of Standard Work Period
Monthly, daily, and other	Annual Rate = Comprate × Frequency Annualization Factor

De-Annualized Rate Calculations

The system uses the following formulas to convert compensation rates from an annual frequency to another frequency:

Non-Annual Frequency	Formula for Conversion from Annual Frequency
Hourly	Hourly Rate = Comprate / (Job Standard Hours × Frequency Annualization Factor of Standard Work Period)
Monthly, daily, and other	Non-Annual Rate = Annual Comprate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following job data information:

Employment Variables	Values
Comprate (hourly)	10
Job Standard Hours	35
Frequency Annualization Factor of Standard Work Period	52
Frequency Annualization Factor of Month	12

The following table shows how the system calculates Teresa Johnson's monthly FTE (full-time equivalency) compensation rate. The total represents Teresa's monthly salary based on a thirty-five hour workweek over a fifty-two week year.

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Rate	Equation
Annual	10 × 35 × 52 = 18,200
Monthly	Annualized Comprate / Frequency Annualization Factor of Month 18,200 / 12 = 1516.67

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following job data information:

Employment Variables	Value
Comprate (monthly)	2000
Frequency Annualization Factor of Monthly	12
Frequency Annualization Factor of Biweekly	26
Apply FTE Selected	Yes
FTE Factor	0.95

The following table shows how the system calculates Bill McKenny's biweekly compensation rate:

Rate	Equation
Annual	Comprate × Frequency Annualization Factor of Month 2000 × 12 = 24,000
De-annualize	Annualized Comprate / Frequency Annualization Factor of Biweekly 24,000 / 26 = 923.08
Multiply by FTE	923.08 × 0.95 = 876.85

Job Data Pay Rate Frequencies

The system uses the country-specific default frequencies to calculate and display the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds the frequencies that are associated with the person's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described in this chapter.

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Because the PeopleSoft Global Payroll and Payroll for North America systems calculate daily and monthly pay rates using frequencies established for the pay group, it is possible that the compensation rates displayed on the Job Data - Compensation page will vary from the pay rates calculated with pay group daily and monthly frequencies. This would occur if the pay group daily or monthly frequency differs from the daily or monthly frequency specified for the country on the Default Frequency page. It is recommended that you establish pay group frequencies to match the default frequencies for the country whenever possible.

The pay rates calculated with pay group frequencies are available on the JOB record in the fields JOB.ANNUAL_RT, JOB.MONTHLY_RT, JOB.DAILY_RT, JOB.HOURLY_RT. These fields are referenced by the Job Summary page and can be referenced in PS Query.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults, page 205

Understanding Frequency in Global Payroll

PeopleSoft Global Payroll uses frequency when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, PeopleSoft Global Payroll also uses frequency defined on the Generation Control Frequency component.

This section discusses:

- Frequency with element definitions.
- Frequency with generation control.
- Frequency with calendar periods.
- Frequency with rate codes and system elements.

Frequency with Element Definitions

An *element* is the smallest component of PeopleSoft Global Payroll, and it is used in defining calculation rules to process your payroll. Elements can hold the values of pay (earnings), an amount to be deducted from pay (deduction), or time away from work (absence).

Elements (such as earnings, deduction, and absence) can be standalone. Supporting elements (such as rate codes or rounding rules) can be used with other elements to define a calculation rule. Each element is defined only once, but it can be used repeatedly.

For any earnings, deduction, or absence element, you must specify the frequency of the stated amount on the Earning/Deduction definition. For each item that you associate with a frequency, you must consider how the frequency fits into the overall processing picture. Selecting the correct frequency for earnings, deductions, and absence elements is essential for correct processing. For example:

Earnings element	In what frequency is the stated amount paid? Is it per week, per month, or per year?
Deduction element	In what frequency is the stated amount withheld? Is the stated amount the amount to withhold each pay period, each month, or for the entire year?
Absence element	Is an employee entitled to three days of holiday time per month or per year?

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In PeopleSoft Global Payroll, you use frequency to define earnings, deduction, or absence elements.

To illustrate, we refer to defining an earnings element. However, the process is the same for earnings, deduction, and absence elements.

You define the calculation rule, frequency, and generation control for an earnings element on the Earnings - Calculation page (GP_ERN_DED_CALC).

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Defining Earning and Deduction Elements," Defining Calculation Rules for an Earning Element.

Select a calculation rule and once you select a calculation rule, you must further define details for each component of the rule. For example, if you select Amount, specify the amount of the earnings element.

The following table lists the calculation rules and the components of the calculation rule for which frequency conversion is performed:

Calculation Rule	Component
Amount	Amount (if necessary)
Rate X Unit	Unit
Rate X Unit X Percentage	Unit
Base X Percentage	Base

Define the frequency that the stated amount represents. If you select Use Calendar Frequency, the system uses the frequency that's defined for the calendar period on the Define Calendars - Period page (GP_CALENDAR_PERIOD). If you select Use Specified Frequency, you can define your frequency directly on the Earnings - Calculation page by selecting from a list of frequencies.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Using Calendars," Creating Periods.

The Frequency field enables you to tell the system the frequency with which you are stating a value. For example, let's say that you select Use Specified Frequency, that you have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of *Monthly.* If you don't have any generation control conditions defined, the system annualizes and de-annualizes the amount into a processing frequency amount. Let's assume that you define your organization's monthly frequency as *12* and the weekly frequency as *52.* The system takes the *100* (monthly amount) and annualizes it to *1200.* Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (weekly, in this example). The amount paid each pay period is:

1200 / 52 = 23.08

The benefit of defining a frequency is that if your organization has multiple pay frequencies (such as weekly, semimonthly, and monthly), you don't have to create separate earnings for each frequency. The system automatically converts the amount into the corresponding pay period amount. Let's say that your organization decides to give an annual bonus of 1000 to all payees and this bonus is distributed throughout the year. Your hourly payees get paid weekly and your salaried payees get paid monthly. If you define an earnings bonus as *BON = 1000,* with a frequency of Annual, you can apply this earnings definition to payees who are paid weekly and payees who are paid monthly by using annualization and de-annualization. The frequency assigned on the Earnings Calculation page calculates the bonus amount correctly, regardless of the pay frequency.

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Note. In PeopleSoft Global Payroll, there is no distinction between organizational relationships (employee, contingent worker, or person of interest). Because payroll is processed for all types of people with jobs, the PeopleSoft Global Payroll documentation refers to both of them as *payees.*

Frequency with Generation Control

Pay period frequency isn't hard-coded into the system. Instead, PeopleSoft Global Payroll uses the HR Frequency Table component to determine how a frequency is calculated. For example, a monthly frequency has a factor of 12 and a weekly frequency has a factor of 52. Frequencies that are defined on the Frequency Table page are easily used wherever you use frequency in the system.

PeopleSoft Global Payroll provides an additional generation control concept called "Generation Control Frequency" to help control the pay periods in which a specific earning or deduction is to be resolved (such as only the first pay period of a month, and so on). Generation control frequencies enable you to define meaningful names and associate the correct frequency ID with a pay period.

An example of a frequency that isn't on the HR Frequency Table is First of the Month. Let's say that you have a weekly pay frequency, but you want an earnings element to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This might not work for your payroll purposes. So, in PeopleSoft Global Payroll, the earnings element would be defined (tagged) as *First of the Month* and paid only on the first pay period of the month.

The Generation Control Frequency component is part of generation control frequency processing.

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if an earnings element is to be paid only on the first pay period of the month (for weekly payrolls), you can control the payroll so that this earning is only paid in Week 1, and not paid in the subsequent week's payrolls during the month:

- First you define generation control ID parameters on the Generation Control - Conditions page (GP_GCTL_CONDITION).

  See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Defining Calculation Elements," Naming Generation Control Elements.

- Next, when you define an earnings element, you prompt against this table by selecting a generation control name on the Earnings - Calculation page.
- Then you don't have to redefine the parameters for each earnings element.

If you leave the Generation Control field blank on the Earnings - Calculation page, the system assumes to be paid every time based on normal eligibility rules for the payee.

Note. If the frequency that you select is other than *Use Calendar Period Frequency,* the system de-annualizes the earnings amount based on the pay period frequency. If a generation control frequency exists, the system de-annualizes the earnings amount based on that frequency. The generation control frequency overrides the pay period frequency during frequency conversion. For example, let's say that you have an earnings element with an amount of 1200, an annual frequency, and a monthly pay period. If your organization's monthly frequency is defined as *12,* and you don't have a generation control frequency for this earnings, the amount is de-annualized to *100* per month (1200 / 12 = 100). If you have a generation control frequency for this earnings element, the amount is different. Let's say that you have defined a generation control frequency of quarterly. The earnings are de-annualized to *300* (1200 / 4 = 300).

PeopleSoft Global Payroll delivers four predefined generation control frequencies: *1st Month, Annual, January,* and *Quarter.* All generation control frequencies can be used in corresponding generation control elements.

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Using Frequency with Calendar Periods

Use frequency with calendar periods when defining the frequency that's being processed.

When processing a payroll or absence run in PeopleSoft Global Payroll, you must tell the system the time period to calculate. This is often referred to as the pay period. You define period selection criteria by defining a period ID on the Define Calendars - Period page.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Using Calendars," Creating Periods.

The period ID defines the start date, end date, and frequency of a particular pay period. This definition is kept separate from the pay calendar to make it easy to reuse and to provide optimum flexibility during processing.

Here are some examples of the time and frequency data that can be defined by a period ID:

Begin Date	End Date	Frequency
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

On the Define Calendars - Period page, the frequency is defined for de-annualization when an earnings, deduction, or absence element is defined without generation control frequency. However, if generation control frequency is included (in the earnings, deduction, or absence element definition), and the element generation control and the calendar ID generation control match, the system uses this generation control frequency for the de-annualization factor.

Examples of Frequencies

This table provides some examples of frequencies:

Frequency	Element 1	Element 2a	Element 2b	Element 3
Amount	1,200	1,200	1,200	1,200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semimonthly (24)
Pay Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24) *

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Frequency	Element 1	Element 2a	Element 2b	Element 3
Calendar Generation Control Frequency	None	Monthly (12)	None	Semimonthly (24) *
Calculated Amount	600	1200	Not resolved	600

You don't need to specify the associated frequency if it coincides with the pay period frequency.

See Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 196.

Using Frequency with Rate Codes and System Elements

When you define an earnings or deduction element that uses either a rate code or a frequency-controlled system element, the earnings or deduction element should always have the frequency Use Calendar Period Frequency. System elements are delivered and maintained by PeopleSoft.

A system element that is frequency-controlled resolves in the calendar frequency portion of payroll processing, according to the frequency that is specified for the element when it is set up. The system then de-annualizes by the calendar frequency.

Understanding Frequency in Payroll for North America

This section discusses:

- Compensation frequency and pay frequency.
- Examples of pay rate calculations.
- Proration of compensation rates.
- Exceptions to Frequency table use.

Compensation Frequency and Pay Frequency

In Payroll for North America you use the frequencies on the Frequency Table component to specify pay period frequency on the Pay Group component. The system uses compensation and pay frequencies for the calculation and proration of pay rates during batch and online system processes.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 196

Examples of Pay Rate Calculations

This section provides examples of how the system uses compensation rates and frequencies and pay period frequency to calculate pay rates.

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Example: Biweekly Pay Period Calculation of Monthly Compensation

This example illustrates how Payroll for North America calculates the pay period rate by annualizing monthly compensation using the following frequencies:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	B1	B (biweekly)	26.1
Compensation frequency (employee's Job data setup)	M	M (monthly)	12

Using a compensation rate of 1,000 USD, the calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × Compensation Frequency Factor

  12,000.00 = 1,000.00 × 12
- Pay Period (Biweekly) Rate = (Annual Rate) / Pay Frequency Factor

  459.77 = 12,000.00 / 26.1

Example: Weekly Pay Period Calculation of Hourly Compensation

Payroll for North America uses the annualization factor of the standard work period frequency in combination with the standard hours to calculate pay rates or proration of hourly compensation.

This example illustrates how Payroll for North America calculates the weekly pay period rate of hourly compensation.

The pay group's pay period frequency definition is:

Description	Frequency ID	Frequency Type	Frequency Annualization Factor
Pay frequency (Pay Group table)	W (weekly)	W (weekly)	52

The employee's compensation frequency definition is:

Comp Rate	Comp Frequency	Standard Hours	Annualization Factor of Std Work Period
10.00	H (hourly)	40.00	52

The calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate × (Standard Hours × Standard Work Period Annualization Factor)

  20,800.00 = 10 x 40 × 52
- Pay Period (weekly) Rate = Annual Rate / Pay Frequency Factor

  400 = 20,800.00 / 52

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Proration of Pay Rates

The system calculates proration for partial periods when events such as new-hires, terminations, or pay rate changes occur in the middle of a pay period. It uses data that you specify on the Pay Group component in conjunction with compensation data to calculate proration.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Setting Up Pay Groups," Understanding Proration Rules.

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the Pay Calendar Table page (PAY_CALENDAR_TABLE). The value in the Pay Periods Per Year field on the Pay Calendar Table page is derived from the pay frequency of the pay group.

See Also

Chapter 19, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars, page 424

Chapter 13, "Setting Up Jobs," Setting Up Pay Groups, page 316

Defining a Frequency ID and Country-Specific Defaults

To define a frequency ID and country-specific defaults, use the Frequency Table component (FREQUENCY_TBL) and the Default Frequencies by Country component (DFLT_FREQUENCY).

This section discusses how to:

- Define a frequency ID, type, and annualization factor.
- Set country-specific frequency defaults.

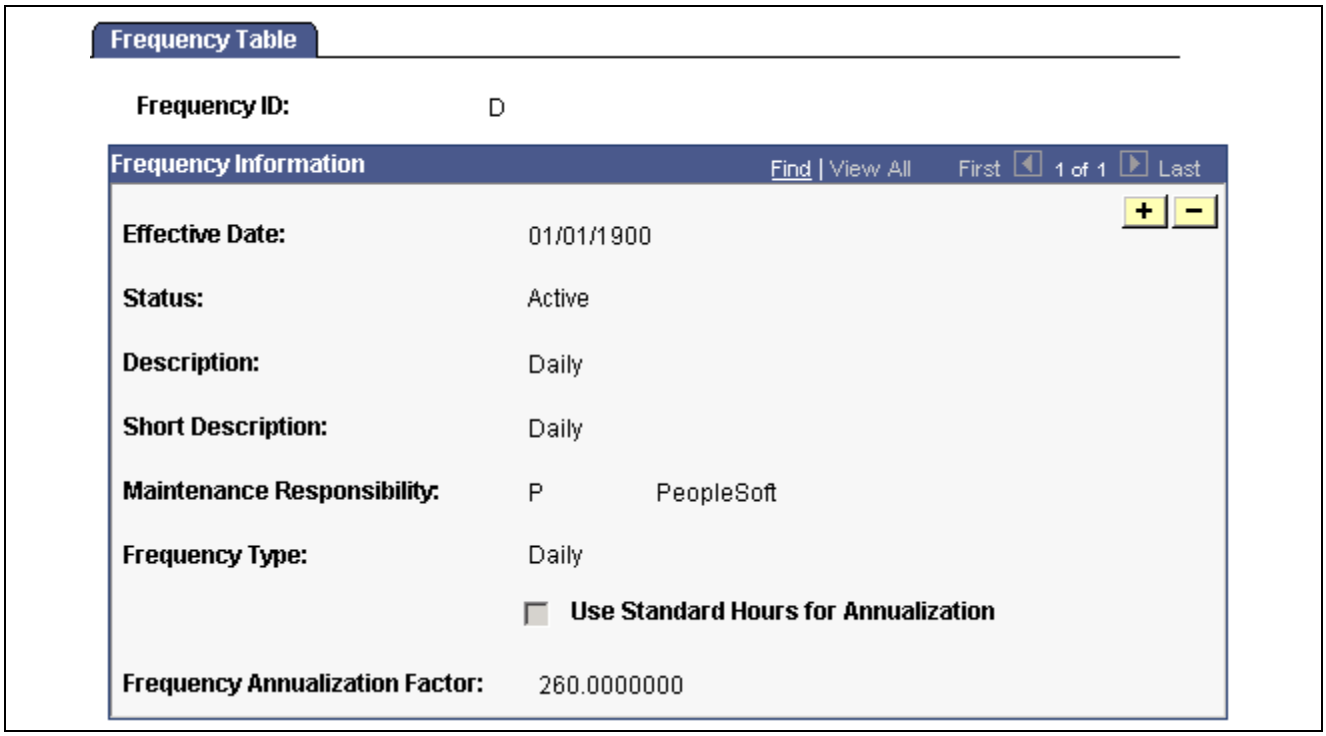
Pages Used to Define a Frequency ID and Country-Specific Defaults

Page Name	Object Name	Navigation	Usage
Frequency Table	FREQUENCY_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Frequency Table, Frequency Table	Define a frequency ID, its frequency type, and its annualization factor.
Default Frequencies	DFLT_FREQUENCY	Set Up HRMS, Foundation Tables, Compensation Rules, Default Frequencies By Country, Default Frequencies	Specify country-specific default frequencies.

Defining a Frequency ID, Type, and Annualization Factor.

Access the Frequency Table page

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Frequency Table page

Maintenance Responsibility Select a maintenance responsibility. Values are:

- *C* (customer): You define the frequency ID. You are responsible for keeping this frequency code up to date.
- *P* (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type Select a frequency type. Values are:

- *A* (annual)
- *B* (biweekly)
- *C* (contract)
- *D* (daily)
- *F* (every four weeks)
- *H* (hourly): The Use Standard Hours for Annualization check box becomes available.
- *M* (monthly)
- *Q* (quarterly)
- *S* (semimonthly)
- *W* (weekly)

Use Standard Hours for Annualization Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The frequency annualization factor is set to *0,* and that field becomes unavailable.

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Note. You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft Human Resources, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.

Frequency Annualization Factor

Defines how many frequency periods occur in one year.

Examples:

- A standard daily compensation frequency is *260* because there are *260* workdays in a standard year.
- You can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53.

Important! If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

Setting Country-Specific Frequency Defaults

Access the Default Frequencies page.



Default Frequencies page

Select four frequencies to set as defaults for the specified country. The system uses these default frequencies to calculate pay rates in the Pay Rates group box on the Job Data - Compensation page. The order you list the frequencies on this page is the order in which the pay rates appear in the Pay Rates group box.

For example, you specify the 1st Frequency as annual, 2nd Frequency as monthly, 3rd Frequency as daily, and 4th Frequency as hourly for Canada. For an employee in Canada, the Pay Rates group box displays the following pay rates in this order: annual, monthly, daily, and hourly. The system converts compensation rates to the default frequencies using the standard formulas described earlier in this chapter.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 196

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CHAPTER 11

Setting Up Organization Foundation Tables

This chapter provides an overview of enterprise integration points and discusses how to:

- Set up person of interest types.
- Set up holiday schedules.
- Define business units.
- Enter company information.
- (USF) Enter agency information.
- Define legal types.
- Define establishments.
- Establish locations.
- Establish military locations.
- (USF) Establish federal locations.
- Set up company locations.
- Maintain departments.
- (USF) Set up federal departments.
- Set up primary permission list preferences.

Setting Up Person of Interest Types

To set up person of interest types, use the Person of Interest Types component (POI_TYPE_TBL).

This section provides an overview of POI types and discusses how to set up new POI types and activate delivered POI types.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Organizational Relationships

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Understanding POI Types

PeopleSoft enables you to track information for people of interest (POIs), people who do not make up a part of your workforce but who are still of interest to the organization. Different POI types are used in different areas of your organization. For example, PeopleSoft Enterprise Global Payroll uses the Global Payroll Payee POI type, whereas the External Trainee POI type may be used by PeopleSoft Enterprise Recruiting Solutions for applicants who require training prior to being hired and PeopleSoft Enterprise Campus Solutions.

You select a POI type on three components:

- Add a Person component (PERSON_DATA_ADD)
- Job Data component (JOB_DATA)
- Person Organizational Summary component (PERSON_ORG_SUMM)

The generic components are on the Workforce Administration menu but these components are also available on different application menus throughout the system. When you set up or modify a POI type, you can limit the components on which the POI type can be selected by menu. For example, you could create a new recruiting POI type that is only available on the components on the Recruiting menu or you could make the Pension Payee POI type, which is delivered as an option only on the Pension Administration menu, available on the Administer Workforce menu components, too.

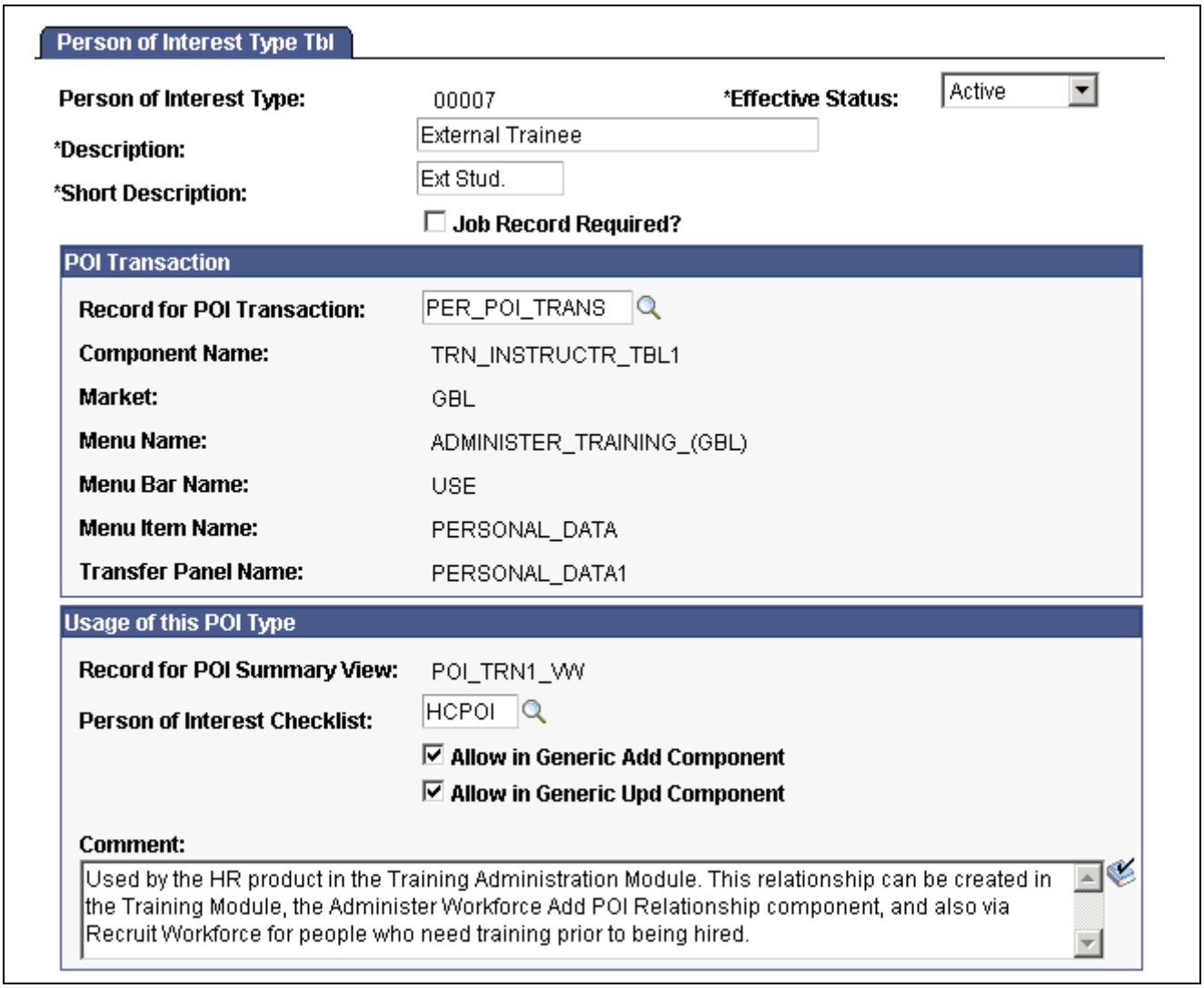
Page Used to Set Up Person of Interest Types

Page Name	Object Name	Navigation	Usage
Person of Interest Type Tbl	POI_TYPE_TBL	Set Up HRMS, Foundation Tables, Organization, Person of Interest Types, Person of Interest Type Tbl	Review the delivered POI types and modify the characteristics that govern how the system processes the information of POIs with this type.

Defining POI Types

Access the Person of Interest Type Tbl page

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Person of Interest Type Tbl page

Effective Status Inactivate any system delivered POI types that you will not be using so that they do not appear as options on HRMS transaction components.

Job Record Required? Select if this POI type requires a POI job record.

When you select this check box for a new POI type, the system enters default information into the POI Transaction group box that you cannot overwrite.

POI Transaction

Record for POI Transaction Select the record used for processing and holding information about people with this POI type.

If you select the PER_POI_TRANS record (the generic POI transaction record used by the Person Organization Summary component), the system enters default information into the rest of the fields in the POI Transaction group box and the Record for POI Summary View field that you cannot overwrite.

If you choose to use a record other than PER_POI_TRANS for POI types that do not require jobs, you will need to create a view to use in the Record for POI

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Summary View field in order for the data in the transaction record to show up in the Person Organizational Summary component.

Component Name Select the component using the POI transaction record. When you select this POI type on the Personal Data – Organizational Relationships page and click the Add the Relationship button, the system will move you to the component you select here.

Market, Menu Name, Menu Bar Name, and **Menu Item Name** Select the menu's market, name, bar name, and item name for the selected component.

Transfer Panel Name Enter the object name of the page you want the system to open to when you click the Add the Relationship button.

Usage of this POI Type

Record for POI Summary View Select the record from which the system draws the summary information for this POI type. When you view the organizational relationships of a person with this POI type on the Person Organizational Summary component, the system pulls the summary information from this record.

If you choose to use a record other than PER_POI_TRANS, you must create a view to use here in order for the data in the transaction record to show up in the Person Organizational Summary component. Create the view in PeopleSoft Application Designer using the PER_POI_TRANS view but with different view text.

Person of Interest Checklist Select a default checklist for this POI type. When you opt to assign a POI type to a person and create a POI checklist from the Personal Data - Organizational Relationships page (PERSONAL_DATA4), the system creates a record for the person on the Person Checklist page (PERSON_CHECKLIST) and adds this checklist.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Creating Checklists.

Allow in Generic Add Component Select to make this POI type available when adding a record for a POI in the Add a Person component, Job Data component, and Person Organizational Summary component on the Administer Workforce menu. The system selects this check box for all new types.

Allow in Generic Upd Component (allow in generic update component) Select to make this POI type available when updating a record for a POI in the Job Data component and Person Organizational Summary component on the Administer Workforce menu.

Modifying a Delivered POI Type

You can modify the following fields for system delivered POI types:

- Effective Status.
- Person of Interest Checklist.
- Allow in Generic Add Component.
- Allow in Generic Upd Component.

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Setting Up Holiday Schedules

To set up holiday schedules, use the Holiday Schedule component (HOLIDAY_SCHED_TBL).

This section provides an overview of holiday schedule defaults on the Job Record and discusses how to define holiday schedules.

Understanding Holiday Schedule Defaults on the Job Record

Because holidays might vary for different segments of your workforce population (depending on location, work schedules, or other factors), you can define as many holiday schedules as you need.

Defaulting of the holiday schedule to the worker's job record depends upon the payroll system:

- PeopleSoft Enterprise Global Payroll.

  If the payroll system is Global Payroll, the system does not enter a default holiday schedule on the Job Data - Payroll page. On the Payroll page, you may select a holiday schedule for the payee or leave the field blank. If you leave it blank, Global Payroll processes use the holiday schedule assigned to the payee's pay group.

- PeopleSoft Enterprise Payroll for North America.

  If the payroll system is Payroll for North America, the default holiday schedule entered on the Job Data - Payroll page is determined by whether you're adding a worker or updating job data, and by whether you have defined a default holiday schedule for the location.

  This section provides additional details for each of these conditions.

When You Add a Worker with Payroll for North America Payroll System

If the payroll system is Payroll for North America, the default holiday schedule initially entered on the Job Data – Payroll page is the holiday schedule that is associated with either the Location table or the Pay Group table:

- Location table.

  If you have assigned a default holiday schedule on the Location Profile page, that schedule is the default when you add a worker with that location.

- Pay Group table.

  If you leave the Holiday Schedule field blank on the Location table, the system enters the default holiday schedule that is assigned to the pay group.

You can change the holiday schedule on the worker's Job Data – Payroll page.

When You Change the Job Data of a Worker with Payroll for North America Payroll System

Changes in the following job data fields might cause a change in holiday schedule if the Holiday Schedule field is blank on the worker's Job Data – Payroll page:

- Company
- DeptID (department ID)
- Position Number
- Pay Group

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Note. If the holiday schedule is already populated on the worker's job record, changes in these fields do not cause updating of the holiday schedule.

This is a description of the impact of changes in these fields:

- Company and DeptID.

  If the worker's holiday schedule is not populated, changes in Company and DeptID cause the system to first enter the default holiday schedule from the Location table. If there is no default holiday schedule assigned on the Location table, the system enters the holiday schedule assigned on the Pay Group table.

- Position Number and Pay Group.

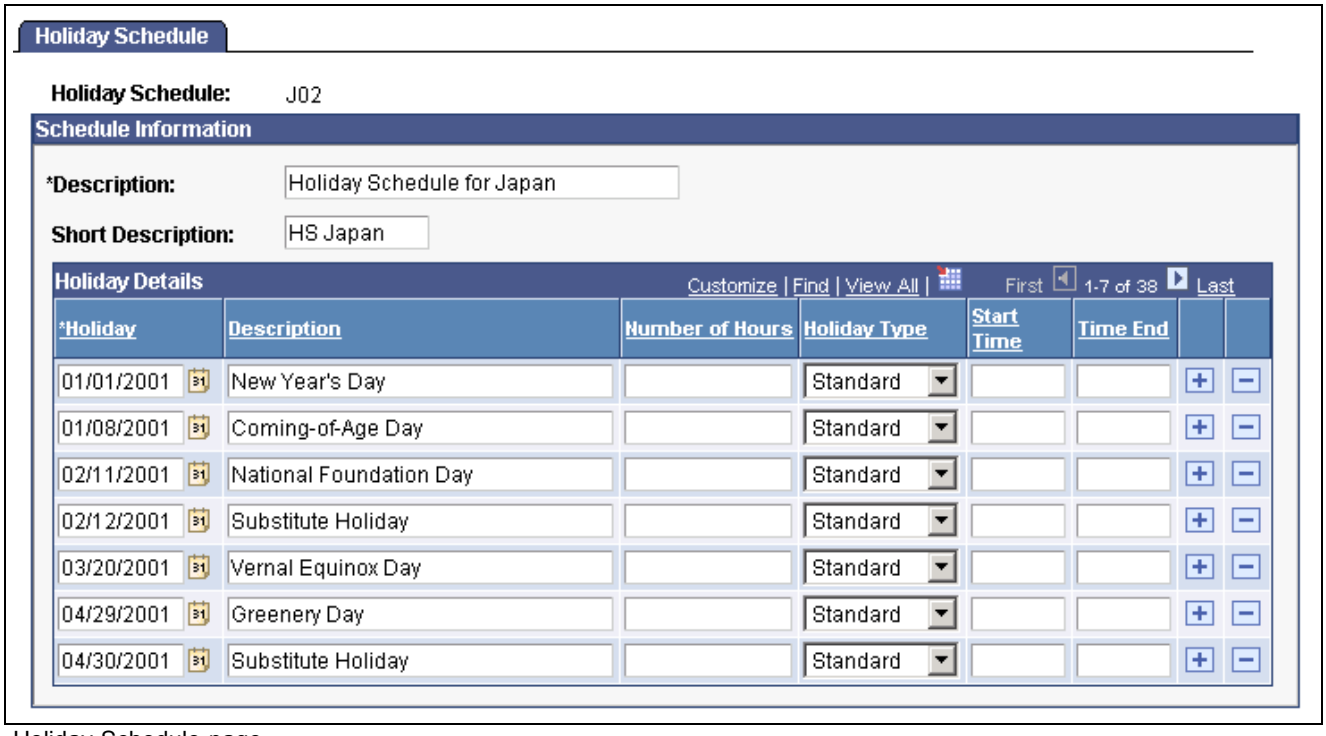
  Changes in the Position Number and Pay Group fields cause the system to enter the default holiday schedule directly from the Pay Group table if the worker's holiday schedule is not already populated.

Page Used to Set Up Holiday Schedules

Page Name	Object Name	Navigation	Usage
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up HRMS, Foundation Tables, Organization, Holiday Schedule	Designate holidays for payroll processing.

Creating Holiday Schedules

Access the Holiday Schedule page.



Holiday Schedule page

Holiday Enter all of the holiday dates that your organization observes within this schedule.

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Number of Hours (Optional) You can specify the number of paid hours for each holiday.

Payroll for North America uses this field to reduce from pay.

Holiday Type Select a holiday type.

The following values are used in PeopleSoft Payroll for North America:

Canadian: In Payroll for North America, this value designates a Canada statutory holiday.

Standard: In Payroll for North America, this value designates a U.S. holiday or Canada non-statutory holiday.

US Public: Select if the holiday is a public holiday in the U.S.

Start Time and End Time (Optional) You can specify the starting and ending time of each holiday.

Note. Payroll for North America and Global Payroll do not refer to these fields.

Defining Business Units

To define business units, use the Business Unit component (HR_BUSINESS_UNIT), Business Unit Options Default component (BUS_UNIT_OPT_HR), and GL Business Unit component (BUS_UNIT_GL).

This section discusses how to:

- Add and update business units.
- Identify business units in other applications.
- Set business unit defaults.

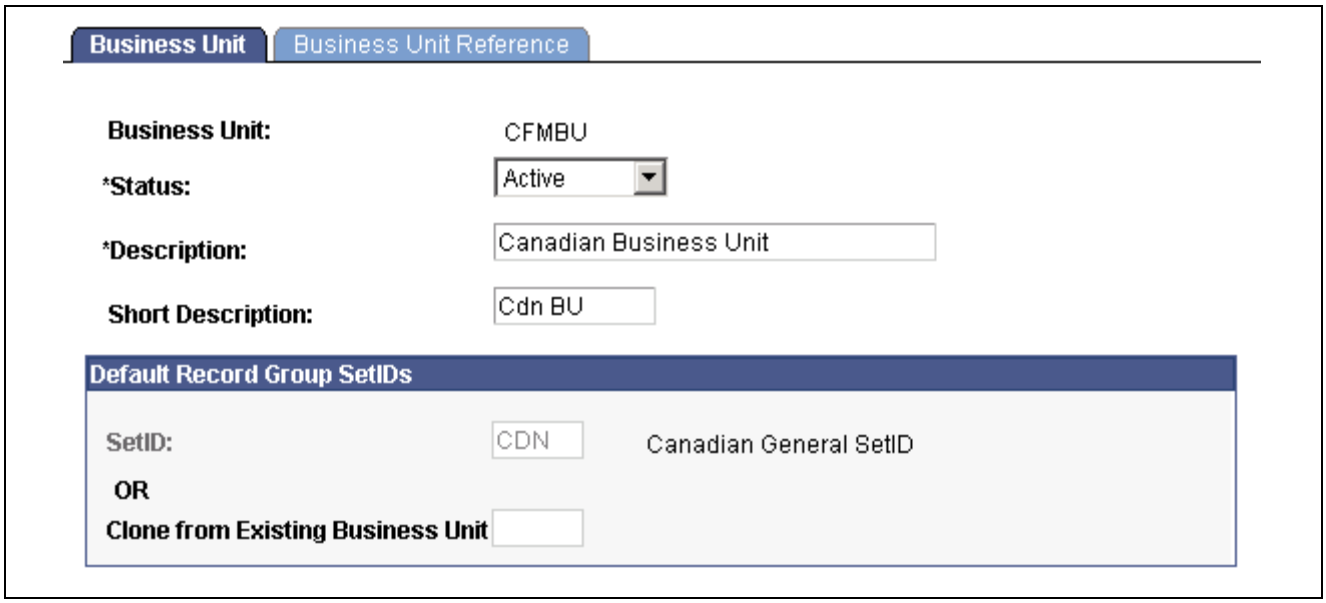
Pages Used to Update Business Units

Page Name	Object Name	Navigation	Usage
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit	Add or update business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Identify business units in other PeopleSoft applications that are related to a business unit.
Business Unit Options Default	BUS_UNIT_OPT_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit Options, Business Unit Options Default	Set system defaults such as Company, Country, and Currency for a specific SetID.
GL Business Unit	BUS_UNIT_TBL_GL	Set Up HRMS, Foundation Tables, Organization, GL Business Unit, GL Business Unit	Review GL business units.

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Adding and Updating Business Units

Access the Business Unit page.



Business Unit page

Warning! To optimize system performance, your business units must be 5 characters. If your SetIDs or business units have fewer than five characters, you will experience serious performance degradation.

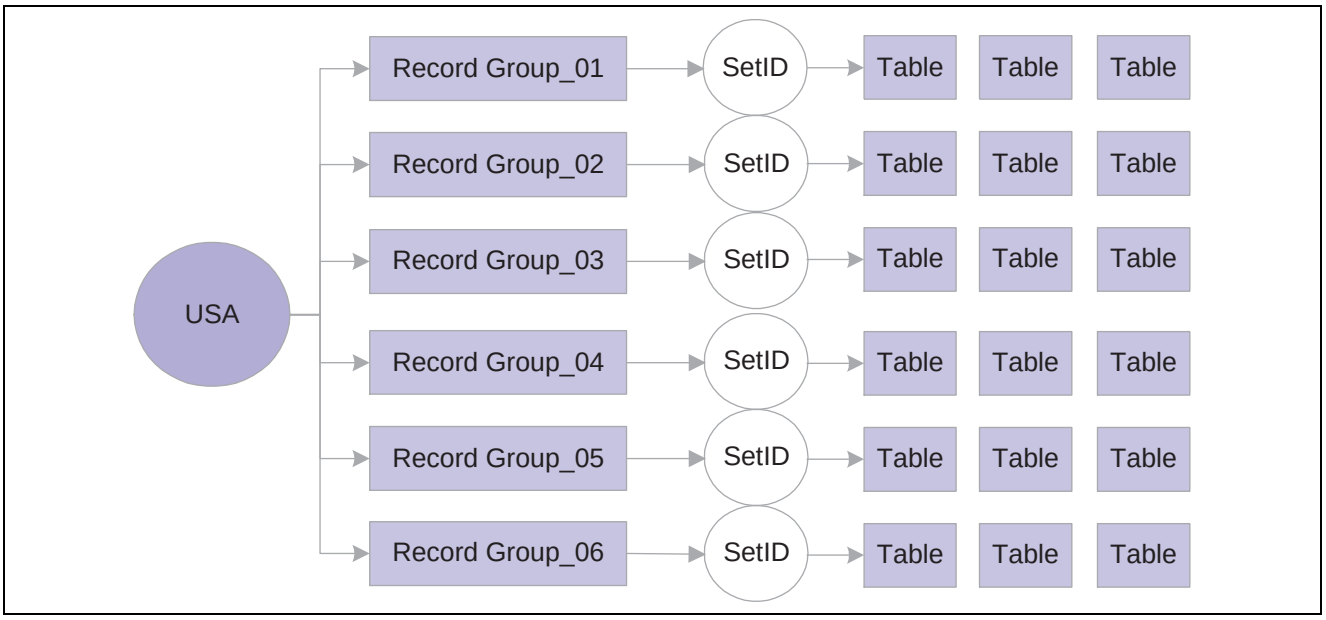
Status Select *Active* or *Inactive* . If you select *Inactive* , the business unit won't appear in any business unit lists in PeopleSoft HRMS.

Note. Business units aren't effective-dated, so use this field to implement or retire business units.

Understanding Your TableSet Sharing Options

Default Record Group SetIDs When you define a new business unit on the Business Unit component, you can specify that the system establish default record group SetIDs for the new business unit, using the options in this group box. The SetID or Clone from Existing Business Unit value that you enter determines your preliminary TableSet sharing setup for the new business unit by determining the SetIDs that are assigned to each record group for the new business unit. The SetID assigned to a record group determines which TableSet is used as valid values for that business unit.

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TableSet Sharing

Establishing a TableSet Sharing Setup Using One Default SetID

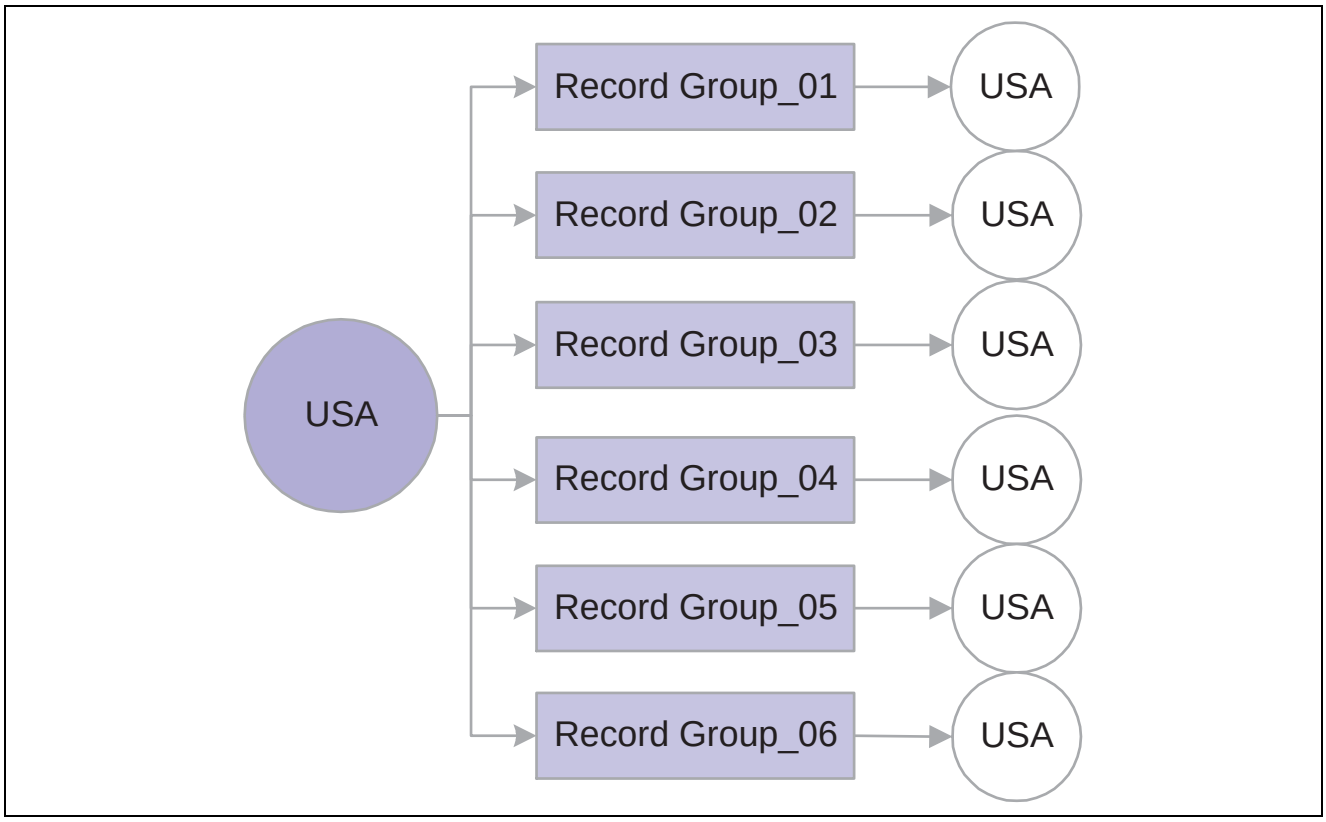
If you want to define a TableSet sharing setup for the new business unit you are creating, using a primary default SetID that you can modify as necessary on the TableSet Control - Record Group page (SET_CNTRL_TABLE1), enter the default SetID that you want to use.

When you add a new business unit to the system, the system populates the SetID field with a SetID name that is the same as your new business unit. For example, if your business unit is called USA, then the SetID defaults to USA. You can override the default SetID as necessary.

Note. You can associate only one default SetID with a business unit.

When you save the business unit, the system creates a new SetID with the same name as the business unit, and the default SetID that you specified on the Business Unit page is assigned to each record group for the new business unit.

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TableSet sharing using default setID.

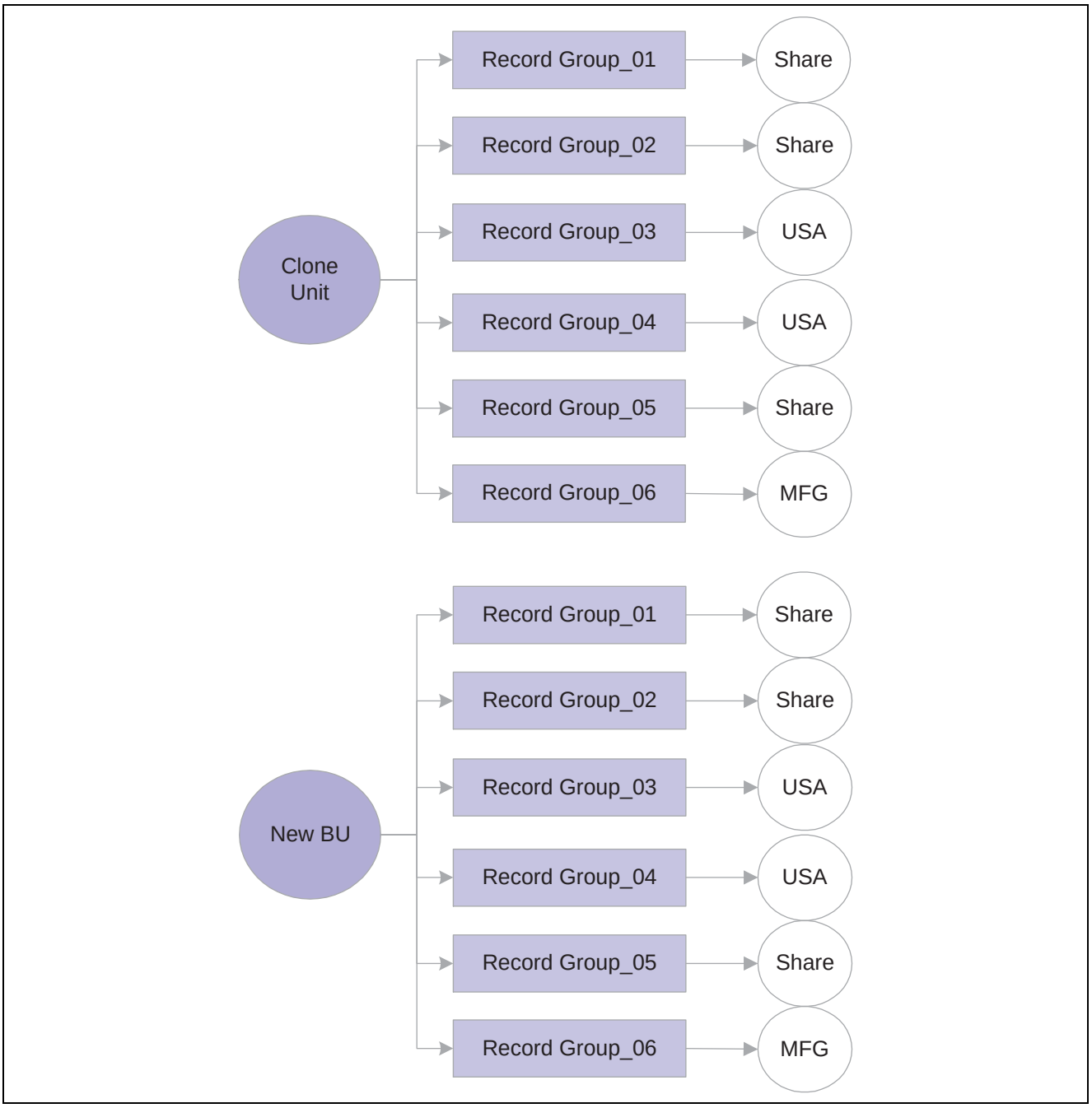
Cloning TableSet Setup From Existing Business Units

With the Clone from Existing Business Unit option, you can clone the TableSet sharing setup of an existing business unit.

Note. When you first enter the Business Unit page, the Clone from Existing Business Unit option is clear. To activate the option, clear any SetID values from the SetID field and move out of the field.

If you want the TableSet sharing for the new business unit that you are creating to mirror that of another business unit you've defined, or if you want the two units to be similar except for a few record groups, enter the business unit that you want to mirror as the Clone Unit. When the record groups are linked to the new business unit, the system assigns each record group the same SetID that is used for the record group by the business unit that you selected as the Clone Unit.

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Cloning the tableset sharing setup from an existing business unit

Whichever method you select, when you save the new business unit for the first time, the system makes the default SetID or Clone Unit unavailable for entry. You can't change the default record group SetID information for this business unit again. This rule prevents you from accidentally overwriting the TableSet record group controls for your defined business units in PeopleSoft HRMS.

Note. When you add a new business unit and save the page, the system creates all the appropriate table values provided by PeopleTools that connect the business unit ID, the record group ID, and the SetID.

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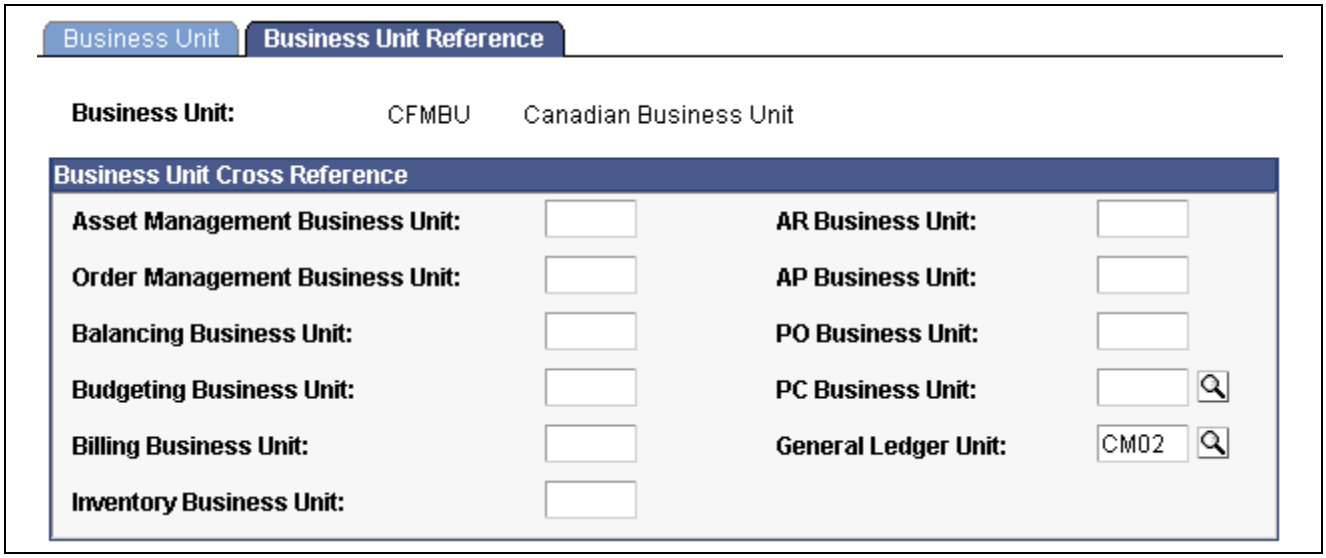
TableSet sharing is set up as soon as you create your business units. However, the sharing, especially if you have chosen to create a TableSet sharing setup using one default SetID, may need some fine-tuning. You can do this by changing the SetIDs that are assigned to individual record groups on the TableSet Control — Record Group page. The system uses the default SetID on this page when you add record groups.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "PeopleTools Utilities", TableSet Control - Record Group

Identifying Business Units in Other Applications

Access the Business Unit Reference page.



Business Unit Reference page

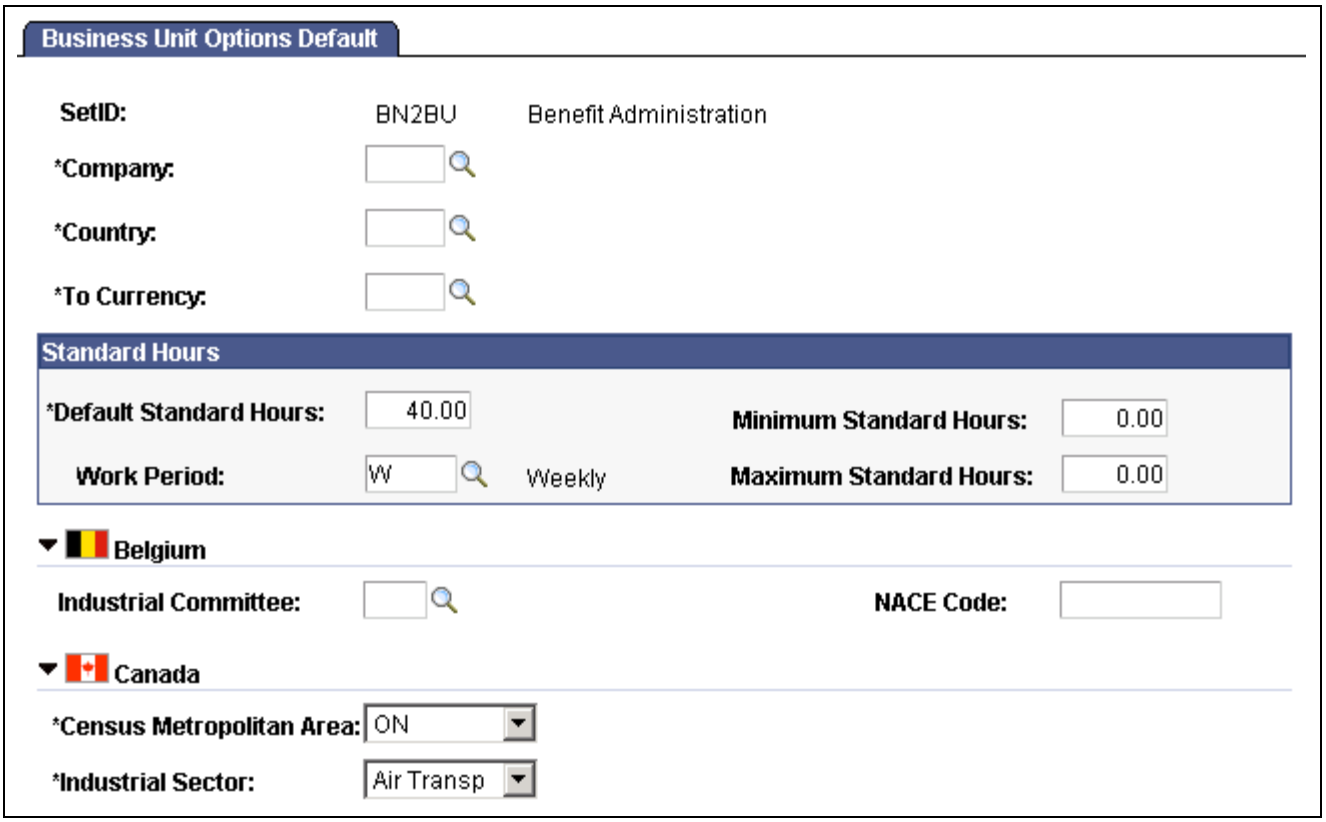
Business Unit Cross Reference In this group box, enter the business unit cross reference, if applicable, for any PeopleSoft application that is listed on the page. You identify other business units in other PeopleSoft applications that relate to your business unit.

Note. You can review which PeopleSoft Enterprise General Ledger units are associated with the PeopleSoft HRMS business units on the GL/HR Business Unit Mapping page (BU_GL_HR_LNK).

Setting Business Unit Defaults

Access the Business Unit Options Default page.

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Business Unit Options Default page

By setting up default values for a SetID, you can specify the default values that populate these fields in your human resources system. Because the SetID keys the Business Unit Options Defaults component (you can share these defaults among multiple business units.

Warning! The values that you enter or select on this page affect the default values throughout your PeopleSoft HRMS system.

Company, Country, and **To Currency** — Select the Company, Country, and To Currency that the system will use as a default value.

Standard Hours

Default Standard Hours — The system takes default standard hours from the Define Salary Plan component (SALARY_PLAN_TABLE), the Job Code Table component (JOB_CODE_TBL), or the Installation Table component (INSTALLATION_TBL).

Work Period — The standard work period is the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency). The system takes default standard work period from the salary plan, the job code, or the Installation Table. The value that you enter here is used for validation in the Job Data pages (JOB_DATA) and the Position Data component (POSITION_DATA).

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Minimum Standard Hours and **Maximum Standard Hours** — Enter the default minimum and maximum standard hours for this SetID. The value that you enter here is used for validation on the Job Data pages and the Position Data component.

(BEL) Belgium

Industrial Committee — Select the appropriate industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code — Enter the NACE code for the company. Note: You can choose the level of detail for the NACE Code. It can range from 5 digits for group level, 6 for class level and 7 for subclass level.

(CAN) Canada

Census Metropolitan Area — Select a metropolitan area.

Industrial Sector — Select an industrial sector.

Note. These values affect Canadian regulatory reporting in PeopleSoft Enterprise Human Resources.

Entering Company Information

To enter company information, use the Company Legal Type component (LEGAL_TYPE), the Company component (COMPANY_TABLE), and the Company Table Report component (RUN_PER707).

This section provides an overview of companies and discusses how to:

- Define company legal types.
- Define companies.
- Set default information for companies.
- (BEL) Enter default information and salary factors.
- (BEL) Associate a provider with a setID.
- (USA) Set up tip allocation.
- (CAN) (USA) Enter liability and expense account codes.
- (USA) Enter FICA and tax information.
- Enter phone information.
- Define company rules.

Understanding Companies

Use the Company component to enter information about a single company or multiple companies in your organization, from the corporate address to general ledger accounts, tax information, and payroll processing information.

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If you're using only PeopleSoft Human Resources, you enter information only on the Company Location page (COMPANY_TABLE1) for each company that you want to add. You can also associate a default pay group with the company on the Default Settings page (COMPANY_TABLE2_GBL). The value you select appears as the default on the Job Data pages for people in this company. However, it is easier to treat each company that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific company information on the Pay Entity component (GP_PYENT), if your pay entity is the same as the company. You do this in PeopleSoft Global Payroll.

(USA) Special Considerations for U.S. Companies

PeopleSoft Enterprise Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active job data records. These retiree jobs must be associated with specific retiree companies. Therefore, be sure to set up companies to house your payees. Because pension plans are distinct tax reporting entities with their own U.S. Employer Identification Numbers (EINs), you typically set up one retiree company for each pension plan that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component (PLANADM).

For U.S. companies, if you're using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a company is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes. Because pension plans have EINs, you create companies for each pension plan. You reference a pension plan company from the payee job data record of anyone collecting benefits from that plan.

If your company uses PeopleSoft Payroll for North America, each company that you add must be equivalent to each EIN that you use. To add a company EIN, your payroll staff needs to complete all three pages at least once.

See Also

PeopleSoft Enterprise Pension Administration 9.0 PeopleBook, "Establishing Plan Administration Information," Entering Funding Provider and Company Information

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook

Pages Used to Enter Company Information

Page Name	Object Name	Navigation	Usage
Legal Type	LEGAL_TYPE_TBL	Set Up HRMS, Foundation Table, Organization, Company Legal Type, Legal Type page	Many countries require that you report on your organization's legal structure, whether it's a corporation, a public limited company, a cooperative, or another type of organization. You can associate the correct legal type with each company on the Company Table and use the information when you generate reports.

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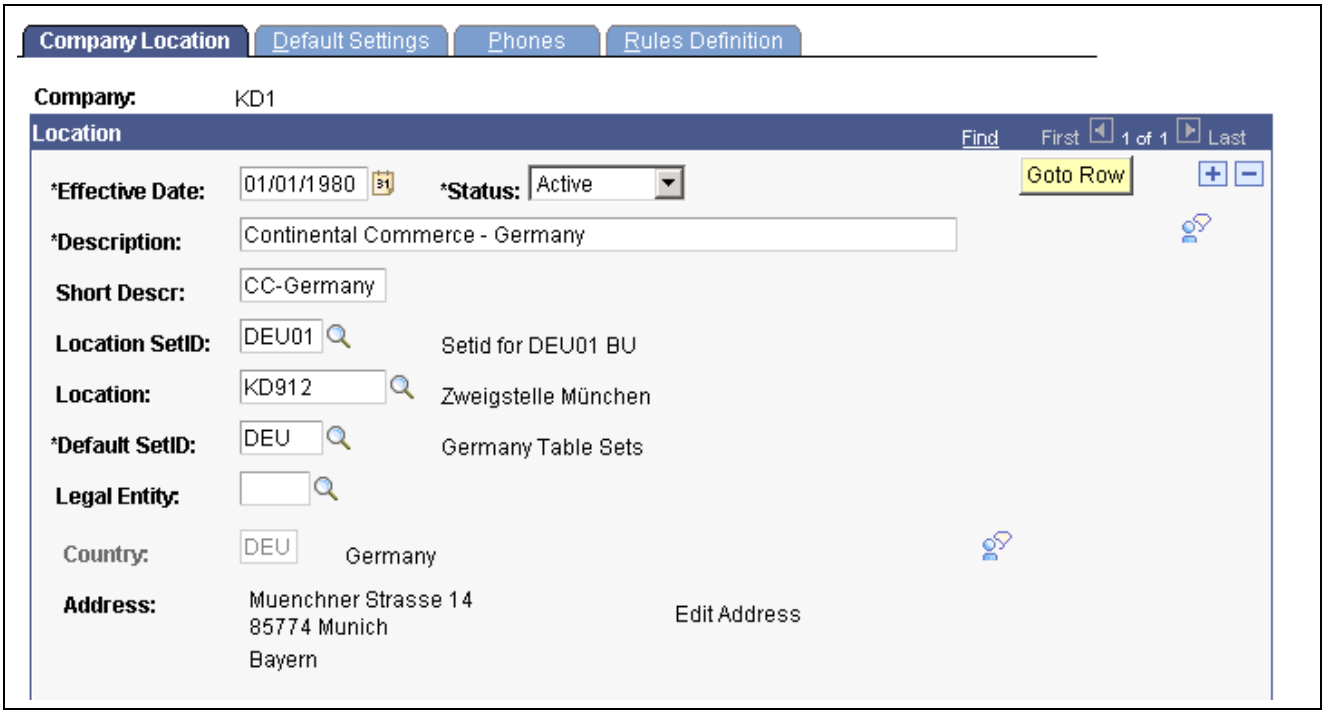
Page Name	Object Name	Navigation	Usage
Company Location	COMPANY_TABLE1	• Set Up HRMS, Foundation Tables, Organization, Company, Company Location • Set Up HRMS, Foundation Tables, Organization, Agency USF, Company Location	Define and describe companies.
Default Settings	COMPANY_TABLE2_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Default Settings • Set Up HRMS, Foundation Tables, Organization, Agency USF, Default Settings	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.
(BEL) Claeys	COMP_TBL2ABEL_SBP	Click the Claeys link on the Default Settings page.	Enter the default information and salary factors that are used to perform Claeys formula calculations.
(BEL) Providers	COMP_TBL2BBEL_SBP	Click the External Providers link on the Default Settings page.	Associate a provider with a setID.
Tips Processing	COMP_TBL6USA_SEC	Click the Tips Processing link on the Default Settings page.	Set up tip allocation.
(USA) (CAN) General Ledger Liability Accts	COMP_TBL7USA_SEC	Select the Liability/Expense Account Codes link on the Default Setting page.	Use the Liability/Expense Acct Codes page to enter General Ledger Account Codes for Net Pay and Direct Deposits.
Tax Details	COMP_TBL8USA_SEC	Select the FICA/Tax Details link on the Default Settings page.	Use the FICA/Tax Details page to specify your federal employer identification number, link companies together, and define default tax status.
Phones	COMPANY_TABLE3_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Phones • Set Up HRMS, Foundation Tables, Agency USF, Company, Phones	Enter telephone information for a company.

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Page Name	Object Name	Navigation	Usage
Rules Definition	COMPANY_TABLE4_GBL	• Set Up HRMS, Foundation Tables, Organization, Company, Rules Definition • Set Up HRMS, Foundation Tables, Organization, Agency USF, Rules Definition	Define FTE rules for the company.
Company Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Company Table Report	Run the Company Table report (PER707). This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.

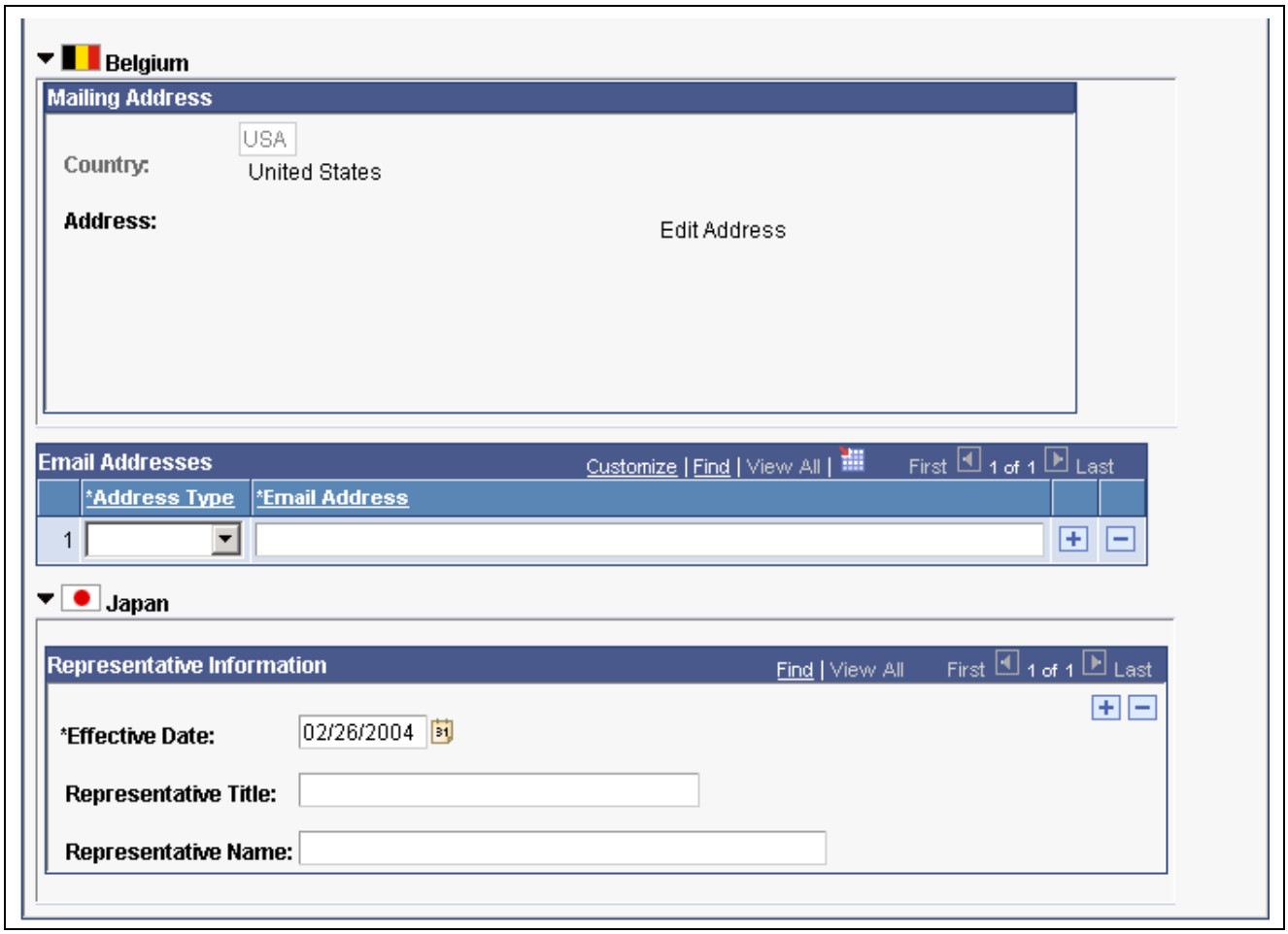
Defining Companies

Access the Company Location page.



Company Location (1 of 2)

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Company Location (2 of 2)

For a single-company environment, you set up this table only once; for multiple-company environments, you set up a company code for each company.

(BEL) Belgium

Enter the address information for your Belgian companies.

(JPN) Japan

Representative's Title Enter the title of your company's representative as of the effective date. This is the person whose title (and name) appears by default on the Appointment Notification report page.

If you accept the default—which you can override on the report page—the title and name appear on the Notification of (Hiring, Department Change, Grade Advance or Termination) pages.

Representative's Name Enter the representative's name. You can override this default on the Appointment Notification report page.

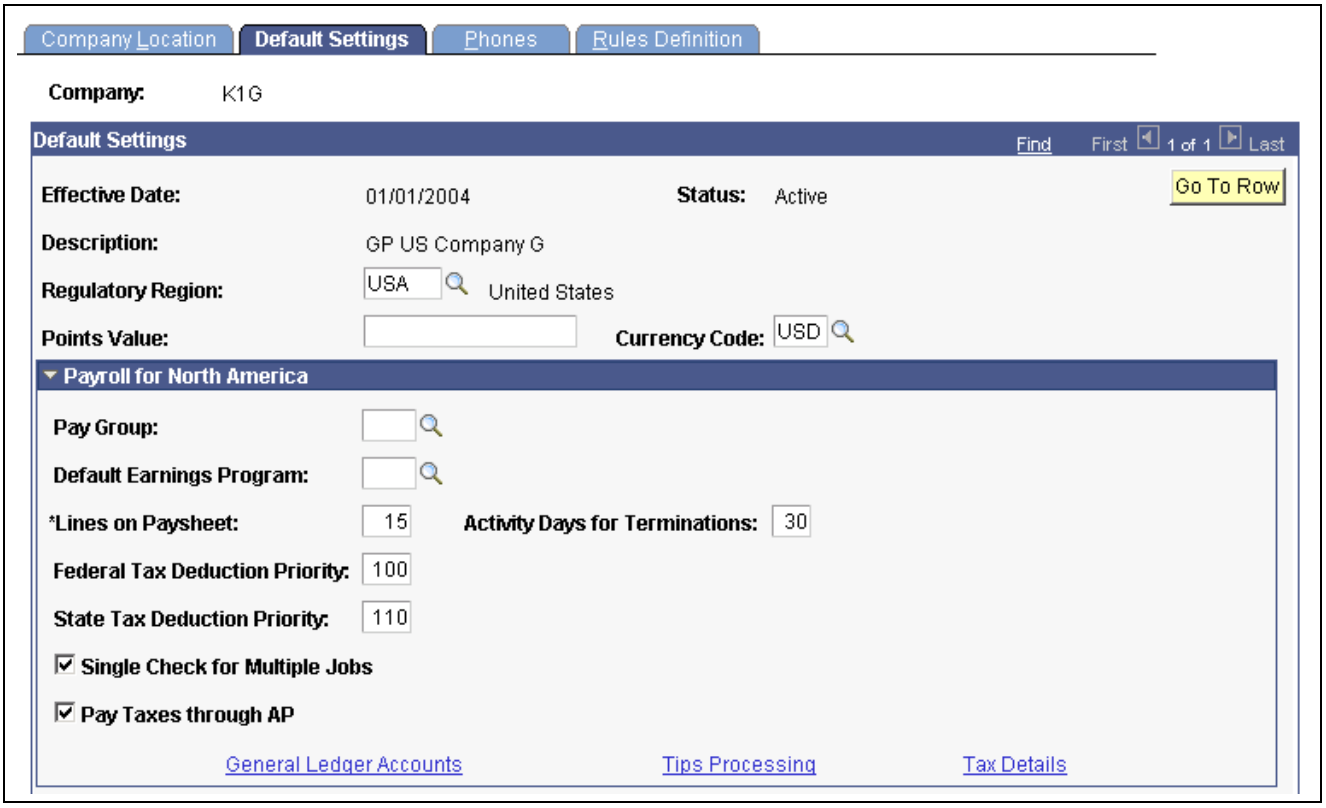
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(JPN) Tracking Additional Appointments (Kenmu)," Recording and Viewing Employee Additional Appointments Data

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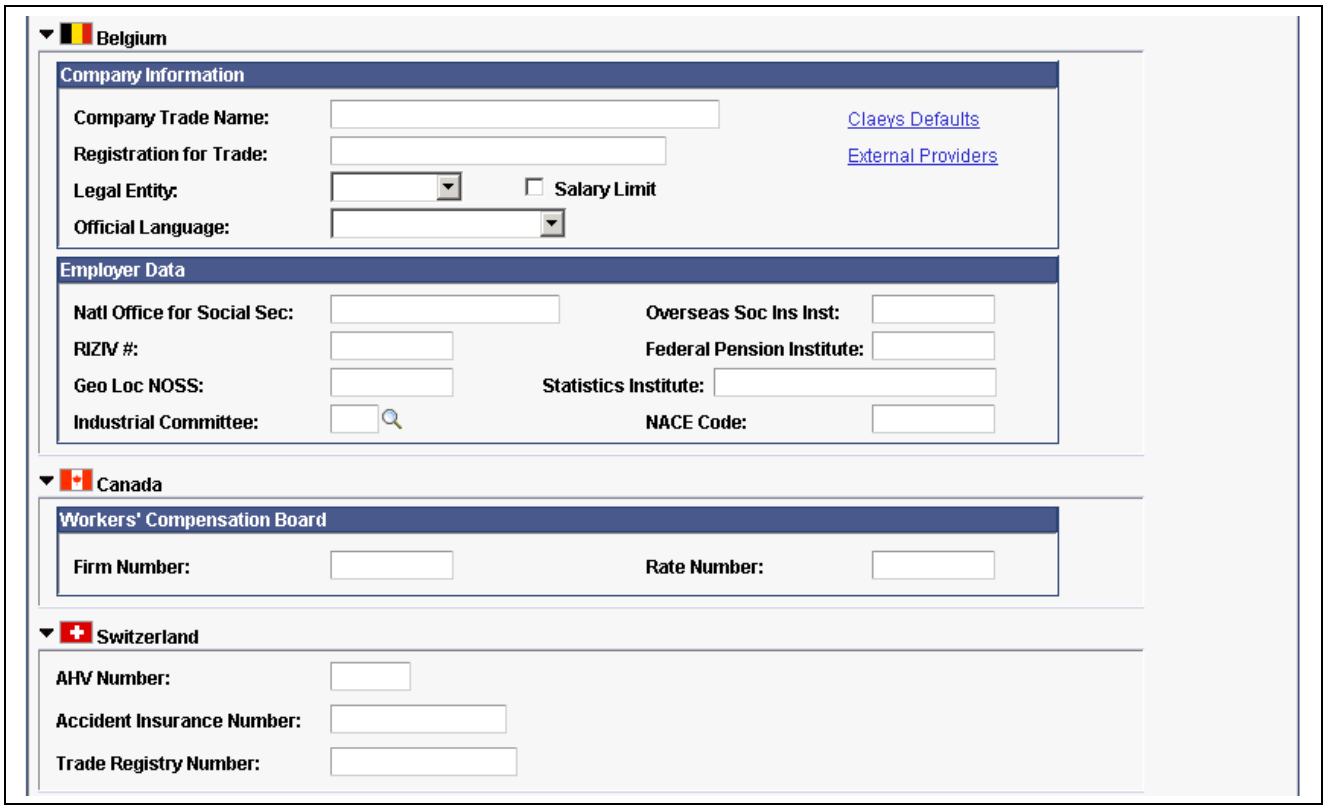
Setting Default Information for Companies

Access the Default Settings page.



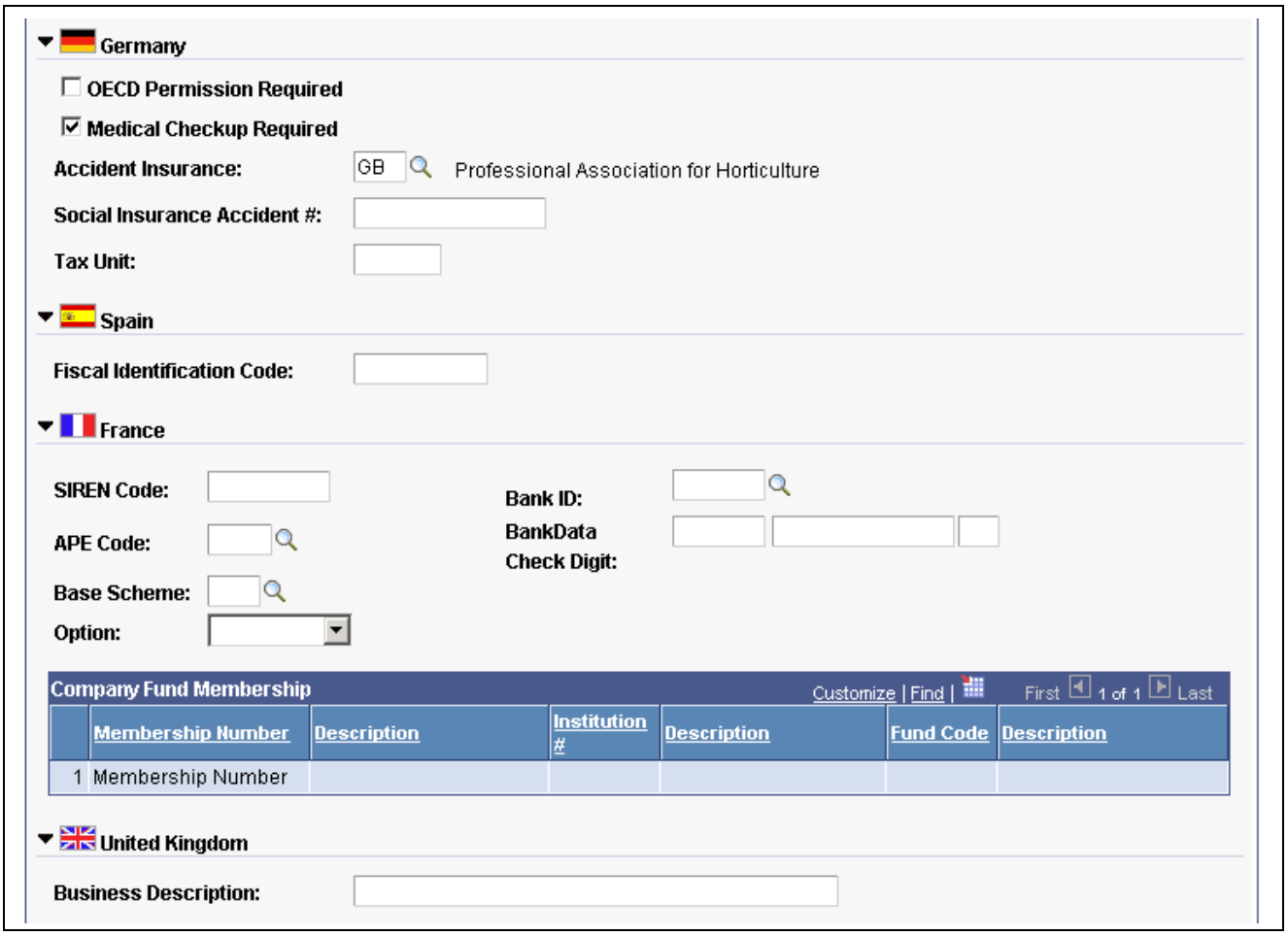
Default Settings page (1 of 6)

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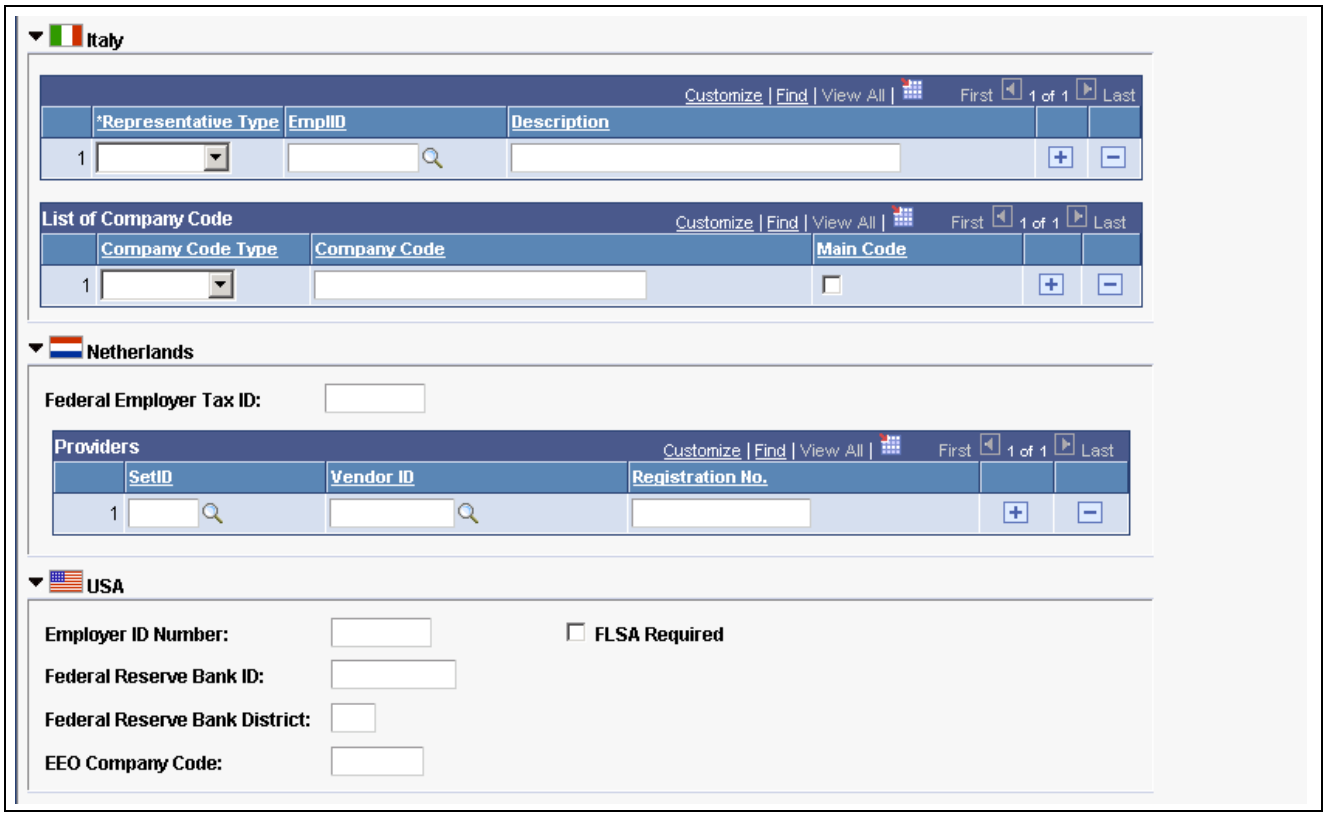
Default Settings page (2 of 6)

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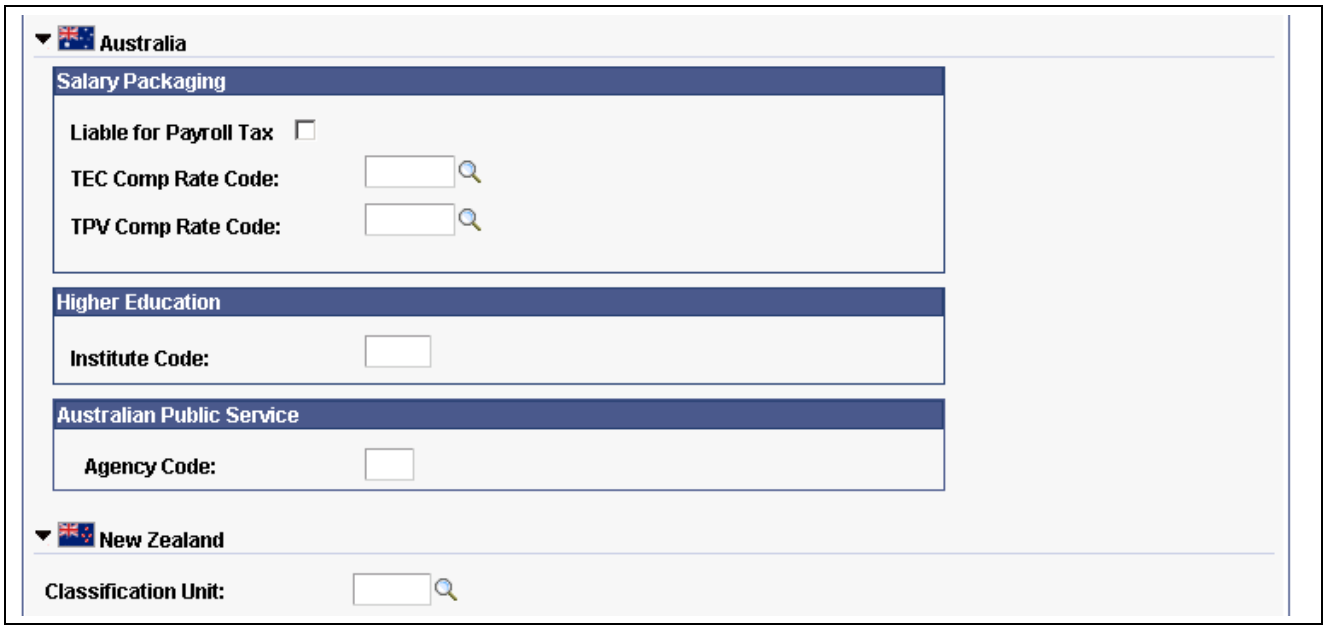


Default Settings page (3 of 6)

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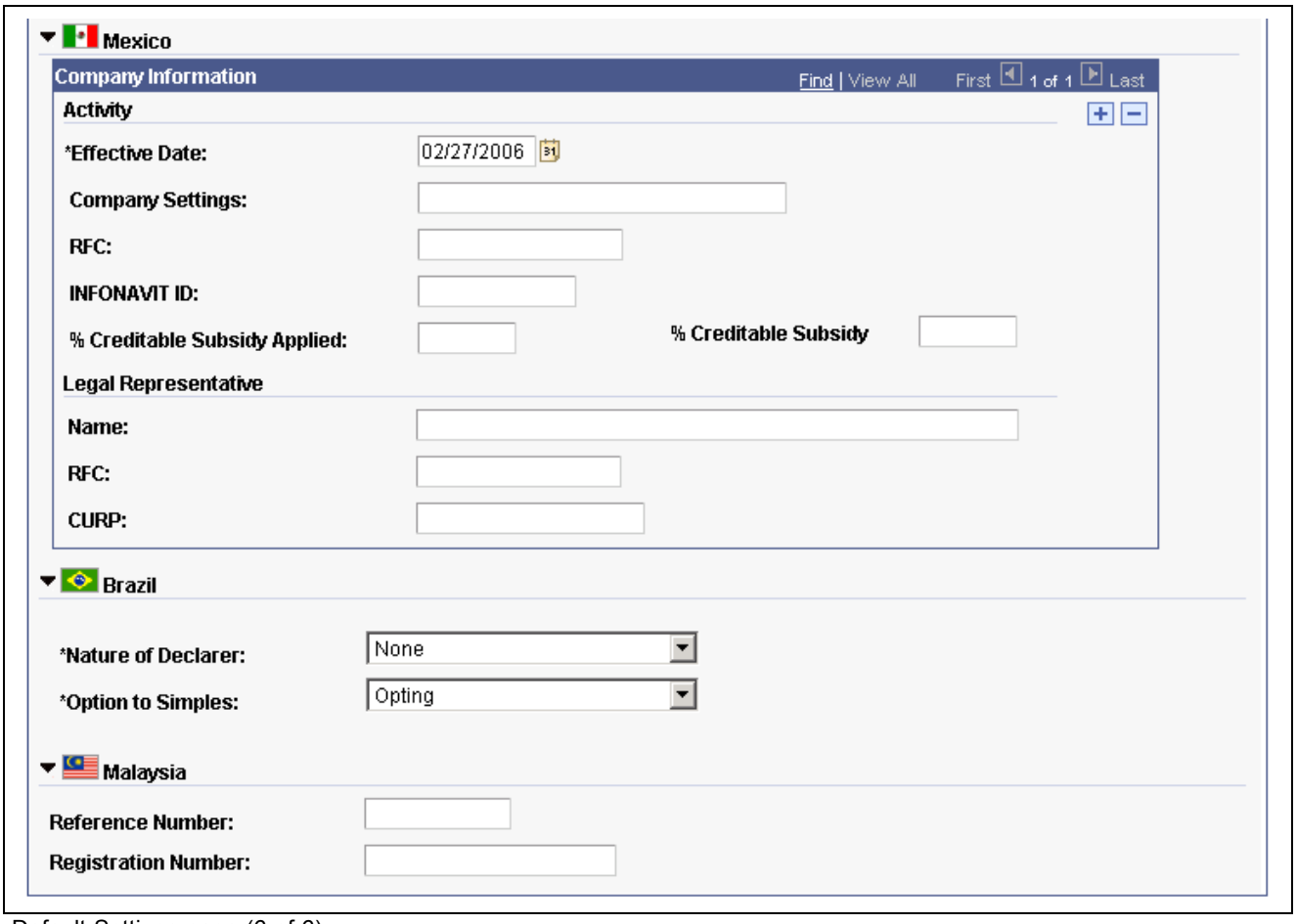


Default Settings page (4 of 6)



Default Settings page (5 of 6)

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Default Settings page (6 of 6)

Default Settings

Points Value Enter the monetary value of your points.

Payroll for North America

These fields are for companies using PeopleSoft Payroll for North America.

Pay Group If you enter a value in this field, the pay group appears as the default for all employees in this company. You save data-entry time at the employee level if most employees have the same pay group.

Note. The size of this field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. First, set up your PeopleSoft Global Payroll or PeopleSoft Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.

Default Earnings Program Select a default value for people in this company.

Lines on Paysheet Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period.

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See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Defining Earnings Codes and Earnings Programs".

Activity Days for Terminations This field is for information purposes only.

Federal Tax Deduction Priority and **State Tax Deduction Priority** Enter the federal and state tax deduction priorities.

Pay Taxes through AP (pay taxes through Accounts Payable) Select to indicate if this company is tracking its taxes through Accounts Payable.

General Ledger Account Codes Click to enter information about general ledger account codes.

Tips Processing Click to set up the parameters for handling tips in your company's environment.

Tax Details Click to enter FICA and tax details.

(BEL) Belgium

Company Trade Name Enter the name of your Belgian company; for example, Continental Commerce - Belgium.

Registration for Trade Enter the company's official registration number from the Belgian Trade Register.

Legal Entity A legal entity is the legal form that applies to a company: *Inc* (corporation), *Coop* (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.

Salary Limit Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed.

If your organization enforces periods where no salary increases are allowed or limits salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.

Official Language Select the company official language. This value is used as the default person's official language, with the exception of companies located in the Brussels-Capital Region, for which the person's preferred language is used as the default.

Claeys Defaults Click to enter Claeys default and salary factor information on the Claeys page.

See Chapter 11, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors, page 235.

External Providers Click to enter Belgian provider information for tracking third-party providers on the Providers page.

See Chapter 11, "Setting Up Organization Foundation Tables," (BEL) Associating a Provider with a SetID, page 236.

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Natl Office for Social Sec (national office for social security) — Enter the number under which the company is registered at the National Office for Social Security.

Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute) — Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.

RIZIV # (RIZIV number) — Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.

Geo Loc NOSS (geographic location for State Social Insurance category) — Enter the geographical location for the NOSS.

Statistics Institute — Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.

Industrial Committee — Select the appropriate industrial committee for the company. You can override this value at the department level.

NACE Code — Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Firm Number and **Rate Number** — Enter if you are tracking Workers' Compensation Board data for Canadian workers.

(CHE) Switzerland

AHV Number (Alters-und Hinterbliebenen Versicherung number) — Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.

Accident Insurance Number — Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.

Trade Registry Number — Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(DEU) Germany

OECD Permission Required (Organization for Economic Cooperation and Development permission required) — Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.

Medical Checkup Required — Select if a medical checkup is required for your workers under German labor law.

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(ESP) Spain

Fiscal Identification Code Enter your company's fiscal identification code as assigned by the Spanish government.

(FRA) France

SIREN Code (*Systeme Informatique pour le Repertoire des Entreprises* code) Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.

APE Code (*Activite Principale Exercee* code) Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.

BankData Check Digit Enter a bank data check digit (optional).

Base Scheme Select the base scheme for the company. Base schemes are defined on the Mandatory Base Scheme page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Base Scheme) and are required for DADS reporting.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, "Setting Up DUCS and DADS Reporting".

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, "Generating DADS".

Option This field was previously used in DADS reporting for the previous DADS norm (DADS-TDS). However, the field is no longer used with the current DADS reporting that uses the DADS-U norm.

Company Fund Membership This scroll area displays the pension/contingency contracts defined for the company on the Pensions/Contingency Contracts page. Click the Membership Number link to view the contract definition.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(FRA) Meeting Regulatory Requirements for France," Setting Up Pension/Contingency Fund Contracts.

Note. The system doesn't check the format of the numbers that you enter in the fields on this page.

(GBR) UK

Business Description Enter the company business description. This information is used on the two local UK RIDDOR reports, which are located on the Monitor Health/Safety menu. The system prints the business description of the relevant company from the Job record of each employee.

(ITA) Italy

Company Code Enter the company code that is assigned to your company by the Italian regulatory authorities.

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Main Code Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Federal Employer Tax ID Enter the tax ID number that is provided by the Dutch government. It is required for the wage declaration that is submitted to the Tax Authority.

See *PeopleSoft Enterprise Global Payroll for the Netherlands 9.0 PeopleBook*, "Withholding and Reporting Taxes," Generating Wage Declarations.

Vendor ID Select the providers that are associated with the company. For Dutch illness reporting, the system uses the vendor that has the HRMS Class field on the Vendor Information page set to *I (Industrial Insurance Board Provider)*. Set up vendors using the Provider/Vendor Table component (Set Up HRMS, Product Related, Benefits NLD).

Dutch illness reporting is delivered with the Human Resources Monitor Absence business process and PeopleSoft Enterprise Global Payroll for the Netherlands.

See *PeopleSoft Enterprise Global Payroll for the Netherlands 9.0 PeopleBook*, "Updating Absences," Understanding Dutch Illness Reporting.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Absence*, "(NLD) Using Dutch Illness Reporting".

Registration No. (registration number) Enter the registration number for the insurance provider, which you obtain from the provider. The registration number is a required field for the vendor that is used in Dutch illness reporting.

(USA) USA

Employer ID Number Specify the unique Federal Employer ID Number (EIN) associated with the company. This control becomes the default for the Employer ID State Withholding control on the Company State Tax Table.

Note. If you choose to set up multiple companies with the same EIN, modifications must be made to the quarterly wage reports to 'roll-up' these totals (for example, TAX810XX, TAX860XX, TAX002XX, etc.).

However, for Annual W-2 reporting, employee balances can be combined using the W-2 Reporting Company feature.

FLSA Required Select this option if *any* non-exempt employees in the company need to have the FLSA rate calculated for their overtime pay. If there are Pay Groups with non-exempt employees who do not need to have the FLSA rate calculated then the FLSA Required flag on the Pay Group should be cleared.

Clearing the FLSA Required on the Company component prevents you from using the FLSA calculation for all pay groups because the FLSA Required flag on the Pay Group component (PAYGROUP_TABLE) is hidden.

If you select this option, also select the applicable FLSA rule to indicate how and when the FLSA calculated premium will apply to overtime pay.

Higher of FLSA/Contractual FLSA premium will apply only when it is greater than the contractual rate.

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Always use FLSA Premium Use the FLSA premium amount regardless of the contractual rate.

Federal Reserve Bank ID The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank (FRB) identifier assigned to this company by the FRB.

Federal Reserve Bank District The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank District Designator indicating which FRB is doing the issuing of the bonds.

EEO Company Code (equal employment opportunity company code) If the U.S. government has assigned this company a code for EE0-1 and VETS 100 reporting, enter the number.

(AUS) Australia

Liability for Payroll Tax Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page (PKG_PYTX_RT_TBL) are used in the package compensation calculation for your salary-packaged employees.

TEC Comp Rate Code and**TPV Comp Rate Code** Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment.

You set up your compensation rate codes on the Comp Rate Code Table page (COMP_RATECD_TBL).

Institute Code This group box appears only if you've selected the Education & Government check box on the Installation Table component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.

Agency Code This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

Classification Unit Enter the classification unit for your company. This information comes from the Class Unit Table page (CLS_UNT_TBL_NZL). The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(NZL) Meeting Regulatory Requirements for New Zealand," Setting Up the ARCI Table.

(MEX) Mexico

Company Settings Define the company's activity. Typical values are *Financial, Pharmaceutical, Manufacturing, Services, Tourism,* and *Sales.*

RFC Enter the RFC ID for your company.

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The Mexican Treasury (*Secretaria de Hacienda y Credito Publico*) identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.

INFONAVIT ID Enter the INFONAVIT ID for your company.

% Creditable Subsidy Enter the percentage of accreditable subsidy. This value is used to calculate federal taxes.

Name Enter the name of the person who acts as the legal representative for the company.

RFC and **CURP** Enter these values for the legal representative.

(BRA) Brazil

Nature of Declarer Enter the legal nature of the establishment. This information is used for reporting purposes.

Option to Simples Select an option to simples value to have the company's contributions replaced by the actual invoice contribution amounts after invoices are generated.

(MYS) Malaysia

Reference Number Enter the company tax reference number (the Company C File Number). This number is used in Annual Statement of Tax Deductions - Malaysian CP159 report (GPMYTX05).

Registration Number This is the company registration number, assigned by the government of Malaysia assigns to an organization to uniquely identify the company. This is used in CP39 Monthly Statement of Tax Deductions - Electronic form (GPMYTX04).

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

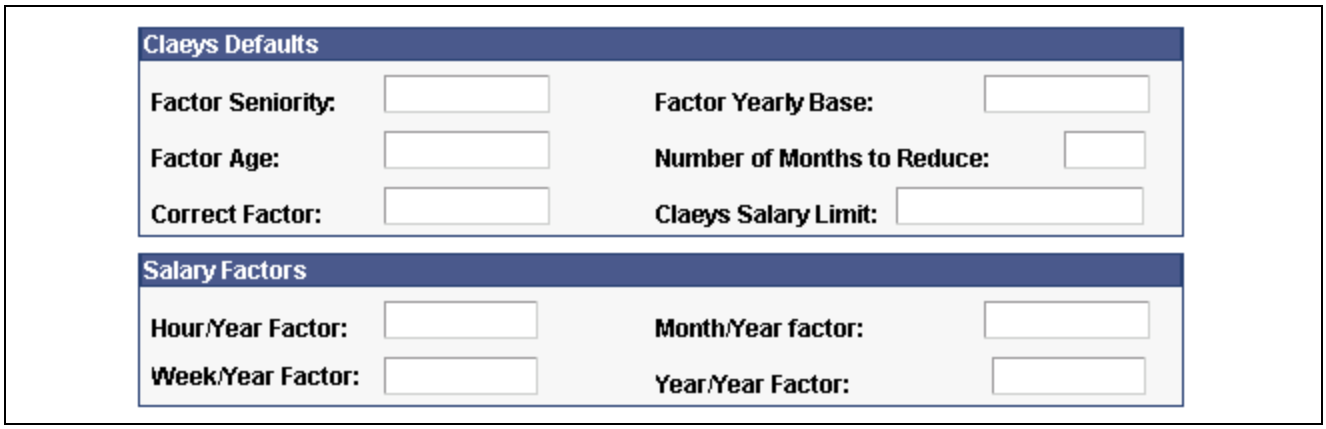
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PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

(BEL) Entering Default Information and Salary Factors

Access the Claeys page.

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Claeys page

Claeys Salary Limit Enter the salary limit for applying the Claeys formula.

Hour/Year Factor Enter the hour/year factor to calculate the hourly amount that an worker earns and gross that amount up to the yearly total.

Month/Year Factor Enter the month/year factor to calculate the monthly amount that an worker earns and gross that amount up to the yearly total.

Week/Year Enter the week and year to calculate the weekly amount that an worker earns and gross that amount up to the yearly total.

Year/Year Enter the year/year factor to calculate the yearly total.

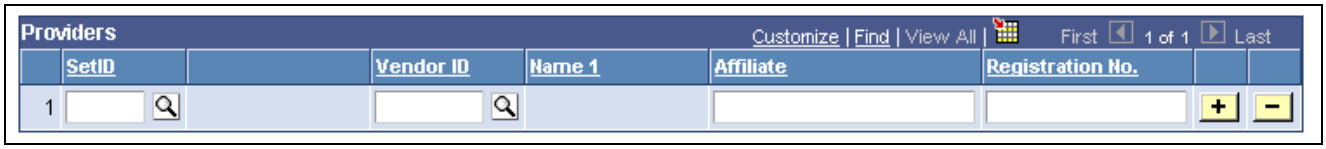
Note. In Belgium, the year factor is 13.85.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(BEL) Entering Additional Data for Belgian Workers"

(BEL) Associating a Provider with a SetID

Access the Providers page.



Providers page

SetID and **Vendor ID** Select from the list of options. The system lists all valid providers, not just Belgian providers.

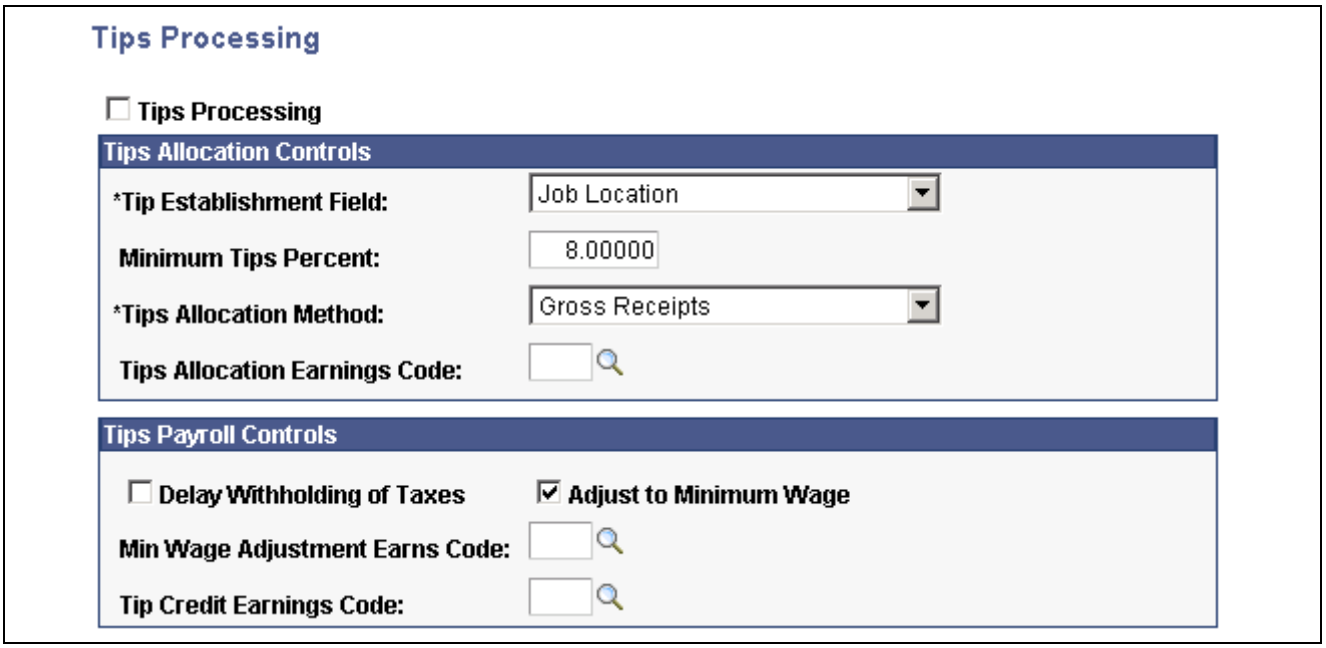
Affiliate Enter the affiliate, if applicable.

Registration No. (registration number) Enter the registration number, if applicable.

(USA) Setting Up Tip Allocation

Access the Tips Processing page.

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Tips Processing page

Tips Processing Select to indicate the use of this feature. Tip allocation is required when the amount of tips reported by tipped worker for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

Tips Allocation Controls

These values populate the Tip Establishment page (TIPS_ESTAB_TBL).

Tip Establishment Field This field designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or other unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant. You cannot override this value in the Tip Establishment page.

Minimum Tips Percent Enter the minimum percentage of tips to be distributed to workers. The percentage specified by the federal regulations is 8 percent. Employers can apply for a lower percentage if it can be shown in writing that the tip rate at an establishment is less than 8 percent. You can override this value in the Tip Establishment table.

Note. The minimum tips percent value is based on federal and state regulations.

Tips Allocation Method Select the tip allocation method used for this company. Only establishments that employ fewer than 25 employees (tipped and nontipped) during a pay period can use the *Hours Worked* method. You can override this value in the Tip Establishment table.

Tips Allocation Earnings Code Select the earnings code to record the amount calculated by the tip allocation process. You cannot override this value in the Tip Establishment table.

Tips Payroll Control

These values populate the Pay Group table, where you can override them.

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Delay Withholding of Taxes Select to have the system delay withholding until the worker reports 20 USD of tips in a month federal and state taxes for each earning that is indicated for tax withholding in the Tax table.

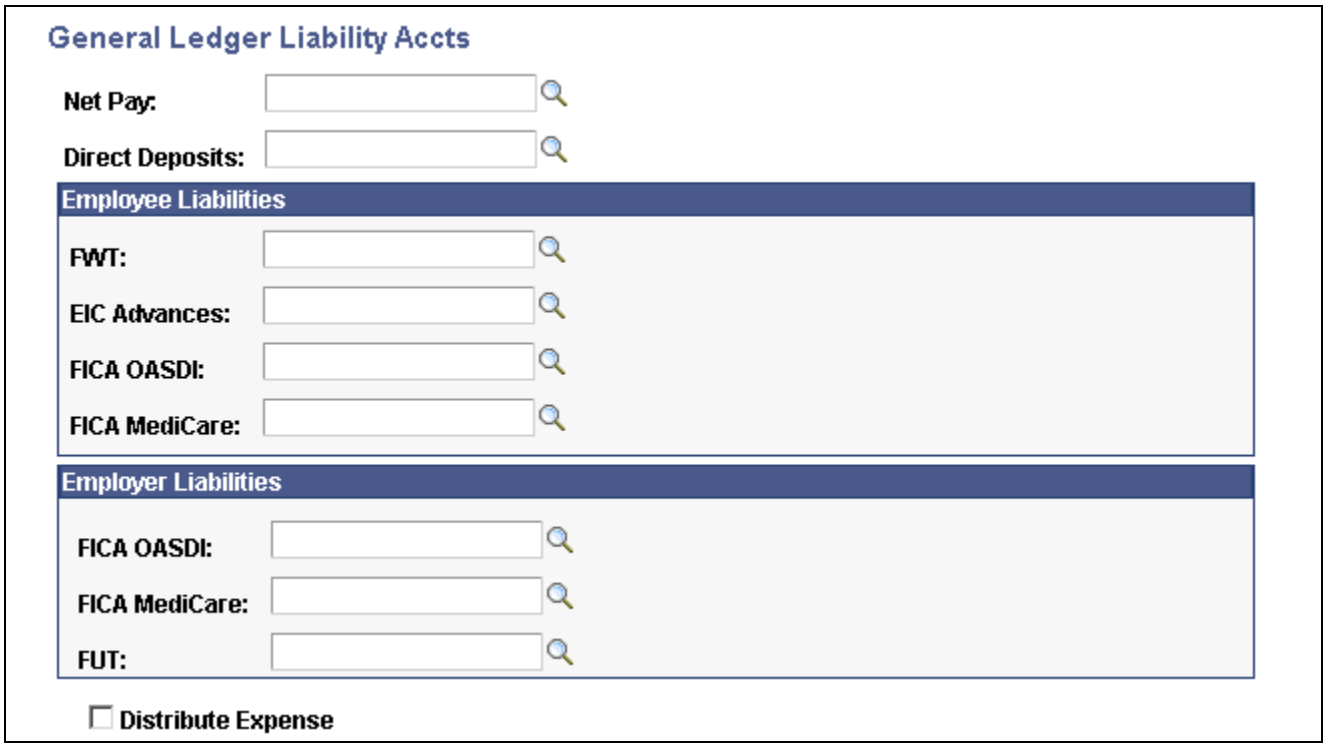
Adjust to Minimum Wage (adjustment to minimum wage) Select this check box unless your company has a special agreement with the Internal Revenue Service. This ensures that tipped workers receive necessary wage adjustments to bring them up to the minimum wage.

Min Wage Adjustment Earns Code (minimum wage adjustment earnings code) Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.

Tip Credit Earnings Code Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

(CAN) (USA) Entering General Ledger Account Codes

Access the General Ledger Liability Accts page from the Company Table - Default Settings page.



General Ledger Liability Accts page

Select the combination codes for each liability.

The Net Pay and Direct Deposits fields on this page are applicable to both U.S. and Canada. The liability combination codes are related to U.S. tax accounting information only. Canadian companies use the Wage Loss Plan Table to enter GL tax accounting information.

Distribute Expense Select this box to distribute the cost of benefits between an employee's home department and other departments where the employee earns earnings (such as an employee who has multiple jobs). The system distributes the cost of benefits according to the percentage of total earnings that the employee earned

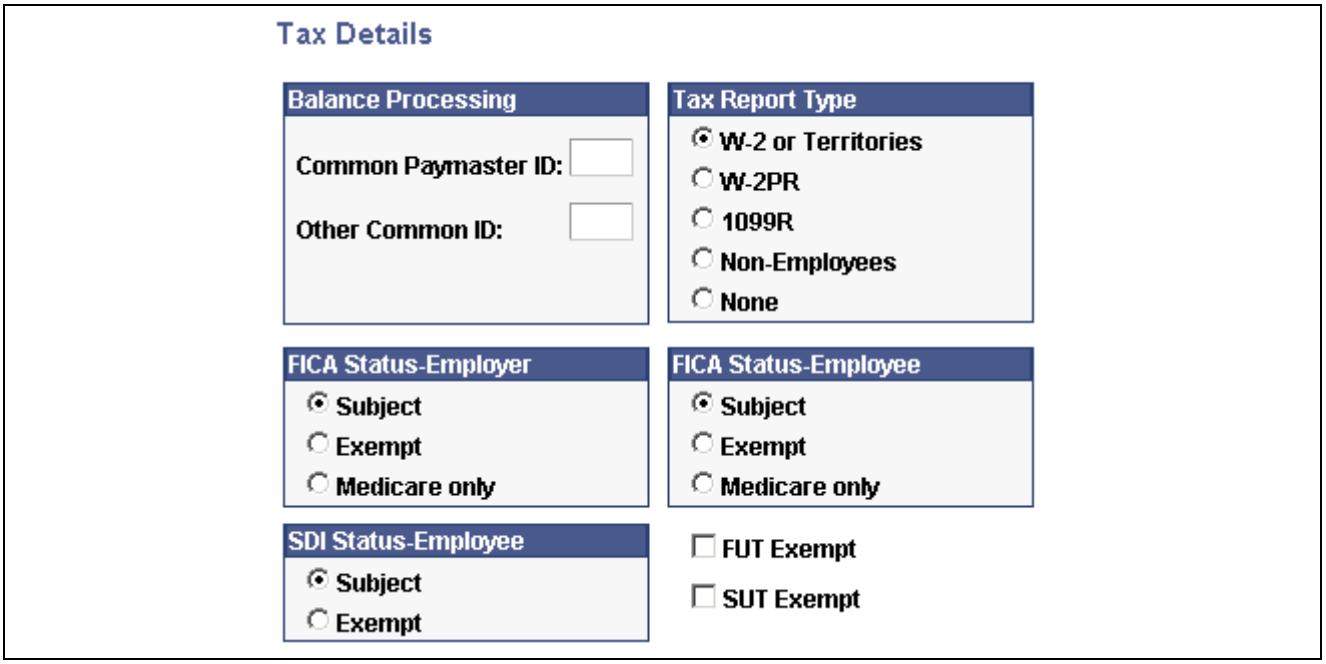
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in each department. If you do not select this check box, all expenses are distributed to the employee's home department.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Setting Up Payroll Tax Tables," (CAN) Setting Up Wage Loss Plans.

(USA) Entering FICA and Tax Information

Access the Tax Details page from the Company Table - Default Settings page.



Tax Details page

Balance Processing

Use the Balance Processing options when two or more related corporations concurrently employ one or more workers and pay them through one of the corporations as a common paymaster. By selecting these controls, the system treats simultaneous employee balances in multiple companies as one total balance when calculating payroll.

The total Social Security and Medicare taxes that must be paid are determined as if the people had one employer—the common paymaster—paying all their wages. The system will also recognize balances in all companies linked by a common paymaster when determining if a certain limit has been met—so you don't have to calculate employee balances manually.

Common Paymaster ID Enter a Common Paymaster ID to tell the system to treat *all employee tax*, *deduction*, *garnishment*, and *earnings balances* as one for companies sharing that Common Paymaster ID.

Other Common ID Enter an Other Common ID to tell the system to treat *all employee deduction garnishment, and earnings balances* as one for companies sharing that Other Common ID.

You'd typically use an Other Common ID when you need to keep your companies separate for tax purposes, but need to maintain accurate current employee balances across companies for calculating Section 415 limits,

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year-to-date deduction maximums, and maximum yearly earnings ceilings. Leave accrual balances are not included in Common Paymaster ID or Common Other ID processing.

Tax Report Type This field is used by the year-end tax reporting programs to select the proper set of people, either W-2, 1099R recipients, or non-employees, for inclusion on one of several possible year-end tax reports.

Note. To produce Forms W2PR for Puerto Rico in Payroll for North America, you must have paid Puerto Rico employees in one or more separate companies for the entire tax year being reported. Each Puerto Rico employee's home address must be set up with the country code *USA* and the state code *PR* for proper tax reporting.

Note. To include retirees in your year-end reports, you must set them up in a separate 1099-R company.

FICA Status-Employer This field is information only.

FICA Status-Employee This information appears as a default on the Job Information page (JOD_DATA_JOBCODE).

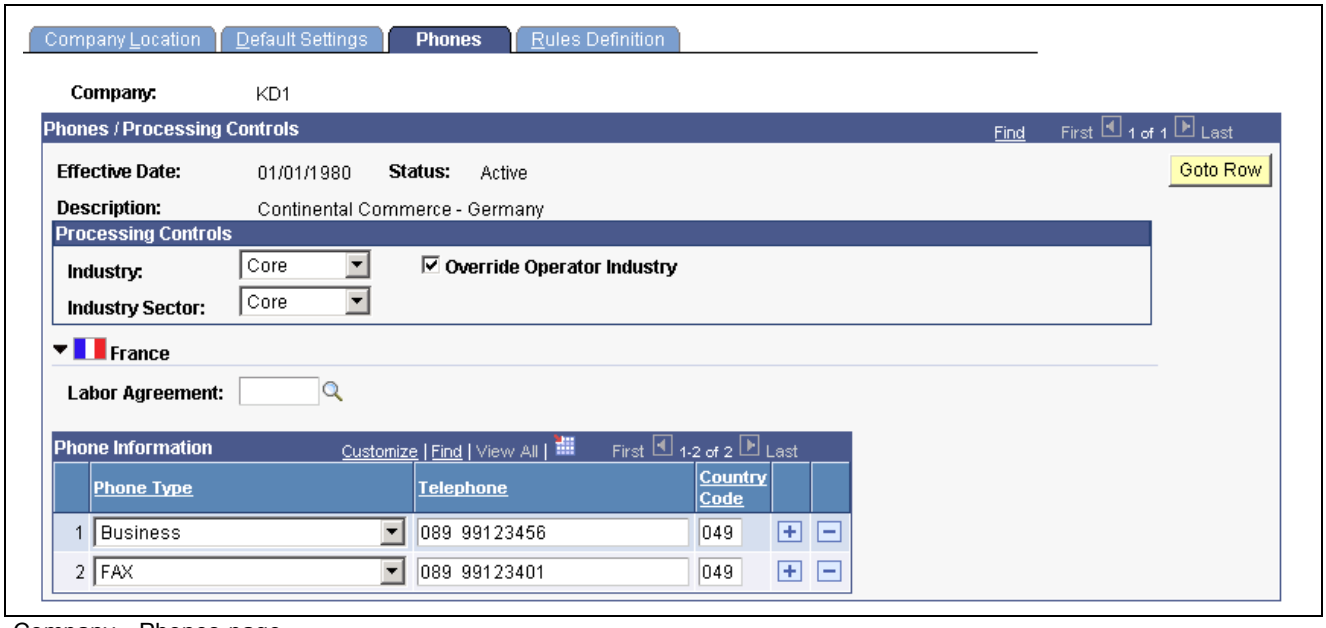
SDI Status-Employee For states where the SDI status is not specified as *Not Applicable*, the Employees' SDI Status will appear as a default.

FUT Exempt Select this option if the company is exempt from FUT.

SUT Exempt Select this option if the company is exempt from SUT.

Entering Phone Information

Access the Phones page.



Company - Phones page

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Processing Controls

Override Operator Industry Select if the operator industry can be overridden.

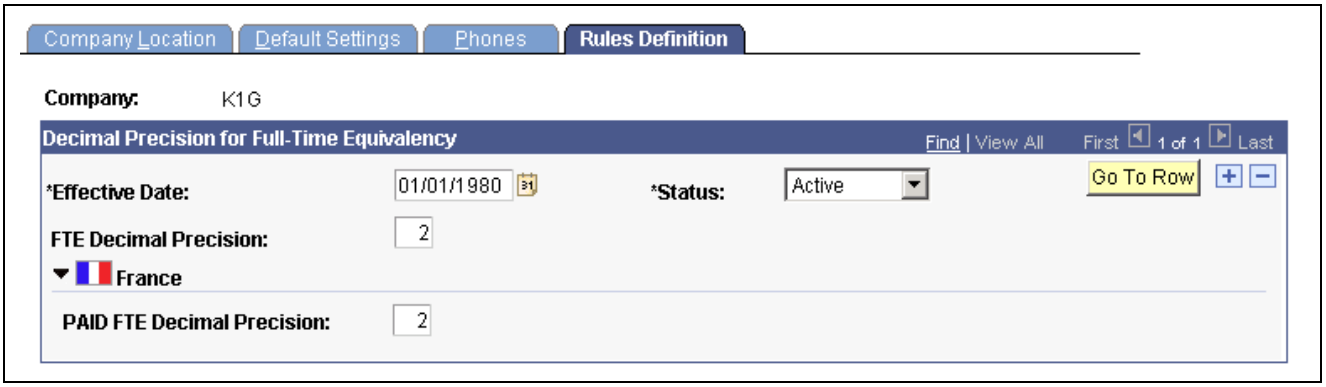
(FRA) France

Labor Agreement Select a Labor Agreement code from the list.

Phone Type and **Telephone** Enter the phone type, such as *Business, Home,* and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data.

Defining Company Rules

Access the Rules Definition page.



Rules Definition page

FTE Decimal Precision Enter the number of decimal points the system will use when calculating FTE.

Note. If you set this field to zero or leave it blank, the FTE calculations on the Job Data pages will default to 1 regardless of the number of hours entered or part/full-time status.

(FRA) France

Paid FTE Decimal Precision Enter the number of decimal points the system will use when calculating FTE for payment purposes.

(USF) Entering Agency Information

To enter agency information, use the Agency USF component (AGENCY_TABLE) and the Agency Table Report component (RUN_FGPER803).

This section provides an overview of agency information and discusses how to enter payroll information.

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Understanding Agency Information

Use the Agency component (AGENCY_TABLE) to enter information about a single agency or sub-agencies in your organization, from the central agency address to general ledger accounts, tax information, and payroll processing information. Most pages contain data from PeopleSoft Payroll for North America.

If you use only PeopleSoft Human Resources, you enter information only on the first page, the Agency Location page, for each agency that you want to add. You can also associate a default pay group with the agency on the Default Settings page. The value that you select appears as the default on the Job Data pages for workers in this agency. However, it is easiest to treat each agency that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Payroll for North America, an agency is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

If your agency uses PeopleSoft Payroll for North America, each sub-agency that you add must be equivalent to each EIN that you use. Your payroll staff needs to complete all nine pages at least once to add an agency EIN.

You can print a report of your Agency table using the Agency Table report.

Note. The Agency Location, Default Settings, Phones, and Rules Definition pages in the Agency Table component are identical to those in the Company Table component and share the same object names.

Pages Used to Enter Agency Information

Page Name	Object Name	Navigation	Usage
Payroll Interface Information	GVT_COMPANY_TBL7	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Interface Information	Enter the agency's payroll interface information.
Payroll Office Address	GVT_COMPANY_TBL8	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Office Address	Enter the agency's payroll office address information.
ECS Address (electronic certification system address)	GVT_COMPANY_TBL9	Set Up HRMS, Foundation Tables, Organization, Agency USF, ECS Address	Enter the agency's ECS address information.
Agency Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Agency Table Report USF	Run the Agency Table report (FGPER803). This prints all agencies in the Agency component and default information, including name and address, agency code, and effective date.

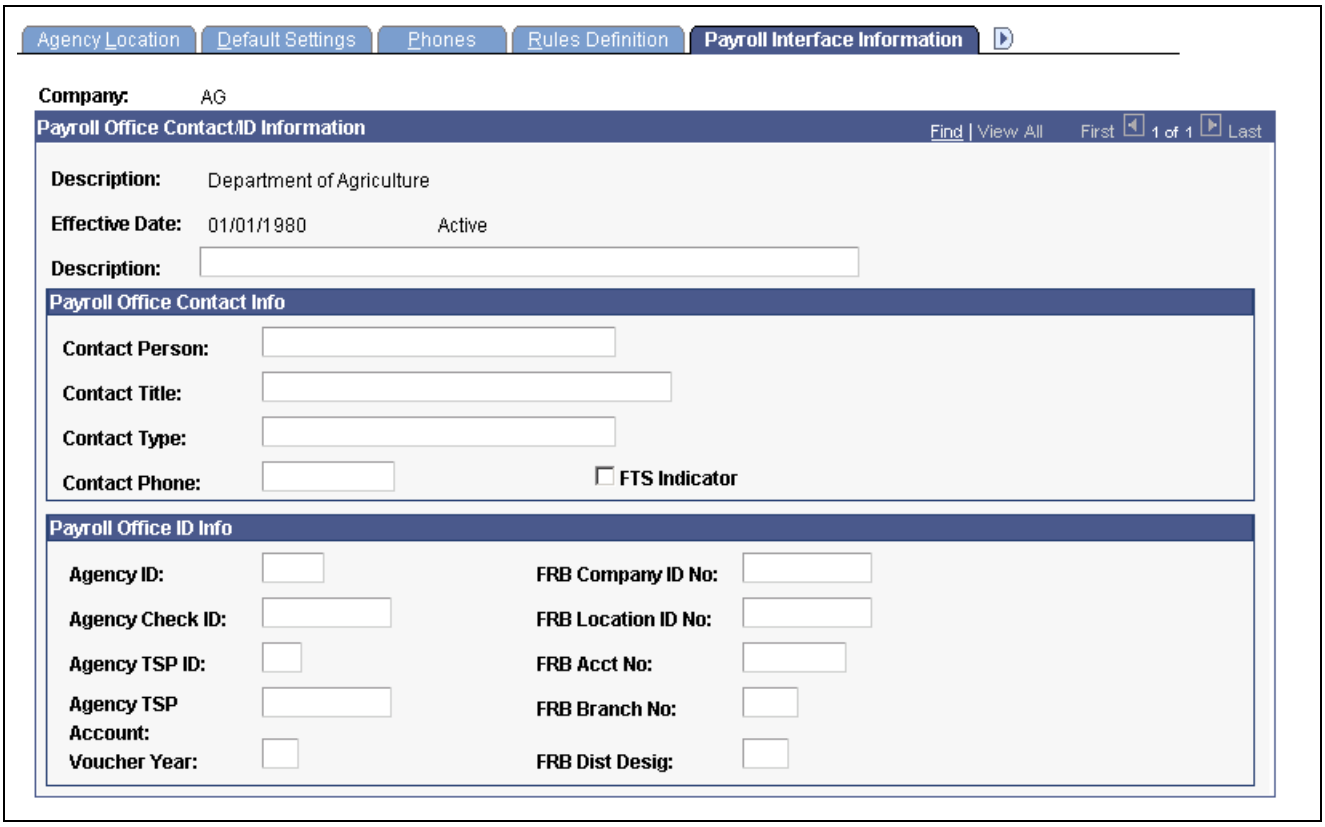
See Also

Appendix D, "PeopleSoft Application Fundamentals for HRMS Reports," Basic HRMS Reports, page 979

Entering Payroll Information

Access the Payroll Interface Information page.

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Payroll Interface Information page

FTS Indicator Select if the phone number is an FTS number.

FRB Company ID No. (FRB company ID number), **FRB Location ID No.** (FRB location ID number), **FRB Acct No.** (FRB account number), **FRB Branch No.** (FRB branch number), and **FRB Dist Desig.** (FRB district designation) If necessary, enter FRB information.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Defining Establishments

To define establishments, use the Establishment component (ESTABLISHMENT_DATA) and Controlled Establishment Sumry component (CONTROLLED_ESTABS). Use the ESTABLISHMENT_DATA component interface to load data into the tables for the Establishment component.

This section provides an overview of establishments and discusses how to:

- Create an information profile for a business establishment.

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- Set up establishment phone numbers.

Understanding Establishments

You use the Establishment component to define distinct physical places of business (establishments) within your company, to enter address information, and to enter regulatory reporting information. In PeopleSoft Human Resources, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.
- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

Note. (USA) To support AAP reporting, locations and establishments can have a many to many relationship. Set up the relationship between establishments to locations on the Location Profile page (LOCATION_TBL2_GBL). Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

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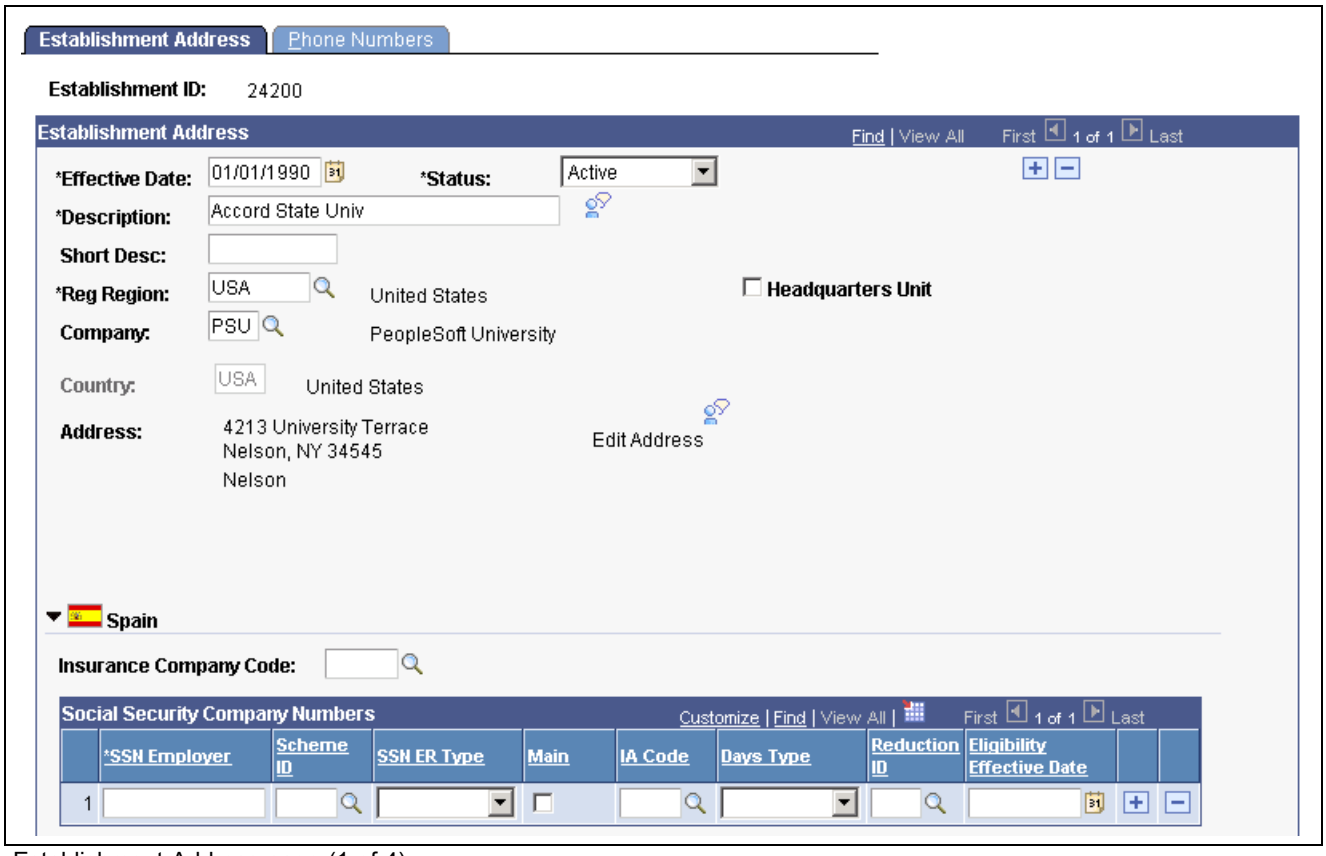
Pages Used to Define Establishments

Page Name	Object Name	Navigation	Usage
Establishment Address	ESTAB_TBL1_GBL	• Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Phone Numbers	ESTAB_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Establishment, Phone Numbers	Enter the establishment's telephone, fax machine, and other related numbers.
Controlled Establishments	CONTROLLED_ESTABS	Set Up HRMS, Foundation Tables, Organization, Controlled Establishments Sumry, Controlled Establishments	Shows all establishments that have designated the selected Headquarters Unit as their Controlling Establishment.

Creating an Information Profile for a Business Establishment

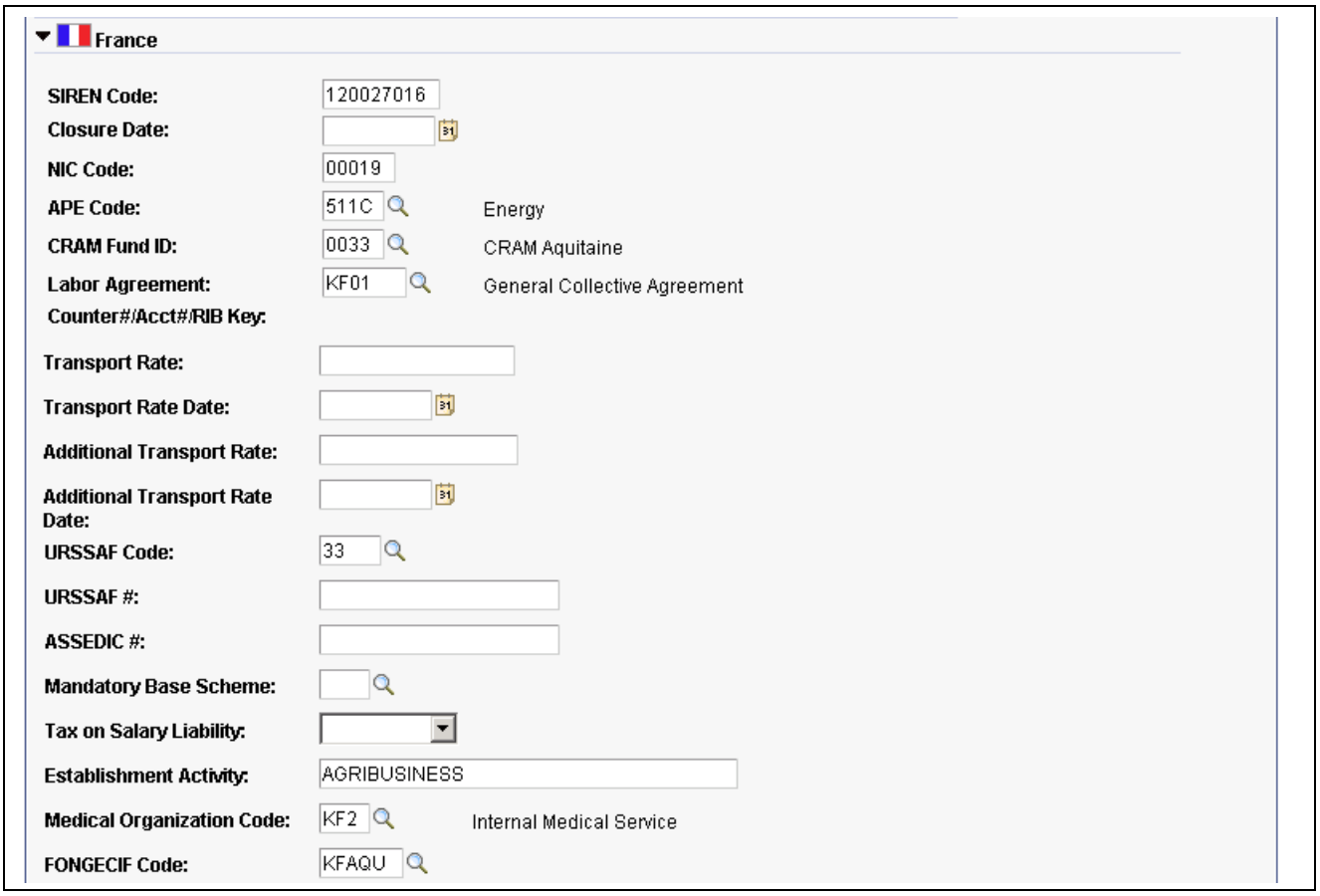
Access the Establishment Address page.

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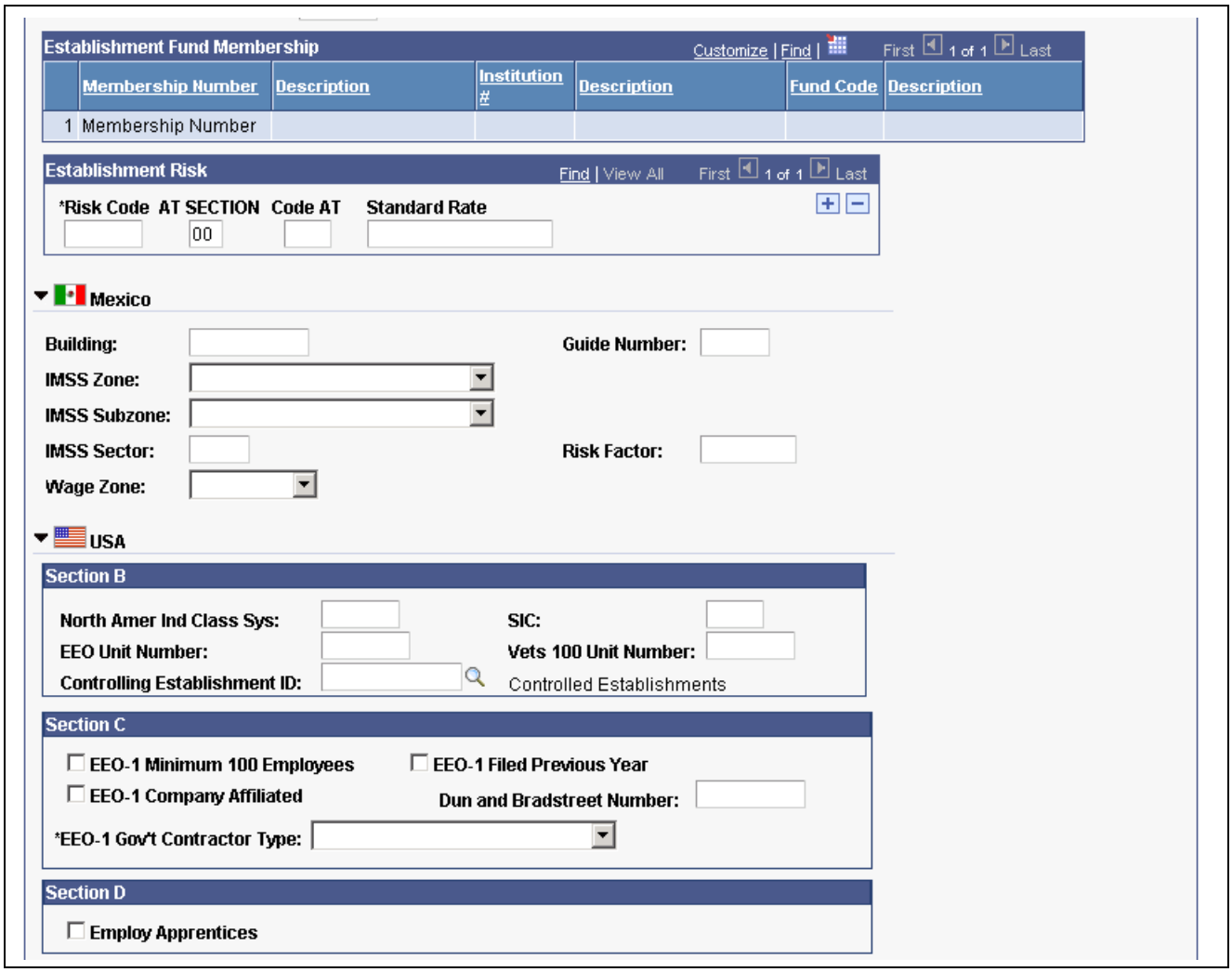
Establishment Address page (1 of 4)

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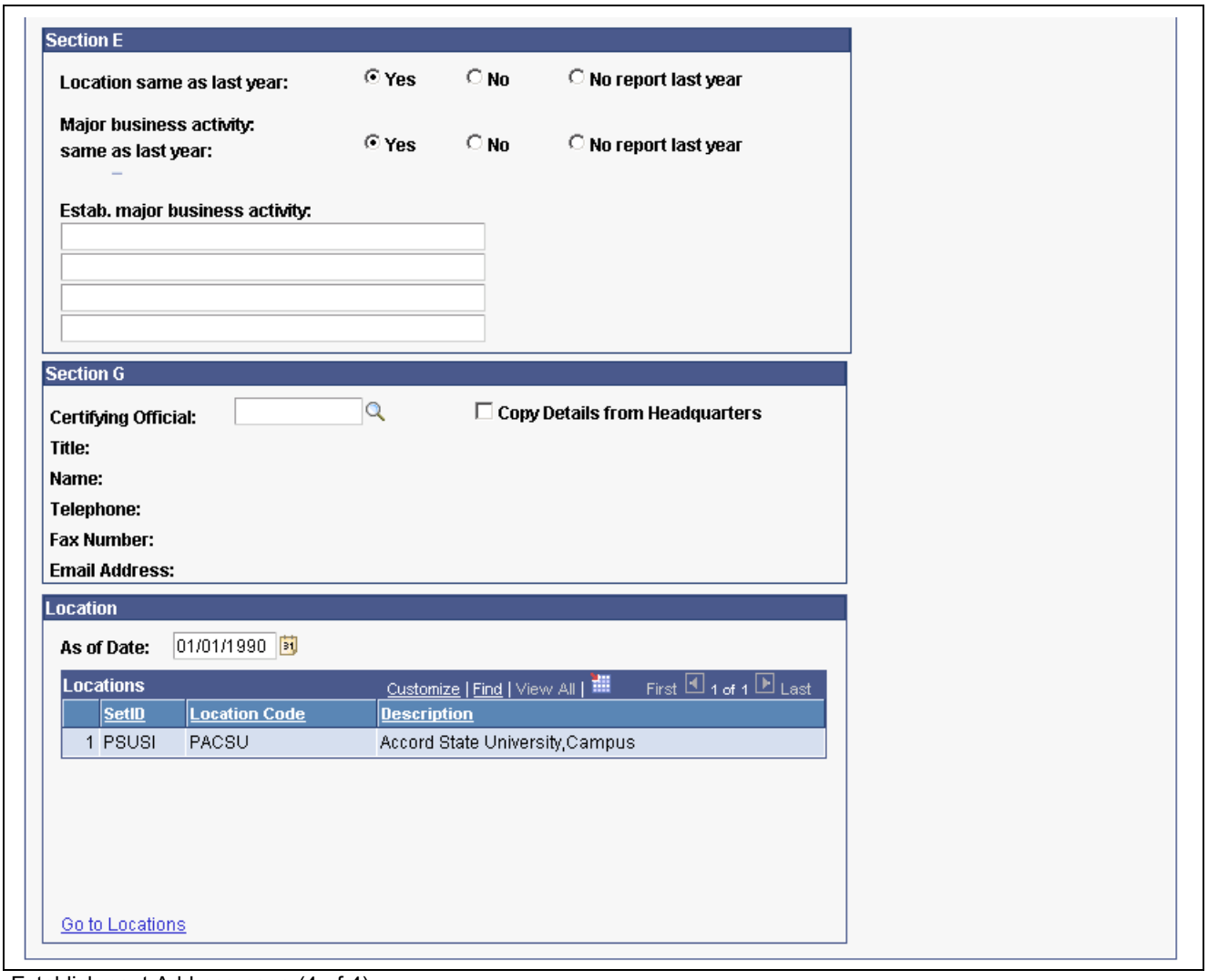
Establishment Address page (2 of 4)

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Establishment Address page (3 of 4)

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Establishment Address page (4 of 4)

Headquarters Unit Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters.

(ESP) Spain

Insurance Company Code Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the Insurance Company page (INSUR_COMP_CD_ESP).

SSN Employer Enter the social security number as assigned by the Spanish government.

Scheme ID Select the scheme id.

SSN ER Type (social security number employer type) Select the SSN type— *Apprentice* , *Regular* , or *Training* —based on the type of contract you have with your employees.

Main Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.

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IA Code (industry activity code) Enter the IA code, which is maintained on the Industry Activity page (INDSTRY_ACT_CD_ESP).

Days Type Select the Days type from the available options.

Reduction ID Select the Reduction ID from the available options.

Eligibility Effective Date Enter the effective date of eligibility.

(FRA) France

NIC Code (Numero Interne de Classement code). (Internal Number of Filing) Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise.

Note. The SIRET number (*Systeme Informatique pour le Repertoire des Etablissements,* or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE (*Institut National de la Statistique et des Etudes Economiques*, or National Institute of Statistics and Economics Information). INSEE is an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers and is used by the tax and social security authorities to identify a business enterprise and its entities.

CRAM Fund ID (*Caisse Regionale d'Assurance Maladie* fund ID) Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM *(Caisse Primaire d'Assurance Maladie)* offices that manage occupational health care coverage.

Counter#/Acct #/RIB Key (counter number/account number/RIB key) Enter the Counter#/Acct #/RIB Key information.

Transport Rate Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Enterprise Global Payroll uses the transport rate that you enter here.

Transport Rate Date Enter the date of the last update to the Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Enterprise Global Payroll for France.

Additional Transport Rate Enter the additional transport rate if applicable.The transport rate is a statutory deduction and is defined by local regulations. PeopleSoft Enterprise Global Payroll for France uses the additional transport rate that you enter here.

Additional Transport Rate Date Enter the date of the last update to the Additional Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Enterprise Global Payroll for France.

URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales code) and **URSSAF # (URSSAF number)** Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.

Base Scheme Select the Social Security code for DADS.

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Tax on Salary Liability Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.

Establishment Activity and **Medical Organization Code** Enter an establishment activity and select a medical organization code. Medical organization codes are defined on the Medical Organizations page (Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Medical Organizations). These fields are used for Single Hiring Statement reporting.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(FRA) Meeting Regulatory Requirements for France," Running Workforce Reporting Statutory Reports.

Establishment Fund Membership

This scroll area displays details of the pension/contingency funds defined for the establishment on the Pension/Contingency Contracts page. Click the Membership Number link to view the pension/contingency contract definition.

Establishment Risk

Risk Code Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

AT Section (Section Accident du Travail section) (Work Accident Section) System-displayed information that you need to identify the risk code by establishment.

Standard Rate Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Building Enter the building for your establishment's address.

Guide Number Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.

IMSS Zone, IMSS Subzone, and **IMSS Sector** Select the IMSS zone, subzone, and sector for your establishment's location.

The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.

Risk Factor Enter the risk factor that's used for IMSS tax calculation.

Wage Zone Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are *A Zone, B Zone,* and *C Zone.*

(USA) USA

Enter information in the following USA-specific sections.

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Section B

NAICS (North American Industrial Classification System), **Controlling Establishment ID, SIC** (Standard Industrial Classification), and **Vets 100 Unit Number**

Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

EEO-1 Minimum 100 Employees, EEO-1 Company Affiliated

Select if they apply to this establishment.

EEO-1 Filed Previous Year

Selected by default. If you didn't file an EEO-1 report for this establishment last year, clear this check box.

Section E

Location same as last year

Select Yes or No to indicate whether your location is the same as last year, or select No Report if you made no report last year.

Major business activity same as last year

Select Yes or No to indicate whether your business activity is the same as last year; or, select No Report if you made no report last year.

Estab. major business activity (establishment's major business activity)

Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Section G

Certifying Official

Select the name of the certifying official.

Copy Details from Headquarters

Select to copy details from headquarters.

Location

As of Date

Select a date to view which locations are associated with this establishment at a certain point in time.

SetID, Location Code, and**Description**

View the location codes associated with this establishment on the Location Profile page.

Go to Locations

Click to access the Location component. The system will open the component with the same action you are in on the Establishments component.

When you save or cancel your changes on the Locations component, the system returns you to the Establishment component.

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See Also

Chapter 11, "Setting Up Organization Foundation Tables," Establishing Locations, page 253

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Setting Up Establishment Phone Numbers

Access the Phone Numbers page.



Phone Numbers page

Phone Type and **Phone** Enter phone information for this establishment.

(FRA) France

Contact for Establishment Select the contact for this establishment.

Establishing Locations

To establish locations, use the Location component (LOCATION_TABLE) and the Location Table Report component (RUN_PER705). Use the LOCATION_TABLE component interface to load data into the tables for the Location component.

This section provides an overview of locations and discusses how to:

- Enter company locations.
- Set up a location profile.

Understanding Locations

Use the Locations component to establish physical locations in your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Global Payroll, you may want to report certain information by location, so consider this when planning your implementation of this information.

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If you use PeopleSoft Pension Administration, you can create one or more locations specifically for pension payees. You can use a single *retiree location* for all retirees if you don't need to report on your payees based on more specific location information.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to locations.

Note. (USA) To support AAP reporting, when you select a regulatory region with a country value of USA on the Location Profile page, the system enables you to establish a many to many relationship between locations and establishments. Set up the relationship on the Location Profile page in the USA section of the page. Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

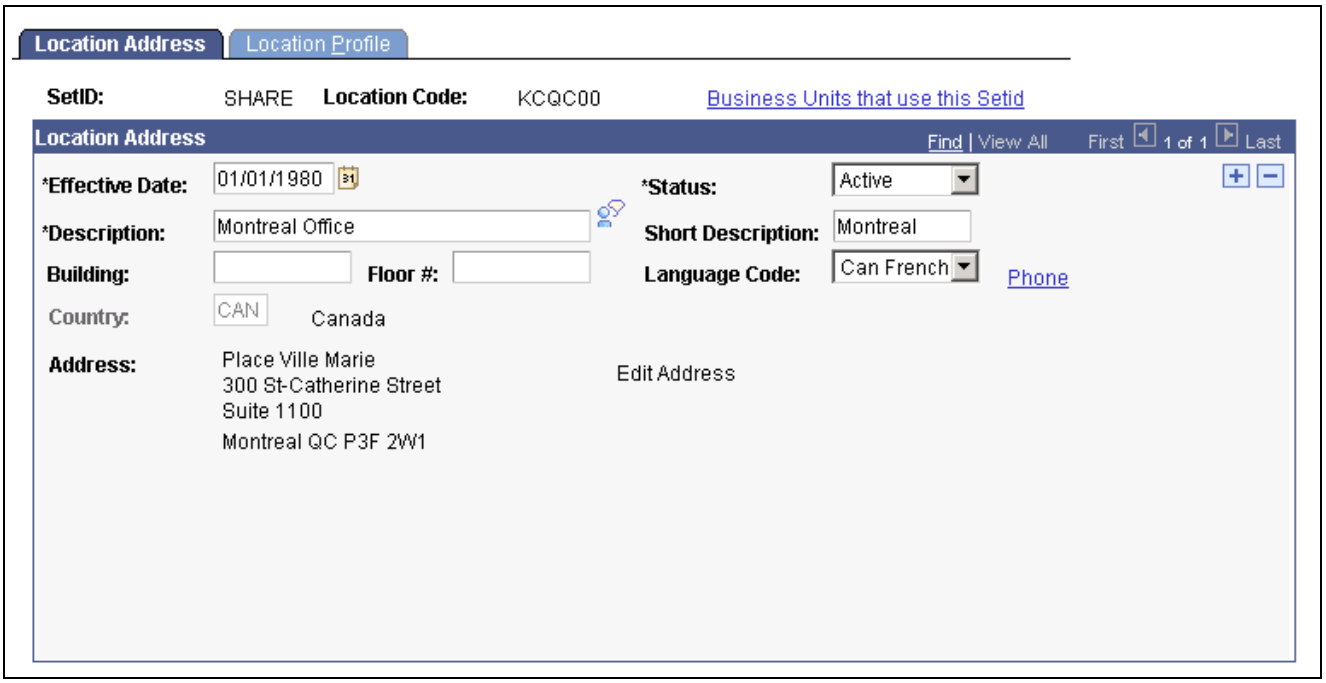
Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Location Address	LOCATION_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location, Location Address	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Business Units by Location	LOC_BU_SEC	Click the Business Units that use this SetID link on the Location Address page.	View a list of the business units that use this setID.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter phone numbers for the location addresses.
Location Profile	LOCATION_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Location, Location Profile	Specify a salary administration plan for the location, as well as tax, establishments and local country information.
Location Details Brazil	LOCATION_TBL_BRA	Set Up HRMS, Foundation Tables, Organization, Location BRA, Location Details Brazil	Define details for geographic locations inBrazil.
Location Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Location Table Report	Run the Location Table report (PER705). This report lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).

Entering Company Locations

Access the Location Address page.

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Location Address page

Building Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.

Floor # (floor number) Enter the floor number, if applicable.

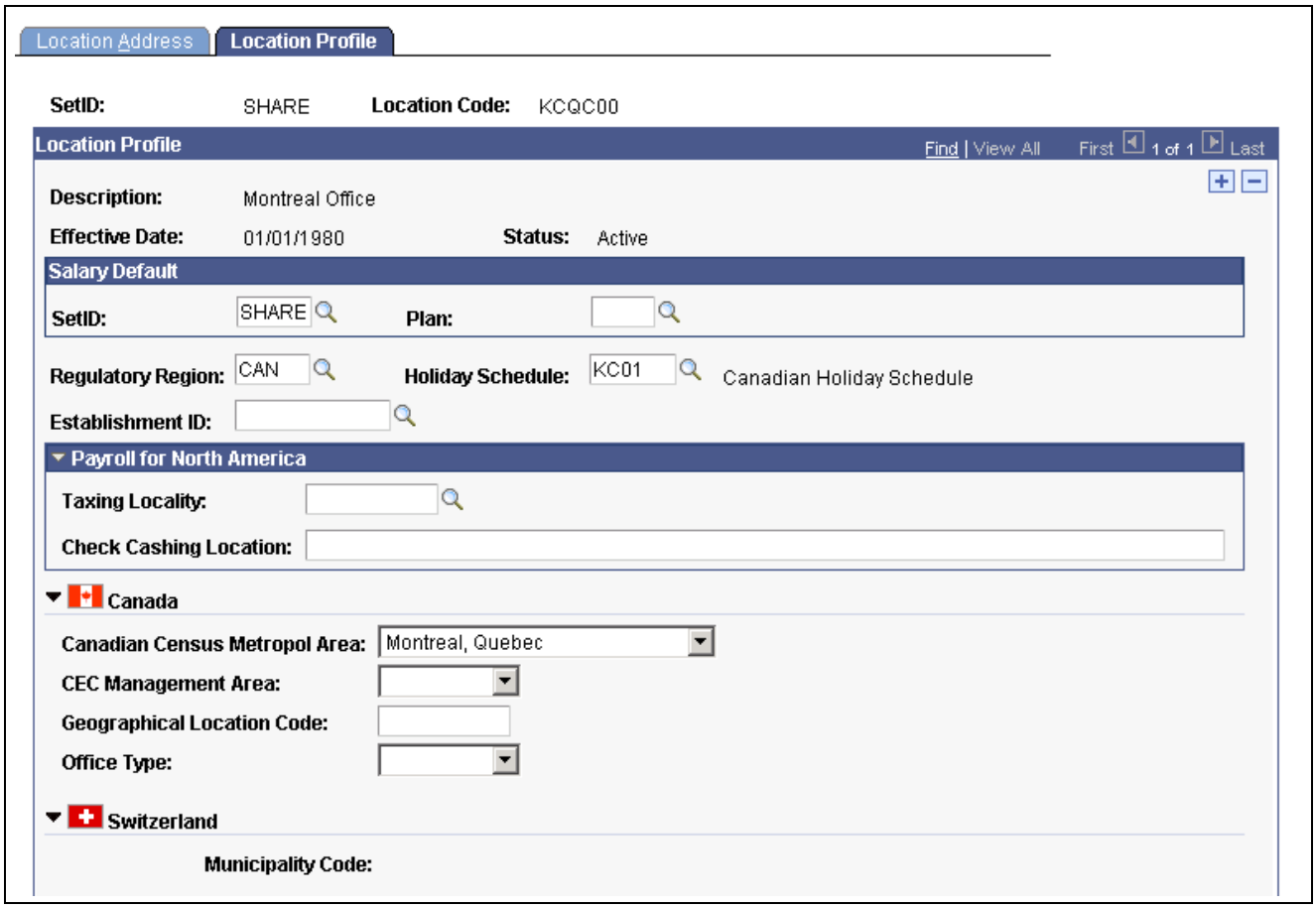
Language Code Select the code for the official language used at this location.

Phone Click this link to enter phone numbers.

Setting Up a Location Profile

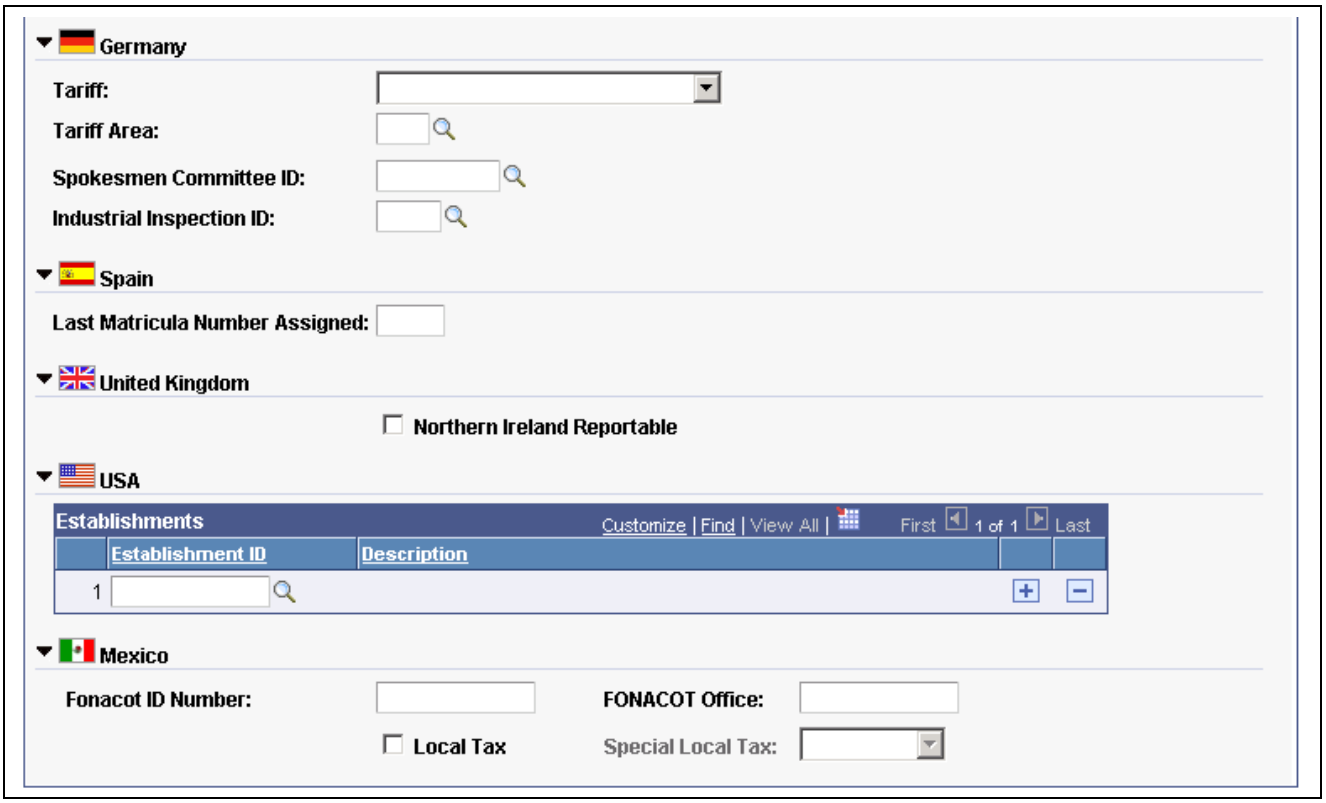
Access the Location Profile page.

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Location Profile page (1 of 2)

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Location Profile page (2 of 2)

You enter U.S. tax information for Canadian and German locations on this page.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information, and PeopleSoft Pension Administration references the PeopleSoft Payroll for North America tax information. For more information about the relationship between the Locations component and the Tax Location Table in PeopleSoft Payroll for North America, see the PeopleSoft Payroll for North America documentation.

Plan

Select a salary administration plan from the values that you created on the Define Salary Plan component.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

Tying a salary administration plan for a location helps you distinguish currency and cost-of-living differences for workers with the same job code. If you don't need to distinguish salary administration plans by location, leave this field blank.

Note. Select only the plans that are associated with the setID that you selected on the Define Salary Plan component. If you select a salary administration plan on this page, the system uses that plan as the default value on the Job Data pages for the people in this location. Otherwise, it uses the salary administration plan that you enter on the Job Code Table.

See Chapter 13, "Setting Up Jobs," Classifying Jobs, page 296.

Regulatory Region

Enter the regulatory region that is associated with this location.

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Note. (USA) If you select a regulatory region with a country value of USA, the system will hide the Estab ID field. To associate establishments with this location, use the Establishments fields in the USA section of this page.

Holiday Schedule Select a holiday schedule for this location.

Note. If you use PeopleSoft Payroll for North America, the holiday schedule you select here is the default holiday schedule assigned to workers on the Job Data – Payroll page (JOB_DATA2). If you leave this field blank, the default holiday schedule comes from the Pay Group component.

If you use PeopleSoft Global Payroll, the holiday schedule on this page is for informational purposes only; assigned pay groups control the default holiday schedule for processing.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 211.

Establishment ID Select an establishment ID to associate with this location.

Note. (USA) If you select a Reg Region value with a country value of USA, the system hides this field. Set up establishments for U.S. locations in the USA section of this page.

Payroll for North America

Taxing Locality and **Check Cashing Location** Select a taxing locality and check cashing location. This field is for information only.

(CAN) Canada

Canadian Census Metropol Area (Canadian Census Metropolitan Area) Select the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada for this location. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.

CEC Management Area (Canada Employment Center Management Area) Select from the list of options.

Geographical Location Code Enter the geographic location code as defined by Statistics Canada.

Note. (CAN) If the Official Languages Act applies to your organization, use the information in the Geographic Location Code, Office Type, TBS Office Code, and National Capital Region fields as part of the Official Languages reports (PER102CN and PER108CN) that you submit to the Canadian government. If this is a military installation, the geographic location code entered on the first page of the Location MIL component, is copied to the Geographical Location code in the Canada section.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada".

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(CHE) Switzerland

Municipality Code The default value is the municipality code that corresponds to the postal code of the location address. You can select a different code from the list of valid municipality codes for the canton that this location is in.

(DEU) Germany

Tariff Enter the *tariff,* or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.

Industrial Inspection ID Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

Note. When you enter a person's location on the Job Data pages, the Tariff and Tariff Area values appear by default from the Locations component, based on the values that you entered on this component for the location.

When you enter a person's location and labor type on the Job Data pages, the system populates the Spokesman Committee ID and Works Council ID fields. These values are based on the person's location in the Work Location page (JOB_DATA1) and the value of the Labor Type (*Management* or *Non-Management)* in the Job Labor page (JOB_LABOR).

(ESP) Spain

Last Matricula Number Assigned The Spanish government requires employers to assign each people a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

(GBR) United Kingdom

Northern Ireland Reportable Select if this is a Northern Ireland reportable location. Indicates that people in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

USA

Establishments Select one or more establishment IDs for this location.

Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations.

Only establishments with an effective date as of the location's effective date are available.

Assign locations and establishments to people on the Job Data - Work Location page. The system will only enable you to select an establishment associated with the location you select.

Note. If an establishment's Description is blank, the establishment has become inactive since you initially assigned it to this location.

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Note. You can view the locations associated with an establishment on the Establishment Address page.

(MEX) Mexico

Fonacot ID Number Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.

FONACOT Office Identify the nearest FONACOT office for your location.

Tax Local Select the Tax Local check box if the location of the state is Chihuahua.

Tax local Special If the location of the state is Chihuahua, the Tax Local Special field will default to Ciudad Juarez.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Establishing Military Locations

To establish military locations, use the Geographic Location MIL component (GVT_LOCATION_TBL) and Location MIL component (LOCATION_TABLE_MIL).

This section discusses how to:

- Define military geographic locations.
- Establish a military locations.

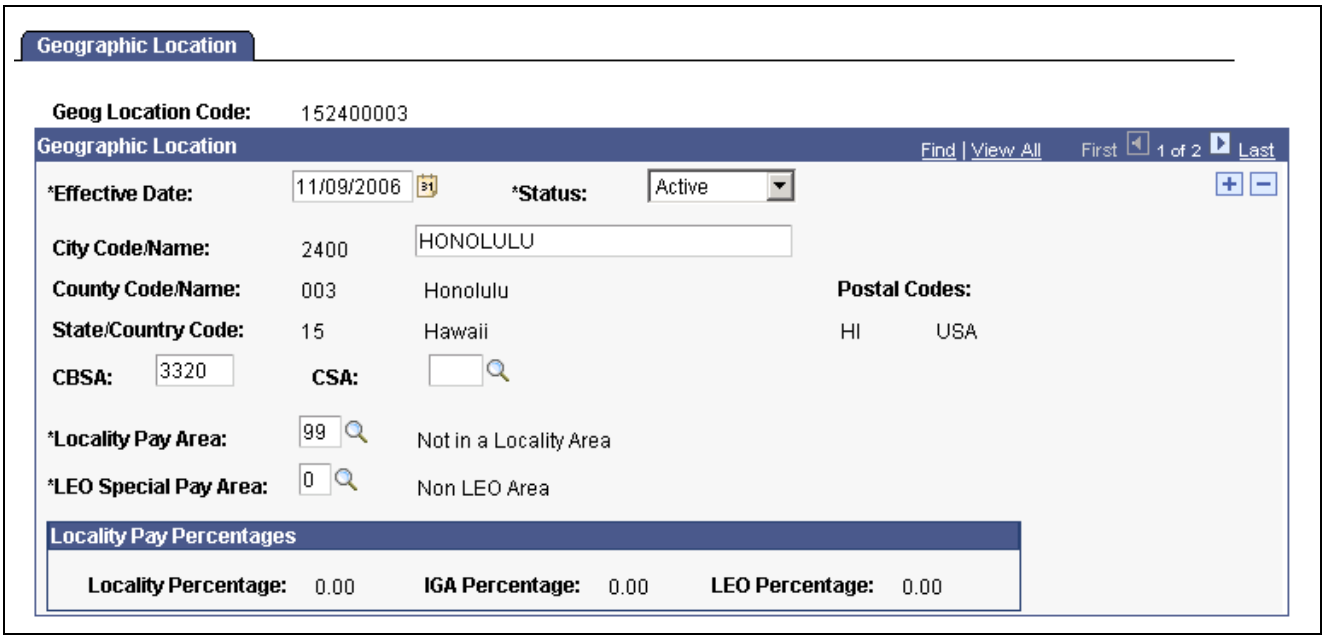
Pages Used to Establish Military Locations

Page Name	Object Name	Navigation	Usage
Geographic Location MIL - Geographic Location	GVT_LOCATION	Set Up HRMS, Foundation Tables, Organization, Geographic Location MIL, Geographic Location	Define geographic locations.
Location MIL - Location Address	LOCATION_TABLE_MIL	Set Up HRMS, Foundation Tables, Organization, Location MIL, Location Address	Enter military locations and associate them to geographic locations.

Defining Military Geographic Locations

Access the Geographic Location MIL - Geographic Location page.

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Geographic Location page

CBSA (core based statistical area) This value is supplied by the OPM data file. It is blank if the duty station is not in a CBSA. This field is labeled MSA for effective dates before February 2, 2005.

CSA (combined statistical area) This value is supplied by the OPM data file. It is blank if the duty station is not in a CSA. This field is labeled CMSA for effective dates before February 2, 2005.

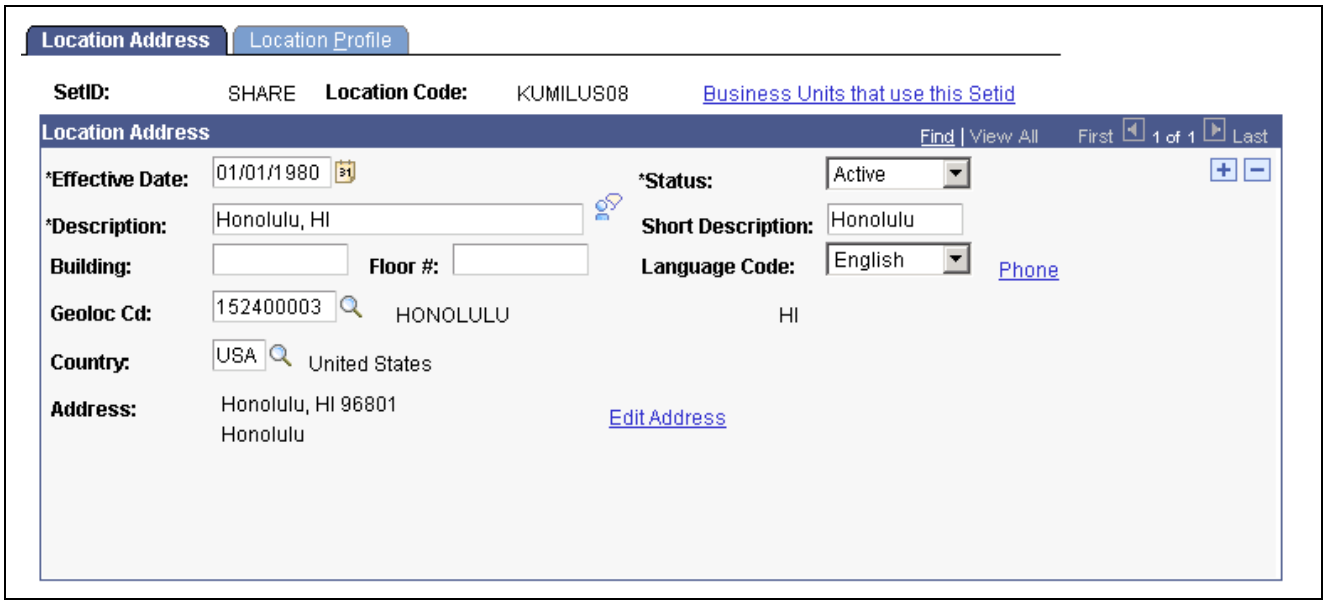
City Code/Name The system assigns a city code. Enter the city name.

Locality Pay Area and LEO Special Pay Area (law enforcement officer special pay area) Select from the list.

Entering Military Locations

Access the Location MIL - Location Address page.

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Location MIL - Location Address page

Geoloc Cd (geographic location code) Select the geographical location code.

See Chapter 11, "Setting Up Organization Foundation Tables," Entering Company Locations, page 254.

(USF) Establishing Federal Locations

To establish Federal locations, use the Locality Pay Are USF component (GVT_LOCPAY_AREA_TB), the Geographic Location component (GVT_LOCATION_TBL), the Location USF component (LOCATION_TABLE), the Work Location Table component (RUN_FGPER817), the Geographic Location component (RUN_FGPER802), and the Locality Pay Area Rpt USF (RUN_FGPER807).

This section provides an overview of federal locations and discusses how to:

- Define regions for people who receive additional pay.
- Define geographic locations.
- Add work locations.

Understanding Federal Locations

Use the Locations USF component to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations USF component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to specific locations.

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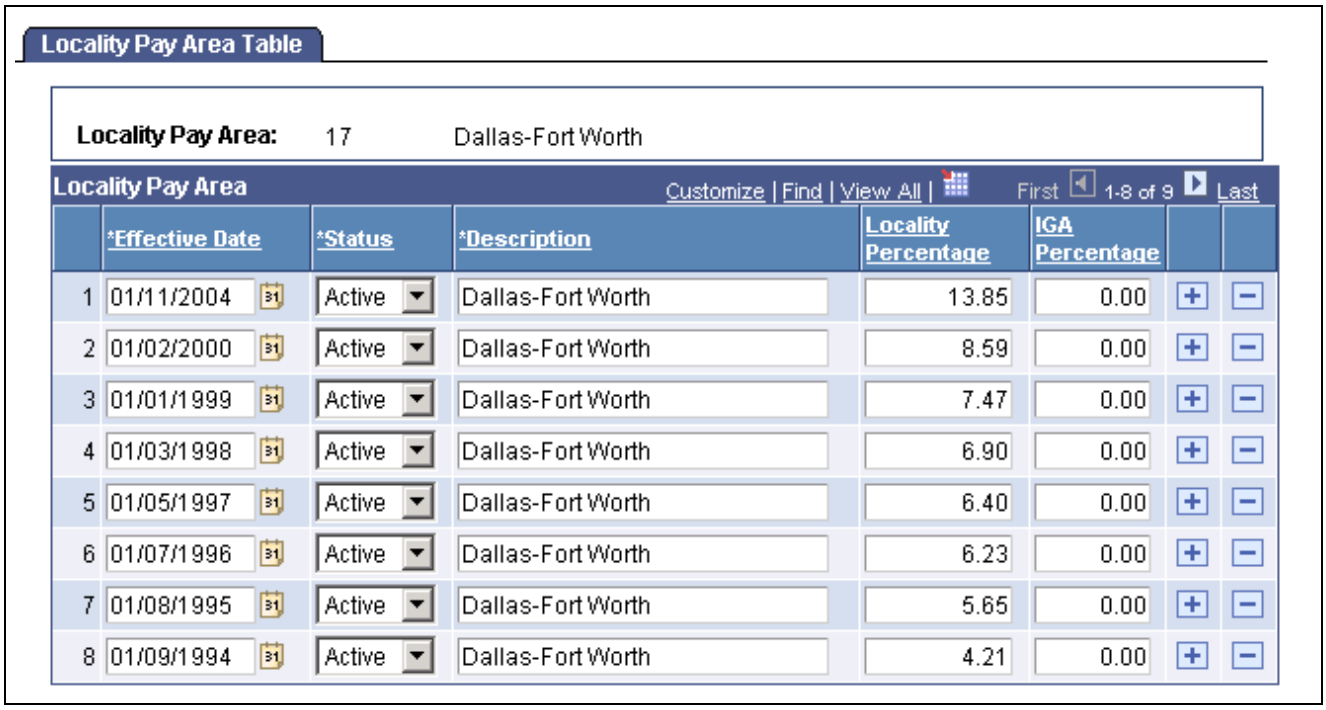
(USF) Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Locality Pay Area Table	GVT_LOCAREA_TABLE	Set Up HRMS, Product Related, Compensation, Locality Pay Area USF, Locality Pay Area Table	Define the regions where federal workers receive additional pay above their base pay.
Geographic Location	GVT_LOCATION	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Geographic Location, Geographic Location	Define geographic locations.
Location Address	GVT_LOC_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location USF, Location Address	Add work locations.
Run Control	PRCSRUNCNTL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location • Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	Use this page to run these reports: • Work Location Table report (FGPER817) prints a detailing of the Work Location Table. • Geographic Location Table report (FGPER802) produces a detailing of the Geographic Location Table. • Locality Pay Area Table report (FGPER807) prints information for every Locality Pay Area.

Defining Regions for Employees Who Receive Additional Pay

Access the Locality Pay Area Table page.

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Locality Pay Area Table page

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Effective Date The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.

Status Select a status.

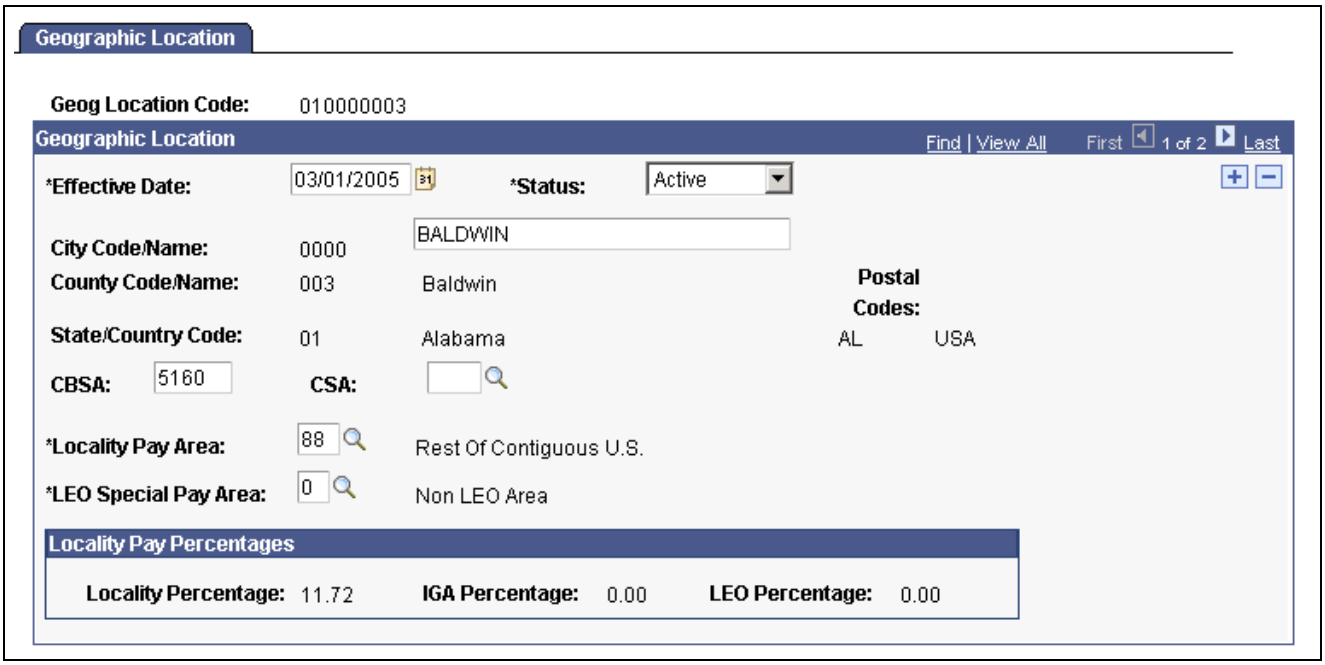
Note. Add data rows and use the scroll bar, the Effective Date field, and the Status field to maintain history data for information that changes over time. For example, to retire a Locality Pay Area, insert an effective-dated row with a status of *Inactive.*

Locality Percentage Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the person's Compensation page (JOB_DATA3) in Administer Workforce.

Defining Geographic Locations

Access the Geographic Location page.

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Geographic Location page

CBSA (core based statistical area) This value is supplied by the OPM data file. It is blank if the duty station is not in a CBSA. This field is labeled MSA for effective dates before February 2, 2005.

CSA (combined statistical area) This value is supplied by the OPM data file. It is blank if the duty station is not in a CSA. This field is labeled CMSA for effective dates before February 2, 2005.

City Code/Name The system assigns a city code. Enter the city name.

Locality Pay Area and LEO Special Pay Area (law enforcement officer special pay area) Select from the list.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Adding Work Locations

Access the Location Address page.

Building Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.

Geoloc Cd (geographic location code) Select the geographical location code.

Designated Agt (designated agent) Select the designated agent code.

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Country Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.

Setting Up Company Locations

To set up company locations, use the Company Location component (COMP_LOC_TBL).

This section discusses how to establish company locations.

Pages Used to Set Up Company Locations

Page Name	Object Name	Navigation	Usage
Company Location Table	COMP_LOC_TBL	Set Up HRMS, Foundation Tables, Organization, Company Location, Company Location Table	Associate Works Council IDs with companies and locations.

Establishing Company Locations

Access the Company Location Table page.



Company Location Table page

Works Council ID Select the ID of the Works Council representing workers at this company and location.

(DEU) Germany

Spokesmen Committee ID Select the works council Spokesmen Committee ID.

Social Insurance ID Select a Social Insurance ID.

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Maintaining Departments

To maintain departments, use the Departments component (DEPARTMENT_TBL) and the Department Table Report component (RUN_PER701). Use the DEPARTMENT_TBL component interface to load data into the tables for this component.

This section provides an overview of departments and discusses how to:

- Define basic information about a department.
- Enable and control department information for specified customers.

Understanding Departments

After you define company and location data for your enterprise, use the Departments component to define business entities in your organization. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll, you must set up department codes according to your cost centers where you charge wages. If you use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

PeopleSoft Human Resources offers two ways to access the Departments component to define and view departments:

- From the Set Up HRMS menu.
- From PeopleSoft Tree Manager.

This section discusses how to use the Departments component from within the Set Up HRMS menu.

Using Departments for Data Permission Security

PeopleSoft enables you to create a security hierarchy using PeopleSoft Tree Manager and use it to grant or deny users to person data, based on the department a person belongs to. If you decide to use a Department Security tree to control data access, you must attach each department you create, whether from the Set Up HRMS menu or Tree Manager, to an effective Department Security Tree.

PeopleSoft HRMS also enables you to use other fields for data permission security.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," page 37

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

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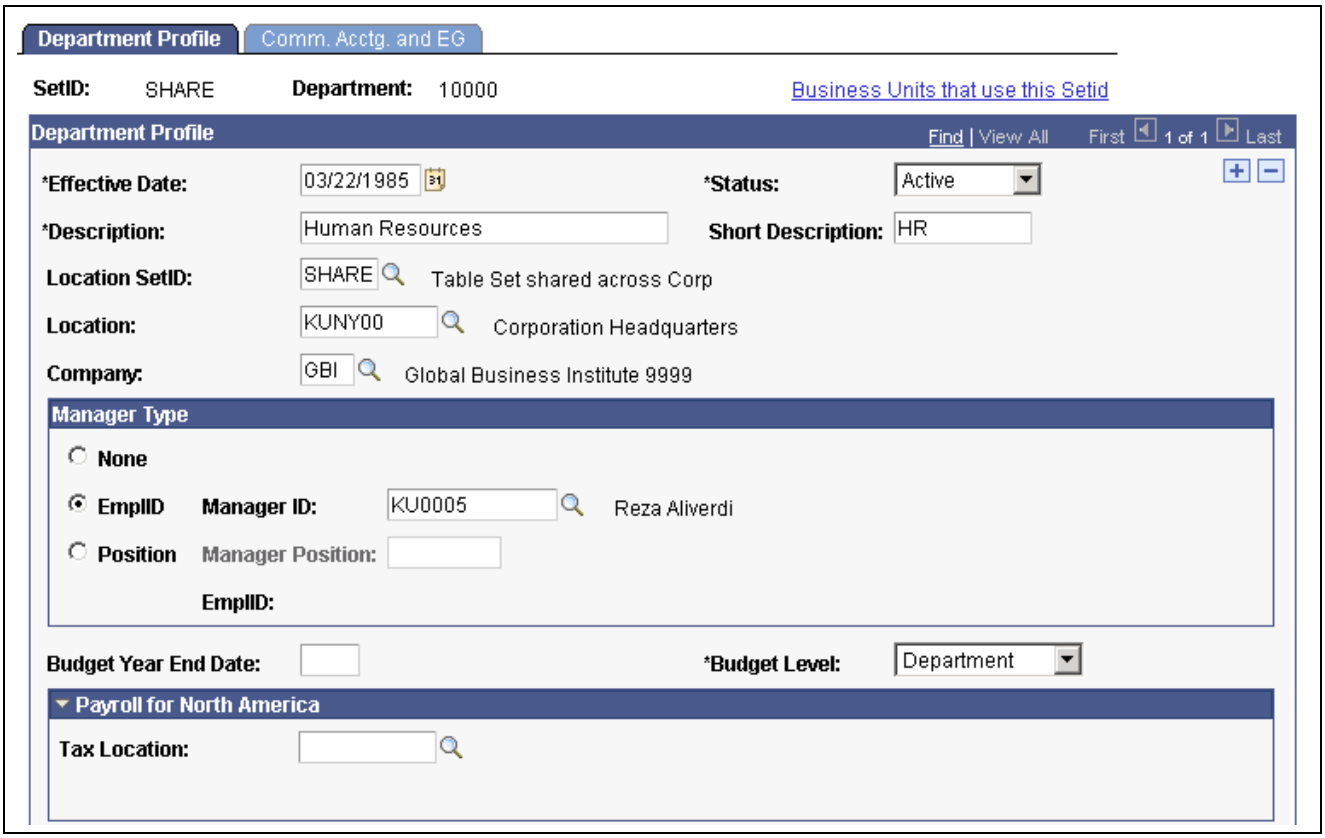
Pages Used to Maintain and Report on Departments

Page Name	Object Name	Navigation	Usage
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments, Department Profile	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	Set Up HRMS, Foundation Tables, Organization, Departments, Comm. Acctg. and EG	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.
Department Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Department Table Report	Use this page to run the Department Table report (PER701) that lists all departments by Department ID.

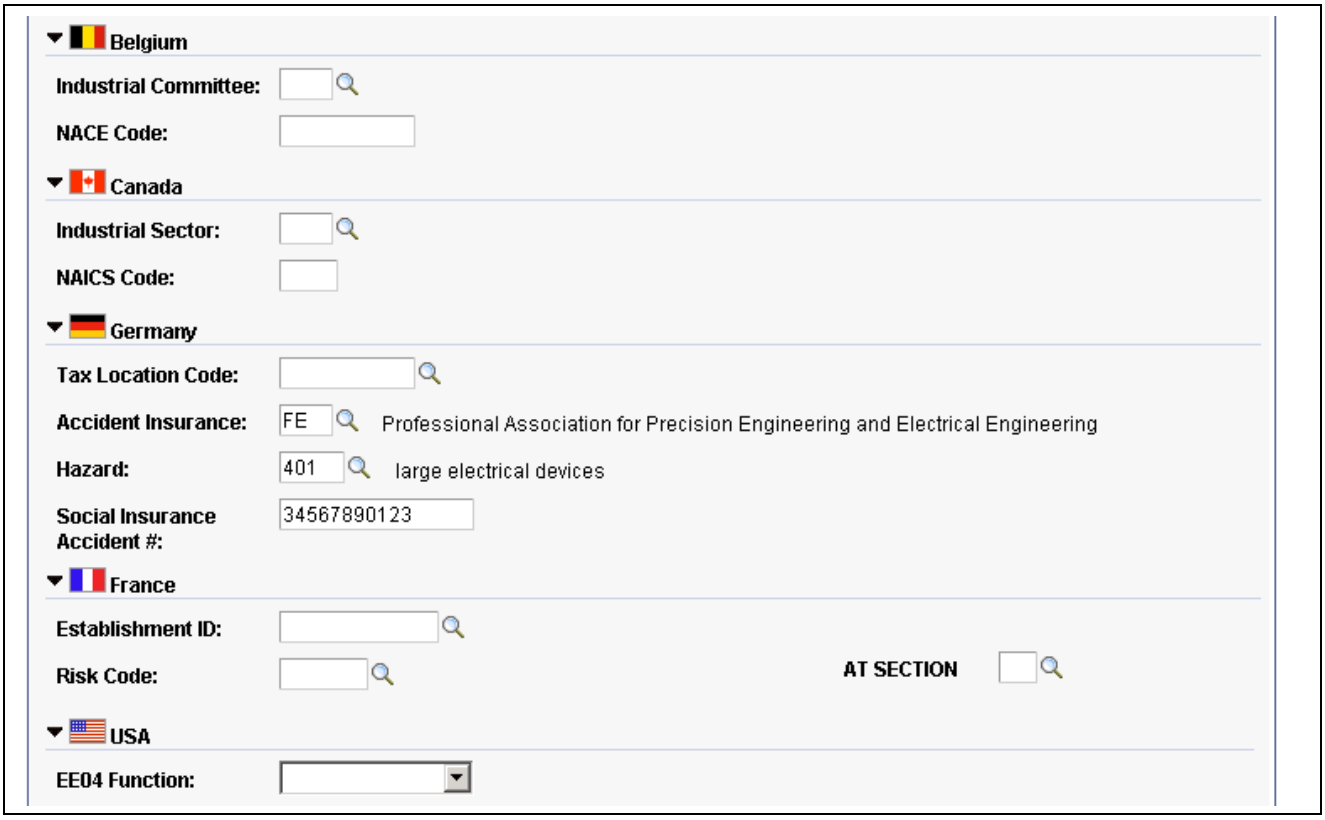
Defining Basic Information About a Department

Access the Department Profile page.

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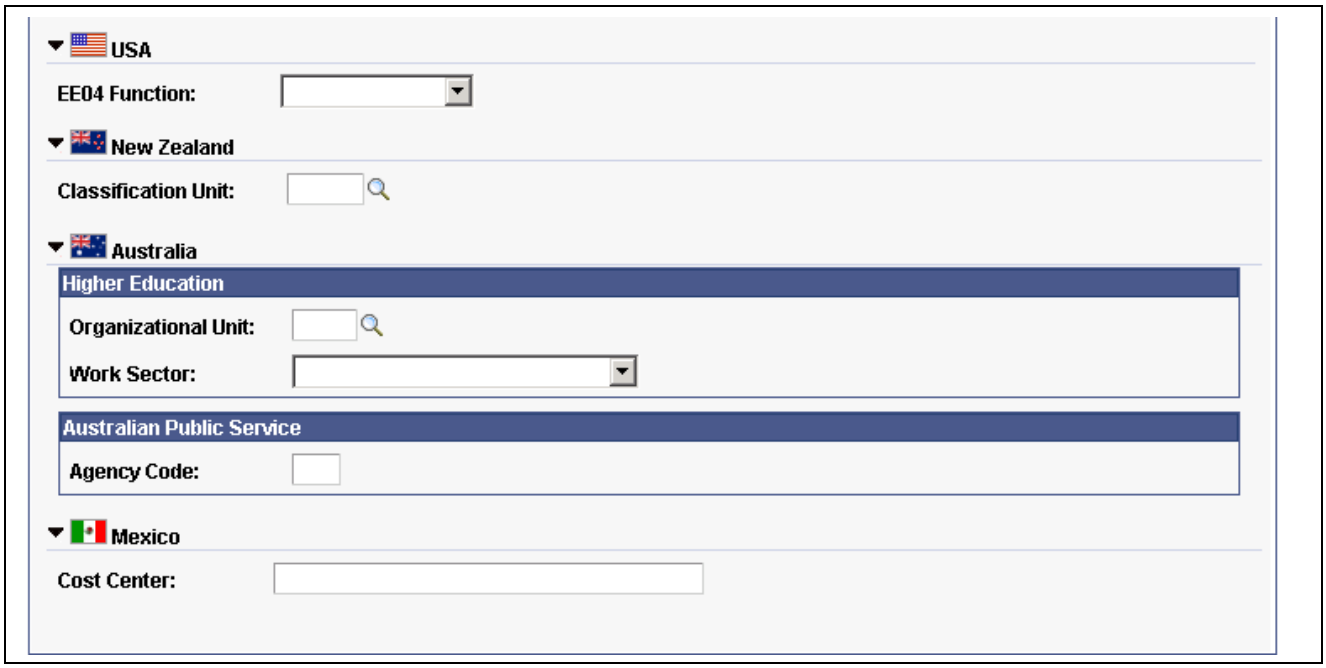


Department Profile page (1 of 3)



Department Profile page (2 of 3)

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Department Profile page (3 of 3)

Effective Date If you add a new department to the Departments component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Description For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.

Location To associate a department with a physical location, select the location. Maintain these values in the Locations component.

Company Indicate the company to which this department belongs. The system uses the Company field value as the default company location on the job records for all people associated with this department. If you add a person to this department, the system assumes that they are also with the designated company. If you don't enter a company here, you can enter it on the Job Data pages. If you do enter a company here, you can't change it on the Job Data pages.

Note. If yours is a multicompany environment and you want more than one company to share the department, leave the *Company* field blank.

Manager Type

If you are not specifying managers for departments, select *None.* If you are specifying managers, indicated if the manager is a person (*EmplID*) or a position (*Position*). If you use partial position management, where you use positions for only a portion of your organization, select whichever option is appropriate for this department.

Manager ID If you selected *EmplID*, the system makes this field available for you to select the ID of the manager. The manager ID that you select becomes the default supervisor ID on the Job records of all people who are assigned to this department. If you have more layers in your organization, override the default.

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Manager Position If you selected *Position*, and you have created positions for this department, select a Manager Position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data.

The system displays the name and EmplID of the current position incumbent in the EmplID field.

Note. The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.

Budget Year End Date If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.

Budget Level Select *Department, Job Code, Line Item, Position Number,* or *None* to define budgeting for this department.

Payroll for North America

Tax Location Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution pages (TAX_DISTRIBUTION or TAX_DIST_CAN) of employees of this department. You can override this information for individual employees.

(BEL) Belgium

Industrial Committee Select the industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Canadian Industrial Sector Select the code that identifies the sector with which people in this department are associated for Canadian employment equity reporting purposes.

Stats-Can-Dept Code (Statistics Canada department code) Enter a 3-character code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Stats-Can Faculty Code (Statistics Canada faculty code) Select a code to associate a faculty with a department. Faculty codes are set up in the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Faculty Events*, "(CAN) Working with the Statistics Canada Academic Teaching Surveys Process".

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(DEU) Germany

Tax Location Code Select a code.

Note. For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Note. The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

(FRA) France

Establishment ID Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund.

This field is required for Global Payroll for France. The system will default this value into a worker's Job record when you use PeopleSoft Human Resources: Manage Positions.

Risk Code Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.

AT SECTION Select the AT section for the risk code selected in the Risk Code field. Risk Code / AT sections are defined for establishments. When there are several AT sections defined for the establishment, use this field to specify the AT section to use.

(USA) USA

U.S. EEO4 Function (United States Equal Employment Opportunity 04 function) Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand

Classification Unit Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(AUS) Australia

These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

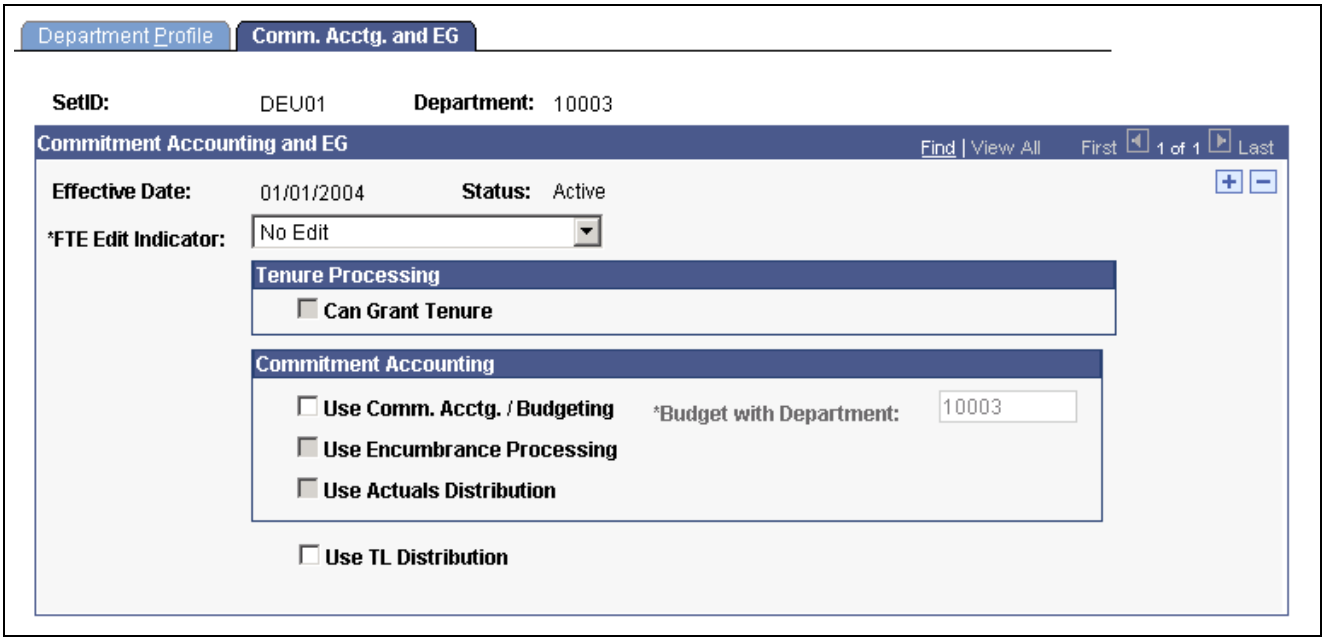
Organizational Unit Enter the appropriate Higher Education organizational unit code.

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Agency Code Enter the four-digit Australian Public Service code for this department.

Enabling and Controlling Department Information for Specified Customers

Access the Comm. Acctg. and EG page.



Comm. Acctg. and EG page

FTE Edit Indicator (full-time equivalency edit indicator) Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select *No Edit*.

Tenure Processing

Can Grant Tenure Select to be able to grant tenure to qualified people in this department.

Commitment Accounting

Use Comm. Acctg. / Budgeting? Select if you use Commitment Accounting processing for this department. When you select this check box, the Use Encumbrance Processing? and Use Actuals Distribution? check boxes become available for entry and are selected by default.

Use Encumbrance Processing? Select if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution? Select if you use Commitment Accounting's Actuals Distribution process for this department.

Budget with Department An accumulated budget for a group of departments rolls up to the department that you enter.

The department that you enter must be in the same SetID as the department that you are defining, and it must be higher on the security tree. For example,

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if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same SetID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005.

See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 77.

Use TL Distribution? Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers.

If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Setting Up Tenure Tracking

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Commitment Accounting, "Defining Fiscal Year Budgets"

Running an SQR Audit to Cross-Check Departments

When you add new departments to the Departments component, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the Departments component but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Departments component. The latter situation can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator.

(USF) Setting Up Federal Departments

To set up Federal departments, use the Departments USF component (DEPARTMENT_TBL).

This section discusses how to:

- Set up departments.
- Run an SQR audit to cross-check departments.

Page Used to Set Up Federal Departments

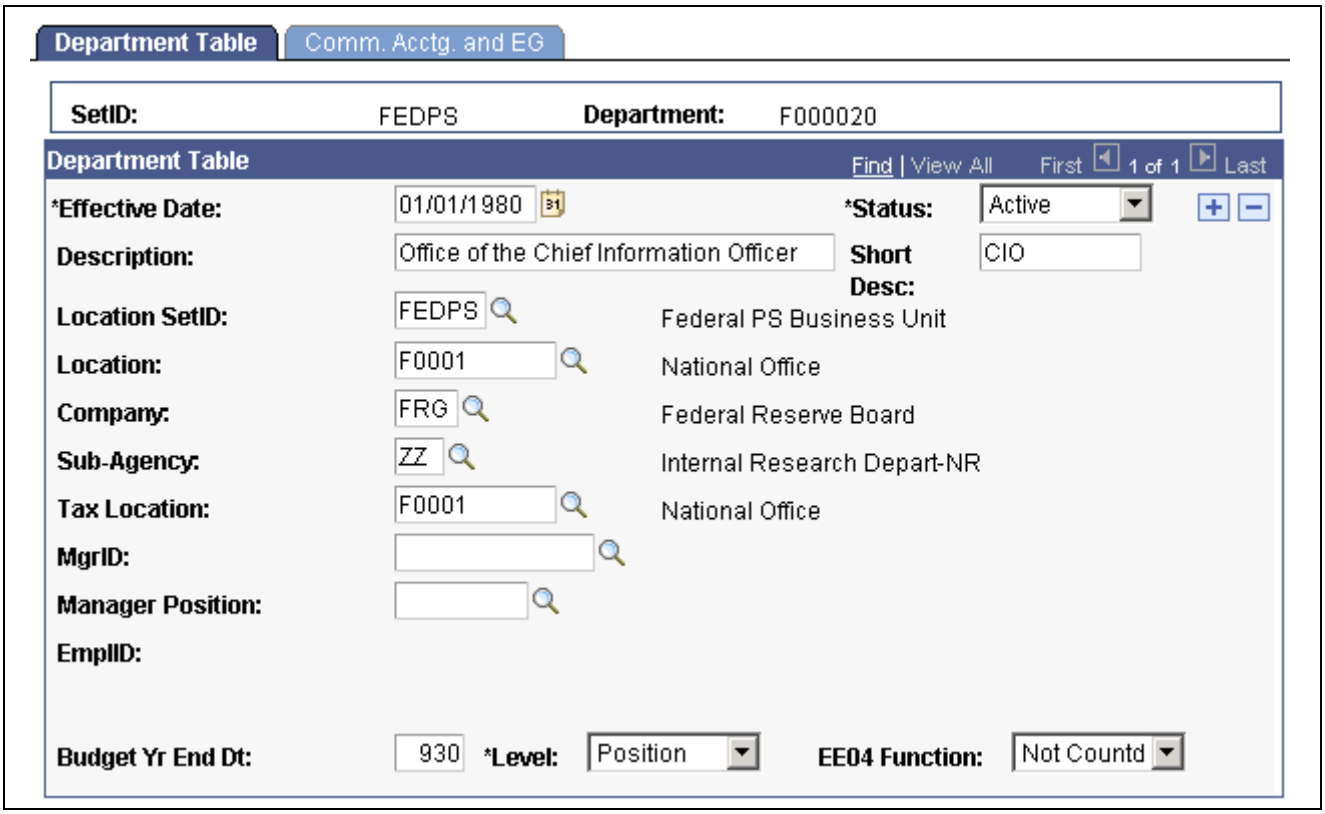
Note. The Department Profile and Comm. Acctg. and EG pages in the Departments USF component are identical to those in the Departments component and share the same object names.

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Page Name	Object Name	Navigation	Usage
Department Table	GVT_DEPART_TBL_USA	Set Up HRMS, Foundation Tables, Organization, Departments USF, Department Table	Set up departments.

Setting Up Departments

Access the Department Table page.



Department Table page

Effective Date

Important! If you add a new department to this Departments USF component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Sub-Agency

Select the sub-agency to which this department belongs.

Note. The system uses the Company and Sub-Agency fields as the default agency/sub-agency location on the Job records for all people who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.

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Manager ID The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position.

Note. You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.

If you use partial position management, where you use positions for only a portion of your organization, you can use either the Manager ID number or the Manager Position number. When you select either field, the system disables the remaining field.

Budget Year End Date If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.

Level Select *Department, Job Code, Line Item, Position Number,* or *None* to define budgeting for this department.

EEO4 Function Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission list preferences and discusses how to:

- Set tableset sharing defaults.
- Set payroll system defaults.

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Understanding Primary Permission List Preferences

You use the Org Defaults by Permission Lst component to set predefined TableSet sharing and system-wide defaults and settings for each of your primary permission lists. Primary permission lists are assigned to the user on the User Profile - General page (USER_GENERAL). The system will default in the values you indicate for a particular permission list on the Org Defautls by Permission Lst component, such as Business Unit, SetID, Currency, Country, and/or Company Code when a user who is associated with that permission list logs in to PeopleSoft HRMS. Primary permission lists also control user access to country functionality, as determined on the Global Panels page (SCRTY_TBL_GBL)).

See Also

Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 115

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

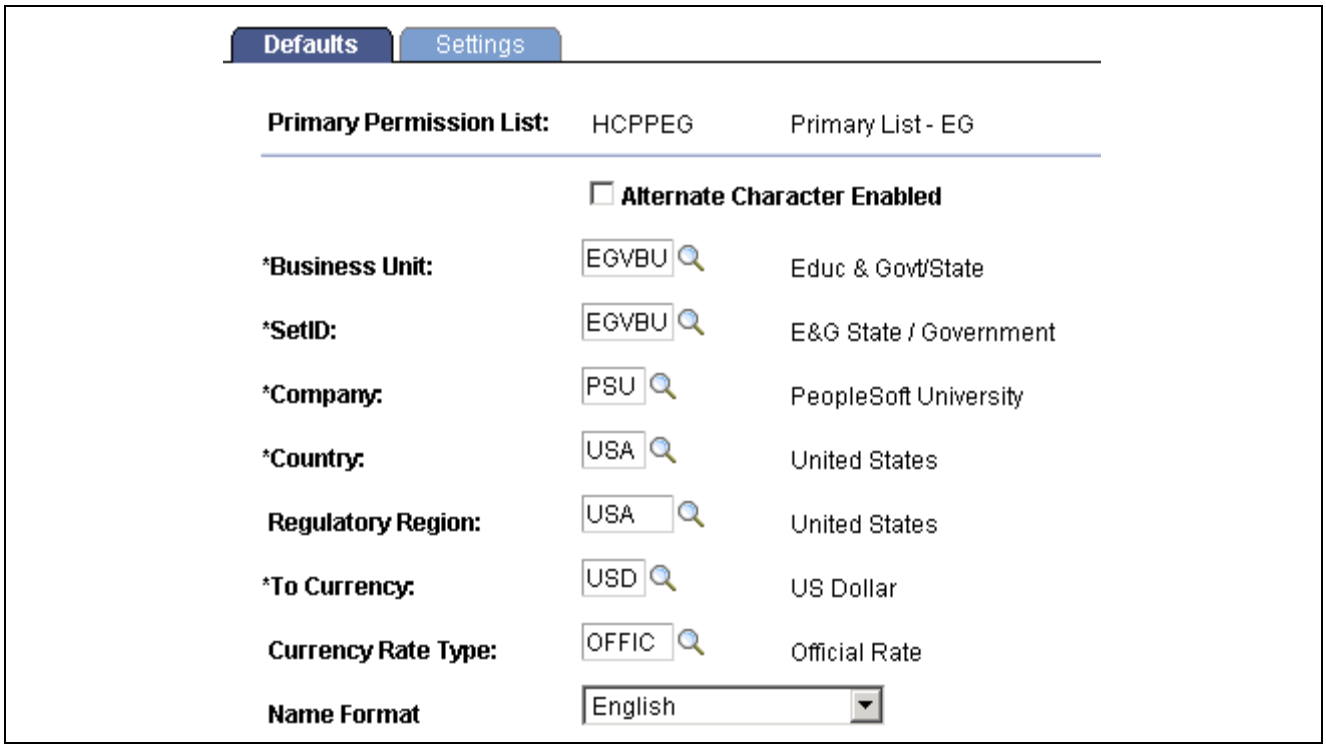
Pages Used to Set Defaults for Permission Lists

Page Name	Object Name	Navigation	Usage
Org Defaults by Permission Lst - Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Defaults	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Org Defaults by Permission Lst - Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Settings	Set Payroll System and system-wide defaults for each of your permission lists.

Setting TableSet Sharing Defaults

Access the Org Defaults by Permission Lst - Defaults page.

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Org Defaults by Permission Lst - Defaults page

You can tailor your PeopleSoft HRMS system for each of your users, controlling the default values that users see on pages in the system.

Note. The TableSet Record - Group Control page regulates what users see on the prompt tables in PeopleSoft HRMS. These defaults override the defaults that you set for these options on the Installation Table for this permission list.

Alternate Character Enabled Select to enable alternate character searching for this permission list.

Warning! The SetID field value that you select affects the business unit and SetID defaults for this permission list throughout your PeopleSoft HRMS system.

See Also

Chapter 8, “Setting Up and Working with Languages,” Working with Double-Byte Characters, page 175

Chapter 2, “Understanding HRMS,” Business Units, Tablesets and SetIDs, page 4

Chapter 6, “Setting Up and Installing PeopleSoft HRMS,” Administering Country Codes, page 137

Chapter 4, “Working with Regulatory Regions,” Associating a Regulatory Region with a Transaction, page 29

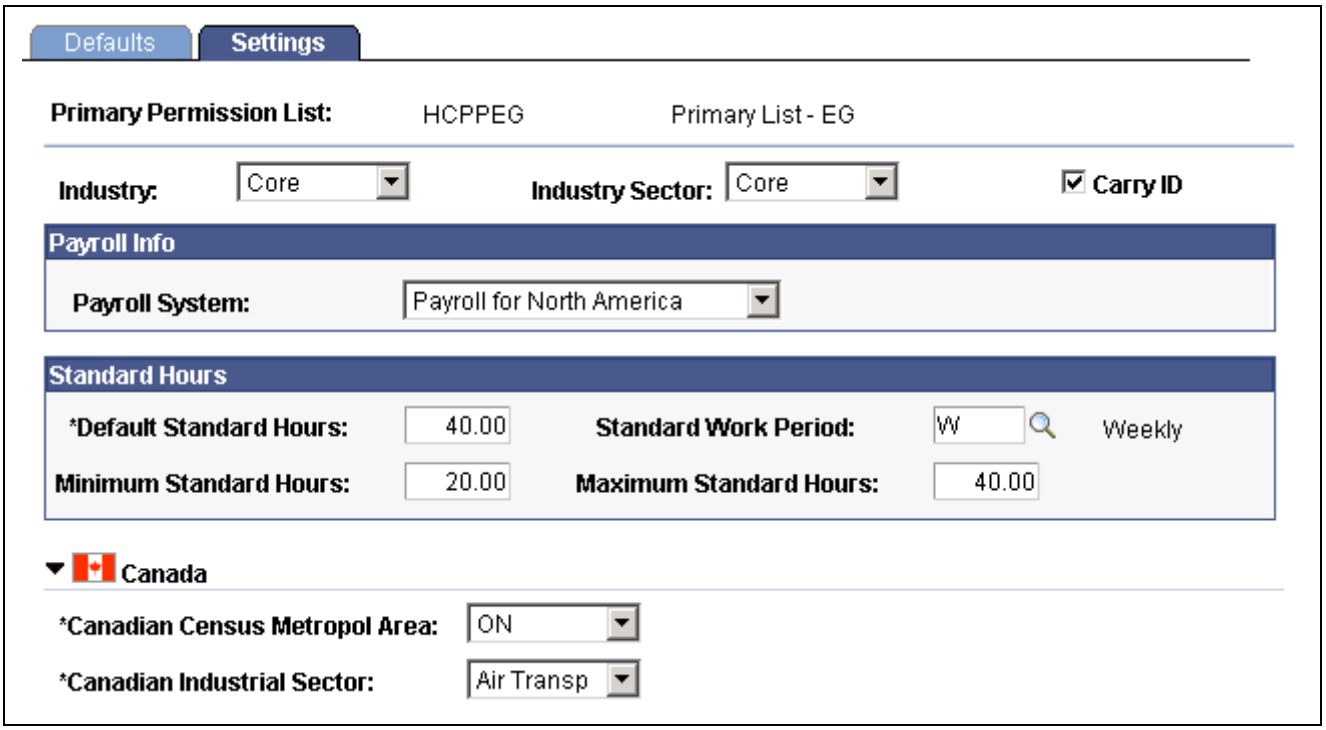
Chapter 9, “Setting Up and Working with Currencies,” page 183

Enterprise PeopleTools PeopleBook: Security Administration, “Setting Up Permission Lists”

Setting Payroll System Defaults

Access the Org Defaults by Permission Lst - Settings page.

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Org Defaults by Permission Lst - Settings page

You can tailor your PeopleSoft HRMS system for each permission list, thus controlling the default values that users see on the system pages.

Industry Select *Government* if this is a U.S. federal government database. The default value is *Core* .

Industry Sector Select *US Federal* if this is a U.S. federal government database. The default value is *Core* .

Carry ID Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

Note. You must select an Industry of *Government* and an *Industry Sector* of *US Federal* to fully use U.S. federal government functionality in your database. In addition, you need to select Federal on the Installation Table - Products page (ISTALLATION_TBL1).

Specifying a Default Payroll System

Payroll System Select the default payroll system. When you select a payroll system on a table or page in PeopleSoft HRMS, the system displays *North American*, *Global*, or neither one based on the choice you enter here for this permission list. The user can override this default, as necessary.

Setting Default Standard Hours

Default Standard Hours The default is *40* hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.

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Standard Work Period	Select a standard work period. The standard work period is the time period in which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).
Minimum Standard Hours and **Maximum Standard Hours**	Enter the default minimum and maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(CAN) Canada

Canadian Census Metropol Area (Canadian census metropolitan area)	Select from the metropolitan areas defined on the Translate table.
Canadian Industrial Sector	Select from the list of values on the Translate table.

Note. (CAN) These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada".

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 119

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CHAPTER 12

Setting Up Personal Information Foundation Tables

This chapter discusses how to:

- Define citizen status codes.
- Define national ID types.
- Set up additional name information.
- Define address types.

Defining Citizen Status Codes

To define citizen status codes, use the Citizen Status component (CITIZEN_STATUS).

This section discusses how to define citizenship statuses.

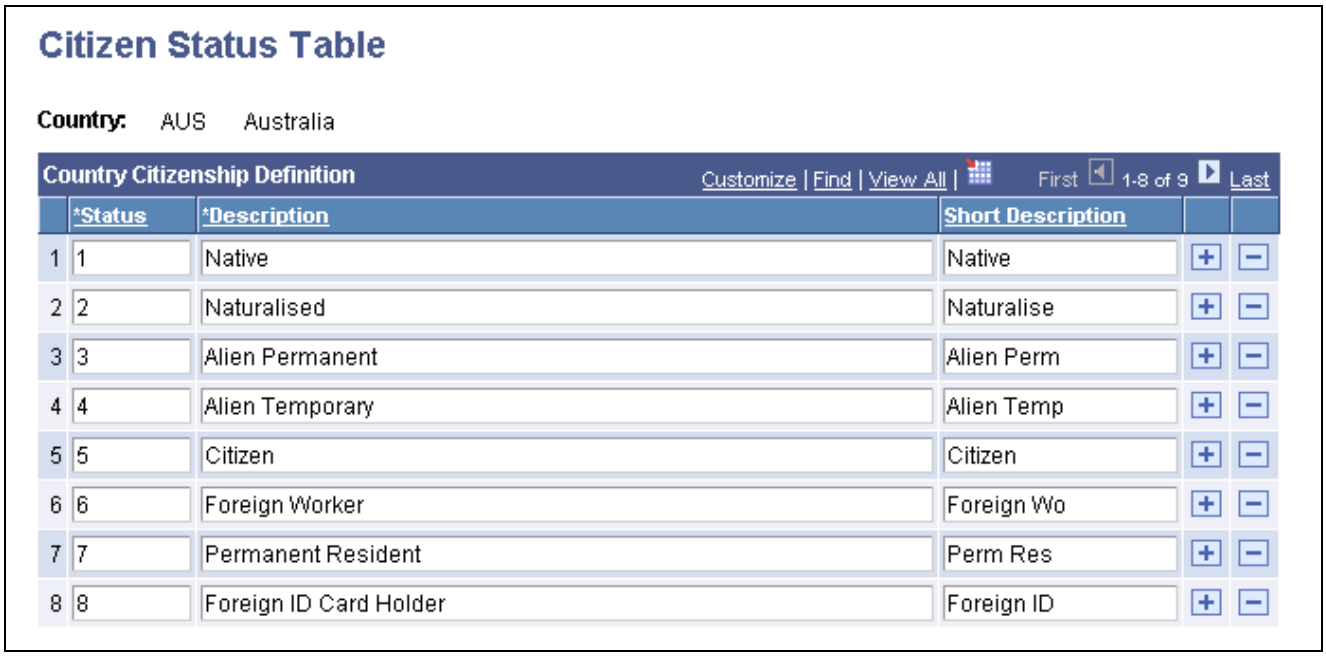
Page Used to Define Citizenship Statuses

Page Name	Object Name	Navigation	Usage
Citizen Status Table	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status, Citizen Status Table	Define the citizenship statuses you'll need to track for various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Defining Citizenship Statuses

Access the Citizen Status Table page.

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Citizen Status Table

Country: AUS Australia

Country Citizenship Definition Customize | Find | View All | First 1-8 of 9 Last

	*Status	*Description	Short Description
1	1	Native	Native
2	2	Naturalised	Naturalise
3	3	Alien Permanent	Alien Perm
4	4	Alien Temporary	Alien Temp
5	5	Citizen	Citizen
6	6	Foreign Worker	Foreign Wo
7	7	Permanent Resident	Perm Res
8	8	Foreign ID Card Holder	Foreign ID

Citizen Status Table page

Country The system displays the country code you entered to access the page. Define citizenship status codes for this country.

Status Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Defining National ID Types

To define national ID types, use the National ID Type component (NID_TYPE_TABLE).

This section discusses how to assign a national ID type to a country code.

Page Used to Define National ID Type

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type, NID Type Table	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when a person or applicant ID is unavailable.

Assigning a National ID Type to a Country Code

Access the National ID Type Table page.

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National ID Type Table

Country: BRA Brazil

National ID Types — Customize | Find | View All | First 1-6 of 9 Last

*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored
C-RES	☐	Militar Certificate	C-RES	99999999999999	99999999999999
CAIXA	☐	CAIXA	CAIXA	99999999999	99999999999
CPF	☐	Person Registry	CPF	99999999999	99999999999
CTPS	☐	Work Card	CTPS	XXXXXXX	XXXXXXX
ESTRAN	☐	Foreigner ID	Foreigner	XXXXXXXXXXXXX	XXXXXXXXXXXXX
PASEP	☐	PASEP	PASEP	99999999999	99999999999

National ID Type Table page

All countries track some form of national ID for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance number, UK workers have a National Insurance number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

When you select a country code on any global page where you are entering a national ID, the system refers to the information defined on this page to enter a default national ID type (if selected) or to ensure that you select a valid one. The system also validates the national ID you enter against the format you specify here. If you don't enter the correct number of digits or letters for a country's national ID, the system displays a warning message.

For example, when you enter national ID information for a new American person on the Biographical Details page the system uses the information set up on the National ID Type Table page to determine the valid national ID types for USA and enters PR as the default. It will validate the data you enter to make sure it matches the specific value types you set up for the National ID Type Format and format the data entered, if necessary. In this example, the system will reformat an entry of 999999999 to 999–99–9999.

Note. Application pages containing the National ID field perform an additional system check to determine the proper display by referring to the User Defined File (UDF) format. Specify these formats in PeopleSoft Application Designer.

Note. PeopleSoft delivers the National ID Type Table with the proper types for BEL, CAN, DEU, CHE, ESP, FRA, GBR, ITA, JPN, MEX, NLD, and USA.

Note. (GBR) Use the NID Prefix GBR page to define valid national insurance prefixes. The Inland Revenue requires that employers' year-end reporting contain valid national insurance prefixes only.

See Chapter 17, "Setting Up Local Country Functionality," (GBR) Setting Up National Insurance Prefixes for the U.K., page 397.

Note. (CAN, USA) The delivered proper national ID type for Canada and the United States is *PR* (which corresponds to the Canadian Social Insurance Number and the American Social Security Number, respectively). You cannot delete this value because it is required for payroll processing.

Note. (DEU, JPN) Users in Germany and Japan aren't required to enter national ID data for workers, so PeopleSoft created a default value of *NO* .

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NID Type (national ID type) Enter the types of national IDs you will use to identify people (for example, employees, dependents, and applicants).

If you do not require a national ID type for a country, create a value of *NO* and leave the National ID Format field blank. National ID Type is often a required field on other PeopleSoft HRMS pages and this gives you a value to enter for individuals from this particular country.

Default Select to have the system use this NID Type as the default national ID type for individuals from this country. You do not have to designate a default national ID type for a country but without a designated default users will need to specify a type every time they enter a national ID in the system.

National ID Format Indicate the default format for the national ID. Use the following values:

- *X* or *Z* when the user can enter an alphanumeric or blank value.
- *A* and any lower case letter when the user must enter a letter.
- *9* when the user must enter a numeric value.
- If you leave this field blank, users can enter any value (or no value at all) for this national ID type.

Note. In addition to the general formatting you set up here, PeopleCode record logic performs special data validation on BEL, BRA, CAN, CHE, FRA, GBR, MEX, NLD, USA, DEU, ESP, MYS, and ITA national IDs.

Note. (USA) When reporting to U. S. federal government agencies, PeopleSoft Enterprise Payroll for North America converts the default for missing or unknown Social Security numbers to the format required by the agency.

NID as stored (national ID as stored) Shows how the NID is stored in the system. Match this value to the field display formats in the Application Designer.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data

Setting Up Additional Name Information

To set up additional name information, use the Name Format Types component (NAME_FORMAT_TBL), Name Type component (NAME_TYPE_TBL), Name Prefix component (NAME_PREFIX_TABLE), Name Suffix component (NAME_SUFFIX_TABLE), Royal Name Prefix component (NM_ROYAL_PREF), Name Royal Suffix (NM_ROYAL_SUFF), and Name Title component (TITLE).

This section provides an overview of additional name information and discusses how to:

- Enter name format types.
- Enter name types.
- Enter name prefixes.

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- Enter name suffixes.
- Define royal name prefixes.
- Define royal name suffixes.

Understanding Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records. With the Name Prefix, Name Suffix, Name Royal Prefix, Name Royal Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.,* and suffixes like *Jr.* and *Sr.*

If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor, doctor,* or *count.* These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

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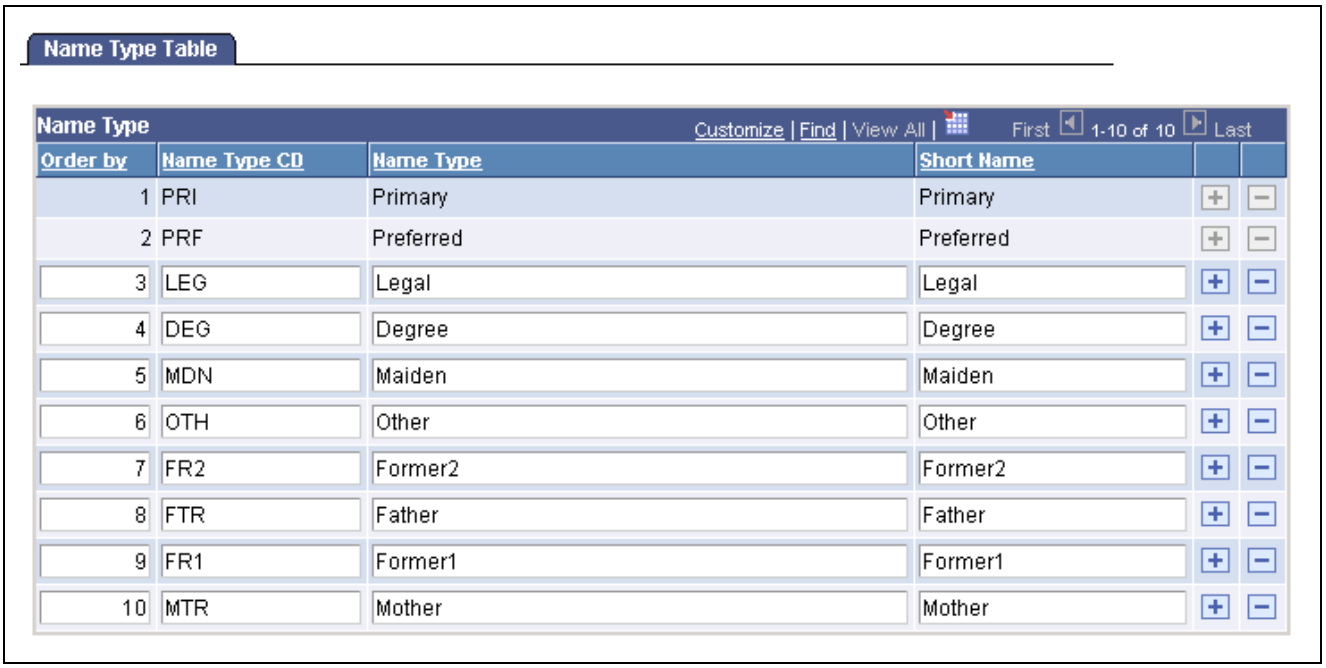
Pages Used to Set Up Additional Name Information

Page Name	Object Name	Navigation	Usage
Name Format Tbl	NAME_FORMAT_TBL	Set Up HRMS, Foundation Tables, Personal, Name Format Types, Name Format Tbl	Define name format types to use on name pages throughout HRMS.
Name Type Table	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type, Name Type Table	Define name types and the order in which they are available.
Name Prefix Table	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix, Name Prefix Table	Enter name prefixes that you'll use when you record name information.
Name Suffix Table	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix, Name Suffix Table	Enter name suffixes to use to record name information.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix	Enter royal prefixes and descriptions. Name Royal Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Name Royal Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix	Define royal suffixes. The Name Royal Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names in the Personal Data pages, you can reference these standard name royal suffixes.
Name Title	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title	Enter titles for use with names. Track standard titles—from *professor* to *mijnheer*—for names in your human resources system.

Entering Name Types

Access the Name Type Table page.

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Name Type Table

Name Type — Customize | Find | View All | First 1-10 of 10 Last

Order by	Name Type CD	Name Type	Short Name
1	PRI	Primary	Primary
2	PRF	Preferred	Preferred
3	LEG	Legal	Legal
4	DEG	Degree	Degree
5	MDN	Maiden	Maiden
6	OTH	Other	Other
7	FR2	Former2	Former2
8	FTR	Father	Father
9	FR1	Former1	Former1
10	MTR	Mother	Mother

Name Type Table page

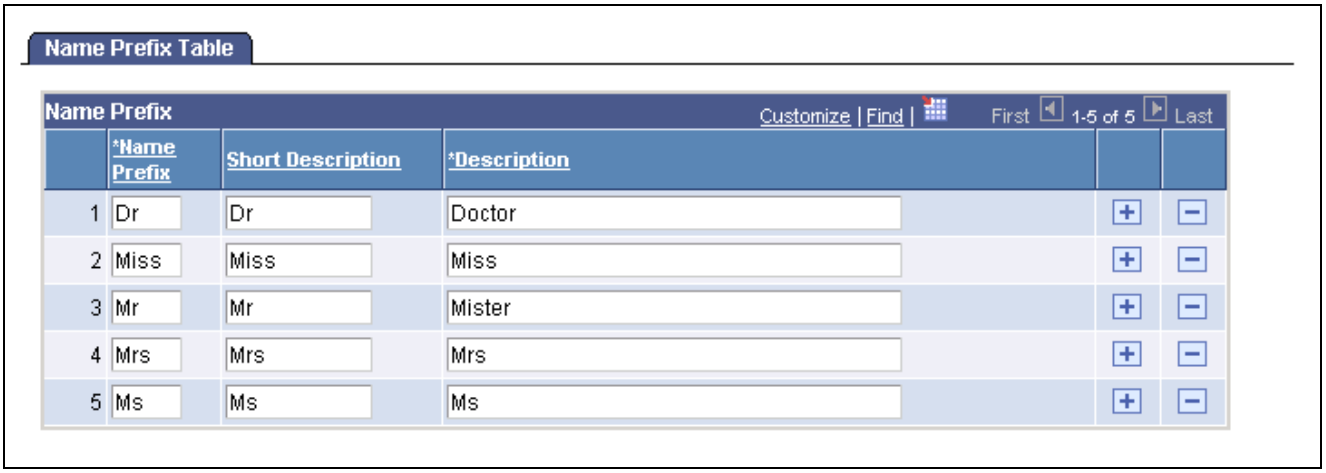
Order by Enter the order in which the system should make this name type available.

Name Type CD (name type code), **Name Type,** and **Short Name** Enter a code for the name type, the full name type name, and a short version of the name type.

Note. You cannot edit the Primary and Preferred name types because they are system data.

Entering Name Prefixes

Access the Name Prefix Table page.



Name Prefix Table

Name Prefix — Customize | Find | First 1-5 of 5 Last

	*Name Prefix	Short Description	*Description
1	Dr	Dr	Doctor
2	Miss	Miss	Miss
3	Mr	Mr	Mister
4	Mrs	Mrs	Mrs
5	Ms	Ms	Ms

Name Prefix Table page

Name Prefix Enter the name prefix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name prefixes.

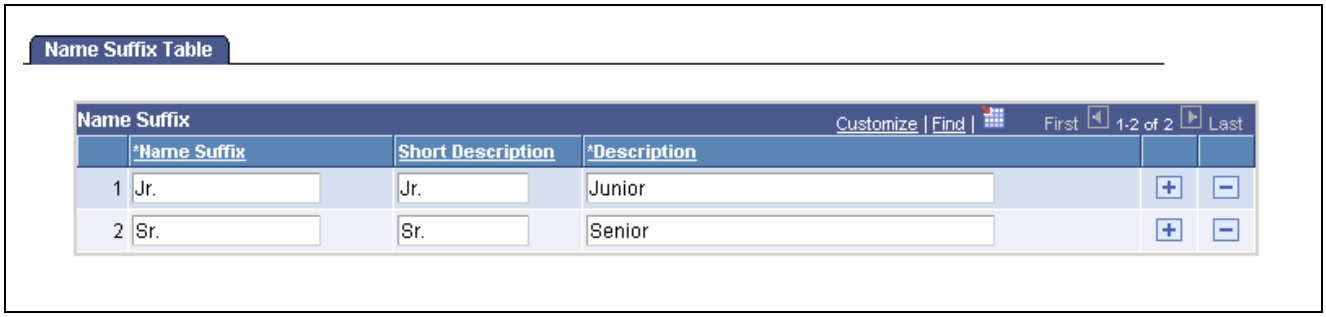
The system displays the prefixes you enter here as part of the person's name.

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Note. Name prefixes aren't effective-dated, nor do they have a status associated with them.

Entering Name Suffixes

Access the Name Suffix Table page.



Name Suffix Table page

Name Suffix Enter the name suffix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name suffixes.

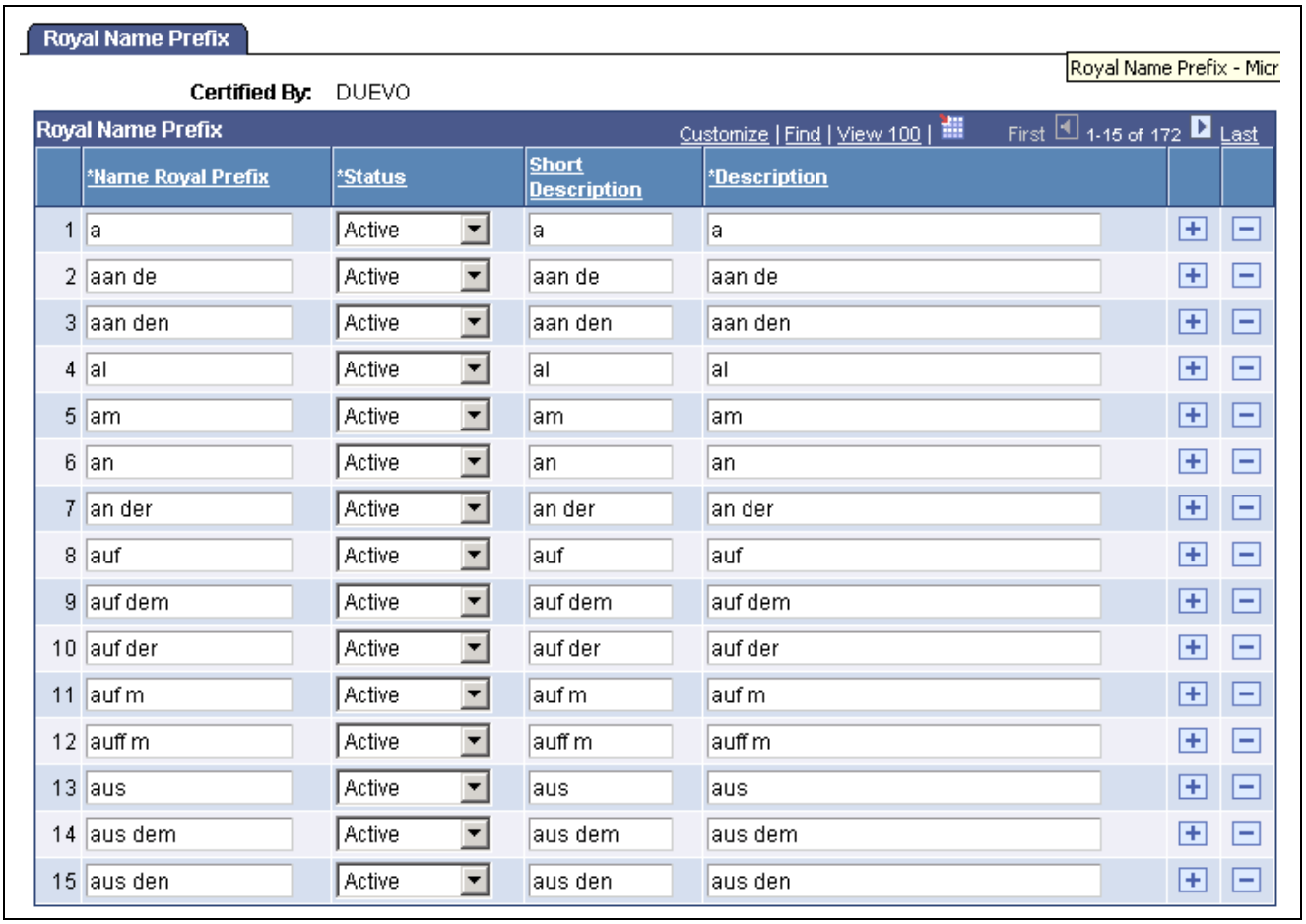
Short Description and **Description** Descriptions you enter for the prefix appear on the page as part of the person's name.

Note. Name suffixes aren't effective-dated, nor do they have a status associated with them.

Defining Royal Name Prefixes

Access the Royal Name Prefix page.

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Royal Name Prefix page

Certified By Displays the value you selected when you accessed the page: *DUEVO* for German prefixes or *NEN* for Dutch prefixes.

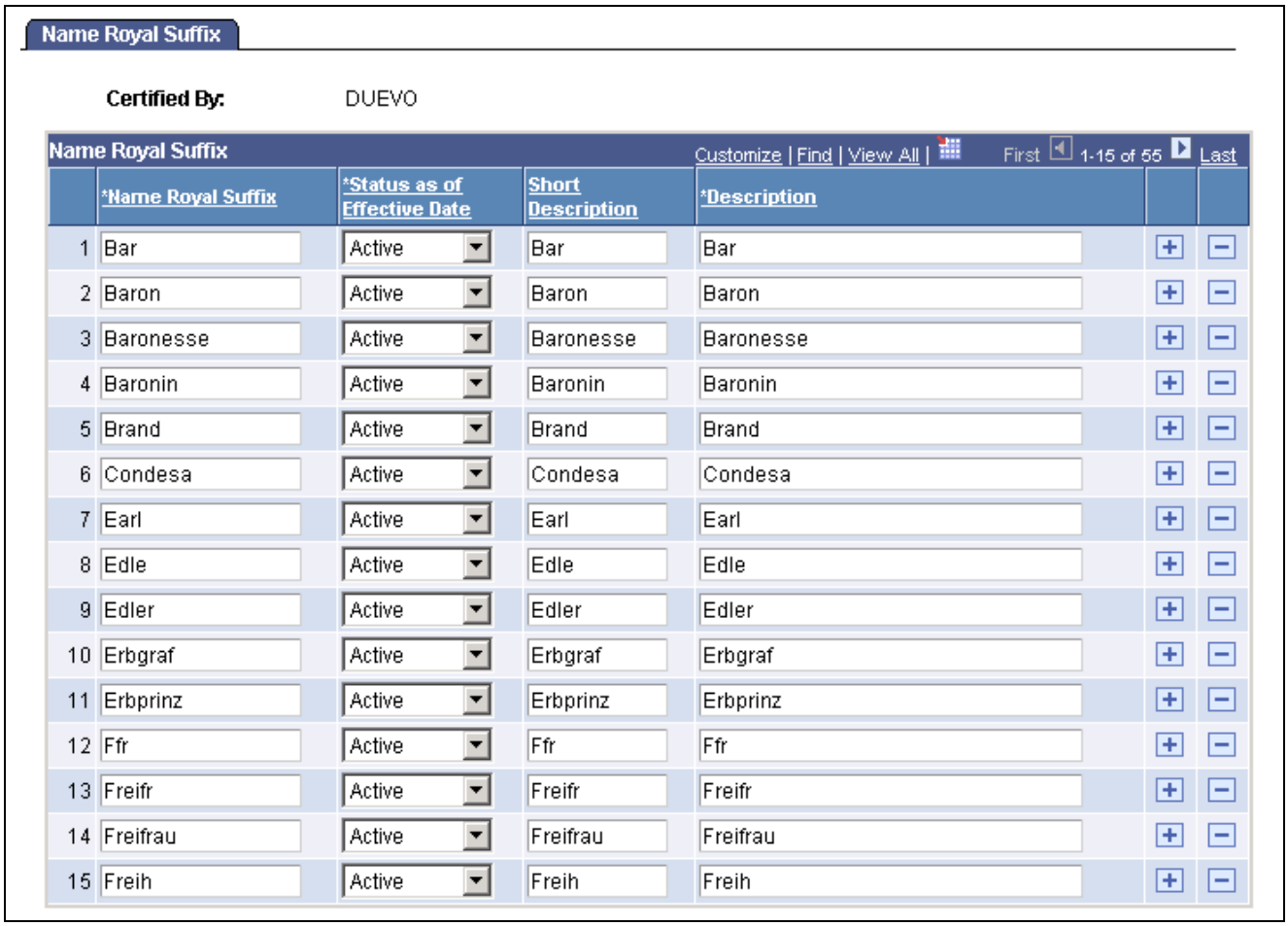
Name Royal Prefix Enter a royal prefix name, using up to 15 characters.

Status Name Royal Prefixes aren't effective-dated, so to retire a prefix code, change the status to *Inactive.*

Defining Royal Name Suffixes

Access the Name Royal Suffix page.

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Name Royal Suffix page

Certified By The system displays the value you selected to access the page: *DEUVO* for German prefixes or *NEN* for Dutch prefixes.

Name Royal Suffix Enter a name royal suffix, using up to 15 characters.

Status as of Effective Date Name royal suffixes aren't effective-dated, so to retire a suffix code, change the status to *Inactive.*

Defining Address Types

To define address types, use the Address Type component (ADDR_TYPE_TBL).

This section discusses how to enter address types.

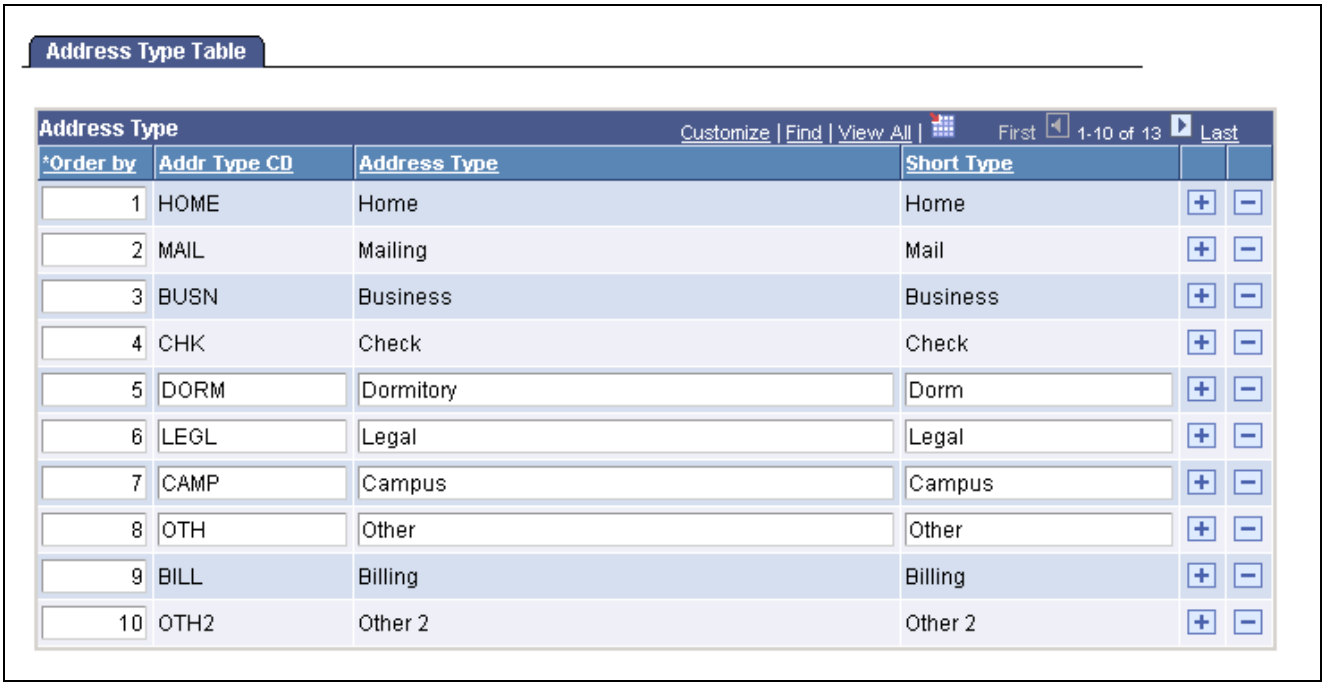
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Page Used to Enter Address Types

Page Name	Object Name	Navigation	Usage
Address Type Table	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type, Address Type Table	Enter address types and the order in which they are available.

Entering Address Types

Access the Address Type Table page.



Address Type Table page

Order by Enter the order in which the system should make this address available.

Addr Type CD (address type code), **Address Type,** and **Short Type** Enter a code for the address type, the full address type name, and a short version of the address type.

Note. You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

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CHAPTER 13

Setting Up Jobs

This chapter discusses how to:

- Define job subfunction and job function codes.
- Define job families.
- Classify jobs.
- Define job tasks.
- Set up holiday schedules.
- Set up pay groups.
- Run job code and pay group reports.

Defining Job Subfunction and Job Function Codes

To define job subfunction codes, use the Job Subfunction Definition component (JOB_SUBFUNC_DEFN). To define job function codes, use the Job Function Table component (JOB_FUNCTION_TBL).

This section provides an overview of job subfunction codes and function codes and discusses how to set them up.

Understanding Job Subfunction and Job Function Codes

Use job subfunction codes to create subfunctions that can then be assigned to job function codes. For example, you can create a job subfunction code of Payroll that can then be assigned to the job function code of Finance and Accounting. It is also possible to set up profiles for job subfunctions and job functions, if desired.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

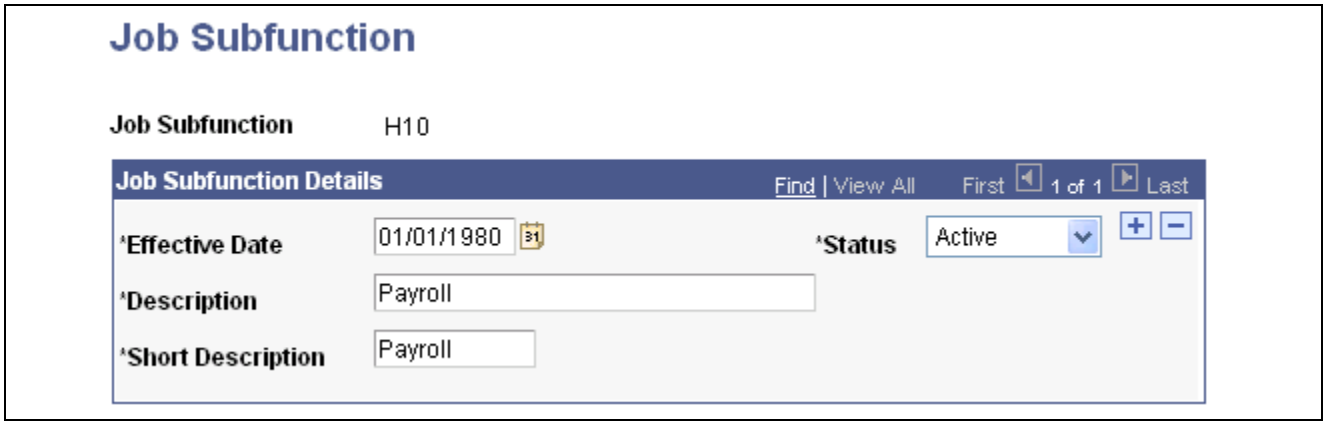
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Page Used to Define Job Function and Job Subfunction Codes

Page Name	Object Name	Navigation	Usage
Job Subfunction	JOB_SUBFUNC_DEFN	Set Up HRMS, Foundation Tables, Job Attributes, Job Subfunction, Job Subfunction	Set up and define job subfunction codes.
Job Function Table	JOB_FUNCTION_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Function, Job Function Table	Set up and define job function codes. Define the relationship of subfunctions to job functions.

Setting up Job Subfunction Codes

Access the Job Subfunction page.

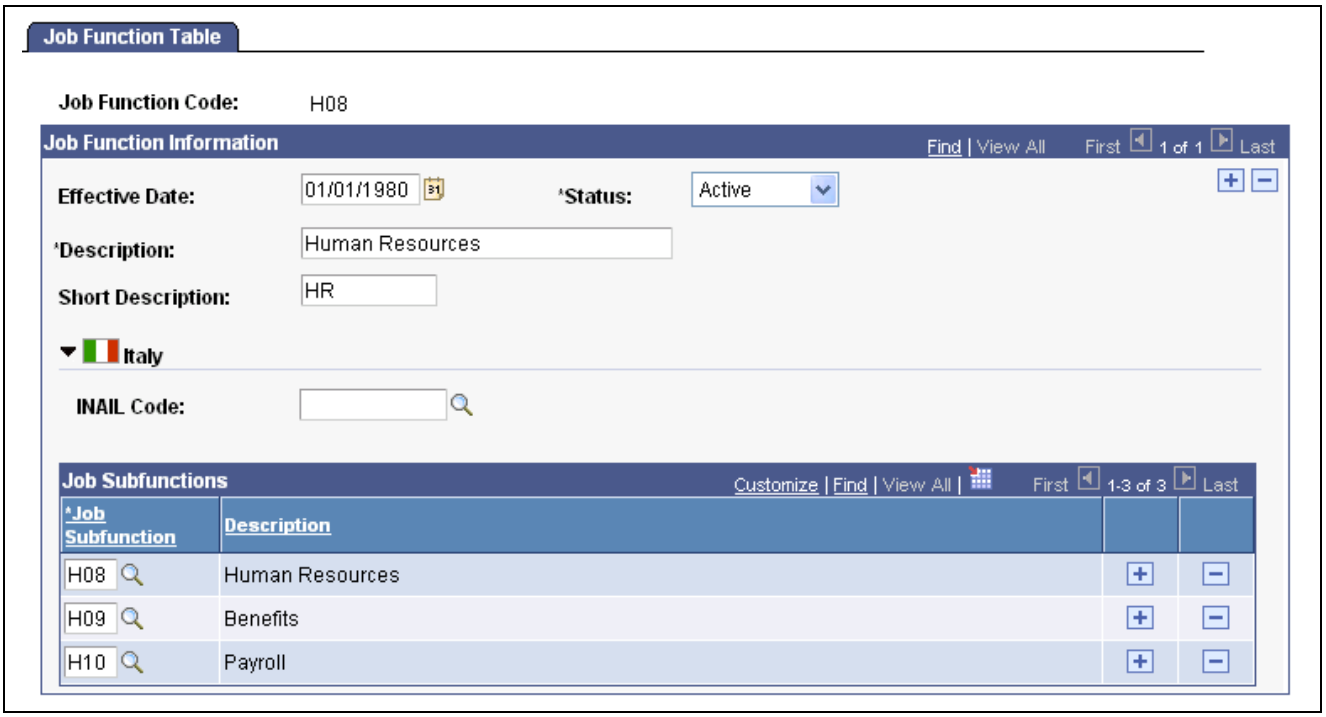


Job Subfunction page

Setting Up Job Function Codes

Access the Job Function Table page.

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Job Function Table page

(ITA) INAIL Code (*Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro* code)

The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Defining Job Families

To define job families, use the Job Family Table component (JOB_FAMILY).

This section provides an overview of job families and discusses how to group jobs into families.

Understanding Job Families

Create job families to group similar jobs. Using Manage Profiles you can create profiles for job families that describe all the jobs in the family.

Page Used To Set Up Job Families

Page Name	Object Name	Navigation	Usage
Job Family	JOB_FAMILY_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Family Table, Job Family	Create job families.

Grouping Jobs Into Families

Access the Job Family page.

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Important! The job family effective date must be effective as of the relevant job code effective dates.

Classifying Jobs

To classify jobs, use the Job Code Table component (JOB_CODE_TBL). Use the CI_JOB_CODE_TBL component interface to load data into the tables for this component.

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

- Add new job codes.
- Assign points to job evaluation criteria.
- Enter salary survey information.
- Associate salary plan information and base pay rate codes with a job code.
- Associate non-base pay rate codes with a job code.

Understanding Job Codes

In HRMS, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Job Codes and Positions in HRMS

In HRMS, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with workers. Job codes have a one-to-many relationship with workers.

You still use job codes to create general groupings or job classifications in your organization if you drive PeopleSoft Enterprise Human Resources by position in your organization, . You then use the Job Code groupings as the basis for default job data for positions.

Note. If you use PeopleSoft Enterprise Pension Administration, set up jobs, and not positions, for your pension payees. You can use Manage Profiles to set up profiles for your job codes.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, “Managing Profiles”.

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(JPN) Using Job Codes and Capability Grade Management in Japan

The Job Code field on the Job Details Page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the Job Code field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

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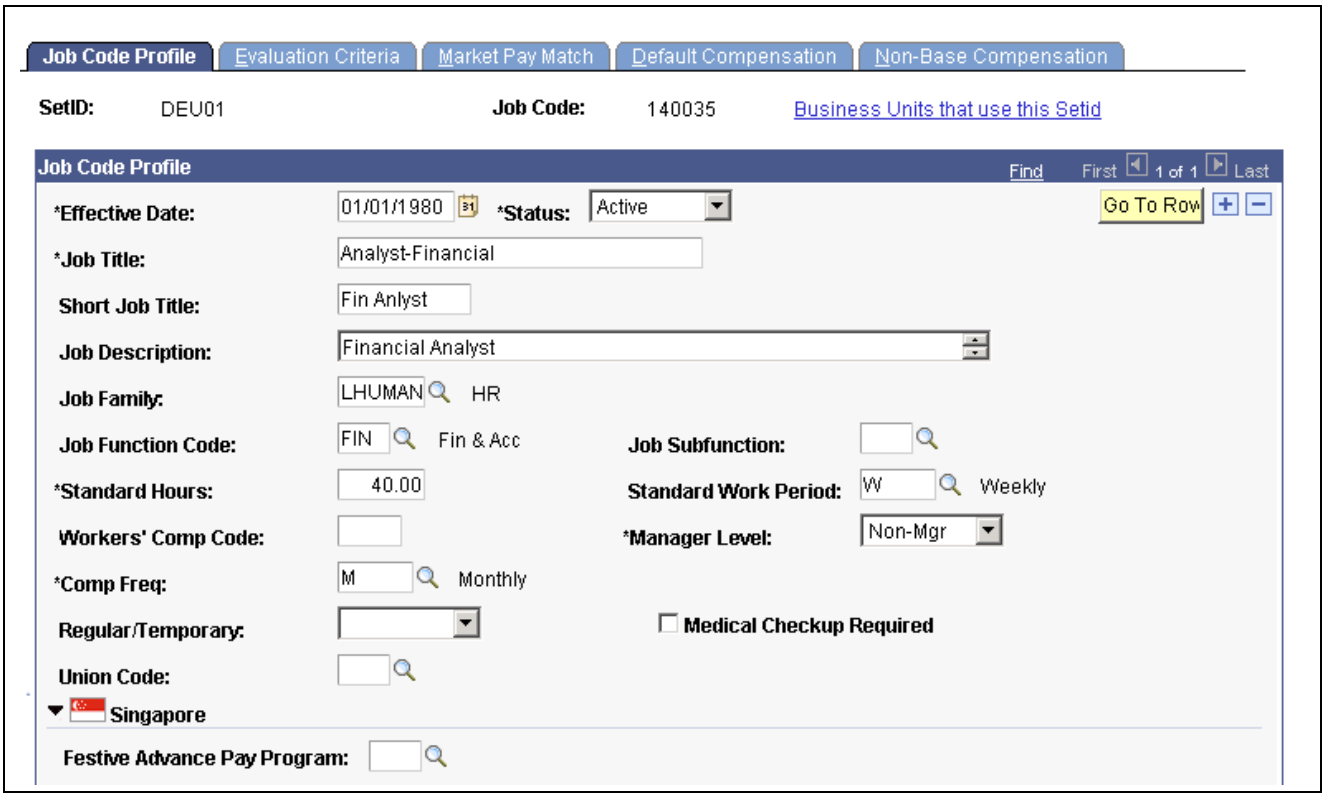
Pages Used to Classify Jobs

Page Name	Object Name	Navigation	Usage
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Business Units by Job Code	JOBCODE_BU	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile Click Business Units that use this setID on the Job Code Profile page.	View all business units associated with the SetID for this Job Code.
Evaluation Criteria	JOBCODE_TBL2_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Evaluation Criteria	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code.
Default Compensation	JOBCD_COMP_RATE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Default Compensation	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page.
Non-Base Compensation	JOBCD_NON_BASE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Non-Base Compensation	Associate non-base rate codes with a job code.

Adding New Job Codes

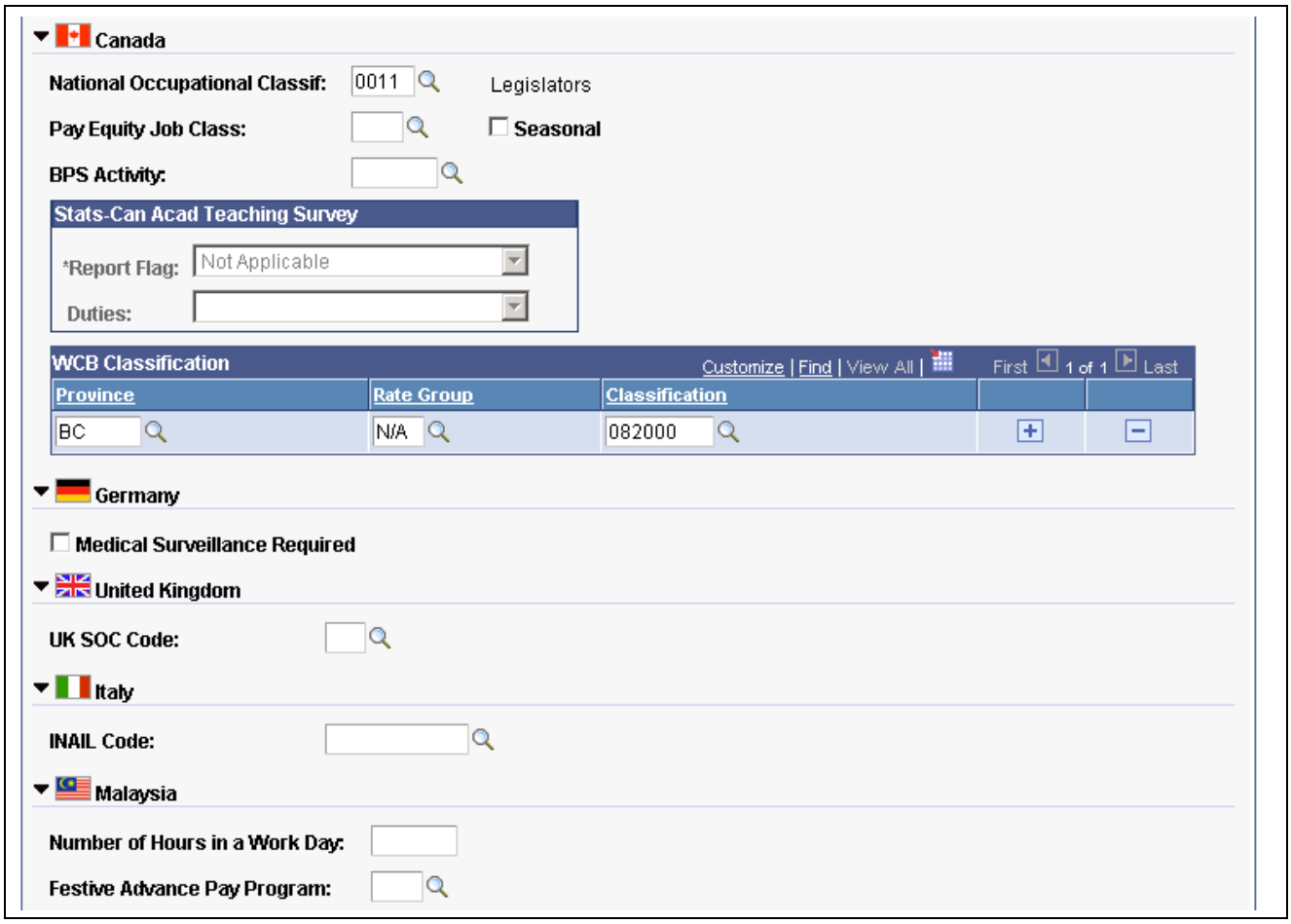
Access the Job Code Profile page.

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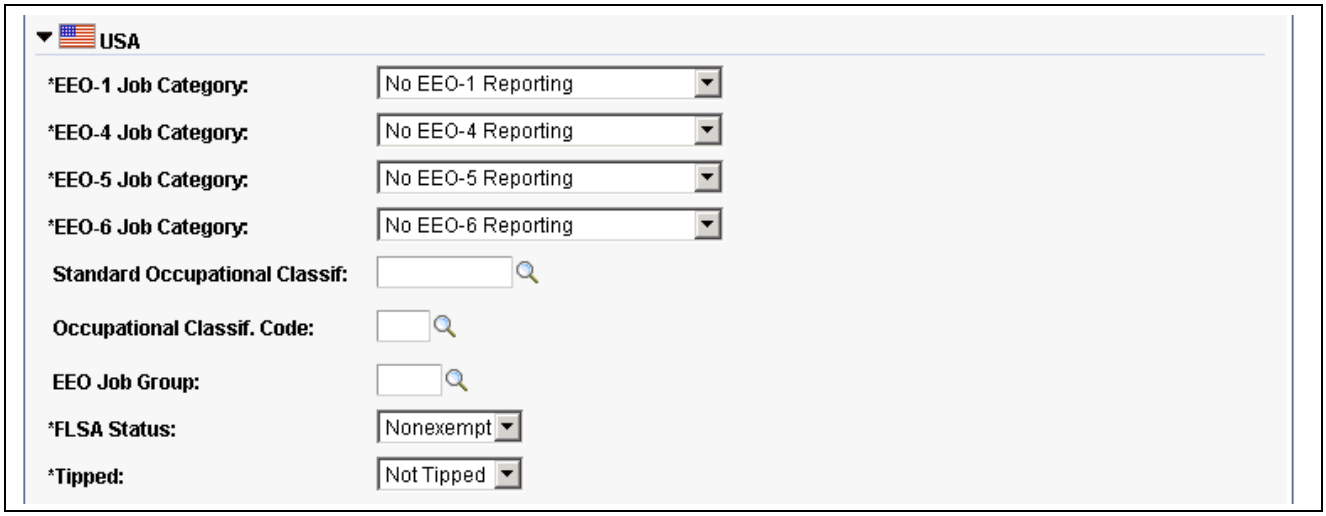


Job Code Profile page (1 of 4)

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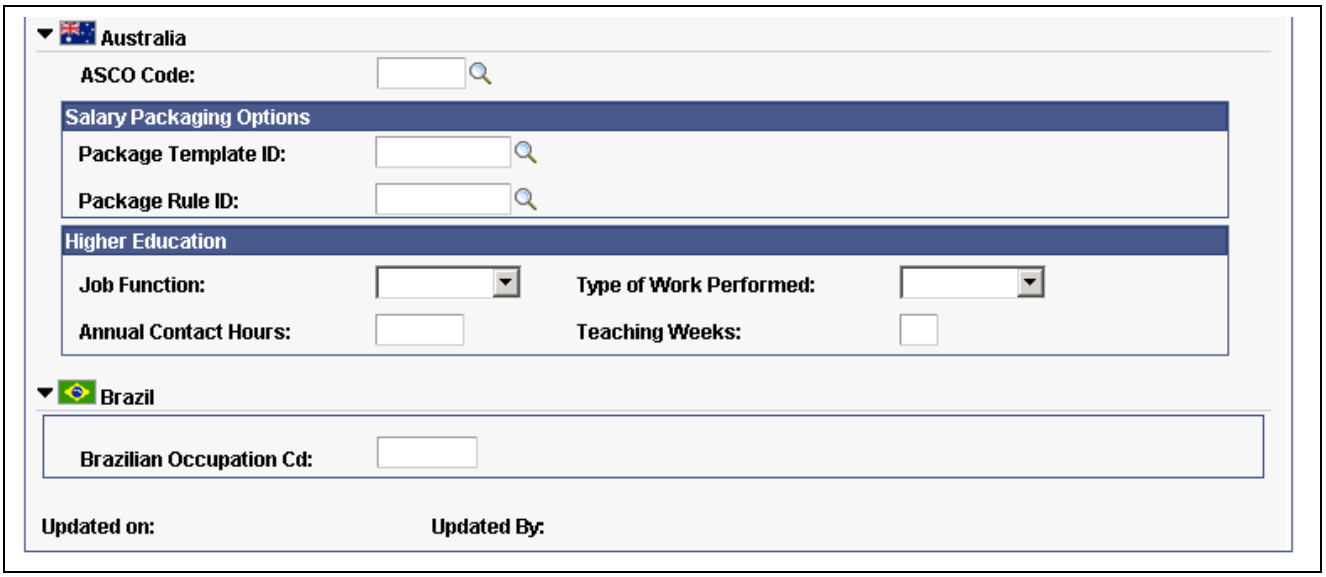


Job Code Profile page (2 of 4)



Job Code Profile page (3 of 4)

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Job Code Profile page (4 of 4)

Job Code — A unique code that you associate with a specific job in your organization.

(USF) Occupation Series, Official Posn Title Code (official position title code), and **Organization Posn Title Cd** (organization position title code) — Select from the list.

Job Family — Select a job family to categorize a job code into a more general grouping. For example, you might group a trust analyst and an operations analyst into a job family called *Analyst.*

Job Function Code — Select the code that best categorizes the job by function, such as administrative, legal, or management.

Job Subfunction — Select the code that best categorizes the job's subfunction.

Standard Hours — Enter the default number of hours in a standard work period for this job. The Standard Hours value that you enter on this page becomes the default for all workers who are associated with this job code. You can modify the standard hours for an worker on the worker's Job Data pages (JOB_DATA).

The value that you assign for Standard Hours must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences table. If no minimum standard hours and maximum standard hours are defined on the Primary Permission List Preferences table, the system uses the values on the Installation table.

Standard Work Period — Select the time period in which workers must complete the standard hours. Maintain these values in the Frequency Table page (FREQUENCY_TBL).

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency).

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook*

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Workers' Comp Code (Workers' Compensation code) Enter a code to specify the workers' compensation plan to which this job code belongs.

Manager Level Select the level of management associated with the employee.

Comp Freq (compensation frequency) Select the frequency in which the compensation is quoted. The default value is the frequency that you specified on the Installation table

Medical Checkup Required Select if this job code requires a onetime medical checkup when the worker is hired into the job.

Note. If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.

Union Code If you're defining a job code that is associated with a union, select a union code.

Updated On Last updated timestamp for this jobcode.

Updated By Last updated by user information

(SGP) Singapore

Festive Advance Pay Program If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(CAN) Canada

National Occupational Classif (National Occupational Classification) Select a Canadian National Occupation classification code.

Seasonal Select if the job is seasonal.

BPS Activity (Business Payrolls Survey activity) If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.

Report Flag Select the appropriate option if the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys.

This field is for Canadian higher education degree-granting institutions only.

Duties Indicate whether the duties of the job code consist of *Teaching only, Teaching & other resp* (teaching and other responsibilities), or *Research.* This field is required if you selected the Report Flag check box.

This field is for Canadian higher education degree-granting institutions only.

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Province Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.

Rate Group Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.

Classification Select a WCB classification for this job code. The classification indicates the industry that applies to this job code.

Note. The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.

(DEU) Germany

Medical Surveillance Required Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code) Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Fair Employment reporting.

(ITA) Italy

INAIL Code Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Festive Advance Pay Program If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(USA) USA

Union Code If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations business process in PeopleSoft Human Resources.

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EEO Job Categories Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC).

To retrieve valid job codes for EEO-1 reporting, select a EEO-1 job category that is not equal to *No EEO-1 Reporting*.

Standard Occupational Classif (Standard Occupational Classification) If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.

EEO Job Group To further classify the job categories, enter the EEO job group to which this job belongs.

FLSA Status (Fair Labor Standards Act status) Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all worker job records that are associated with this job code. Example values are *Administrative, Executive, Nonexempt,* and *Professional.*

(AUS) Australia

ASCO Code (Australian standard classification of occupation code) Select the ASCO code.

Package Template ID / Package Rule ID Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here.

By associating templates and rules with job codes, package components are automatically assigned to workers during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling.

Note. You set up package templates on the Package Template page. You set up package rules on the Package Rule page.

(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Job Function Select the default job function for the organization.

Type of Work Performed Select the default type of work performed for the organization.

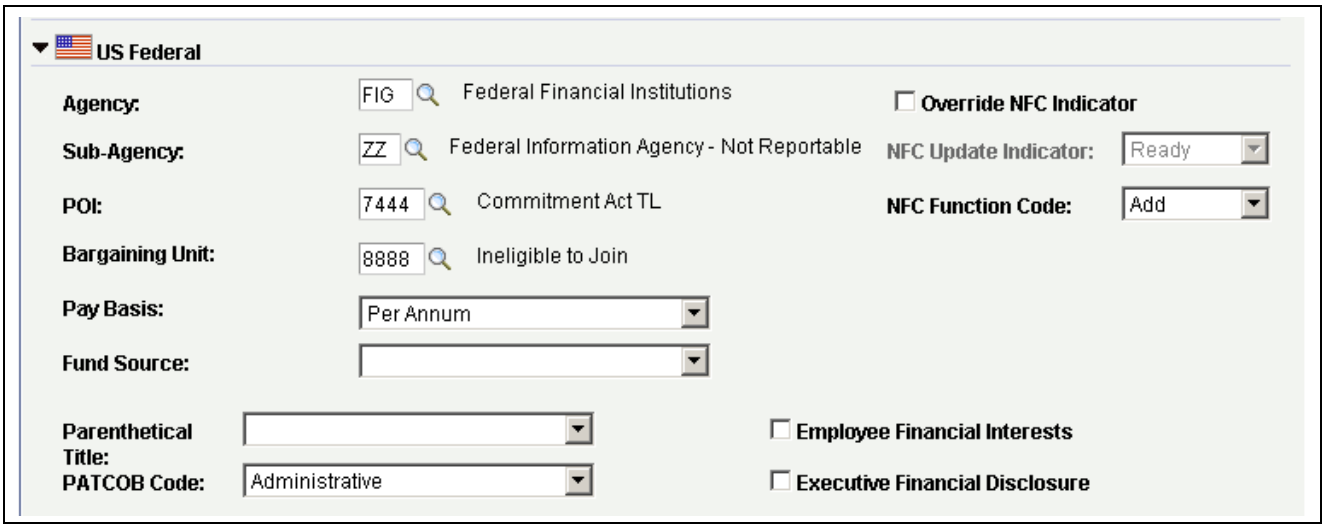
Annual Contact Hours Enter the number of contact hours. This depends on the type of work performed. See “Determining Contact Hours” to calculate this value.

Teaching Weeks Enter the default number of teaching weeks.

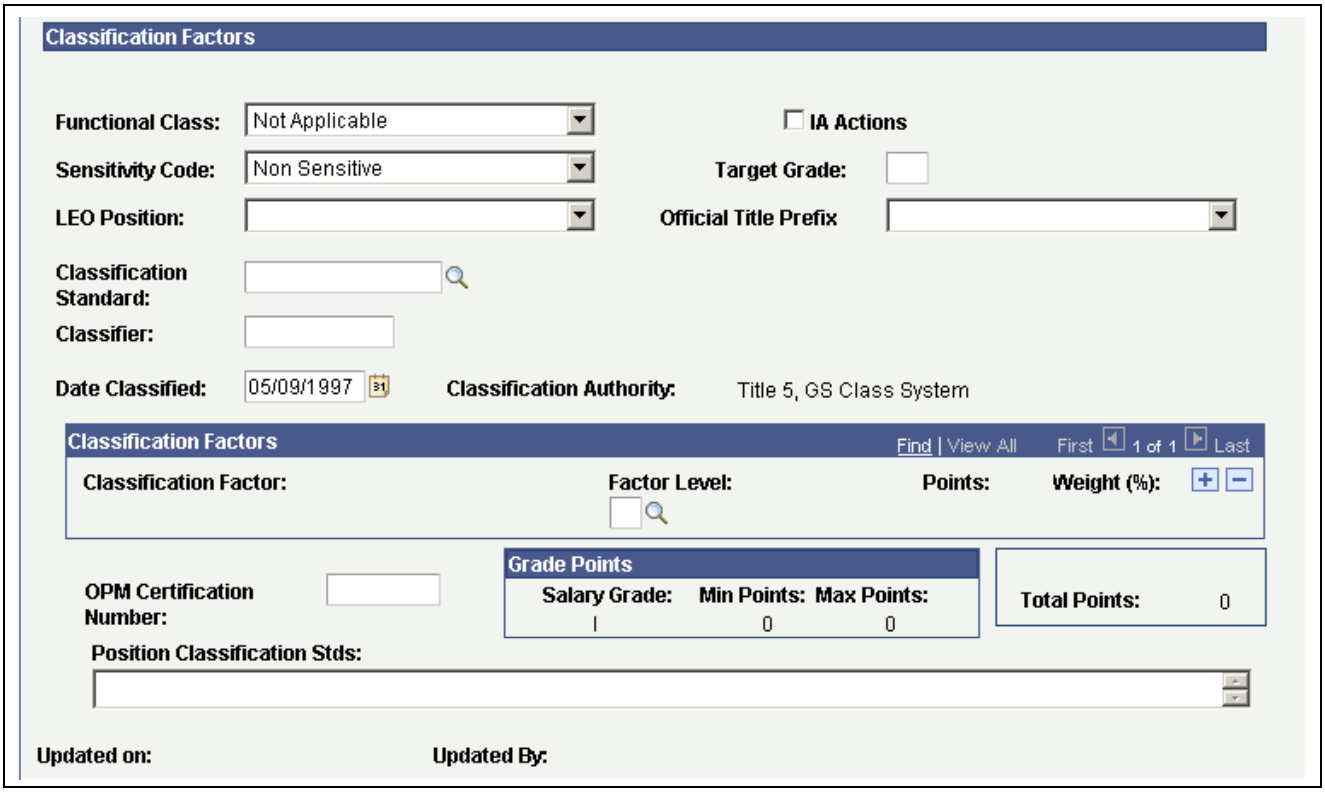
(USF) U.S. Federal

These fields are available when you work in a federalized (U.S. Federal) database:

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Job Code Profile page – US Federal 1 of 2



Job Code Profile page – US Federal 2of 2

Bargaining Unit If the job code is associated with a union, select a bargaining unit.

Pay Basis Enter the pay basis for which you quote salaries for this job code; for example, *Per Annum, Per Hour.*

Override NFC Indicator Select this check box to override the value in the NFC Update Indicator field.

NFC Update Indicator Status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include:

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- *In Process* – This Jobcode has been run through the export program and will be sent to NFC.
- *Not Ready* – User intends to exclude this Jobcode from export to NFC.
- *Other* – Status maintained by system user.
- *Ready* – User intends to include this Jobcode in the next NFC export.
- *SINQ* – This Jobcode has not successfully passed NFC's PINE Edits and needs correction.

NFC Function Code Identifies the task to be performed by NFC on a master record. Options in this field include *Add*, *Change*, *Delete*, *Inactivate*, and *Reactivate.*

Classification Authority and Classification Factor The system displays the classification authority and the classification factors that are associated with the classification standard.

Target Grade Enter the target grade of the job, if applicable.

Official Title Prefix NFC-defined list of title prefixes.

Factor Level Enter a classification factor level for each classification factor that is associated with this classification standard.

Points, Grade Points, and **Total Points** The system displays the points that are associated with the classification standard.

Weight (%) The system displays the weight percentage of the points that are associated with the classification standard.

OPM Certification Number (office of personnel management certification number) Enter the OPM certification number that is associated with this job code.

Position Classification Stds (position classification standards) Enter the position classification standards that are used.

(BRA) Brazil

Brazilian Occupation Cd (Brazilian occupation code) Enter the appropriate Brazilian Code of Occupation (CBO - Código Brasileiro de Ocupações) from the official table.

Codes effective before December 31, 2002 should be in the format 99999. Codes effective from January 1, 2003 onward should be in the format 9999–99.

Note. Go to www.mte.gov.br to view a list of CBOs.

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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Festive Advance, "Setting Up Festive Advance"

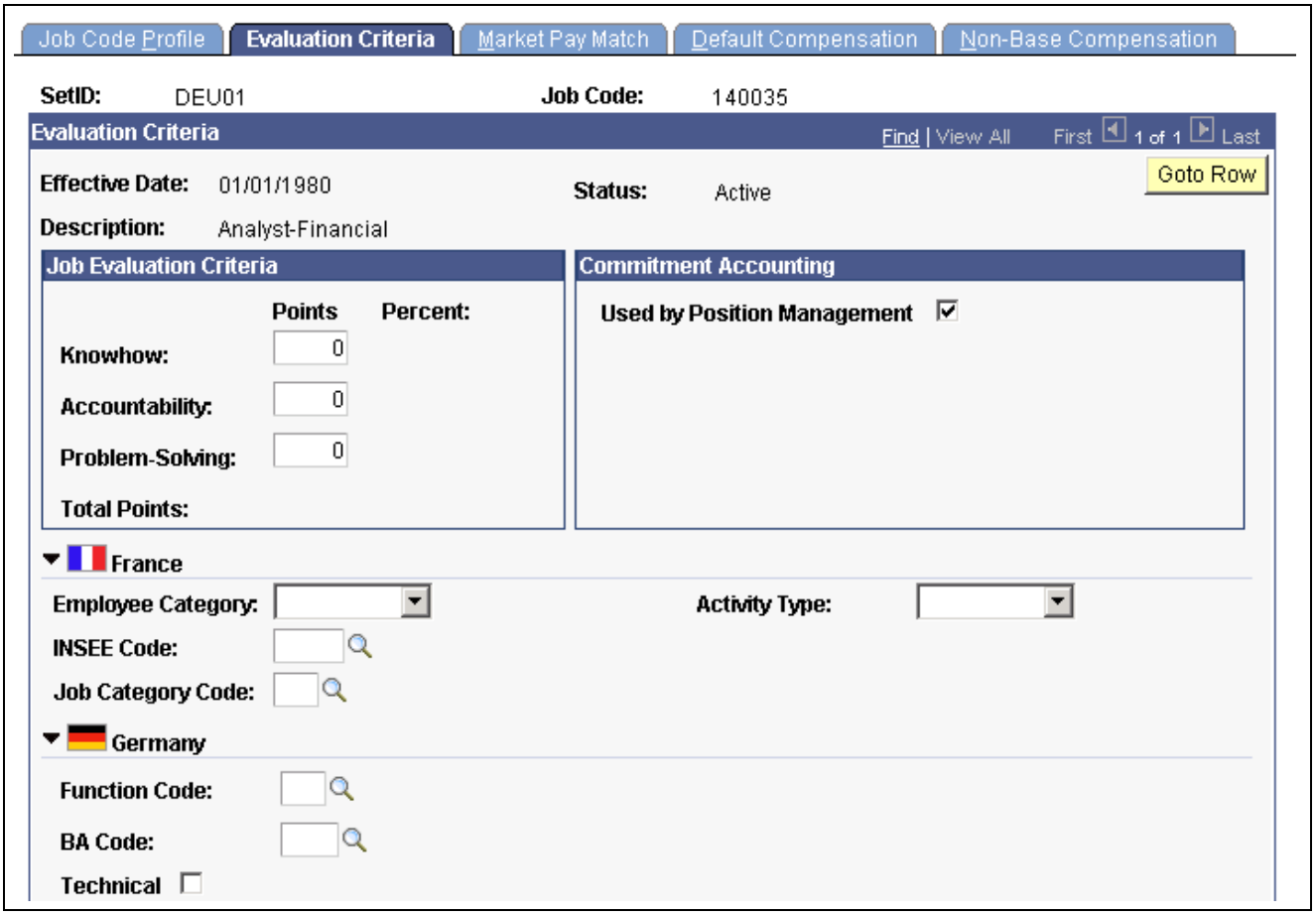
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Faculty Events, "(AUS) Reporting DETYA for the Australian Higher Education Sector," Understanding DETYA Calculations and Reference Dates

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

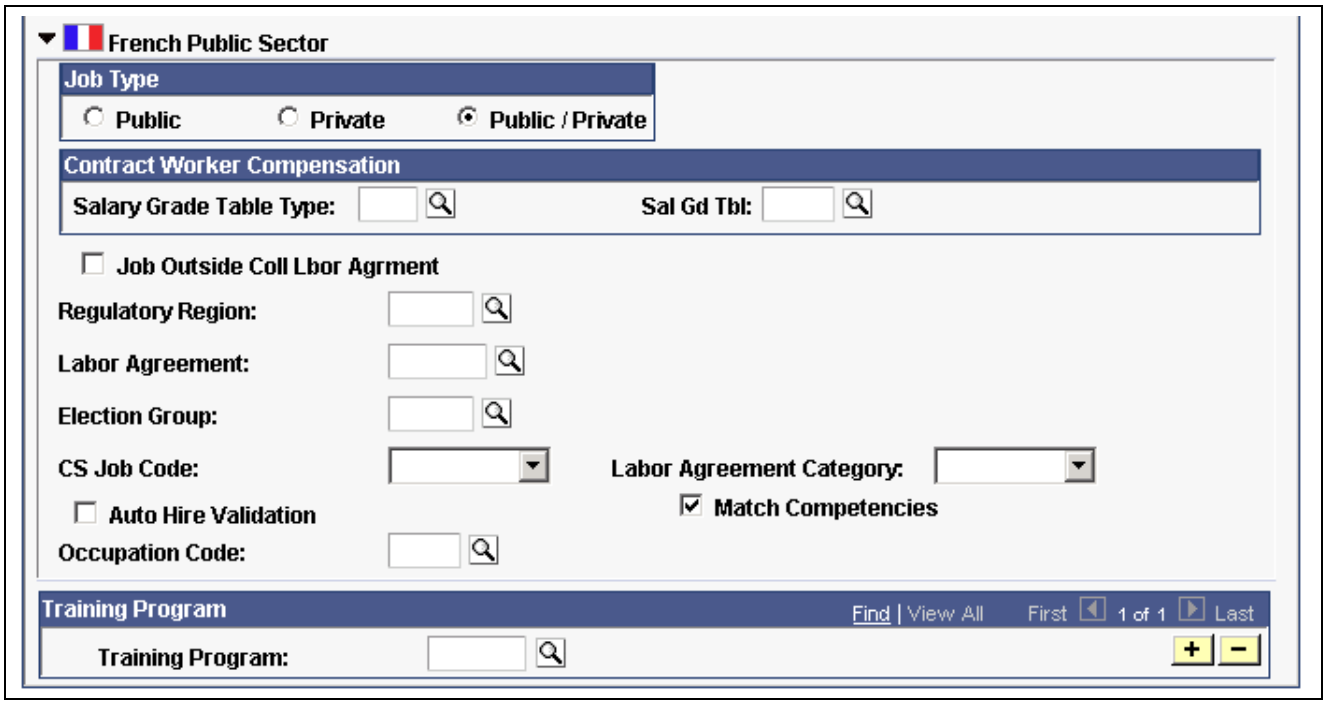
Assigning Points to Job Evaluation Criteria

Access the Evaluation Criteria page.



Evaluation Criteria page (1 of 2)

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Evaluation Criteria page (2 of 2)

Knowhow Enter points that represent the worker's knowledge required to perform the job.

Accountability Enter points that represent the worker's ability to do the assigned job.

Problem-Solving Enter points that represent the worker's ability to work out solutions despite obstacles.

Total Points You determine the points by comparing each of these factors to every other job in your company. The greater the know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility.

The system calculates Total Points and the Percent, or relative importance, of each factor. For example, if Knowhow receives 33.2 percent of the total points, Accountability receives 33.7 percent, and Problem-Solving receives 33.1 percent, then all three factors are almost equally important.

However, if Knowhow receives 54.4 percent of the total points, Accountability receives 9.2 percent, and Problem-Solving receives 36.4 percent, then Knowhow is of greater importance than Accountability or Problem-Solving, and Accountability is of little significance.

Used by Position Mgmt? (used by position management?) Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default.

A selected check box tells the system that you're budgeting for the job code at the position level. It does not restrict your ability to attach positions to a job code or attach workers to a job code. If this check box is clear, you can still set up a position with the job code. If the check box is selected, you can still enter the job code on the worker's job data record.

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When you clear this check box, the Pre-Encumbrance Indicator and Encumber Salary Option fields appear.

Pre-Encumbrance Indicator Indicate if you want the system to encumber this job code immediately (*Immediate*), not at all (*None*), or upon requisition (*Requistn*).

Encumber Salary Option If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.

Encumber Salary Amount If you select *User Spec*as the Encumber Salary Option, enter the salary amount to encumber.

(FRA) France

Employee Category Select the employee category for the job code. This code is required for these statutory reports:

- Personal Register
- Annual Survey by Nationality
- French Accident report

INSEE Code Link this job code to an INSEE code for use in the French Disability report.

Job Category Code Select a job category code, required for the Single Hiring Statement report.

(DEU) Germany

BA Code (Bundesanstalt fuer Arbeit code) Select this job code's BA code, if applicable.

Technical Select if this job code is technical.

(FRA) French Public Sector

Job Type Select whether this job is public, private, or public private combination.

Contract Worker Compensation Select the salary grade table type and salary grade table that apply to contract workers in this job.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector*, "Setting Up French Public Sector Tables," Setting Up Salary Grades.

Job Outside Coll Lbor Agrment Select this check box if the job code is not covered by a collective labor agreement.

Regulatory Region Select the job code's regulatory region.

Note. Labor agreements are grouped by regulatory region. If you are assigning a labor agreement to this job code, ensure that the regulatory region matches that of the labor agreement.

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See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreements.

Labor Agreement Select the labor agreement that covers this job code.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreements.

Labor Agreement Category Select the labor agreement category for this job code.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Labor Agreement Categories.

Auto Hire Validation Select to have the system automatically validate the newly hired person's qualifications with the job requirements.

Match Competencies Select to have the system match the competencies associated with this job code with the qualifications of the person assuming the job.

Occupation Code Select an occupation code for this job code.

Training Program

Training Program You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for workers in this job code, you can use the default training program as the basis for an individual career-training plan.

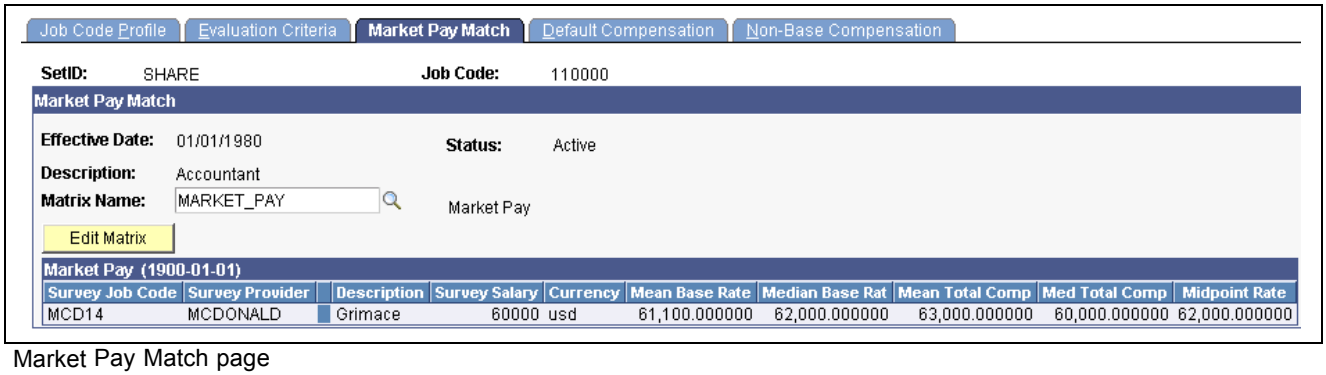
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

Associating Market Pay Matrices to Job Codes

Access the Market Pay Match page.



Market Pay Match page

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Matrix Name Select the market pay matrix that you want to associate with this job code. The effective date of the matrix must be less than or equal to the effective date of the job code.

Edit Matrix Click this button to access the Data Content page where you can view and edit values associated with this matrix. Any other job code linked to this same matrix will be impacted as well.

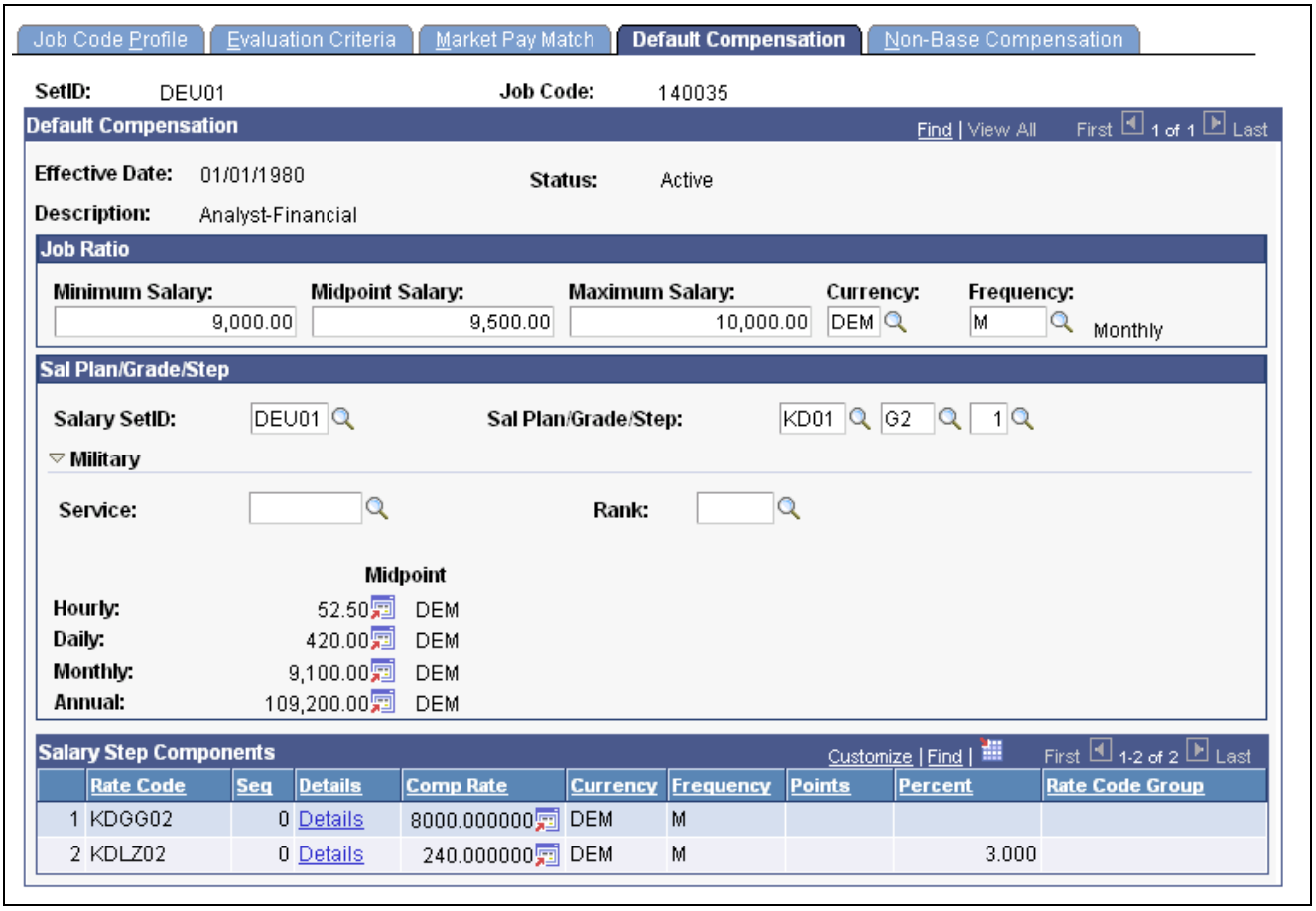
See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook, "Using Configurable Matrices"

Chapter 18, "Setting Up and Working with Market Pay," page 401

Associating Salary Plan Information and Base Pay Rate Codes with a Job Code

Access the Default Compensation page.



Default Compensation page

By associating rate codes with job codes, you define default compensation packages that will be associated with a worker's job record on the Job Information page.

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Job Ratio

The job ratio calculates comparative salary information for workers who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The worker's compensation rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

Minimum Salary, Midpoint Salary, Maximum Salary, Currency, and **Frequency** — Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Sal Plan/Grade/Step — Select a salary plan , grade and step. Note that all three fields are optional. If you do set defaults, the system populates the rest of the Salary Administration Plan fields on the page and the Salary Step Components grid with hourly, monthly, and annual midpoint pay rates that are associated with the grade.

When you assign a worker to a job code on the Job Information page (JOB_DATA_JOBCODE), the system enters these values as a default on the Salary Plan page (JOB_DATA_SALPLAN).

Note. If you have associated a salary plan with the location code assigned to the worker on the Work Location page (JOB_DATA1), the system will use the location salary plan as a default on the Salary Plan page instead of the job code salary plan.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Administering Salary Plans, Grades, and Steps," Tying Salary Plans to Job Codes, Locations, or Labor Agreements.

Military

Service — Select the military service to which this job belongs. This becomes the military service default value in Manage Positions when you associate this job code to a position.

Rank — Select the military rank to which this job is classified. This becomes the military rank default value in Manage Positions when you associate the job code to a position.

Salary Step Components

Details — Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.

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Frequency	The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page. See Chapter 10, "Setting Up and Working with Frequencies," page 189.
Apply FTE (apply full-time equivalency)	Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.
Points	The system displays the points that are associated with this rate code, if applicable.
Percent	If the rate code type for this rate code is *Percent,* the system displays the percent that is to be applied to the job compensation rate or to a rate code group.

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

Job Code Base Components

Select one or more rate codes that will make up default base compensation for this job code. The default values for compensation rate, currency, and frequency come from the Rate Code Definition page, but you can set different values if required.

Note. If a rate matrix is associated with the rate code, the compensation rate field will be unavailable. In this case, the rate will be set dynamically based on employee data when this rate code is added to the employee's compensation record.

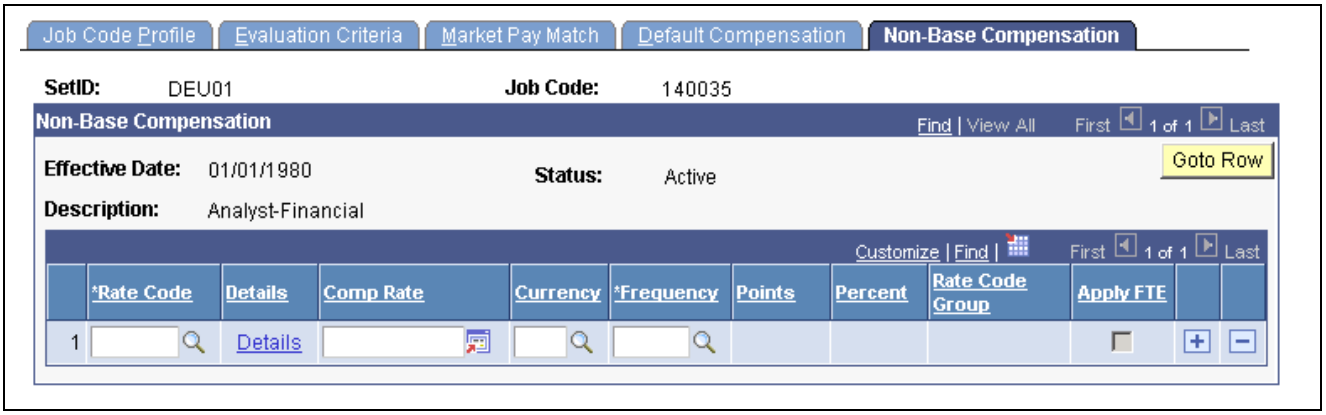
See Also

"PeopleSoft Enterprise HRMS Application Fundamentals Preface," page xlvii

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

Associating Non-Base Pay Rate Codes with a Job Code

Access the Non-Base Compensation page.



Non-Base Compensation page

The system doesn't use non-base pay rate codes as default values on any HRMS pages. The codes are used for payroll processing.

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Defining Job Tasks

To define job tasks use the Job Task Table component (JOB_TASK_TABLE) Use the JOB_TASK_TABLE component interface to load data into the tables for this component.

This section provides an overview of job tasks and discusses how to define job task codes.

Understanding Job Tasks

Define job task codes, such as *Data Entry*, and assign it to a Job Code on the Job Code Task Table. On the Job Code Task Table, indicate the importance and frequency of the task. You can use Manage Profiles to set up a profile for a job task.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

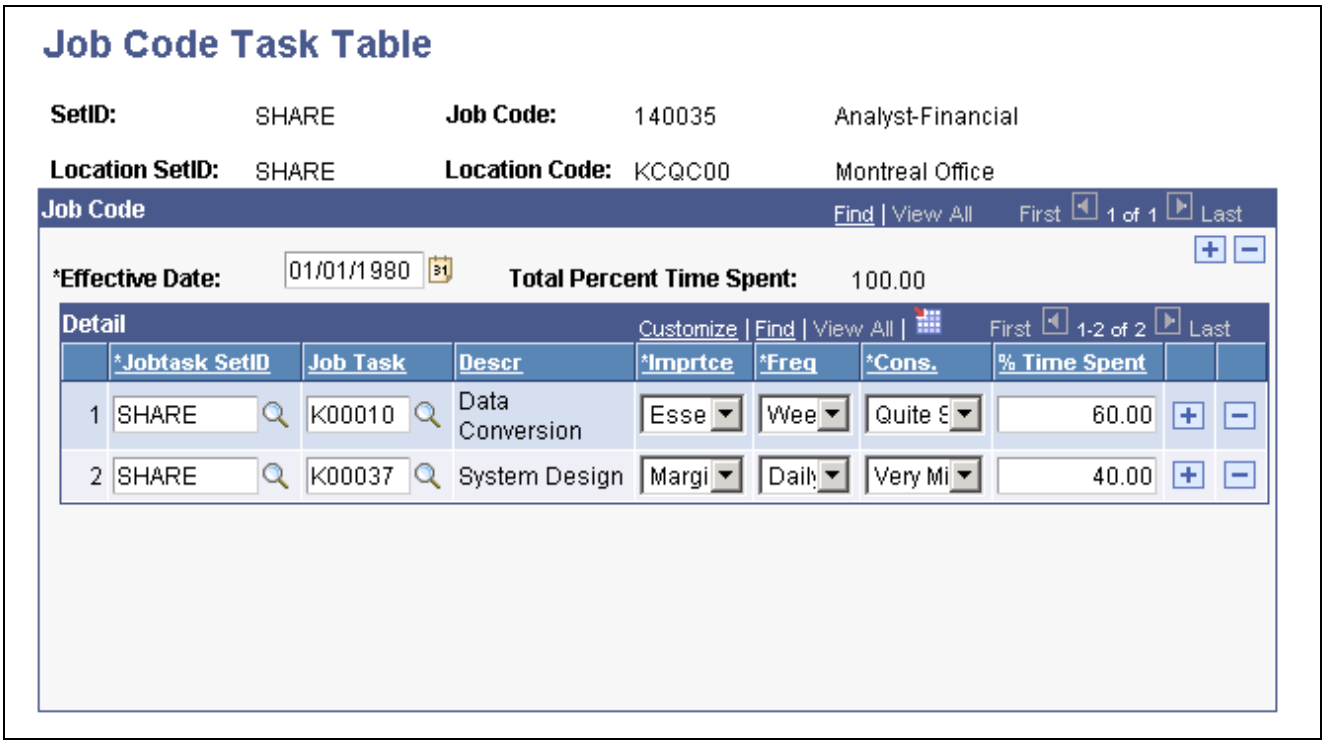
Pages Used to Define Job Tasks

Page Name	Object Name	Navigation	Usage
Job Task Table	JOB_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Task Table	Define job task outcomes. For example, if a job requires an worker to pick up heavy boxes and move them, then define moving heavy boxes as the essential job task. Because a worker with a disability could use a forklift to move them, do not define the job task as *lifting* heavy boxes.
Job Code Task Table	JOBCODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table	Define job tasks associated with each job code.

Defining Job Task Codes

Access the Job Code Task Table page.

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Job Code Task Table page

Jobtask SetID Select a job task setID from the available options. Valid values are stored on the TableSet ID page.

Job Task Select a job task from the available options. Valid values are stored on the Job Task Table page.

Imprtce (importance) Select the importance of the job task to the particular job code. Valid values are in the Translate Table.

Freq (frequency) Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.

Cons (consequence) Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.

% Time Spnt (percentage time spent) Enter the percentage of time that is spent on the job task.

Total Percent Time Spent The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed *100%*.

Note. Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

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Setting Up Pay Groups

To set up pay groups, use the Pay Group Table component (PAYGROUP_TABLE).

This section provides an overview of pay groups and discusses how to:

- Set up and describe pay groups.
- Set up process controls for pay groups.
- Set up payroll calculation parameters for pay groups.
- (USA) Specify the FLSA period definition.
- (E&G) Enter additional E&G earnings codes.

Understanding Pay Groups

When implementing a payroll system for use with HRMS, one of your major tasks is to set up pay groups. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While pay groups may seem specific to payroll processing, you also need this information for Human Resources, to set up job records and benefit programs. Many of the default field values on the Administer Workforce pages are based on the pay group values that you specify on the Pay Group Table component (PAYGROUP_TABLE). Set up at least one pay group for each company that you established in the Company component (COMPANY_TABLE) or the Agency USF component (AGENCY_TABLE) for U.S. federal users.

See Chapter 11, "Setting Up Organization Foundation Tables," Entering Company Information, page 220.

See Chapter 11, "Setting Up Organization Foundation Tables," (USF) Entering Agency Information, page 241.

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- PeopleSoft Enterprise Payroll for North America.

  If you use PeopleSoft Payroll for North America, use the Pay Group table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook.*

  See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Setting Up Pay Groups".

- PeopleSoft Enterprise Payroll Interface

  If you use PeopleSoft Payroll Interface, use the Pay Group Table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook.*

  See *PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook*, "Setting Up Payroll Schedules".

- PeopleSoft Enterprise Global Payroll.

  If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

  See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Defining the Organizational Structure," Defining Pay Groups.

- Pay system other than a PeopleSoft payroll application.

  If you are not using a PeopleSoft payroll application, use the Pay Group table pages discussed in this section.

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- PeopleSoft Enterprise Pension Administration.

  If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. Pension Administration doesn't use pay groups for paying pension benefits.

  See *PeopleSoft Enterprise Pension Administration 9.0 PeopleBook*

Note. If you use more than one payroll application (for example, Payroll for North America and Global Payroll), set up the pay groups required for both applications. Otherwise, set up only the pay groups required for the application you are using. The company and pay group keys must be unique to the payroll application; do not use the same combination of keys for multiple payroll applications.

Using the Pay Group Table

The Pay Group Table component consists of nine pages. For Human Resources, enter information only on the first three pages of the component, because that information is used across all HRMS applications. The last six pages in the component are used with Payroll for North America, and to a lesser extent, with Payroll Interface.

Pages Used to Set Up Pay Groups

Note. Do not use this component with PeopleSoft Enterprise Global Payroll. Additional pages of the Pay Group Table component are documented in the *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook* and the *PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook.* The pages listed below are also documented in the *PeopleSoft Enterprise Human Resources: Administer Salaries for the Netherlands 9.0 PeopleBook.*

Page Name	Object Name	Navigation	Usage
Definition	PAYGROUP_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Set up and describe pay groups.
Process Control	PAYGROUP_TABLE2	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Establish employee type options for a particular pay group.
Calc Parameters	PAYGROUP_TBL3	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table	Define further payroll processing parameters for pay groups.

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Page Name	Object Name	Navigation	Usage
FLSA Period Definition	FLSA_PERIOD_SBPNL	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table Click FLSA Period Definition on the Calc Parameters page. • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table Click FLSA Period Definition on the Calc Parameters page.	(USA) Specify FLSA period definition and other parameters for the pay group's FLSA calculation.
Education and Government Additional Earnings Codes	PAYGRP_TBL3_HP_SEC	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table Click Addl Educ/Govt Earnings Codes on the Calc Parameters page • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table Click Addl Educ/Govt Earnings Codes on the Calc Parameters page	(E&G) Add earnings codes for education and government

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Setting Up Pay Groups"

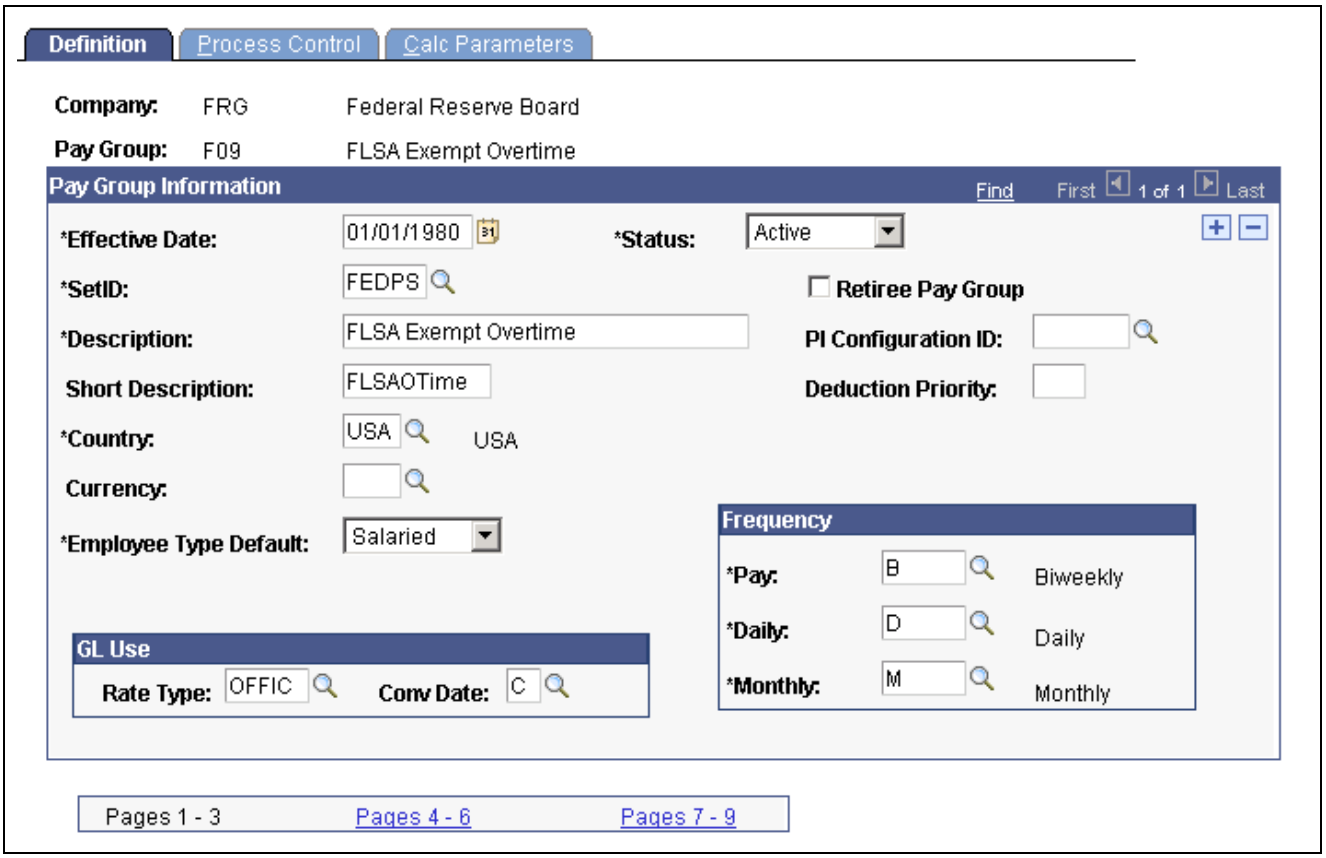
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salaries for the Netherlands, "Setting Up Administer Salaries for the Netherlands," Creating and Maintaining Pay Groups

Setting Up and Describing Pay Groups

Access the Definition page.

Note. This page is not required for USF users.

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Definition page

Pay Group The Pay Group value that you specified in the entry dialog box is displayed.

Note. On employee job records, the Pay Group default is from the company level.

SetID Select a setID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic setID.

Retiree Pay Group Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.

PI Configuration ID (Payroll Interface configuration ID) Select, if appropriate. The PI Configuration ID is set up using the Configuration Table component (INTRFC_CONFIG) in Payroll Interface. You must set up that component first, or leave this field blank for now.

Note. You *must* enter a value for Payroll Interface. If the PI Configuration ID is not set up correctly, payroll processing in Payroll Interface will not function properly. Refer to the *PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook* for more information.

Deduction Priority Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

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Employee Type Default Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit Program table. You need either to set up that table first or leave this field blank for now. Values are as follows:

- *Salaried:* Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets.
- *Hourly:* Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets.
- *Exep Hrly* (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets.
- *Not Appl* (not applicable): Select if this field isn't applicable.

(CAN) Wage Loss Plan Default Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency

Pay Select the pay period frequency.

Note. If the employee's compensation rate on the Compensation page is quoted with the same frequency type as the pay period (for example a monthly frequency), you must use the same frequency ID (same annualization factor) for both the pay frequency and the compensation frequency.

Daily Select the frequency used by Payroll for North America to calculate the daily pay rate. Only frequencies on the Frequency table with a frequency type of daily are available for selection.

Monthly Select the frequency used by Payroll for North America to calculate a monthly pay rate. Only frequencies on the Frequency table with a frequency type of monthly are available for selection.

General Ledger Use

PeopleSoft Enterprise General Ledger uses these fields.

Rate Type Select the appropriate value from the list provided.

Conv Date (conversion date) Values are *Check Date, Pay End Date,* and *Today's Date.*

See Also

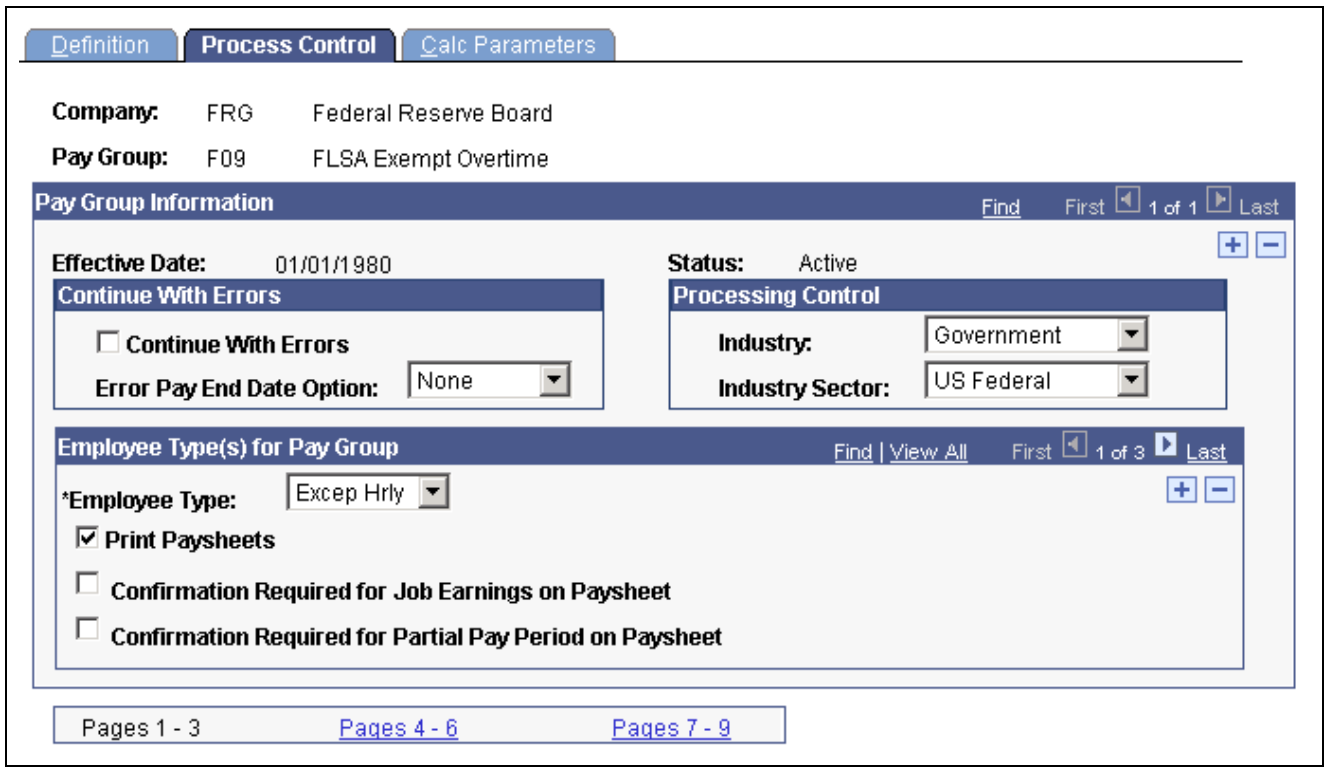
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Deductions," Setting Up Deductions

Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 201

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Setting Up Process Controls for Pay Groups

Access the Process Control page.



Process Control page

You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

Continue with Errors

Continue With Errors Select to enable the Pay Confirmation process to proceed even if the Pay Calculation process encounters nonfatal calculation errors. The system moves the paysheets in error to a designated off-cycle calendar to be corrected in a separate off-cycle run.

Note. All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on this page. If this condition is not met, the system cannot transfer any errored paysheets for the pay run ID.

Error Pay End Date Option This value is used by the Pay Calendar build process to set up the pay calendar. Select the date of the off-cycle calendar to which erred paysheets are moved.

If you select *Next Day,* the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st.

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Warning! If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Industry Select your organization's primary business industry, such as *Core, Education, Government, Retail,* and so on.

Industry Sector Select *None, Core, Public Sct* (public sector), or *US Federal.*

Employee Type(s) for Paygroup

Employee Type Select the options—*Hourly, Exception Hourly,* or *Salaried*—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave Print Paysheets selected as the default.

Note. If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.

Print Paysheets If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is cleared still appear on the paysheet pages.

Note. You must check this box if either of the confirmation required check boxes is selected.

Confirmation Required for Job Earnings on Paysheet If you are using PeopleSoft Payroll for North America, select this box to clear the OK to Pay field on the paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected.

Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid.

For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

Confirmation Required for Partial Pay Period on Paysheet If you are using PeopleSoft Payroll for North America, select this box to control the OK to Pay check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should clear this check

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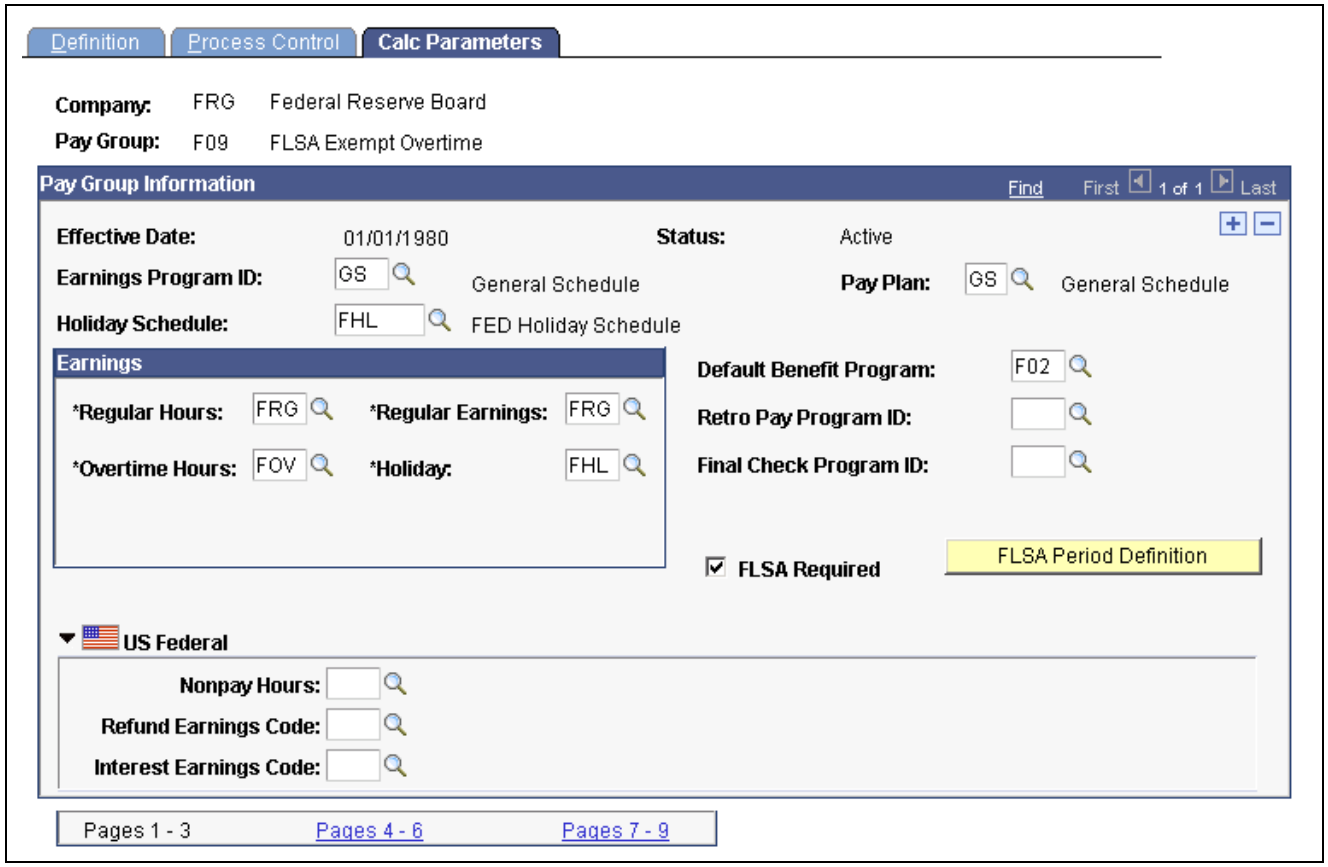
box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Working with Paysheets"

Setting Up Payroll Calculation Parameters for Pay Groups

Access the Pay Group Table - Calc Parameters page.



Pay Group Table - Calc Parameters page

Pay Group Information

Earnings Program ID Select a default value for the employee records in this pay group. Earnings Program IDs are set up using the Earnings Program Table component (EARNS_PROGRAM_TBL) in either Payroll for North American or Payroll Interface. You must set up that component first or leave this field blank for now.

(USF) Pay Plan Select the pay plan to assign to this pay group.

Holiday Schedule Select the holiday schedule for the pay group. If you left the Holiday Schedule field blank on the Location Profile page, the system uses the holiday schedule

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you specify on this page as the default for the worker's job record. You must set up the Holiday Schedule table before making a selection or leave this field blank for now.

Note. In Payroll Interface, if you want the third-party payroll system to process holiday pay, on the Holiday Schedule component set up a holiday schedule called NONE.

Default Benefit Program

Select the default benefit/deduction program for the pay group. The system uses this default benefit/deduction program as the default for the employee's job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Benefits menu. You must set up that table first, or leave this field blank for now.

Retro Pay Program ID

Select a retro pay program ID to assign the pay group to a retro pay program. Specify a retro pay program ID that identifies the earnings codes used in retro pay calculations.

Note. You define Retro Pay Programs on the Retro Pay Program Table and earnings codes on the Earnings Tables. In each Retro Pay Program you define, you can specify any number of earnings codes as earnings for which Retro Pay can be calculated. For each of these earnings codes, you can specify an earnings code to be used for paying the Retro Pay earnings.

Final Check Program ID

To specify a default final check program for the pay group, select the final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

(USA) FLSA Required

Select this check box if FLSA regulations are to be applied to this pay group. When you select this check box, the *FLSA Period Definition* button appears. If you do not select this check box, the button does not appear and you cannot define FLSA pay periods.

FLSA is for U.S. Payroll only; this check box appears on the page if you have enabled FLSA processing on the Fica/Tax Details page (access through the Company Table − Default Settings page) and on every pay group when applicable.

Note. If FLSA is not selected for a company, it cannot be selected for a pay group within that company. After it has been selected at the company level, it does not have to be selected at the pay group level. However, if FLSA is required for a pay group, it must be selected at both the company and pay group levels.

Note. (USF) If FLSA is required for a whole agency or for most pay groups in an agency, you should clear the *FLSA Required* check box and define FLSA requirements on the Agency Table. Remember that if the *FLSA Required* check box isn't selected on the Agency Table, the FLSA Rule for a pay group is set by default to *Higher of FLSA Contractual.*

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Note. To be included in FLSA calculation, an employee must have non-exempt status and belong to an FLSA pay group.

Note. When setting up pay groups, do not use the same pay group ID in two separate companies if the companies use different overtime earnings codes for FLSA.

(USA) FLSA Period Definition Click to access the FLSA Period Definition page.

Earnings

Use this group box to define earnings codes for each earnings type.

Regular Hours Select the appropriate earnings code for the regular hours earnings type.

Overtime Hours (overtime hours earnings type) Select the appropriate earnings code for the overtime hours earnings type.

Regular Earnings Select the appropriate earnings code for the regular earnings type.

Holiday When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with this field. If Holiday Type on the Holiday Schedule Table is Canadian, the system uses this earnings code to set up the statutory holiday earnings on the paysheet.

Note. (USF) The system does not enter the holiday earnings code on the paysheet if the employee is in a nonpay status for the entire pay period.

(USF) US Federal

Specify additional earnings codes.

Nonpay Hours Enter the earnings code to be entered on the paysheets when the system detects that an employee is on leave without pay or short or long-term disability for an entire pay period.

Note. Nonpay hours are included on paysheets only if the employee is in nonpay status for the entire pay period.

Refund Enter the earnings code used to refund money to employees who cancel U.S. Savings Bond elections.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "(USA) Administering Additional U.S. Payroll Functionality," (USF) Refunding Employees for Cancelled Bond Elections.

Interest Enter the earnings code used to pay interest on retroactive payments that are over 30 calendar days late.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Processing Retro Pay," (USF) Managing Interest Calculations on Retro Pay.

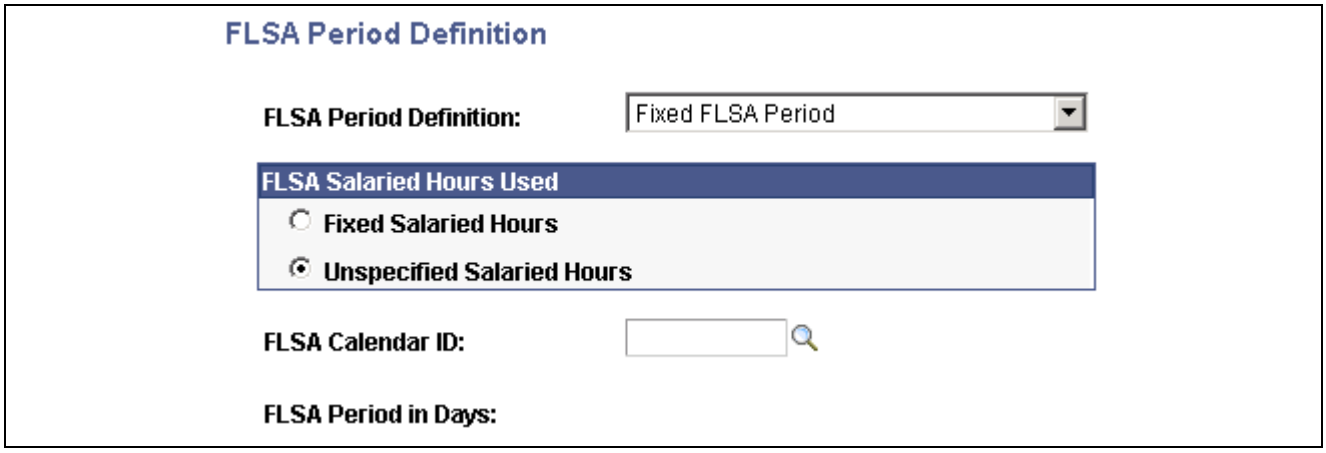
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See Also

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 211

(USA) Specifying the FLSA Period Definition

Access the FLSA Period Definition page.



FLSA Period Definition page

The FLSA Period Definition page changes, depending on which options you select. The following table shows which fields are visible on the page, depending on the FLSA Period Definition you select:

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X	X	X	
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula selected	X	X			
Fixed FLSA Period with Unspecified Salaried Hrs selected	X		X	X	

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FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Law Enforcement			*X*	X	X
Fire Protection			X	X	X

FLSA Period Definition Select the appropriate FLSA period definition:

- *Fixed FLSA Period:* 7 or 14 days. 7 is the default.
- *Fire Protection:* 7 to 28 days.
- *Law Enforcement:* 7 to 28 days.
- User-defined FLSA period definitions are also available in the list.

If you select *Fixed FLSA Period,* the period can only be for 7 or 14 days. There are no FLSA Threshold Hours for employees in the *Fixed FLSA Period,* because threshold hours only apply to law enforcement and fire protection employees.

FLSA Salaried Hours Used

Fixed Salaried Hours (Hours per Week) Select this option to use the standard hours you entered on the employee's Job record. If you select this option, the *Use Basic Formula* check box appears.

Use Basic Formula If you select this check box, the *FLSA Calendar ID* and *FLSA Period in Days* check boxes disappear. Basic formulas are used only for monthly and semi-monthly pay periods. The FLSA period is assumed to be the same as the Pay Calendar period; hence, no FLSA Calendar ID is required. If you select this check box, you must enter information into the Work Day Hours field on the Job Information page.

Unspecified Salaried Hours Select this option to use the actual number of hours worked per week by salaried employees to determine their FLSA rate.

FLSA Calendar ID Select a FLSA calendar ID. The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA Calendar ID to define the FLSA periods. This field is not applicable if you select *Basic Rate Formula.* If you select *Fixed FLSA Period,* the prompt list contains only FLSA Calendar IDs with 7 or 14 FLSA Periods in Days. For Fire Protection or Law Enforcement, the prompt list contains FLSA Calendar IDs from 7 to 28 days.

FLSA Period in Days The length of the FLSA pay period, or the days from the FLSA Begin Date to the FLSA End Date. The system displays it automatically. It is based on the FLSA Period in Days you define on the FLSA Calendar Table. This field is display-only.

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FLSA Threshold Hours The number of hours worked before the FLSA rate applies to Fire Protection and Law Enforcement employees. Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in the FLSA Period Table. You can create user-defined FLSA period definitions with different threshold hour schedules if necessary.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "(USA) FLSA and Alternative Overtime Calculations".

(E&G) Entering Additional E&G Earnings Codes

Access the Education and Government Additional Earnings Codes page.

Select the appropriate earnings code for each field.

Running Job Code and Pay Group Reports

To run job code and pay group reports, use the Job Code Table Report component (RUN_PER_709C) and Pay Group component (RUN_PAY711).

This section lists the page used to run job code and pay group reports.

Page Used to Run Job Code and Pay Group Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	Job Code Table report (PER709C) lists all job codes.
Pay Group Report	PRCSRUNCNTL	• Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Group • Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Pay Group Table	The Pay Group report (PAY711) prints each pay group and the processing characteristics that apply to that group.

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CHAPTER 14

(USF) Setting Up Human Resources Management Tables

This chapter discusses how to:

- Set up federal HRMS control tables.
- Run federal HRMS setup reports.
- View the Project Costing and General Ledger Business Unit tables.

Setting Up Federal HRMS Control Tables

To set up federal HRMS control tables, use the Handicap Table component (GVT_HANDICAP_TBL), Legal Authority component (GVT_LEGAL_AUTH_TBL), U.S. County Table component (GVT_COUNTY_TABLE), Nature of Action Table component (GVT_NOAC_TBL), LEO Pay Area USF component (GVT_LEOPAY_AREA_TB), NOA/Legal Authority Table component (GVT_AUTH_VAL_1), Sub Agency component (GVT_SUB_AGENCY_TBL), Personnel Office ID component (GVT_POI_TABLE), and Personnel Action Rqst Rmks component (GVT_SF50_RMK_TBL).

This section provides an overview of federal HRMS control tables and discusses how to:

- Set up disability codes.
- Set up legal authority codes.
- Set up nature of action codes.
- Set up LEO pay areas.
- Associate nature of action codes with legal authority codes.
- Set up sub-agencies.
- Set up personnel office IDs.
- Specify PAR approving officials.
- Set up PAR remarks.

Understanding Federal HRMS Control Tables

This section discusses the set up of control tables that are specific to federal agencies

When creating personnel action requests, you search fields using information from the Legal Authority table, the Nature of Action table, the PAR Remarks table, and the NOA/Legal Authority 1 table.

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When you enter employee-specific information, you use values from the Handicap table and the LEO Pay Area table.

In PeopleSoft HRMS, you use values from the U.S. County table, the Personnel Office ID table, and the Sub-Agency table.

Pages Used to Set Up Federal HRMS Control Tables

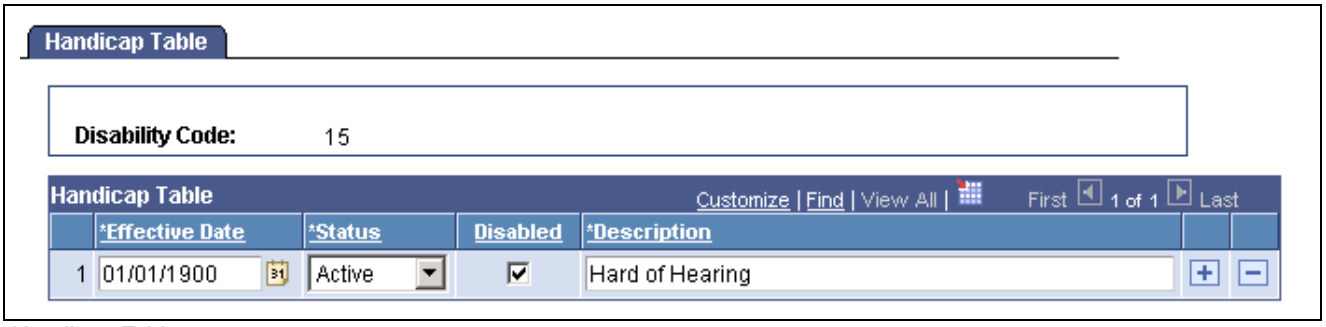
Page Name	Object Name	Navigation	Usage
Handicap Table	GVT_HANDICAP_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Handicap Table	Assign codes to the types of disabilities a person might have. You can set up the table with the disabilities that your agency is likely to use and add more as needed.
Legal Authority Table	GVT_LEGAL_AUTH_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Legal Authority, Legal Authority Table	The Legal Authority table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.
U.S. County Table	GVT_COUNTY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, U.S. County Table	View a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.
Nature of Action Table	GVT_NOAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Nature of Action Table	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources.
LEO Pay Area Table	GVT_LEOAREA_TABLE	Set Up HRMS, Product Related, Compensation, LEO Pay Area USF, LEO Pay Area Table	Set up special pay areas in the LEO Pay Area Table. Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.

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Page Name	Object Name	Navigation	Usage
NOA/Legal Authority 1 Table	GVT_AUTH_VAL_1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NOA/Legal Authority 1, NOA/Legal Authority 1 Table	Connect the NOA codes that are defined in the Nature of Action table with the legal authorities that are defined in the Legal Authority table. You must have set up nature of action codes and legal authority codes.
Sub-Agency Table	GVT_SUBAGCY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Sub-Agency, Sub-Agency Table	Set up sub-agencies if your agency has multiple organizations that report to OPM as separate entities.
Personnel Office ID Table	GVT_POI_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, Personnel Office ID Table	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the personnel action requests.
PAR Approving Officials Table	GVT_POI_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, PAR Approving Officials Table	Enter the names that appear in the routing process section of the PAR.
PAR Remarks Table	GVT_SF50_RK_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Action Rqst Rmks, PAR Remarks Table	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert person-specific information into other remarks when you attach the remark at the person level.

Setting Up Disability Codes

Access the Handicap Table page.



Handicap Table page

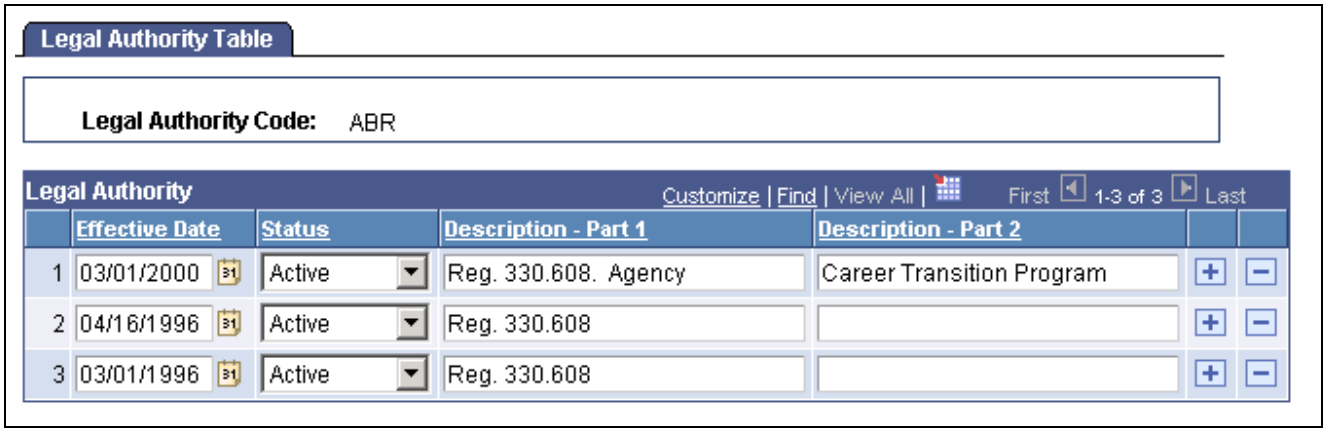
Disabled Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a

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disability code to indicate that a person has no disability, leave this check box cleared.

Setting Up Legal Authority Codes

Access the Legal Authority Table page.



Legal Authority Table page

A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority table.

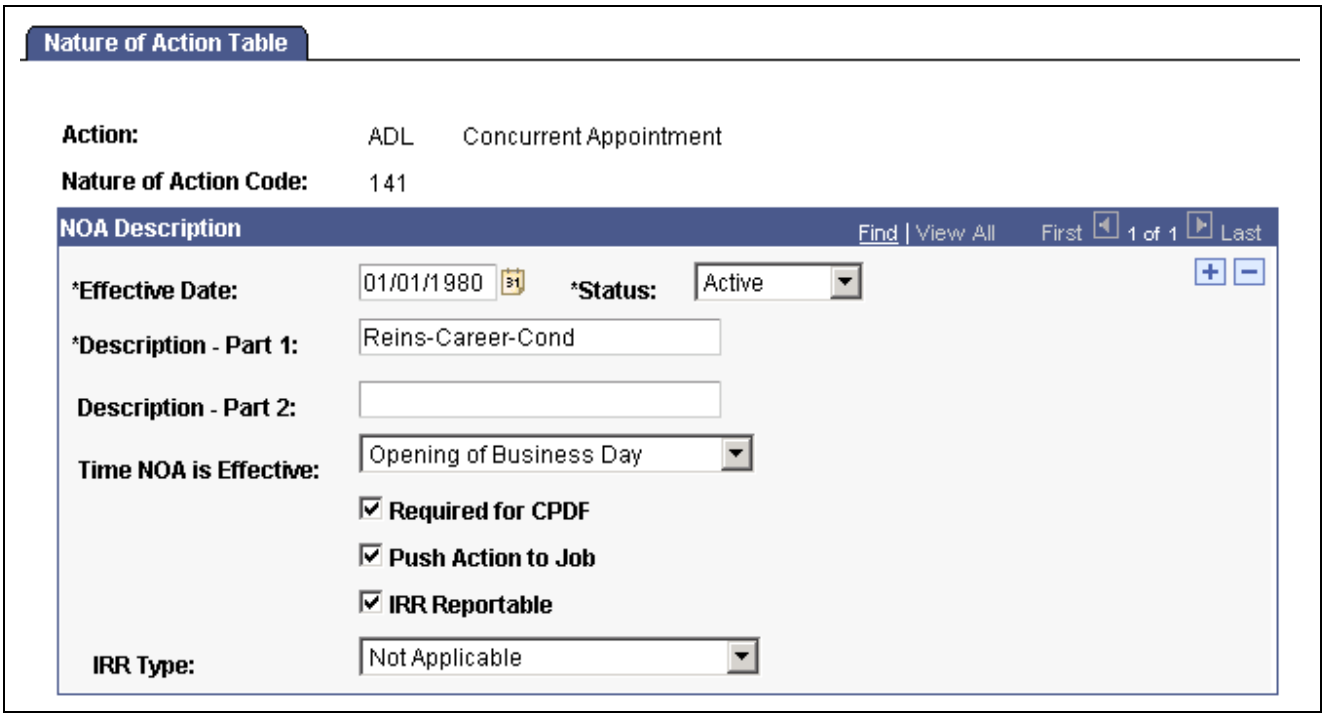
Effective Date When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

Description - Part 1 and **Description Part - 2** Enter descriptions that appear on the Data Control page (GVT_JOB0) when you process personnel actions for a person.

Setting Up Nature of Action Codes

Access the Nature of Action Table page.

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Nature of Action Table page

Nature of Action Code

Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code.

PeopleSoft delivers the NOA codes, but you can add or update entries as needed. When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series.

Effective Date

When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time for the NOA code.

Time NOA is Effective (time nature of action is effective)

This field designates when the personnel action should take effect. Select *Opening of Business Day* (the default) or *Close of Business Day.*

If you select *(none),* the system uses the default, *Opening of Business Day.*

In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With *Termination/Non-Pay* actions (NOAs that are in the 300 series and 400 series), the action is effective at *Close Of Business Day* on the effective date. Any personnel action defined with *Close of Business Day* increments the Job effective date by one. The Federal (GVT_JOB) effective date is not affected.

Required for CPDF (required for central personnel data file)

Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.

Push Action to Job

Select if the nature of action is to be applied to the core PeopleSoft job record (JOB) from the federal government side after saving the personnel action.

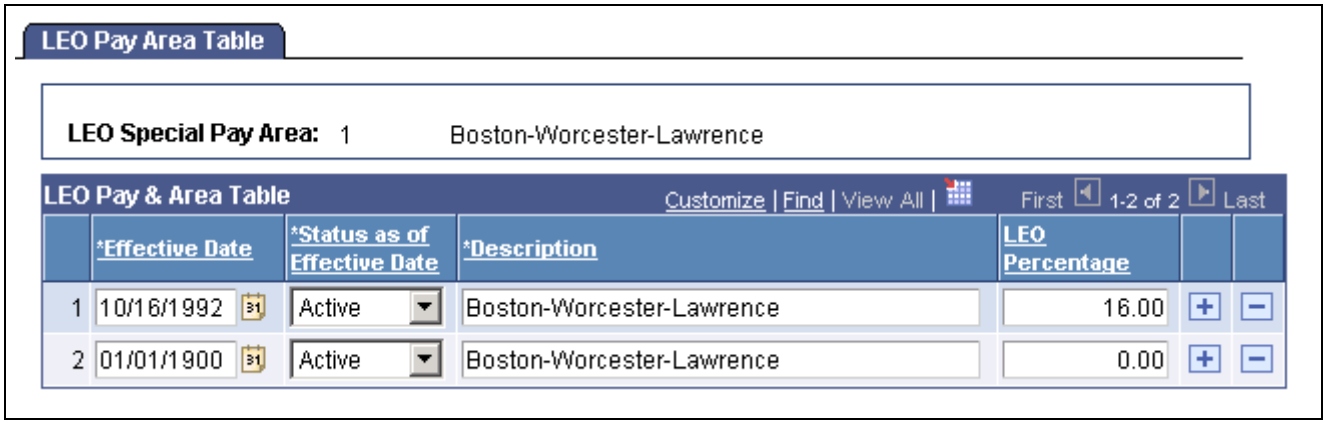
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IRR Reportable (individual retirement record reportable) Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.

IRR Type Select the type of IRR to be generated. Values are *Retirement, Transfer/Resignation,* and *Supplemental.*

Setting Up LEO Pay Areas

Access the LEO Pay Area Table page.



LEO Pay Area Table page

LEO Percentage (law enforcement officer percentage) Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page (JOB_DATA3) in Administer Workforce.

Associating Nature of Action Codes with Legal Authority Codes

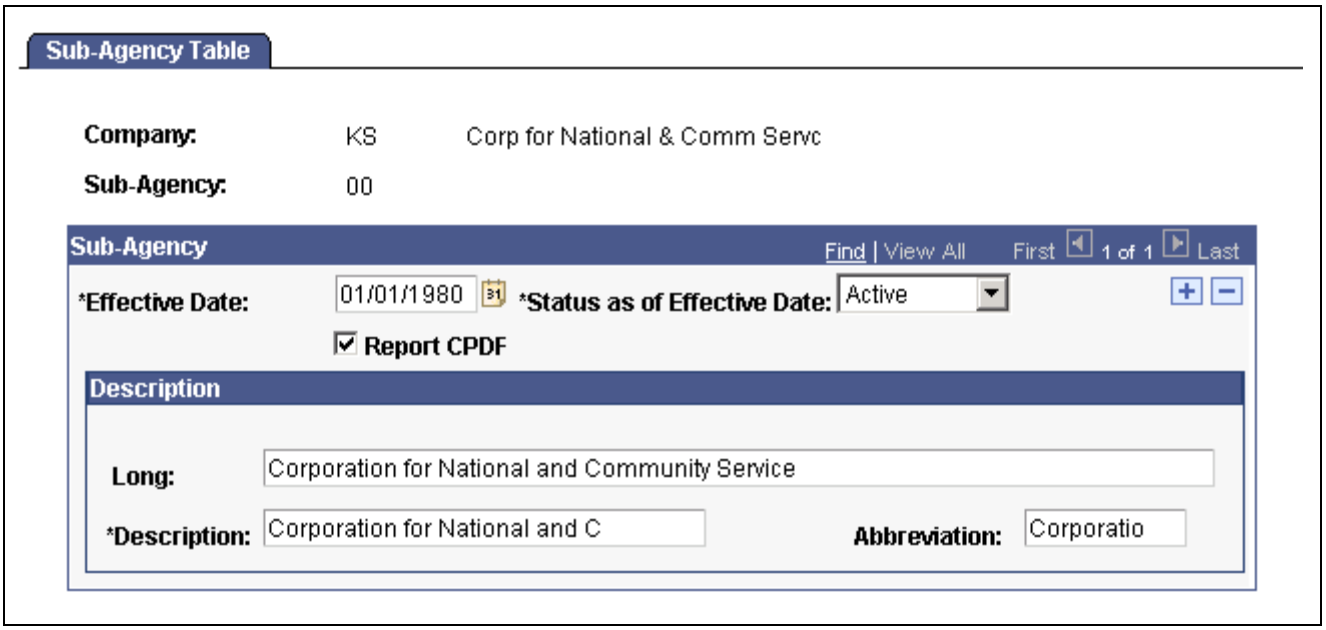
Access the NOA/Legal Authority 1 Table page.

When you enter an NOA (nature of action) code on the PAR Data Control page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority table.

Setting Up Sub-Agencies

Access the Sub-Agency Table page.

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Sub-Agency Table page

Sub-Agency If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.

Report CPDF (report central personnel data files) Select if this sub-agency reports CPDF on a regular basis.

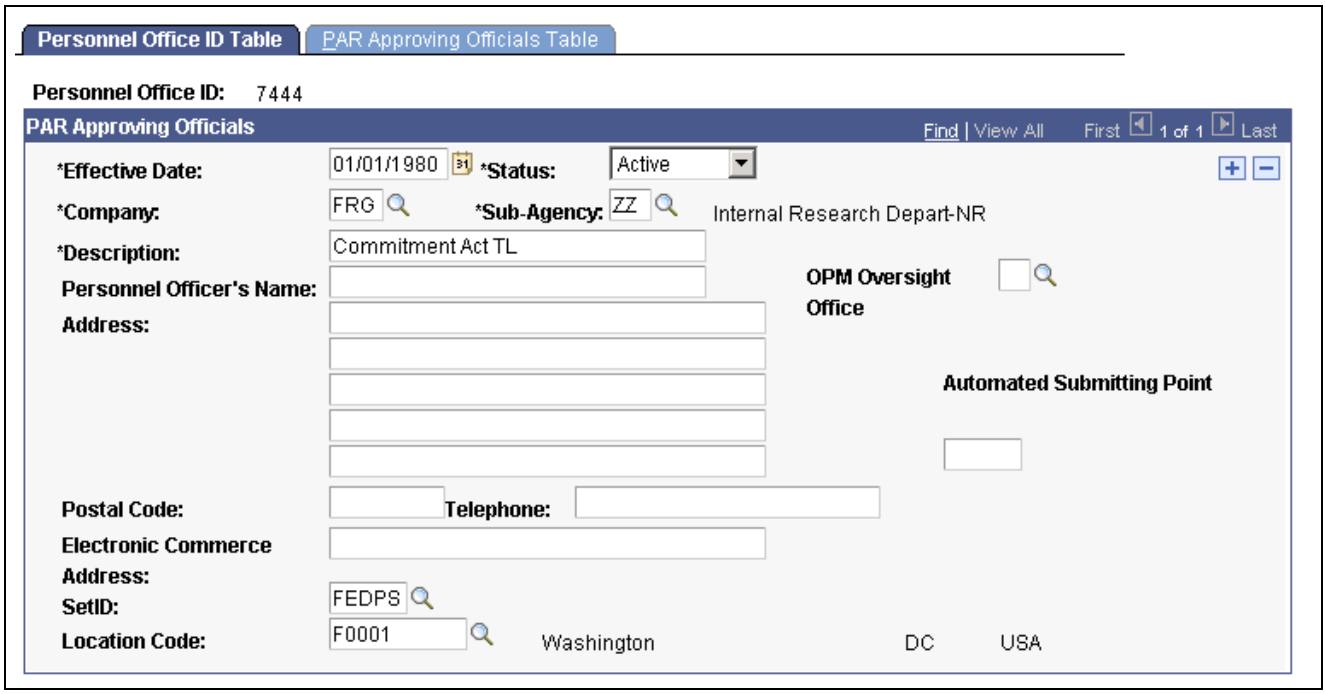
Long Enter a long description of the sub-agency.

Abbreviation Enter an abbreviated description of the sub-agency.

Setting Up Personnel Office IDs

Access the Personnel Office ID Table page.

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Personnel Office ID Table page

Sub-Agency Select the sub-agency code.

Personnel Officer's Name Enter the name of the person who is responsible for personnel actions for this office.

OPM Oversight Office (office of personnel management oversight office) Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.

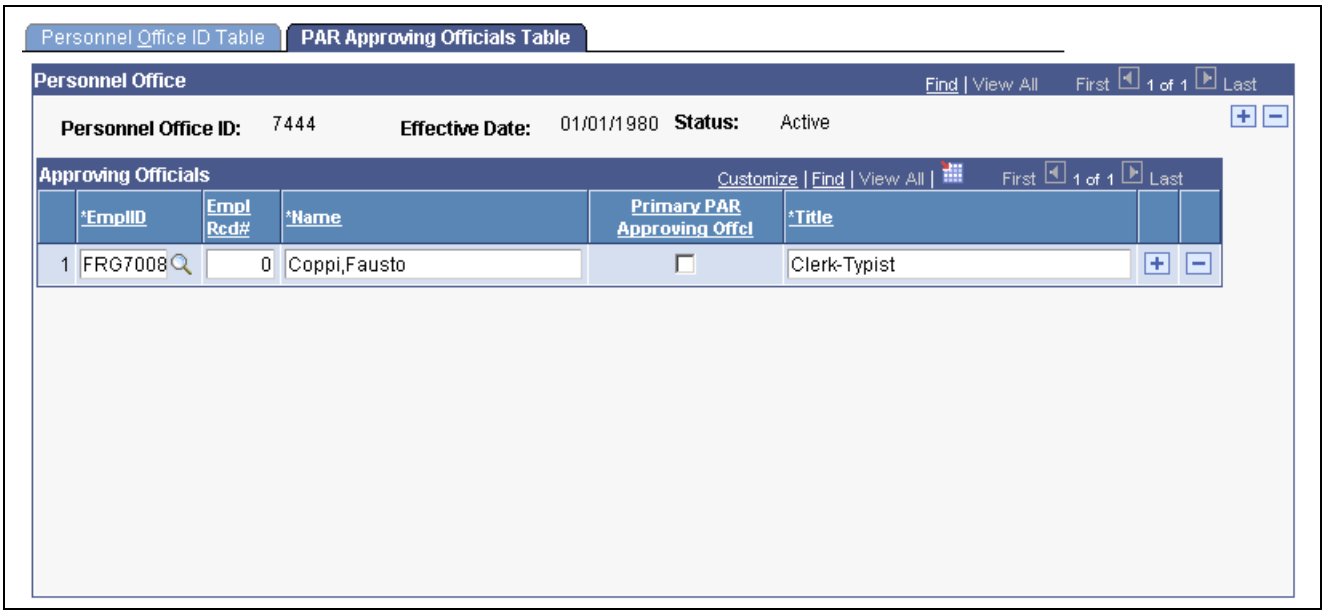
Electronic Commerce Address This address is for your agency's information only. For example, this might be an email address or a government network ID.

Automated Submitting Point The automated submitting point is an informational field and isn't used during PeopleSoft HRMS processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.

Specifying PAR Approving Officials

Access the PAR Approving Officials Table page.

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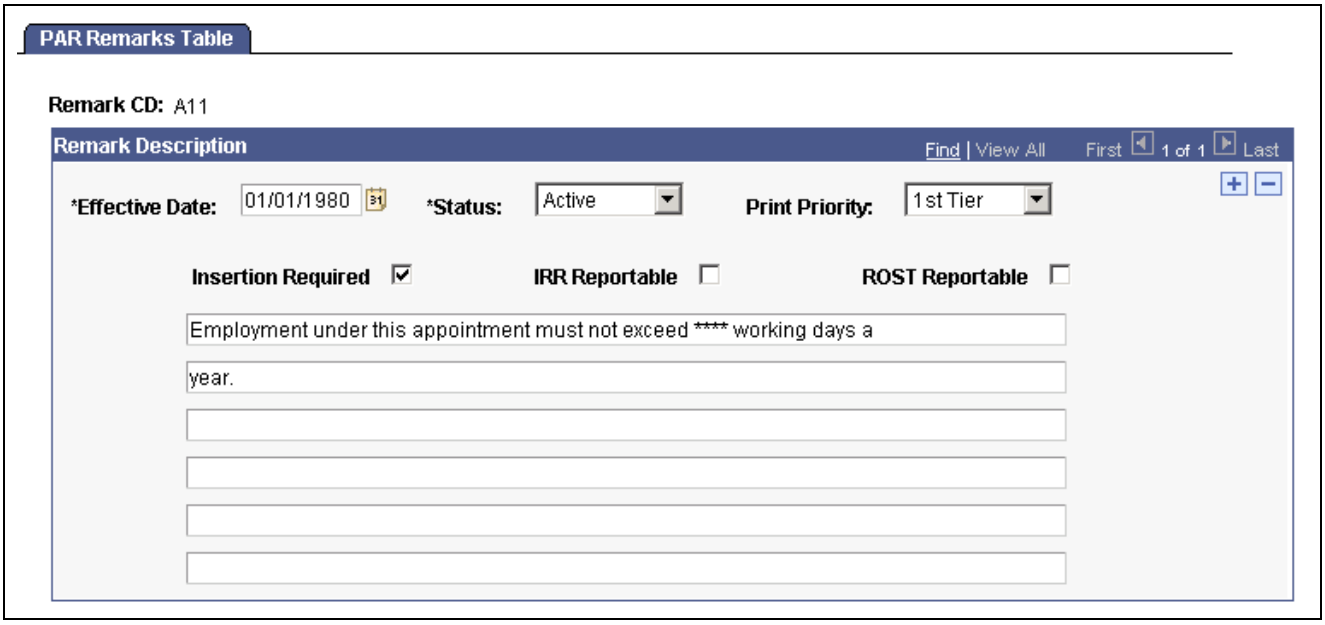
PAR Approving Officials Table page

EmplID (employee ID) Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the *Empl Rcd#, Name,* and *Title* fields. You can edit these fields.

Primary PAR Approving Offcl (primary personnel action request approving official) Select if applicable. This check box is for your information only.

Setting Up PAR Remarks

Access the PAR Remarks Table page.



PAR Remarks Table page

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The Office of Personnel Management (OPM) designates remark codes that begin with *A* through *X*. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with *Y* or *Z*. When you upgrade PeopleSoft HRMS, retain your agency-specific remarks.

Print Priority — Select the printing priority for the remark. Available values are *1st Tier* and *2nd Tier*. First tier remarks print first on the SF50/52 reports before any second-tier remarks. Therefore, any remark that is defined as *1st Tier* is printed in the order it is listed by the HR personnelist. These are followed by the 2nd tier remarks.

Insertion Required — Select if this remark needs employee-specific information. When you select this remark at the person level, this check box is unavailable for entry.

PeopleSoft uses an asterisk (*) to denote person-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the person level.

IRR Reportable (individual retirement record reportable) — Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.

ROST Reportable (Register of Separations and Transfers reportable) — Select to have this remark printed on the ROST.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Generating IRR and ROST Reports"

Running Federal HRMS Setup Reports

This section lists the pages used to run the federal HRMS setup reports.

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Pages Used to Run the Federal HRMS Setup Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table • Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA/Authority 1 • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table • Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	Use this page to run these reports: • Handicap Table report (FGPER811) prints all disabilities and their associated codes. • Legal Authority Table report (FGPER812) prints information about the legal authorities you set up in the Legal Authority table. • Nature of Action Table report (FGPER813) generates a list of the codes in the Nature of Action Table. • LEO Pay Area Table report (FGPER808) lists each LEO Special Pay Area and associated percentage. • NOA Authority 1 report (FGPER814) generates a list of the information in the Nature of Action/Authority 1 Table. • Personnel Office ID Table report (FGPER805) prints information about all Personnel Offices in your agency. • Sub-Agency Table report (FGPER804) prints all sub-agencies in the Sub-Agency Table and their associated agencies.

Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages.

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PC Business Unit Table

The PC Business Unit table is part of the Project Costing process in PeopleSoft Enterprise Financials, which interacts with the Time and Labor process. If you don't use project costing, you don't need to import the values for this table.

See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*

GL Business Unit Table

The GL Business Unit table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don't need to import the values for this table.

See *PeopleSoft Enterprise General Ledger PeopleBook*

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CHAPTER 15

Setting Up Banks and Bank Branches

This chapter provides an overview of bank and bank branch setup and discusses how to:

- Set up banks and bank branches.
- Set up IBAN information.
- Specify source banks.
- Report on banks and bank branches.

Understanding Bank and Bank Branch Setup

This section discusses:

- Banking setup.
- (GBR) Bank and building society setup in the UK.
- The CI_BANK_EC component interface.

Banking Setup

To set up banks in HRMS:

1. Set up bank information on the Bank Table page (BANK_EC).
2. Specify bank branch information on the Branch Table page (BANK_BRANCH_EC).

   Note. There is some additional banking setup required for the UK.

   See Chapter 15, "Setting Up Banks and Bank Branches," (GBR) Bank and Building Society Setup in the UK, page 341.
3. Specify source banks for payroll processing on the Source Bank Accounts page.

(GBR) Bank and Building Society Setup in the UK

This section discusses how to set up the pages in the Bank/Branch component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

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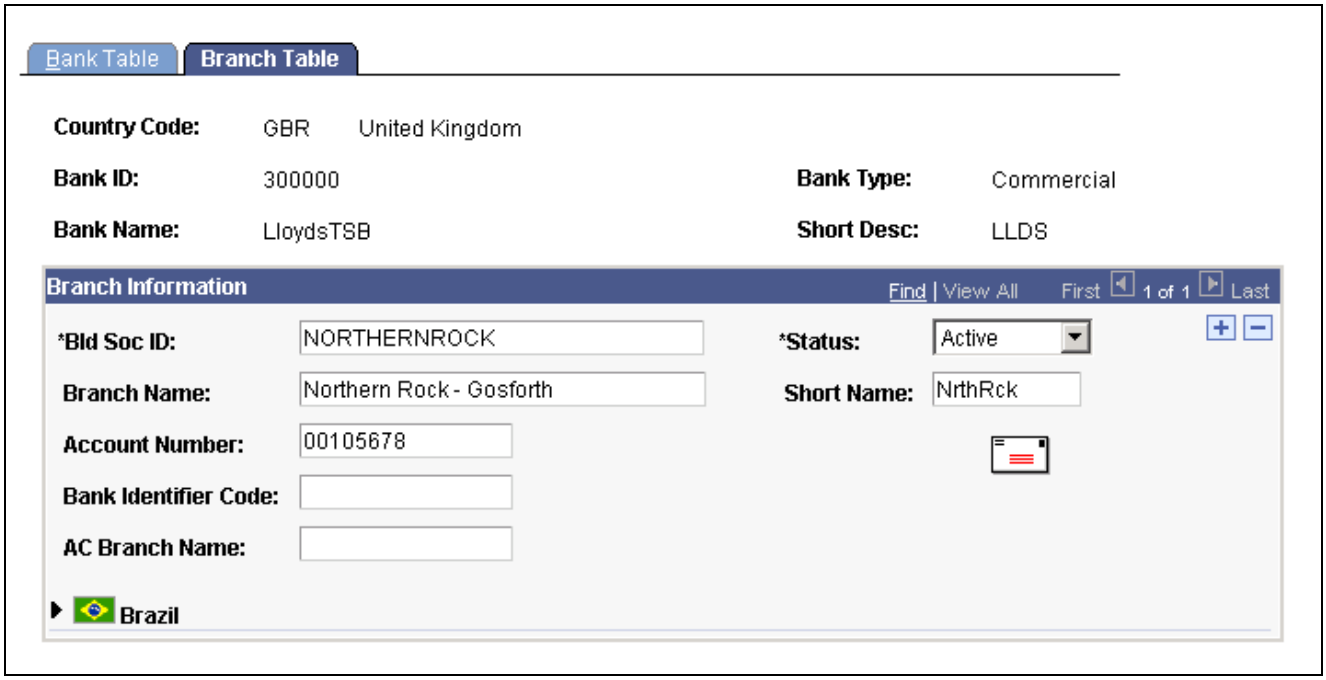
You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your payee's bank and building society accounts.

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society. Use the Branch Table page and its associated Building Society Address page, to enter the building society details. This table shows how to complete these pages:

Type of Account	Bank Table Page	Branch Table Page and Building Society Address Page
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning! You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

This example shows how a building society is defined on the Branch Table page:



Example Building Society Setup

In the example, the building society is linked to LloydsTSB bank (bank ID 30000) that handles clearing for the building society. The building society's clearing account is shown in the Account Number field.

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The CI_BANK_EC Component Interface

Because there may be a large volume of bank information to set up, you can simplify the process by importing bank information from a Microsoft Excel spreadsheet into the bank setup tables with the use of the CI_BANK_EC component interface that PeopleSoft provides.

You download bank information from a website or service that provides bank information to an Excel spreadsheet and then import the information from the Excel spreadsheet to the CI_BANK_EC component interface, using the Excel to Component Interface utility. The CI_BANK_EC component interface loads the bank information into the BANK_EC table and BANK_BRANCH_TBL in PeopleSoft HRMS.

Note. It is your responsibility to determine which rows to update and which rows to add to the PeopleSoft HRMS database when using the Excel to Component Interface utility.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

Setting Up Banks and Bank Branches

To set up banks, use the Bank component (BANK_EC). To set up bank branches, use the Bank Branch component (BANK_BRANCH_TBL).

Use the CI_BANK_EC component interface to load the banking data into the tables for this component interface.

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook*

This section discusses how to:

- Identify banks.
- Define bank branches.

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Pages Used to Set Up Banks and Bank Branches

Page Name	Object Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banking, Branch Table	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Brazil	BANKBRANCH_BRA_SEC	Set Up HRMS, Common Definitions, Banking, Banking, Branch Table Click the Other Information link on the Branch Table page.	Enter additional information for Brazilian bank branches.
Bank Branch Address	BANK_BRA_ADR_SP	Set Up HRMS, Common Definitions, Banking, Banking, Branch Table Click the Address Information link on the Branch Table page.	Enter the address for a bank branch.

Identifying Banks

Access the Bank Table page.

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Bank Table page

Bank ID System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.

Bank Type Select the type of bank. Values are *Commercial, Community, General, Post Bank,*and *Savings*.

Alternate Bank ID Enter the bank's national ID, if applicable. If the bank participates in an international banking consortium or system, it is given an alternate bank ID that is used in international transactions.

Bank Name Enter the name of the bank.

Bank Identifier Code Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.

Country Select the country where the bank is located.

Address The bank's address is displayed.

Edit Address Click the Edit Address link to change address information for a bank.

Phone Enter the phone number for the bank.

AC Bank Name (alternate character bank name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.

(GBR) Special Considerations for the UK

To set up UK bank branches, enter the following information:

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Country Code Enter *GBR*.

Bank ID Enter the sort code for the bank branch.

Note. If you're setting up a building society, enter the sort code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.

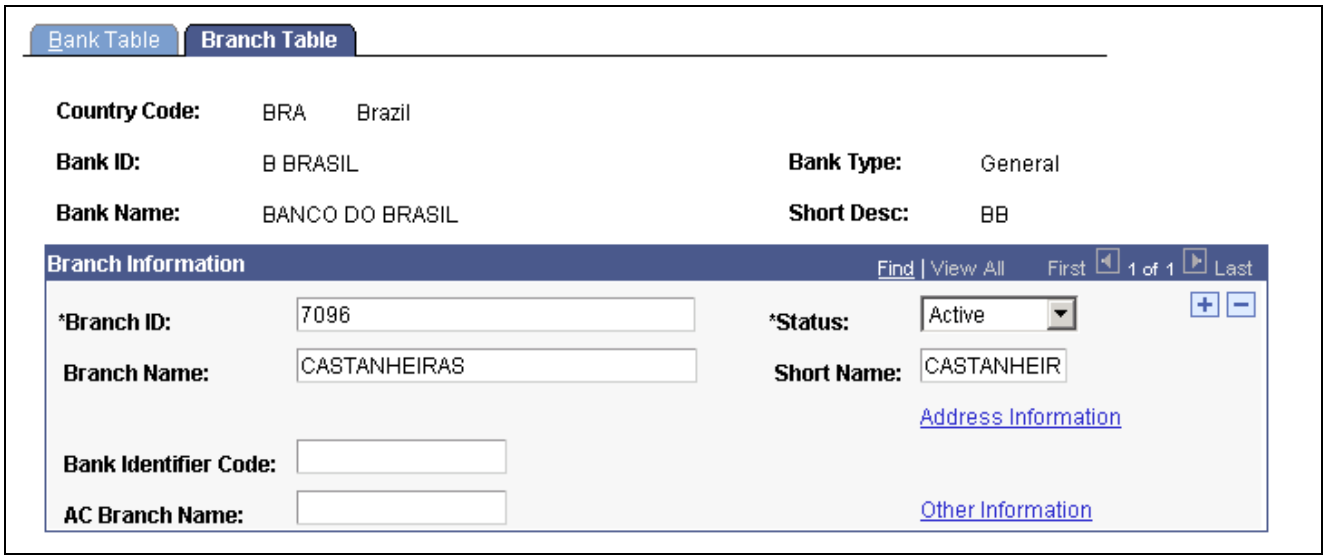
Bank Type Optional for UK banks.

Alternate Bank ID Leave blank for UK banks.

Bank Name Enter a description of the branch. Include the location of the branch, not just the bank name.

Defining Bank Branches

Access the Branch Table page.



Branch Table page

Branch ID Enter the branch ID for the bank. Branch ID formats vary by country.

Branch Name Enter the name of the bank branch.

Bank Identifier Code Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.

AC Branch Name (alternate character branch name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.

Address Information Click the Address Information link to access the Bank Branch Address page.

Other Information Click the Other Information link to access the Bank Branch Brazil page.

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(GBR) Special Considerations for the UK

To set up UK building societies, enter the following information on the Branch Table page:

Bld Soc ID (building society ID)	Enter a unique identifier for the building society.
Status	You can enter employee account details only for building societies with an active status.
Branch Name	Enter the full name of the building society.
Account Number	Enter the number of the building society's account at the clearing bank.
Address Information	Click the Address Information link to access the Building Society Address page, where you enter the building society's head office address.

(BRA) Bank Branch Brazil Page

Verifier Digit	Enter the bank-assigned verifier digit. File transfers may require the verifier digit.
Branch Location	Enter the bank branch location.
Contact Name	Enter the contact name for the bank branch.

Setting Up IBAN Information

To set up IBAN Information, use the IBAN Country Setup (SETUP_IBAN_TBL) component.

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

Understanding IBAN Setup

The International Bank Account Number (IBAN) is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders. PeopleSoft applications can include this information at the bank account level.

To set up IBAN functionality you must select the IBAN enabled field on the IBAN Country Setup page. You can also establish the rules used to create the Basic Bank Account Number (BBAN) on this page. After the IBAN feature is enabled, the IBAN field and Edit IBAN link appears on the Source Bank Account page and the Maintain Bank Account pages for the country.

See Also

Chapter 15, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 349

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Entering Bank Account Information

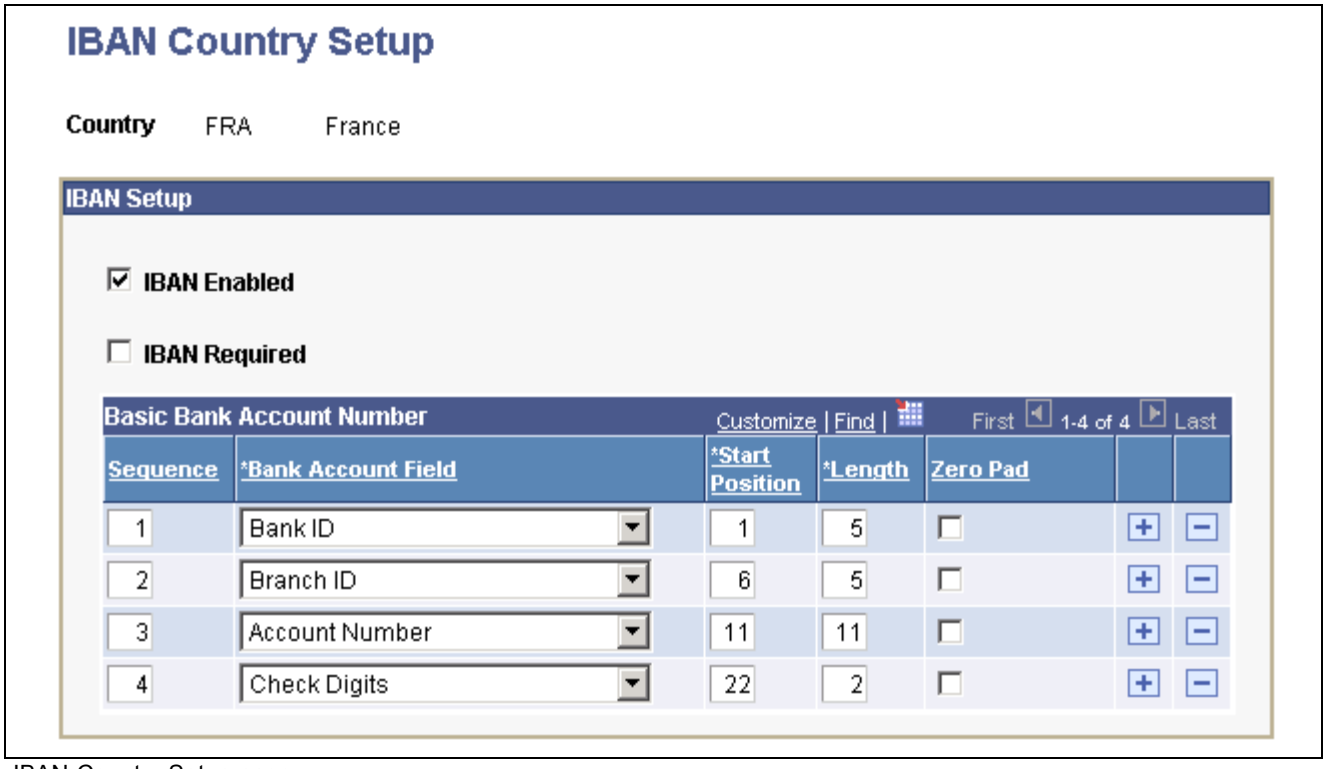
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Page Used to Set Up IBAN Information

Page Name	Object Name	Navigation	Usage
IBAN Country Setup	SETUP_IBAN_TBL	Set Up HRMS, Common Definitions, Banking, IBAN Country Setup	Enable the IBAN feature for a specific country. Create BBAN validation rules.

Setting Up IBAN Information

Access the IBAN Country Setup page.



IBAN Country Setup page

IBAN Enabled Select this check box to enable the IBAN functionality for this country. If you enable IBAN, the IBAN field and the Edit IBAN link appears when you set up a source bank account page or a payee bank account with this country code.

IBAN Required Select this check box to require an IBAN value for accounts in this country. If you select this check box, you must complete the IBAN fields when you set up a source bank account or a payee bank account with this country code.

See Chapter 15, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 349.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

Basic Bank Account Number

Sequence Enter the order in which the value will appear in the Basic Bank Account Number (BBAN).

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Bank Account Field	Select the field used to compose the BBAN.
Start Position	Enter the position where the Bank Account Field will begin.
Length	Enter the number of characters allotted for this Bank Account Field.
Zero Pad	Select this option to fill any difference between Length and the actual Bank Account Field value with zeroes.

Specifying Source Banks

To specify source banks, use the Source Bank Accounts component (SRC_BANK).

This section provides an overview of source banks and discusses how to:

- Define source banks.
- Edit IBAN information.
- (CAN) (USA) Specify data for banks in Canada or the U.S.
- (JPN) Specify the account type and company code.

Understanding Source Banks

Source banks are the money sources that payroll disbursements are drawn from. For each source bank, identify the appropriate bank and bank branch, account number, and EFT formats.

For certain countries, such as the U.S., Canada, and Japan, you must set up additional information for source banks, accessed through the Other Required Information link on the Source Bank Accounts page. For countries in Europe, you must define International Bank Account Number (IBAN) information, accessed through the Edit IBAN link on the Source Bank Accounts page.

Payroll Setup

PeopleSoft Enterprise Global Payroll users must link source banks to a pay entity.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, “Defining Banking Instructions”.

PeopleSoft Enterprise Payroll for North America users must link source banks to a pay group.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, “Setting Up Pay Groups,” Specifying Banks and Tips Processing.

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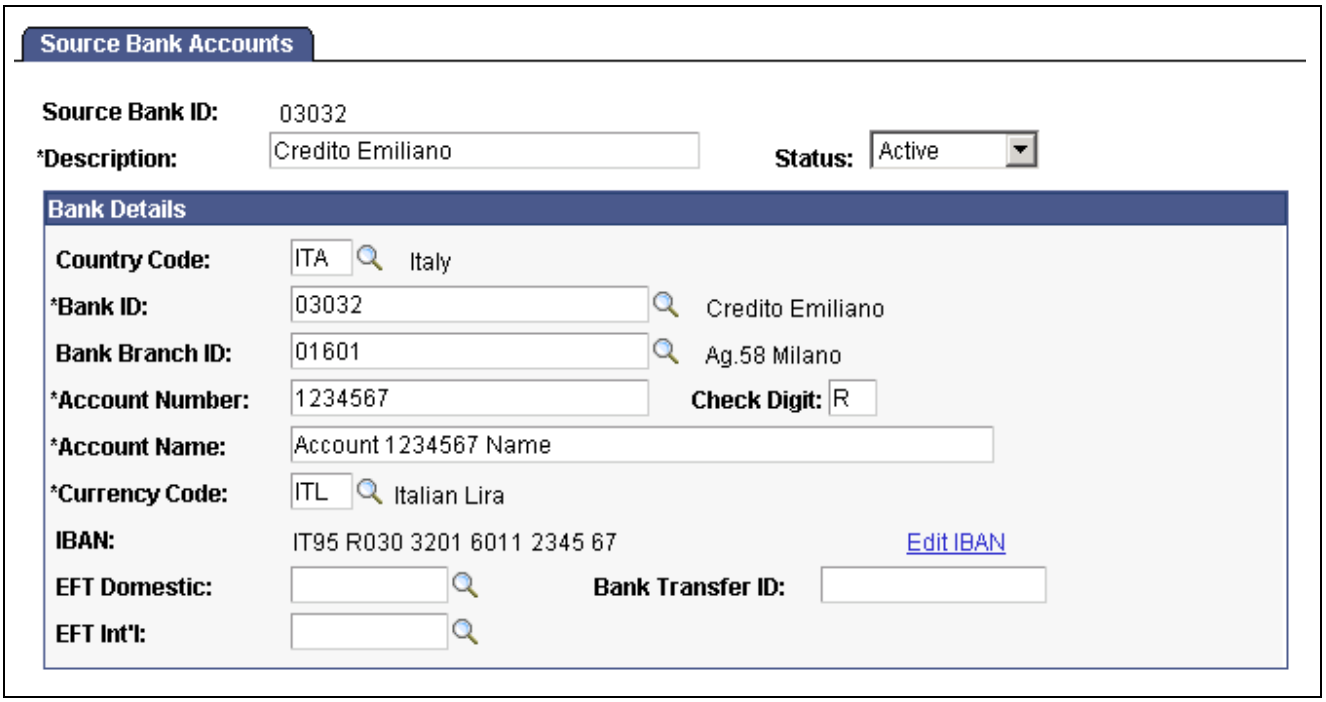
Pages Used to Specify Source Banks

Page Name	Object Name	Navigation	Usage
Source Bank Accounts	SRC_BANK	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts	Assign a source bank ID and define information about the banks that pay out money.
International Bank Account Nbr	BANKACCT_IBAN_SEC	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Edit IBAN link on the Source Bank Accounts page.	(BEL)(FRA)(DEU)(CHE)(ITA)(ESP)(NLD)(GBR) Enter or edit the International Bank Account Number. Generation of the IBAN is the responsibility of the bank or bank branch servicing the account. This page is only available if the country selected on the Source Bank Accounts page is set up for IBAN on the IBAN Country Setup page.
Canada Bank Additional Data page , US Bank Additional Data page	SRC_BANK_PY_SP	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Other Required Information link on the Source Bank Accounts page.	(CAN)(USA) Specify data for banks in Canada or the U.S. This page is only available if you select *CAN* or *USA* as the Country Code on the Source Bank Accounts page.
Japan Bank Additional Data page	GPJP_SRC_BANK_SEC	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts Click the Other Required Information link on the Source Bank Accounts page.	(JPN) Specify the account type and company code for Japanese banks.

Defining Source Banks

Access the Source Bank Accounts page.

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Source Bank Accounts page

Description Enter the name of the bank.

Country Code Select the country code where the bank is located.

Bank ID Select the bank ID.

Bank Branch ID Select the bank branch ID, if applicable.

Account Number Enter the bank account number. Each country has its own account number format.

Check Digit Enter the value used to validate the bank ID, bank branch ID (if applicable), and account number. This field only appears for countries where check digits are used.

Note. This field is not for IBAN accounts. You enter the IBAN check digit on the International Bank Account Nbr page that you access when you click the Edit IBAN link on this page.

Account Name Enter the name of the bank account.

Currency Code Select the currency code.

IBAN Displays the IBAN. This only appears if the country code is *BEL, FRA, DEU, CHE, ITA, ESP, NLD,* or *GBR.*

Edit IBAN Click this link to access the International Bank Account Nbr (number) page where you can edit the IBAN.

Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

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Depending on the country that you select, you may not have this page. It is used to record information for companies that operate in Europe.

See Chapter 15, "Setting Up Banks and Bank Branches," Editing IBAN Information, page 352.

Other Required Information Click this link to access the Additional Data page. Depending on the country that you select, this page might not be available. It is used to record information for companies that operate only in the U.S., Canada, or Japan.

See Chapter 15, "Setting Up Banks and Bank Branches," (CAN) (USA) Specifying Data for Banks in Canada or the U.S., page 353.

See Chapter 15, "Setting Up Banks and Bank Branches," (JPN) Specifying the Account Type and Company Code, page 354.

AC Account Name (alternate character account name) This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

EFT Domestic (electronic funds transfer domestic) Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the EFT Domestic field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation.

Note. Not applicable in the U.S. or Canada.

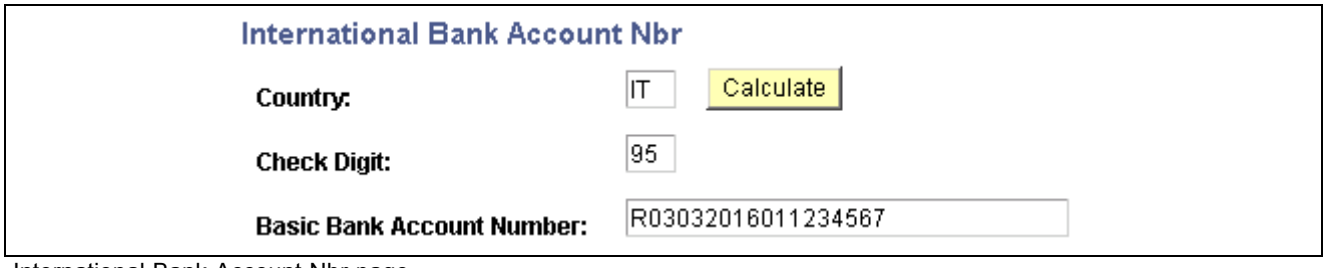
Bank Transfer ID Enter the bank transfer ID that is used to identify banks to clearing systems.

EFT Int'l (electronic funds transfer international) Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name is taken from the EFT Int'l field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

Note. The Payment ID Assignment page, found in this component, is specific to PeopleSoft Global Payroll and is documented in the PeopleSoft Global Payroll documentation.

Editing IBAN Information

Access the International Bank Account Number page.



International Bank Account Nbr page

Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

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Note. While saving, the system validates the data. The page will not be saved if any invalid values appear.

Country Enter or edit the country code used to generate the IBAN.

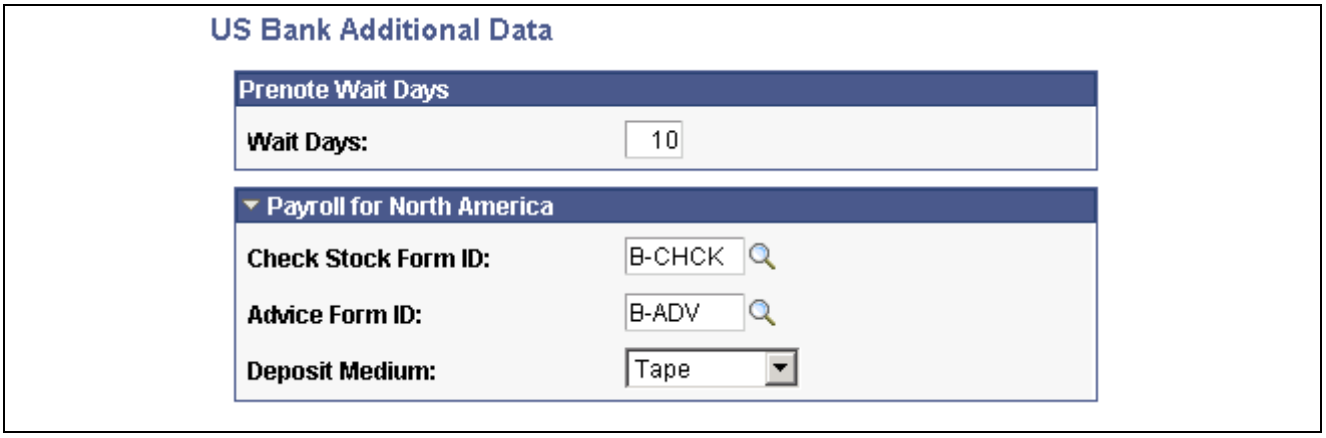
Calculate Click this button to generate the IBAN. The system populates the Country and Basic Bank Account Number fields using data from the Source Bank Accounts page. You must complete the Check Digit field and correct the defaulted values if necessary.

Check Digit Enter the number used to validate the IBAN.

Basic Bank Account Number Enter or edit the account number used to generate the IBAN.

(CAN) (USA) Specifying Data for Banks in Canada or the U.S.

Access the Canada Bank Additional Data page or the US Bank Additional Data page.



US Bank Additional Data page

(USA) Prenote Wait Days

Wait Days Enter the number of prenote wait days. What you enter here at the source bank level determines whether the prenotification process is required or not. If you enter *0* in this field, there won't be a prenote generated at the payee level. If you enter any number other than *0* in this field, a prenote is required.

When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks recommend an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days*.

Note. enable the prenote process to validate the transit numbers, which you specify at the employee level.

Payroll for North America

The Payroll for North America group box only appears if you have PeopleSoft Payroll for North America installed. You only have to define this group box if you have PeopleSoft Payroll for North America.

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Check Stock Form ID If your company generates checks, select the form ID for this source bank account.

Advice Form ID If your company generates direct deposits, select the form ID for this source bank account.

When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Form IDs are defined in the Form Table.

Deposit Medium Specify how transactions are transferred to the bank for processing. Options are *Tape, EFT,* (electronic funds transfer), *Diskette,* and *Report.*

For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the payroll process in any way.

(CAN) Routing Format Enter the routing number.

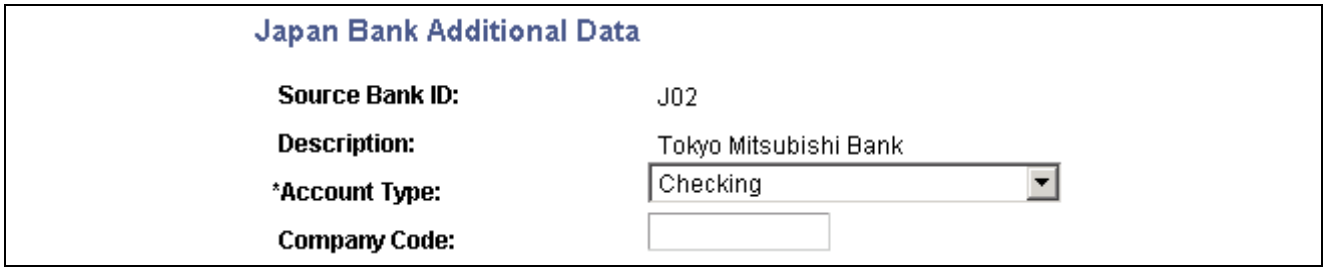
The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first.

Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees' paychecks directly into their personal bank accounts. Valid values are:

- *Lead 0, Bank ID, Branch ID.*
- *Lead 0, Branch ID, Bank ID.*
- *Bank ID, Branch ID* (no leading zero).
- *Branch ID, Bank ID* (no leading zero).

(JPN) Specifying the Account Type and Company Code

Access the Japan Bank Additional Data page.



Japan Bank Additional Data page

Account Type The source bank account type. Values are *Checking* and *Regular.*

Company Code Enter the ID that is assigned to the company by the banking institution.

Reporting on Banks and Bank Branches

To report on banks and bank branches, use the Bank/Branch Report (RUN_PAY701) component.

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This section lists the page used to report on banks and bank branches.

Page Used To Report on Banks and Bank Branches

Page Name	Object Name	Navigation	Usage
Bank/Branch Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	Run the Bank/Branch report that lists information from the bank and bank branch table.

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CHAPTER 16

Setting Up and Working with ChartFields and ChartField Combinations

This chapter provides an overview of PeopleSoft ChartFields, lists prerequisite integration points, and discusses how to:

- Specify the General Ledger system and version.
- Set up the ChartField configuration template.
- Enter and maintain ChartField values.
- Enter and maintain valid ChartField combinations.
- Review and maintain ChartField transactions.
- Edit ChartField combinations in HRMS transactions.

Note. For customers integrating with PeopleSoft Enterprise 8.4 Financials or higher, most of the components described in this chapter are display only.

Understanding PeopleSoft ChartFields

In PeopleSoft applications, the fields that store your charts of accounts and provide your system with the basic structure to segregate and categorize transactional and budget data are called ChartFields. Each ChartField has its own attributes for maximum efficiency and flexibility in recording, reporting, and analyzing its intended category of data. While a particular ChartField always represents only one category of data, it stores many values that you use to further categorize that same data.

In addition to this basic categorization of a transaction amount using the account ChartField, you can simultaneously record the same transaction by product, project, fund, or any number of categories by using other ChartFields with appropriate values. This creates additional subsets of that same transactional data.

PeopleSoft delivers a set of ChartFields and associated functionality that fully covers most accounting and reporting requirements. ChartFields are designed to be configured by you to meet your specific requirements.

Delivered ChartFields

This table describes the delivered ChartFields:

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Account	Account	ACCOUNT (10)	GL_ACCOUNT	Classifies the nature of a transaction. This field is required. Use it for corporate accounts.
Alternate Account	Alt Acct	ALTACCT (10)	ALTACCT	Classifies the nature of a transaction for regulatory authorities. Use it for statutory accounting.
Operating Unit	Oper Unit	OPERATING_UNIT (8)	OPERATING_UNIT	Can be used to indicate a location, such as a distribution warehouse or a sales center.
Fund Code	Fund	FUND_CODE (5)	FUND_DEFINITION	The primary structural units of Education and Government accounting.
Department	Dept	DEPTID_CF (10)	DEPARTMENT	Tracks information according to a divisional breakdown of your organization. Can be used to indicate who is responsible for or affected by a transaction.
Program Code	Program	PROGRAM_CODE (5)	PROGRAM_ DEFINITION	Tracks expenditures for programs within or across your organizations. Can be used to identify groups of related activities, cost centers, revenue centers, responsibility centers and academic programs.
Class Field	Class	CLASS_FLD (5)	CLASS_PNL	Can be used to identify specific appropriations.

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Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Budget Reference	Bud Ref	BUDGET_REF (8)	BUDREF_PNL	Use to identify unique budgets, when individual budgets share budget keys and overlapping budget periods.
Product	Product	PRODUCT (6)	PRODUCT	Captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
Project/Grant	Project	PROJECT_ID (15)	PROJECT	Captures additional information useful for grant and project accounting. The Project ChartField does not have effective dating.
ChartField 1	N/A	CHARTFIELD1 (10)	CHARTFIELD1	Generic expansion ChartField.
ChartField 2	N/A	CHARTFIELD2 (10)	CHARTFIELD2	Generic expansion ChartField.
ChartField 3	N/A	CHARTFIELD3 (10)	CHARTFIELD3	Generic expansion ChartField.
Affiliate	Affiliate	AFFILIATE (5)	N/A	Used to map transactions between business units when using a single interunit account.
Fund Affiliate	Fund Affil	AFFILIATE_ INTRA1 (10)	N/A	Use to correlate transactions between funds when using a single intraunit account. It is delivered as inactive.
Operating Unit Affiliate	Oper Unit Affil	AFFILIATE_ INTRA2 (10)	N/A	Use to correlate transactions between operating units when using a single intraunit account. It is delivered as inactive.

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Prerequisites

This table describes the service operations that you must configure in the HRMS database to implement the ChartField and ChartField combination functionality:

Service Operation	Description
RELEASE_REQUEST	HRMS requests an update of the General Ledger version from Financials.
RELEASE_RESPONSE	HRMS recieves the update of the General Ledger version from Financials.
FSCM_CF_CONFIG	HRMS receives the specific ChartField configuration template from Financials.
One integration point for each GL ChartField	HRMS receives the ChartField values published from the Financials database. See Chapter 16, "Setting Up and Working with ChartFields and ChartField Combinations," Entering and Maintaining ChartField Values, page 366.
HR_ACCT_CD_LOAD	HRMS receives the combination codes imported from the Financials database or flat file and populates the GL Account Code table (GL_ACCT_CD_TBL).
HR_CHARTFLD_COMBO_SYNC	HRMS receives the service operation published by the Financials database to keep the Speed Type table up to date.
COMBO_CF_EDIT_REQUEST	HRMS sends a request to the Financials database (8.4.01 or higher version) to validate a combination code.
COMBO_CF_EDIT_REPLY	HRMS receives and processes the response from the Financials database to a request for validation of a combination code.

Note. Most of these service operations require that you use PeopleSoft Enterprise General Ledger in a version that is capable of using Integration Broker.

See Also

Interactive Services Repository in the Implementation Guide section of the Customer Connection Website

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 39, "Working with Integration Points in Enterprise HRMS," page 871

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

Specifying the General Ledger System and Version

This section provides a comparison of functionality for different setup options and discusses how to:

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- Specify PeopleSoft Enterprise General Ledger.
- Specify other general ledger systems.

Understanding Comparison by General Ledger System and Version

The setup of the General Ledger indicator and General Ledger version on the Installation table impacts the ChartField combination edit functionality and the behavior of the ChartField pages.

This table compares the ChartField functionality for the different combinations of General Ledger indicator and version on the Installation table:

General Ledger Indicator	General Ledger Version	Update ChartField Configuration Template	Update or Add Individual ChartField Values	Combination validation using Integration Broker
Cleared	N/A	Yes	Yes, except Department ChartField	No
Selected	N/A	No. Use delivered ChartField template	Yes, except Department ChartField	No
Selected	Below 8.40.00	No. Use delivered ChartField template	No. Review only.	No
Selected	8.40.00	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	No
Selected	8.40.01 and above	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	Yes

Note. The Department ChartField is always set up as read only. Changes made to the Department table are automatically reflected in the Department ChartField.

See Also

Chapter 6, “Setting Up and Installing PeopleSoft HRMS,” Setting Up Implementation Defaults, page 119

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Pages Used to Specify General Ledger System and Version

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Specify the PeopleSoft applications for your installation.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Enter product- and industry-specific installation information.

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 119

Specifying PeopleSoft Enterprise General Ledger

To specify and update the PeopleSoft Enterprise General Ledger system and version:

1. Select the General Ledger indicator on the Installation Table - Products page (INSTALLATION_TBL1).
2. Click the Update Version button in the General Ledger group box on the Installation Table - Product Specific page (INSTALLATION_TBL1A).

   This button triggers a request to the Financials database and updates the GL version automatically.

   Note. The default GL version is *N/A,* which you can update using the Update Version button if you use Enterprise Financials 8.4 or higher.

Specifying Other General Ledger Systems

If you do not use PeopleSoft Enterprise General Ledger, do not select the General Ledger indicator on the Installation Table - Products page. The system displays N/A as the GL version.

If Payroll for North America supports your General Ledger system, follow the system configuration instructions in the related documentation.

Setting Up the ChartField Configuration Template

To update the standard ChartField configuration template, use the Standard Configuration (STANDARD_CF_TMPLT) component.

This section provides an overview of standard ChartField configuration and discusses how to:

- Import the ChartField configuration from PeopleSoft Enterprise Financials.
- Review or update the standard ChartField configuration template.

Understanding Standard ChartField Configuration

PeopleSoft delivers the Standard ChartField Configuration Template with fourteen active ChartFields in the following sequence:

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- Account
- Department
- Project
- Product
- Fund Code
- Program Code
- Class Field
- Affiliate
- Operating Unit
- Alternate Account
- Budget Reference
- ChartField1
- ChartField2
- ChartField3

Note. The ChartField configuration template is review only if you use PeopleSoft Financials. Modifications to this ChartField configuration template should be done in the Financials system. If you use Financials 8.40 or above, ChartField configuration changes are sent to HCM by the FSCM_CF_CONFIG service operation.

If you do not use PeopleSoft Enterprise General Ledger, you can use the Standard ChartField Configuration page to make the following modifications to the standard ChartField configuration:

- Change the display order of ChartFields on pages and reports.
- Relabel long and short names (descriptions) of ChartFields.
- Inactivate or activate ChartFields.

  Inactivated ChartFields are not displayed on pages, reports, or in prompt lists. They are not included in indexes. While not displayed, they are not removed from records or pages. This significantly reduces configuration time and effort.
- Change the display length of ChartFields on pages and reports.
- Change Related ChartFields for IntraUnit Affiliate ChartFields.

Pages Used to Review or Update the Standard ChartField Configuration Template

Note. ChartField Configuration Template is review only when you are using PeopleSoft Enterprise Financials.

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Page Name	Object Name	Navigation	Usage
Standard ChartField Configuration	STANDARD_CF_TMPLT	Set Up HRMS, Common Definitions, ChartField Configuration, Standard Configuration, Standard ChartField Configuration	Activate ChartFields to make them available on the ChartField Values page. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Action Status	STANDARD_CF_LOG	Click the Configuration Status button on the Standard ChartField Configuration page.	View the status of ChartField changes. The report is produced by the PAY_CONFIG report.
ChartField Labels	STANDARD_CFLBL_LNG	Click Label Details on the Action Status page.	View changes of ChartField labels for both base language and related language.

Importing the ChartField Configuration From PeopleSoft Enterprise Financials

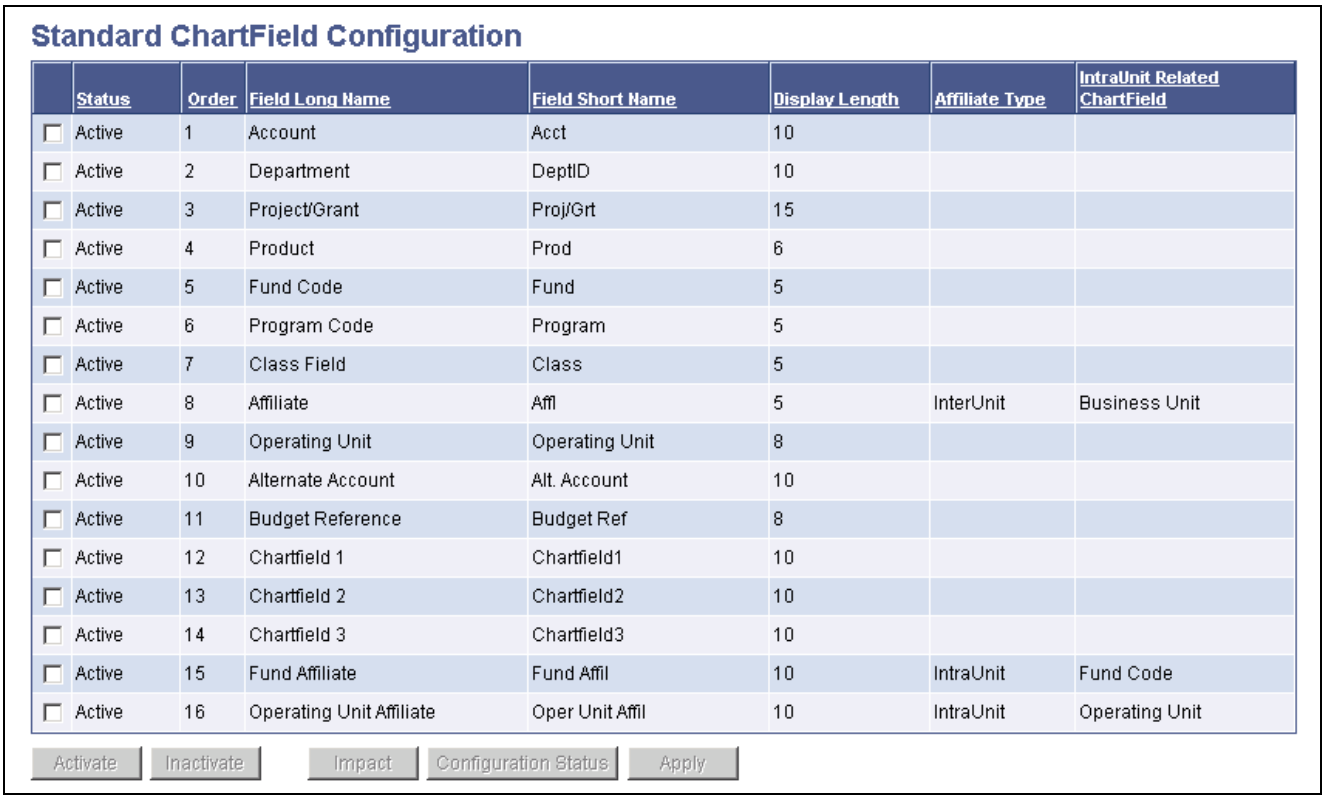
If you integrate with PeopleSoft Enterprise Financials 8.40 or above, the system automatically sends the FSCM_CF_CONFIG service operation from the Financials database to the HCM database when the ChartField Configuration process (PYCONFIG) completes successfully in the Financials database.

The FSCM_CF_CONFIG service operation consists of Financials's latest ChartField template along with all corresponding ChartField labels. Upon receiving the service operation, the HCM database compares the configuration template and labels and generates the actions required to perform ChartField changes in HCM. These pending ChartField change actions reside on the Action Log file. You can review these changes on the Action Status page and determine the time to apply them to your system. Use controls on the Standard ChartField Configuration page to review the configuration status and apply the changes.

Reviewing or Updating the Standard ChartField Configuration Template

Access the Standard ChartField Configuration page.

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Standard ChartField Configuration

	Status	Order	Field Long Name	Field Short Name	Display Length	Affiliate Type	IntraUnit Related ChartField
☐	Active	1	Account	Acct	10		
☐	Active	2	Department	DeptID	10		
☐	Active	3	Project/Grant	Proj/Grt	15		
☐	Active	4	Product	Prod	6		
☐	Active	5	Fund Code	Fund	5		
☐	Active	6	Program Code	Program	5		
☐	Active	7	Class Field	Class	5		
☐	Active	8	Affiliate	Affl	5	InterUnit	Business Unit
☐	Active	9	Operating Unit	Operating Unit	8		
☐	Active	10	Alternate Account	Alt. Account	10		
☐	Active	11	Budget Reference	Budget Ref	8		
☐	Active	12	Chartfield 1	Chartfield1	10		
☐	Active	13	Chartfield 2	Chartfield2	10		
☐	Active	14	Chartfield 3	Chartfield3	10		
☐	Active	15	Fund Affiliate	Fund Affil	10	IntraUnit	Fund Code
☐	Active	16	Operating Unit Affiliate	Oper Unit Affil	10	IntraUnit	Operating Unit

Activate Inactivate Impact Configuration Status Apply

Standard ChartField Configuration page

The Standard ChartField Configuration page initially displays the ChartFields as delivered by PeopleSoft.

Status

An active ChartField displays on pages, reports and prompt lists. An inactive ChartField is not displayed on pages, reports and prompt lists, but it is not removed from records and pages.

Fund Affiliate and Operating Unit Affiliate are delivered inactive but can be activated if the delivered active ChartFields are not sufficient for your requirements.

Warning! Do not change the status of a ChartField after you have run the full configuration and are using the system in production. Status determines whether ChartFields are displayed on pages, reports and prompt lists throughout the system.

Order

Change the order of display by changing the sequence of order numbers in this field. Inactive ChartFields have the order value of 99. Active ChartFields require an order number. When you activate an inactive ChartField, the system assigns it the next available number, which you can change to place the newly activated ChartField in any desired sequence.

When you save the page, the system completes the final reordering to remove gaps or duplicates in the numbering sequence.

Field Long Name and **Field Short Name**

Enter a new long name and short name to relabel the description of a ChartField. These names are displayed on pages, reports and prompt lists rather than the database field name of the ChartField.

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Display Length Enter a new value to change display length on pages. The display length cannot be greater than the actual field length of the ChartField.

Affiliate Type An Affiliate ChartField is either an Interunit or Intraunit Affiliate. Standard ChartFields have no affiliate type.

IntraUnit Related ChartField A unique intraunit related ChartField of the same or smaller ChartField length must be specified for each intraunit affiliate ChartField that is active. (Business Unit is required for the InterUnit Affiliate ChartField.)

Activate To activate an inactive ChartField, click the check box next to the field you want to activate and then click the Activate button.

Inactivate To inactivate an active ChartField, click the check box next to the field you want to inactivate and then click the Inactivate button.

Warning! Do not inactivate a ChartField if you have transaction data posted to that ChartField. If you do, you will not be able to view that ChartField on pages and reports.

Impact Click to run the ChartField Configuration PSJob process (PYCONFIG) in report mode to analyze the ChartFields changes and determine the impact of applying the new template.

Configuration Status Click to access the Action Status page where you can view the standard ChartField activity log and pending changes, including changes that have been subscribed to from Financials but not yet applied.

Before applying the subscribed changes, view their impact by clicking the Impact button.

If you have saved changes but want to cancel them before applying them, use the Configuration Status - Action Status page to cancel the undesired configuration actions. This resets the ChartField to its previous configuration.

Apply Click to run the ChartField Configuration PSJob process (PYCONFIG) in update mode to apply the ChartField configurations changes.

Warning! If you make any changes to the Standard Configuration pages, you must run the ChartField Configuration process in update mode to apply those changes before they take effect.

After you apply your changes, the system displays only the active ChartFields. ChartFields display in the order and with the labels defined in this standard configuration.

Entering and Maintaining ChartField Values

To enter and maintain ChartField Values, use the Define ChartField Values component (DEFINE_CF_VALUE).

This section provides overviews of ChartField values setup and discusses how to:

- Use Affiliate ChartFields.

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- Add project and grant values.
- Add alternate account values.

Understanding ChartField Import from Financials

If you use PeopleSoft Enterprise Financials release 8.0 or later, import ChartField values from the Financials database and keep them up to date using Integration Broker.

This table lists the service operations used to import ChartFields from Financials by Integration Broker:

ChartField	Service Operation
Account	ACCOUNT_CHARTFIELD_FULLSYNC ACCOUNT_CHARTFIELD_SYNC
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC
Product	PRODUCT_CHARTFIELD_FULLSYNC PRODUCT_CHARTFIELD_SYNC
Fund Code	FUND_LOAD FUND_CF_SYNC
Program Code	PROGRAM_CF_FULLSYNC PROGRAM_CF_SYNC
Class Field	CLASS_CF_FULLSYNC CLASS_CF_SYNC
Operating Unit	OPER_UNIT_CF_FULLSYNC OPER_UNIT_CF_SYNC
Alternate Account	ALTACCT_CF_FULLSYNC ALTACCT_CF_SYNC
Budget Reference	BUDGET_REF_CF_FULLSYNC BUDGET_REF_CF_SYNC

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ChartField	Service Operation
ChartField 1	CHARTFIELD1_FULLSYNC CHARTFIELD1_SYNC
ChartField 2	CHARTFIELD2_FULLSYNC CHARTFIELD2_SYNC
ChartField 3	CHARTFIELD3_FULLSYNC CHARTFIELD3_SYNC

You can view the imported ChartField values from the ChartField Values page.

See Also

Interactive Services Repository in the Implementation Guide section of Customer Connection

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 39, “Working with Integration Points in Enterprise HRMS,” page 871

Understanding ChartField Values for Other Financials Systems

If you do not integrate with PeopleSoft Enterprise Financials, or the Financials system does not have Integration Broker capability, you must directly enter and maintain ChartField values in the HCM database.

The active ChartFields on the Standard ChartField Configuration page determines the pages that are available for entering ChartField values.

Note. PeopleSoft recommends that you not use special characters and embedded blanks in ChartField values. Use the generally accepted alphanumeric characters and the underscore. Special characters and embedded blanks can be problematic and in particular can cause problems in some background processes.

Other than Project ChartField, all changes to the definition of a ChartField value are effective-dated. Therefore, you can establish when you want to *activate* a department, *introduce* a product line, or *close* an account. Use effective dating with activation and inactivation functionality to maintain a full history of all changes or additions, to provide a complete audit trail, and to make possible historical comparisons with past, present, or future conditions. When you no longer use a certain ChartField value, add a row to create an effective-dated *inactive* entry, instead of inactivating the original row. If you simply make the existing row *inactive,* you will have no history of its time as an active ChartField value.

After you initially populate the ChartField tables, you can maintain them from the ChartField Values page.

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Pages Used to Set Up and Review ChartFields

Page Name	Object Name	Navigation	Usage
ChartField Values	DEFINE_CF_VALUES	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Values, ChartFIeld Values	Displays the links to the components of the *active* ChartFields. Click the link of the component you want to access. **Note.** This page only displays links to the components of those ChartFields you activated on the Standard ChartField Configuration page.
GL Account Table	GL_ACCOUNT	Click the Account link on the ChartField Values page.	Set up new account ChartField values. Account values are used in combination with other ChartFields values to create valid ChartField Combinations. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Department	DEPT_CHARTFIELD	Click the Department link on the ChartField Values page.	Review a department. Departments typically represent a divisional classification of a larger entity in your organization (such as a profit center, an operating unit, a school within a university, or a bureau of a government). Its emphasis is usually on budget and responsibility accounting. **Note.** This page is not available for entry.
Project/Grant	PROJECT_CF	Click the Project/Grant link on the ChartField Values page.	Add project values, set up project start and end dates, and project status. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials. .
Product	PRODUCT	Click the Product link on the ChartField Values page.	Add product codes. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.

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Page Name	Object Name	Navigation	Usage
Fund Code	FUND_DEFINITION	Click the Fund Code link on the ChartField Values page.	Define fund values for all types of funds. Funds are primary structural units for education and government accounting. Funds are maintained as a balanced set of accounts and are used to present financials statements. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Program Code	PROGRAM_DEFINITION	Click the Program Code link on the ChartField Values page.	Set up codes to enable financial tracking of programs. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Class Field	CLASS_PNL	Click the Class Field link on the ChartField Values page.	Set up codes to enable financial tracking of class amounts, such as salaries or bonuses. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Operating Unit	OPERATING_UNIT	Click the Operating Unit link on the ChartField Values page.	Set up codes to identify a unit of operation for financial tracking. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Alternate Account	ALTACCOUNT	Click the Alternate Account link on the ChartField Values page.	Set up new alternate account ChartField values. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
Budget Reference	BUDREF_PNL	Click the Budget Reference link on the ChartField Values page.	Set up unique budgets where budgets share budget keys and overlapping periods. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.

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Page Name	Object Name	Navigation	Usage
ChartField 1	CHARTFIELD1	Click the ChartField 1 link on the ChartField Values page.	Set up new account ChartField 1 values. ChartField 1 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.
ChartField 2	CHARTFIELD2	Click the ChartField 2 link on the ChartField Values page.	Set up new account ChartField 2 values. ChartField 2 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoftFinancials.
ChartField 3	CHARTFIELD3	Click the ChartField 3 link on the ChartField Values page.	Set up new account ChartField 3 values. ChartField 3 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. **Note.** This page is not available for entry if you are integrating with PeopleSoft Financials.

Using Affiliate ChartFields

If your organization uses commitment accounting, use affiliate ChartField values when interunit or intraunit transactions are maintained using the same account ChartField values among several related entities (such as business units, funds, or operating units). For example, each entity might use account 140000 as both an interunit receivables and payables account. Each entity could have a different account. However, in each instance an affiliate ChartField value must be assigned to the accounting line to identify the entity with which the receivable or payable is shared.

PeopleSoft delivers the following affiliate ChartFields:

- Affiliate ChartField.

  Used only for *interunit* accounting in association with business unit.

- Fund affiliate ChartField.

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Used for *intraunit* accounting between entities.

- Operating unit affiliate ChartField.

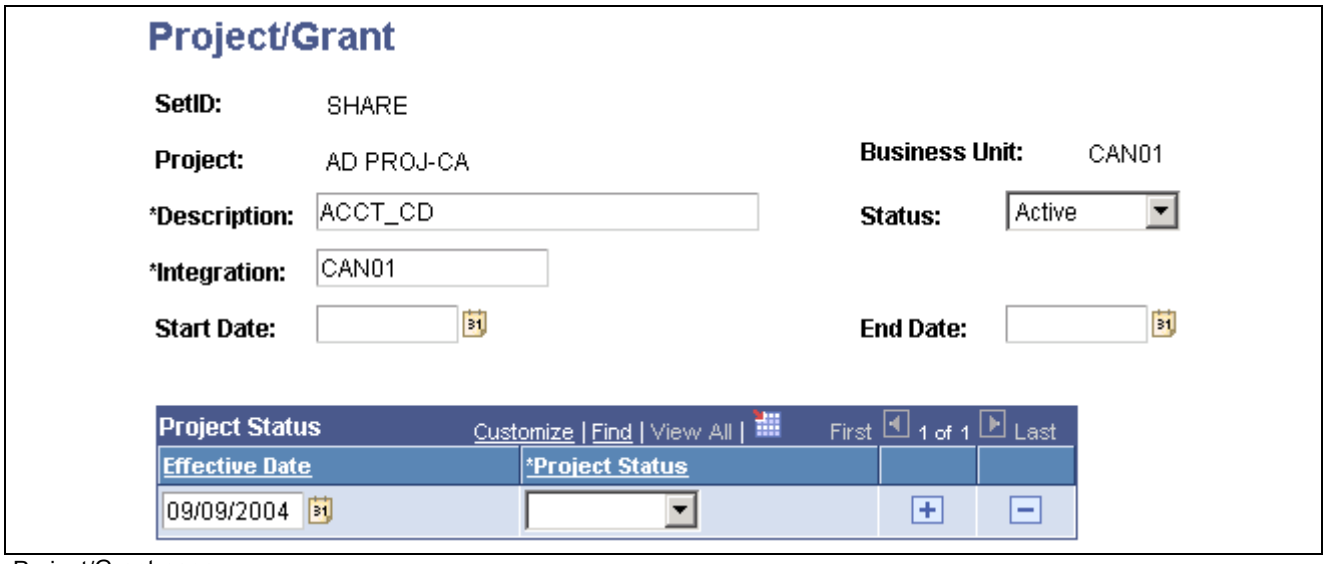
  Used for *intraunit* accounting between entities.

Affiliate ChartField values are the values of the related ChartField. In other words, there is no separate affiliate ChartField page where you enter affiliate values as with the stand alone ChartFields, such as account or department.

Business unit is required as the interunit-related ChartField for affiliate. It provides the values available in the list box for the Affiliate field on the Journal Entry page.

Adding Project and Grant Values

Access the Project/Grant page.



Project/Grant page.

Integration Use to select an integration template for the project and project level.

Start Date and **End Date** These fields are for information only. There is no processing behind them.

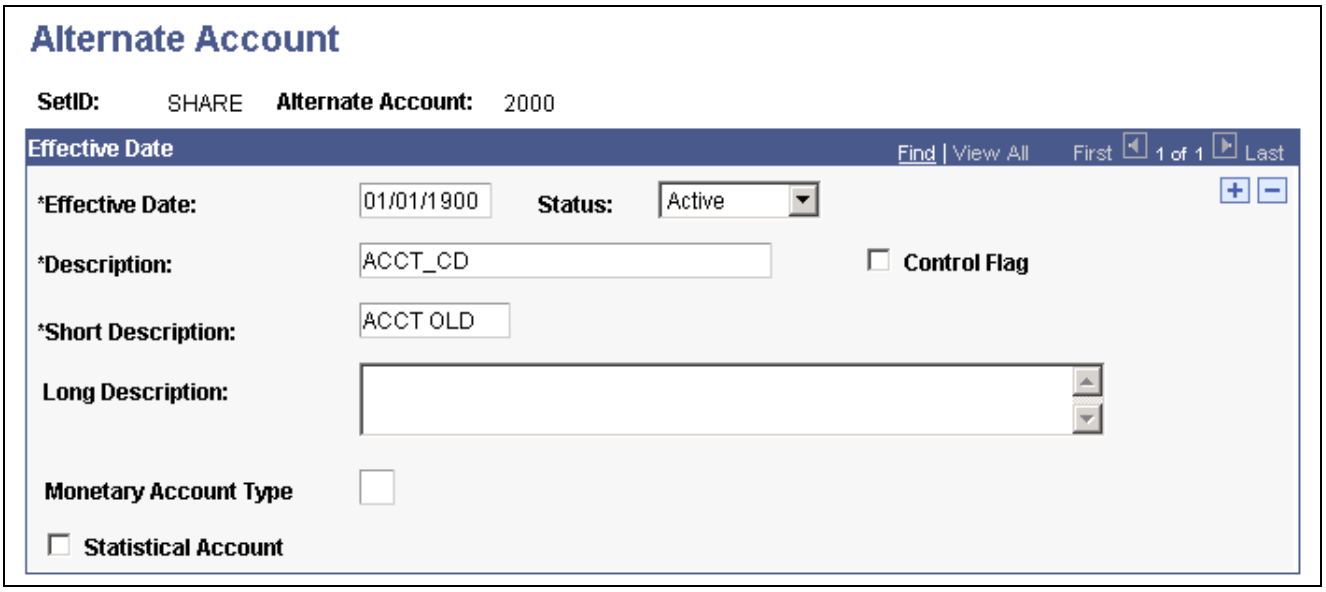
Project Status Enter the effective date and select a project status to indicate the various stages of the life cycle for the project.

Note. These fields are for information only.

Adding Alternate Account Values

Access the Alternate Account page.

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Alternate Account page

The PeopleSoft alternate account feature enables you to enter a statutory chart of accounts as well as analytic or primary accounts at the detail transaction level. The alternate account produces journal line or transaction level balances for statutory reporting requirements. The primary account ChartField contains the corporate accounts, and alternate account ChartField contains the statutory accounts. This is useful for organizations that have two different reporting requirements—one for internal management or a corporate parent, and another for a local jurisdiction or national government.

In PeopleSoft applications, the analytic or primary account ChartField is ACCOUNT.

Local regulatory authorities often require *statutory* accounts. In PeopleSoft applications, this is termed the alternate account ChartField (ALTACCT).

You link alternate account ChartField values with account ChartField values. When you enter values for the account ChartField, the system enters the associated alternate account value. When you enter values for the alternate account ChartField, the system enters the associated account value. You can override the default values by selecting another value from the prompt list. The system displays only account values that you have mapped to the account or alternate account ChartField.

Note. You can map alternate account ChartFields only to account ChartFields with the same attributes unless they have a different SetID.

Long Description Optionally, you can enter the purpose or use of the alternate account, and an explanation of the type of transactions that are to be posted to it.

Note. This field is for information only.

Monetary Account Type Select from the types previously defined on the Account Types page.

Note. This field is for information only.

Statistical Account Used for statistical amounts, not monetary amounts. If you select the check box, you must specify a unit of measure.

Note. This field is for information only.

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Control Flag Select to indicate that you can update this alternate account only by using the Journal Generator. A control account represents a summarization of detail from an application.

Note. This field is for information only.

Entering and Maintaining Valid ChartField Combinations

To populate HRMS with valid ChartField combinations, use the Load Combination Code Table component (RUN_BUD003) and the Combination Code Table component (VALID_COMBO_TABLE).

This section provides overviews of combination codes, valid combination loading, and speed types and discusses how to:

- Run the Load Combination Code process.
- Define combination codes.

Understanding Combination Codes

A combination code is a key that defines a combination of ChartFields. When you run processes to post transactions to the general ledger, the combination code identifies the ChartFields to include on each transaction.

A valid combination code is a combination of ChartFields that are valid in general ledger. Store valid combination codes in the Valid Combination table (VALID_COMBO_TBL) to be used by the ChartField combination validation process.

Note. If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Combination Code table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so that you can track them and reuse them.

See Also

Chapter 16, "Setting Up and Working with ChartFields and ChartField Combinations," Editing ChartField Combinations in HRMS Transactions, page 382

Understanding Valid Combination Table Loading

This section discusses three methods of entering valid combination codes into the Valid Combination table. The method you use depends primarily on which General Ledger system and version you use.

Importing from the Enterprise Financials Database

If you integrate with PeopleSoft Financials 8.0 or later, you can import the valid ChartField Combinations from the Financials database and keep them up to date using Integration Broker.

To import valid combinations from Financials:

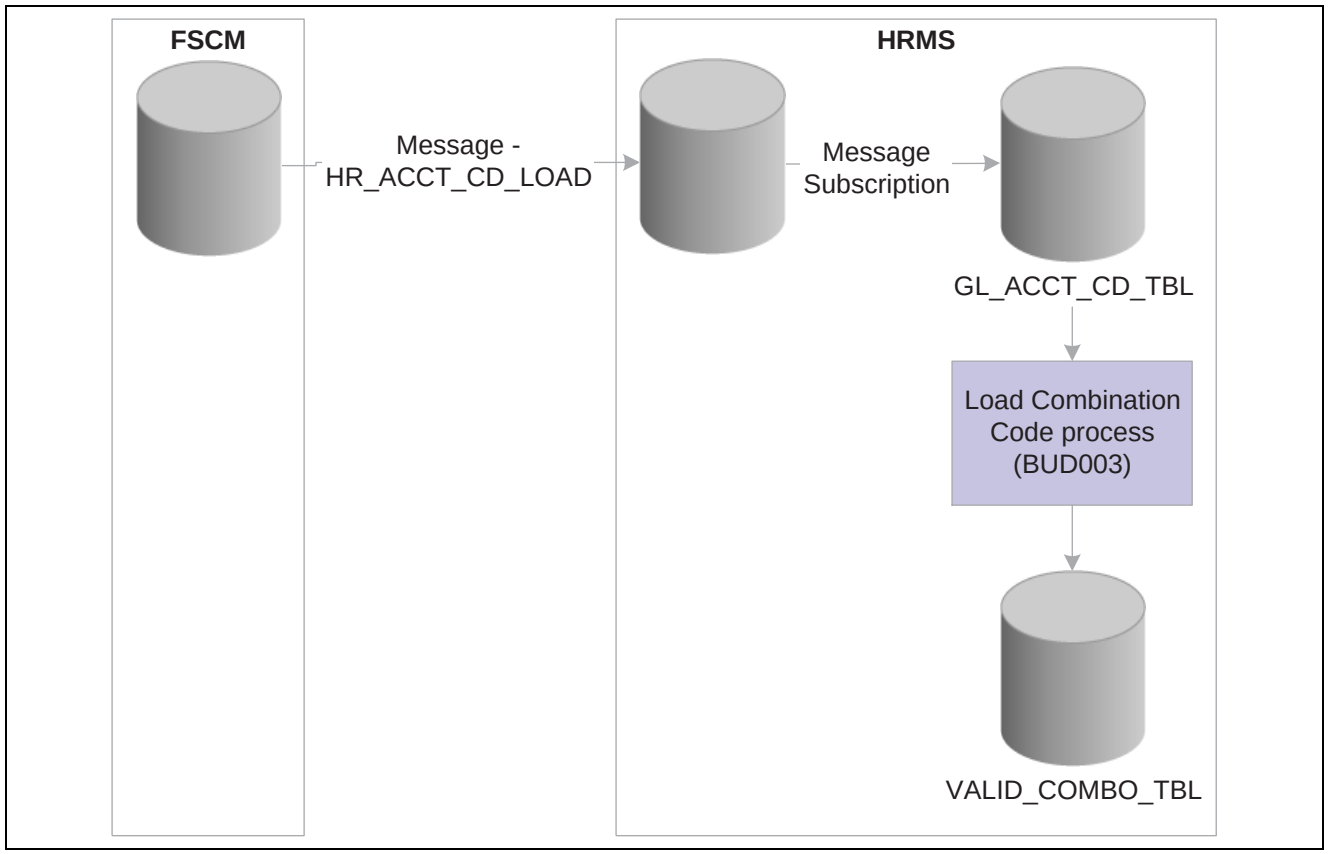
1. Publish combination data information from Financials to HCM using the HR_ACCT_CD_LOAD Integration Broker service operation.

   When HRMS receives this service operation, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL.

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2. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes from the Financials database:



Importing valid combination codes from the Financials database

Flat File Loading

If you integrate with a financials system that does not have Integration Broker capability, you can use the Inbound Flat File process to load and maintain the Valid Combination table (VALID_COMBO_TBL).

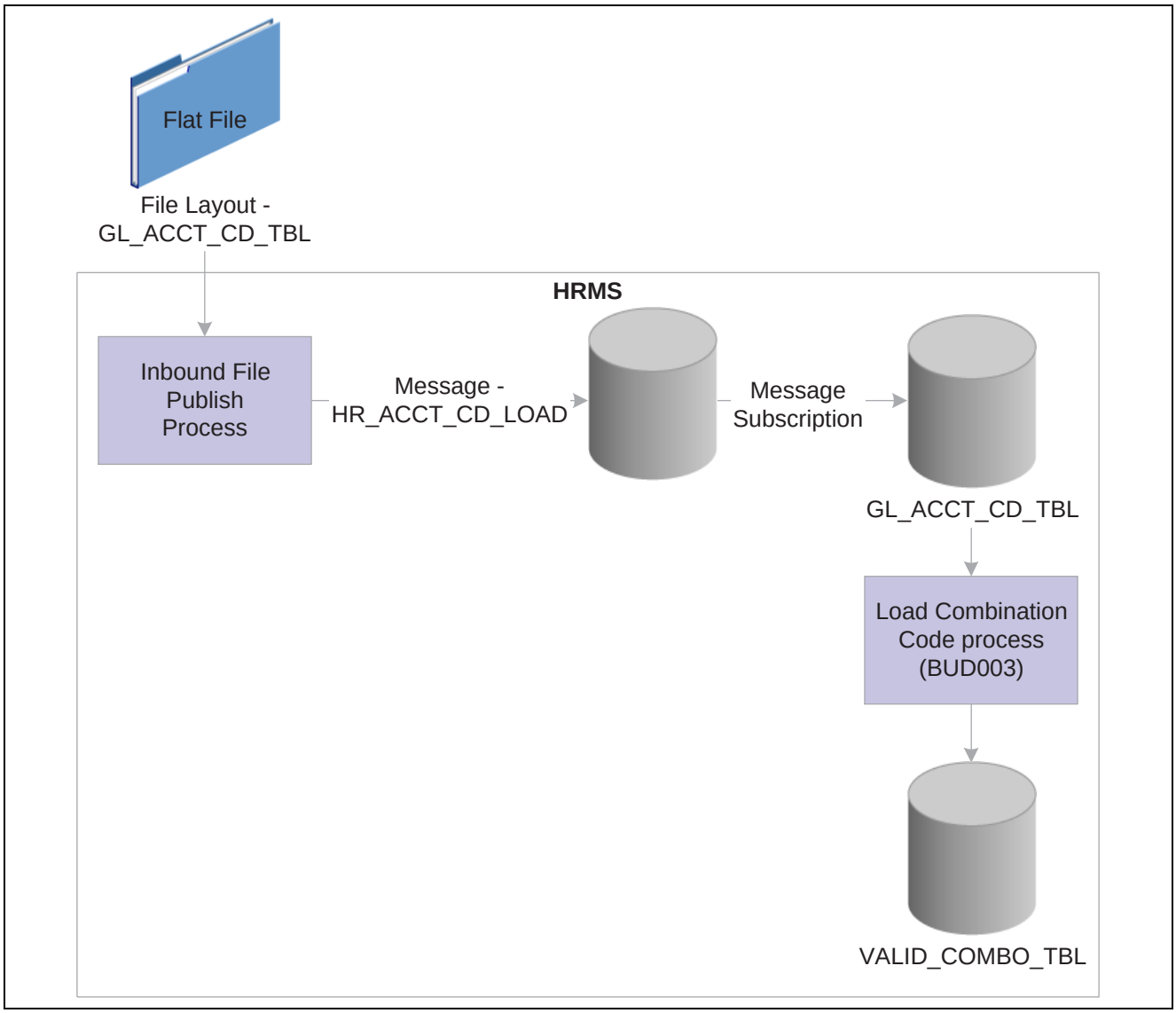
To populate valid combination codes using the Inbound Flat File process:

1. Create a flat file that contains valid combination data in the layout format specified by GL_ACCT_CD_TBL.
2. Initiate the Inbound Flat File process to publish this combination data using the HR_ACCT_CD_LOAD service operation.

   When the service operation is received, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL
3. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes using a flat file:

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Importing valid combination codes using a flat file

Manual Loading

If you do not integrate with PeopleSoft Enterprise Financials, you can enter valid ChartField combinations directly into the Combination Code Table page. This page is not available for manual data entry if the GL indicator is selected on the Installation table.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook, "Using the Flat File Utility"

Understanding Speed Types

Speed Types are shortcut keys for frequently used combinations of ChartFields. Using Speed Types can minimize keying, greatly increase journal efficiency, and reduce errors.

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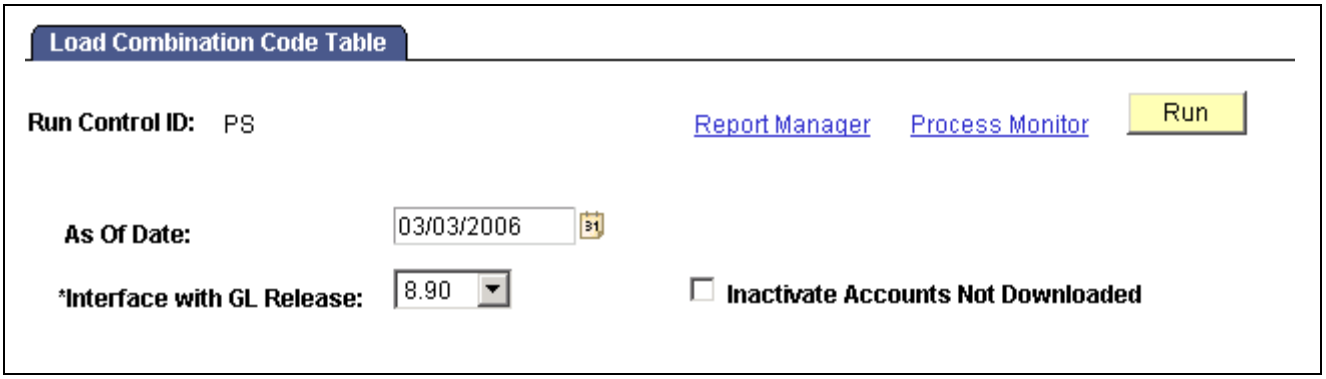
If you integrate with PeopleSoft Financials 8.0 or later, you can use the HR_CHARTFLD_COMBO_SYNC service operation to keep the Speed Type table up to date. Any change made to the Speed Type table in the Financials database triggers the Integration Broker update to HCM.

Pages Used to Enter and Review ChartField Combinations

Page Name	Object Name	Navigation	Usage
Load Combination Code Table	RUNCTL_FILEPATH	Set Up HRMS, Common Definitions, ChartField Configuration, Load Combination Code Table, Load Combination Code Table	Run the Load Combination Code process (BUD003) to load the Combination Code table with ChartField combinations already imported into the GL_ACCT_CD_TBL using the HR_ACCT_CD_LOAD service operation.
Combination Code Table	VALID_COMBO_TBL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Table, Combination Code Table	Review all combination codes imported into HRMS and loaded by the Load Combination Code process (BUD003) Manually define and review valid combinations of ChartField values if not importing them.
Combination Code Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Report	Run the Combination Code report (PAY760) to report on the contents of the Valid Combination table (VALID_COMBO_TBL).
SpeedTypes	HMCF_SPEEDTYPE	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Speedtypes, SpeedTypes	Review the Speed Type table maintained from PeopleSoft Financials.

Running the Load Combination Code Process

Access the Load Combination Code Table page.



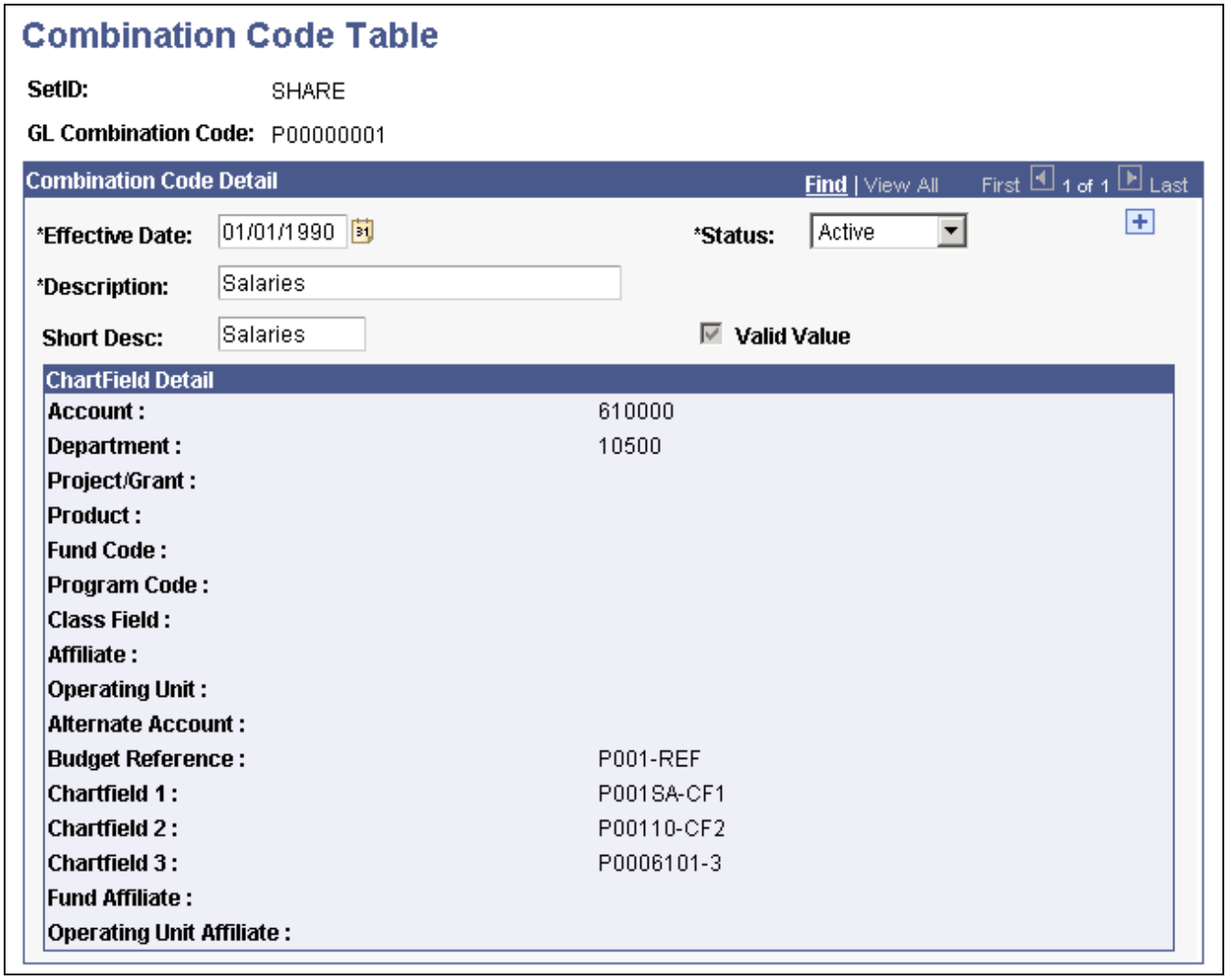
Load Combination Code Table page

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As of Date	Enter the as of date for the ChartField combinations you are importing from PeopleSoft General Ledger.
Interface with GL Release (interface with general ledger release)	Select the general ledger version number of the PeopleSoft General Ledger system with which you are interfacing.
Inactivate Accounts Not Downloaded?	When this option is selected, the system inactivates combinations for which it doesn't find matches in the current fiscal year. When this option is blank, old combinations remain active for the current fiscal year.

Defining Combination Codes

Access the Combination Code Table page.



Combination Code Table page

Note. You cannot change the ChartField values for combination codes imported from Financials, but you can change the description and make it active or inactive.

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GL Combination Code Ener this code on the HRMS pages to use this combination of ChartFields in a transaction.

The system generates the combination code sequentially based on the Installation table's Last Combination Code Assigned field under these conditions:

- The ChartField combination is received from Financials by Integration Broker.
- The Combination Code value is not supplied on the inbound flat file.
- You manually add the ChartField combination and do not pre-assign the Combination Code value.

Valid Value This field is available for entry when entering the ChartField combination for the first time for the setID. Select it if the ChartField combination is valid. If the combination already exists with the same SetID, this field is populated based on the value of the preexisting combination and is unavailable for change.

ChartField Detail

If you're setting up combination codes manually, enter the ChartField value for each ChartField that applies to this ChartField combination.

Reviewing and Maintaining ChartField Transactions

To review and maintain ChartField transactions, use the ChartField Transaction Table component (ACCT_CD_TABLE).

This section provides an overview and discusses how to review and maintain ChartField transactions.

Understanding the ChartField Transactions Table

The system creates a record whenever you use a new combination of ChartField values in an HRMS transaction, whether you select a valid combination code or select a combination of individual ChartField values on the transaction page. It stores that combination in the ChartField Transaction table to maintain a history of ChartField combinations used in transactions.

You can use the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

Note. If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Valid Combination table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so you can track them and reuse them.

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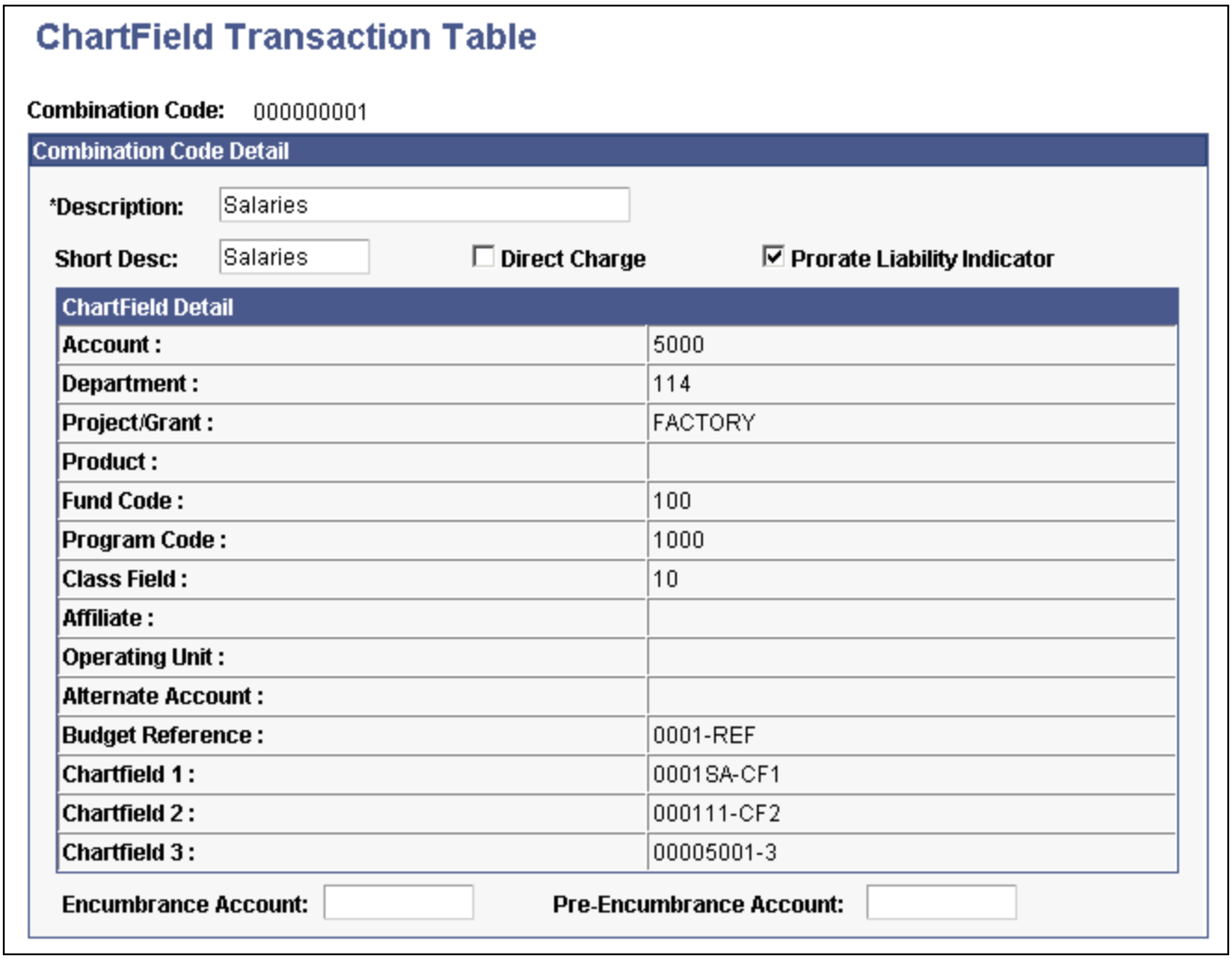
Pages Used to Review and Maintain ChartField Transactions

Page Name	Object Name	Navigation	Usage
ChartField Transaction Table	ACCT_CD_TABLE	• Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Table, ChartField Transaction Table • Set Up HRMS, Product Related, Commitment Accounting, Budget Information, ChartField Transaction Table, ChartField Transaction Table	The system populates the ChartField Transaction Table with ChartField combinations once they've been used in processing. Maintain additional information about combination codes on this page.
ChartField Transaction Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Report	Run the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

Reviewing and Maintaining ChartField Transactions

Access the ChartField Transaction Table page.

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ChartField Transaction Table page

The ChartField information on this page is unavailable for entry, but you can maintain information about the combination.

Combination Code If this is not a valid combination code imported into or created in the Valid Combination table, the system assigns this unique combination of ChartFields a combination code. You can use the combination code on the transaction pages to reuse this particular combination of ChartFields.

Combination Code Detail

Direct Charge Select this check box to indicate whether you'll use this combination code during the Actuals Distribution process. This field is for information only; it has no affect on processing.

Prorate Liability Indicator If you want to prorate liabilities, select this check box.

The system looks for the Prorate Liability Indicator flag when it runs the Actuals GL Interface process. If you select this indicator, employee paid taxes and deductions are prorated back across the earnings expenses.

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Encumbrance Account Enter a combination code to be used as an encumbrance funding source for each Combination Code in the ChartField Transaction table. When the system writes an encumbrance transaction for PeopleSoft General Ledger (using either the Fiscal Year or the Nightly Encumbrance process), it uses the encumbrance combination code specified here instead of the Combination Code.

Pre-Encumbrance Account Enter combination code to be used as a pre-encumbrance funding source for each Combination Code. When the system writes an encumbrance transaction for PeopleSoft General Ledger (using either the Fiscal Year or the Nightly Encumbrance process), it uses the encumbrance combination code specified here instead of the Combination Code.

Editing ChartField Combinations in HRMS Transactions

This section provides an overview of ChartField validation and discusses how to:

- Edit or review ChartField details.
- Search by combination code.
- Search by speed type.

Understanding ChartField Validation

Any HCM transaction page on which you enter a ChartField combination code accesses a common ChartField Details page (HMCF_HRZNTL_CFLD) where you enter or view the ChartField details associated with the combination code. If you enter a new ChartField combination, the system performs a combination code validation process to ensure that the entered combination is valid.

The system uses one of these validation methods:

- If you integrate with PeopleSoft Financials 8.4.01 or higher, the system uses the COMBO_CF_EDIT_REQUEST and COMBO_CF_EDIT_REPLY service operations to validate the combination with the Financials database.
- If you do not integrate with PeopleSoft Financials 8.4.01 or higher and you populated the Valid Combination table (VALID_COMBO_TBL) with valid combinations, the system searches the Valid Combination table to find the ChartField combination that matches the individual ChartField values specified.
- If you do not integrate with PeopleSoft Financials 8.4 or higher and you did not populate the Valid Combination table, the system assumes the combination of ChartFields that you selected is valid and searches the Transaction table to find the match.

  If it finds a match, it uses the corresponding combination code. If it does not find a match, it generates a combination code using the next available number.

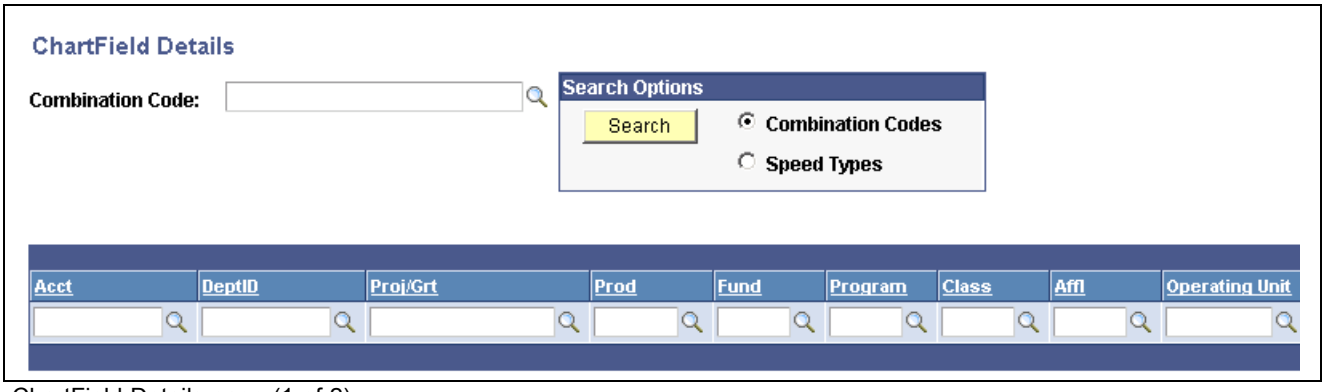
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Pages Used to Edit ChartField Combinations in HRMS Transactions

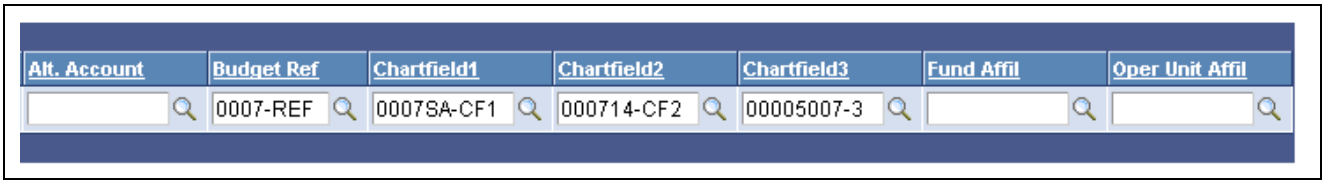
Page Name	Object Name	Navigation	Usage
ChartField Details	HMCF_HRZNTL_CFLD	Click the ChartField Details or Edit ChartFields link or button on HRMS transaction pages.	Enter or review ChartFields or combination codes in PeopleSoft HRMS transactions.
Search Combination Codes	HMCF_VLD_CMBO_SRCH	On the ChartField Details page, select the Combination Codes search option and click the Search button.	Search for ChartFields using valid combination codes.
Search Speed Types	HMCF_SPD_TYP_SRCH	On the ChartField Details page, select the Speed Types search option and click the Search button.	Search for ChartFields using PeopleSoft Financials Speed Types.
Search Combo Codes	HMCF_CMBO_CD_SRCH	On the ChartField Details page, select the ChartField Transactions search option and click the Search button.	Select ChartFields individually or search for valid chartfield combinations already used in transactions.

Editing or Reviewing ChartField Details

Access the ChartField Details page.



ChartField Details page (1 of 2)



ChartField Details page (2 of 2)

Note. This page might have a more specific name, depending upon the transaction page from which you access it.

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If the combination code is already entered on the transaction page, this detail page displays the associated chartfield values. If you are in correction mode or in a new effective dated row on the transaction page, then you can make changes to individual ChartField values and let the system determine if the new combination is valid. Otherwise the page is display only and you can only review the chartfield values.

If there is no combination code entered on the transaction page, all ChartField values are blank on the detail page and you can enter the specific ChartFields required.

Note. Only the ChartFields that are active on the Standard Chartfield Configuration page are visible on this page.

Search Options

Select from the available options to search for an existing ChartField combination. The options available include the following, depending upon the combination code tables that you have set up:

- *Combination Codes*

  This option is available if you populated the Valid Combination table (VALID_COMBO_TBL).

- *Speed Types*

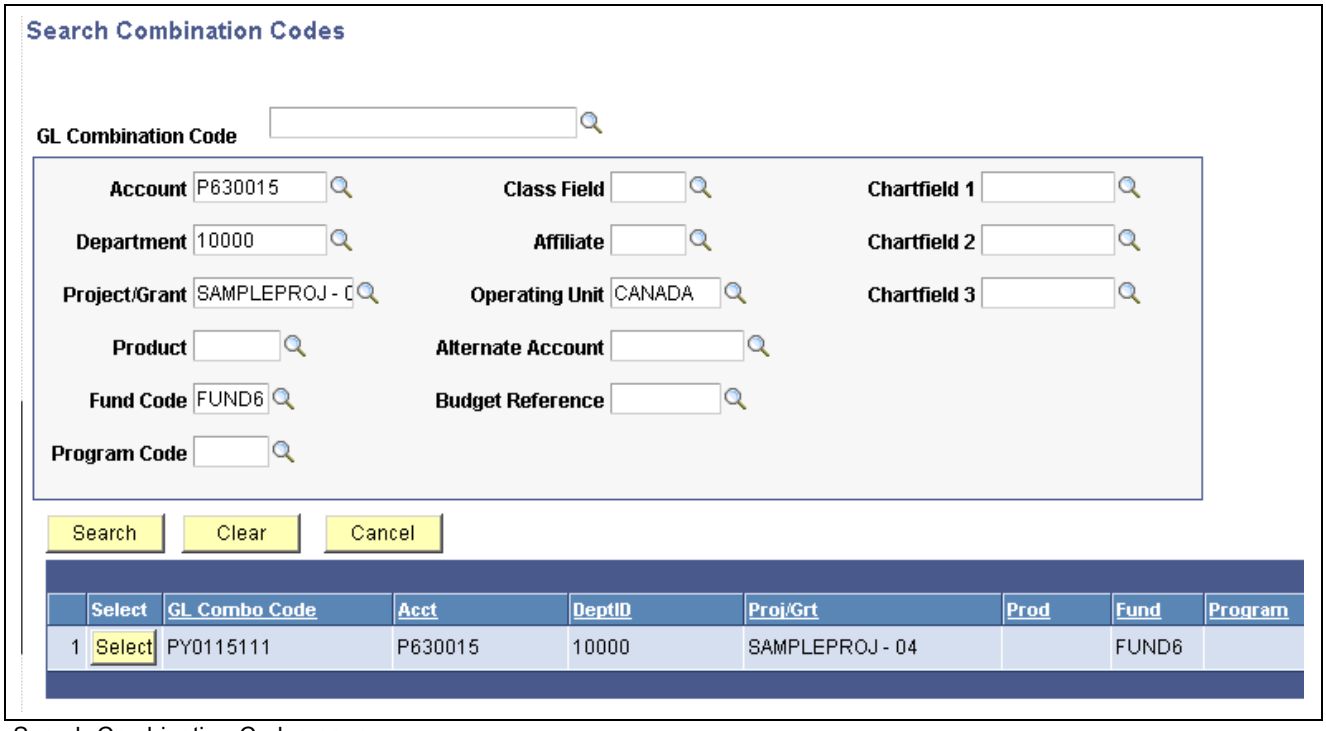
  This option is available if you imported SpeedType values from PeopleSoft General Ledger.

- *ChartField Transactions*

  This option is available if you did not populate the Valid Combination table (VALID_COMBO_TBL) and the system has entered combination codes on the ChartField Transaction table (ACCT_CD_TABLE).

Searching by Combination Code

Access the Search Combination Codes page.



Search Combination Codes page

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To seach for a combination code:

1. Enter individual ChartField values.

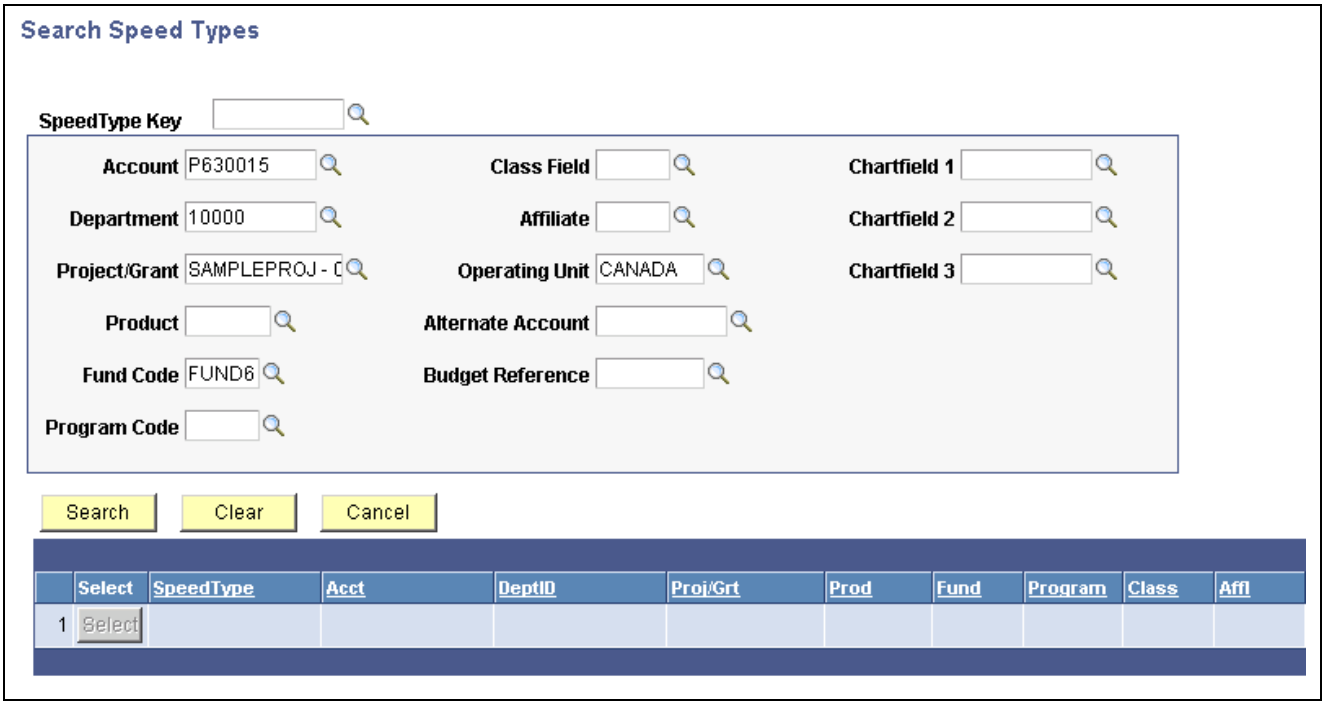
   The system finds all ChartField combination codes that match those ChartField values.

2. Select the combination code that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

Searching by Speed Type

Access the Search Speed Types page.



Search Speed Types page

To seach for a combination code using Speed Type:

1. Enter individual ChartField values.

   The system finds all speed types that match those ChartField values.

2. Select the speed type that you want.

   The system returns you to the ChartField Details page with all individual ChartField values populated.

3. Since this is selected from speed types, you might have to enter additional ChartField values to form a valid ChartField combination.

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CHAPTER 17

Setting Up Local Country Functionality

This chapter provides an overview of local country functionality set up and discusses how to:

- (CHE) Maintain Swiss postal codes.
- (DEU) Set up German industrial inspection codes.
- (ITA) Set up Italian city tables.
- (JPN) Set up Japanese control tables.
- (NLD) Load Dutch postal codes.
- (ESP) Set up Spanish control tables.
- (GBR) Set up national insurance prefixes for the U.K.

Understanding Local Country Functionality Setup

If you're administering a local or multinational workforce, you must set up certain tables that are referenced in the core control tables to support local country requirements. Do this before you set up core control tables, such as for pay groups, or define companies, locations, departments, and job codes.

(CHE) Maintaining Swiss Postal Codes

To maintain Swiss postal codes, use the Load Postal Codes CHE component (POSTAL_LOAD_CHE).

This section provides an overview of Swiss postal code maintenance and discusses how to update Swiss valid addresses.

Understanding Swiss Postal Code Maintenance

To update postal codes:

1. Download the latest update of postal codes from the website of the Swiss Post and note the path to the file in which you save it.
2. Download the latest update of alternate names from the website of the Swiss Post and note the path to the file in which you save it.
3. Use the Load Valid Addresses CHE page to enter the file paths and load the valid addresses and alternate names files to the Valid Addresses table.

The system uses the information on the Valid Addresses table to validate municipalities against the postal code.

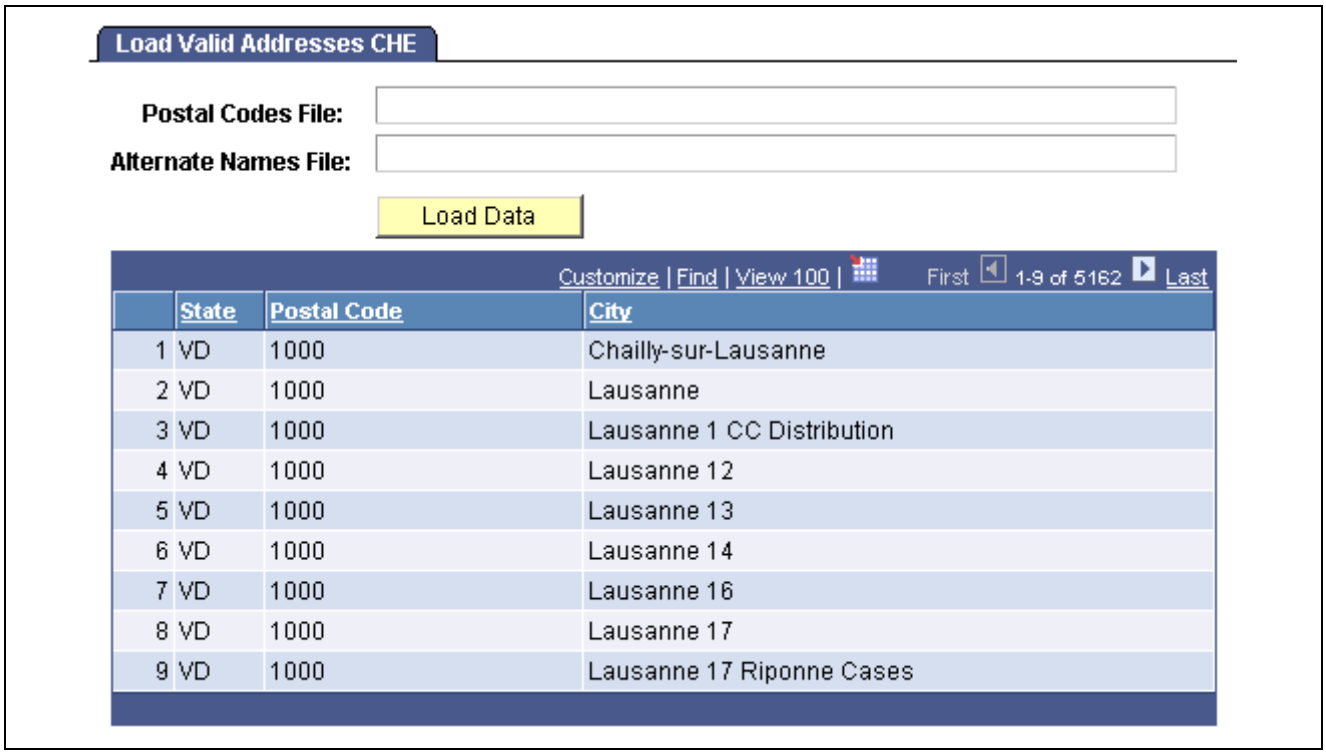
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Page Used to Maintain Swiss Valid Addresses

Page Name	Object Name	Navigation	Usage
Load Valid Addresses CHE	POSTAL_LOAD_CHE	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes CHE	Load Swiss postal code information into the Valid Addresses table.

Updating Swiss Valid Addresses

Access the Load Valid Addresses CHE page.



Load Valid Addresses CHE page

Postal Codes File Enter the complete path to the Postal Code file that you downloaded from the Swiss Post.

Alternate Names file Enter the complete path to the Alternate Names file that you downloaded from the Swiss Post.

Load Data Click to load the postal code data into the Valid Addresses table.

State, Postal Code, and **City** Initially, these fields display the current data from the Valid Addresses table. After you run the load process, the updated information appears.

(DEU) Setting Up the German Control Table

To set up German industrial inspection codes, use the Industrial Inspection component (IDUST_INSPEC_GER).

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This section discusses how to set up German industrial inspections codes.

Page Used to Set Up German Industrial Inspection Codes

Page Name	Object Name	Navigation	Usage
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization.

Setting Up German Industrial Inspection Codes

Access the Industrial Inspection page.

Industrial inspection codes aren't effective-dated and have no status.

City Specify the city that is associated with this industrial inspection code according to the German *Berufsgenossenschaft.*

(ITA) Setting Up Italian City Codes

To set up Italian city codes, use the Load Cities ITA component (RUNCTL_CITYUPDATE).

This section lists the page used to load Italian city data.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables"

Page Used to Load Italian City Data

Page Name	Object Name	Navigation	Usage
ITA City Update	RUNCTL_CITYUPDATE	Set Up HRMS, Install, Product and Country Specific, Load Cities ITA, ITA City Update	After downloading the city code data file from the Ministero delle Finanze, run the ITA City Update process to update Italian city data.

(JPN) Setting Up Japanese Control Tables

To set up Japanese control tables, use the Postal Code Table JPN component (POSTAL_CODE_TBL), the Education Level component (EDLVLAG_TBL_JPN), and the Calculation Rules Settings component (SETUP_SALCOMP_JPN).

This section provides an overview of education level age and discusses how to:

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- Set up the Education Level Age table.
- Establish Japanese salary component settings.
- Set up the Postal Code table.
- Maintain the Postal Code table.

Understanding Education Level Ages

The Education Level Age Table enables you to link highest education levels—already in the system—to what we call the Education Level Age Basis (as of hire). The system uses the Education Level Age Basis in the calculation of a worker's Education Level - Adjusted Birth Date, which is in turn used in the calculation of a worker's Education Level Age at any point in time. The system uses a worker's Education Level Age in education level age-related pay calculations. Education level age-related pay is a form of seniority pay.

Calculating a Worker's Education Level Age

This section discusses how the system uses the Education Level Age Basis in the eventual determination of a worker's education age-related pay. This section uses many acronyms, so here's a quick reference:

Acronym	Meaning
ELABa	Education Level Age Basis (as of Hire)
AELABa	Adjusted Education Level Age Basis (as of Hire)
ELABi	Education Level - Adjusted Birth Date
SCB	Standard Calculation Birthday
CSD	Company Seniority Date
ELA	Education Level Age

Company A has set the Education Level Age Basis (ELABa) for four years of college at 22. The company also set the Standard Calculation Birthday (SCB)—the anniversary for incrementing years of service—to April 1.

Hiroshi was born on February 6, 1972 and graduated after four years of college on March 23, 1994 at age 22. He then spent two years travelling around the world. Company A hired him on June 1, 1996. He is not hired on April 1 because he didn't get back from his travels until May 1996. At the time he is hired, he is 24 years old.

For the purpose of calculating Hiroshi's education age-related pay, each year the system needs to calculate Hiroshi's Education Level Age. It will use his Education Level - Adjusted Birth Date to do this.

In calculating a worker's ELABi, the system uses the ELABa, the Company Seniority Date (CSD), and the company's SCB.

The relationship between the worker's CSD and the company's SCB may result in an adjustment to the worker's ELABa, called the Adjusted Education Level Age Basis or AELABa. If the month/day of a worker's hire date (as determined by the CSD field) is after the company's SCB (that is, CSD is greater than SCB), the worker's ELABa is decreased by 1.

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In Hiroshi's case, because his June 1 month/day hire date (also his CSD) falls after the company's April 1 SCB, his ELABa is decreased by 1. If he had been hired on or before April 1, there would be no adjustment to his ELABa.

This is how to get Hiroshi's AELABa:

- Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
- Using this -1 you get:

  ELABa – 1 = AELABa

  Which in Hiroshi's case is:

  22 – 1 = 21

The system now uses the AELABa (21) to determine Hiroshi's ELABi year.

This formula is:

Year of Hire – AELABa = ELABi (year)

or

1996 – 21 = 1975

So for education age-related pay calculations, Hiroshi's ELABi is April 1, 1975, the combination of the company's SCB month/day and Hiroshi's ELABi year (remember, he was born February 6, 1972).

Now we can look at how important that ELABi is.

One year later, 1997, the system needs to know Hiroshi's ELA. This is the calculation:

SCB (including Year of Calculation) – ELABi = ELA

or

April 1, 1997 – April 1, 1975 = 22

This is the same ELA as a graduate who started with the company immediately after college. This set of calculations has, then, effectively adjusted Hiroshi's ELA, upon which education age-related pay is based, to take into account the two years that he spent traveling and the fact that he started work after the company's SCB.

Note. If your company considers that the lapse of two months from April to June is not significant, you can adjust Hiroshi's ELABi from April 1, 1975 to April 1, 1974. Then, for the same 1997 calculation, Hiroshi's ELA is 23 (April 1, 1997 to April 1, 1974), the same as a new graduate who has worked for one year.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Administering Seniority Pay"

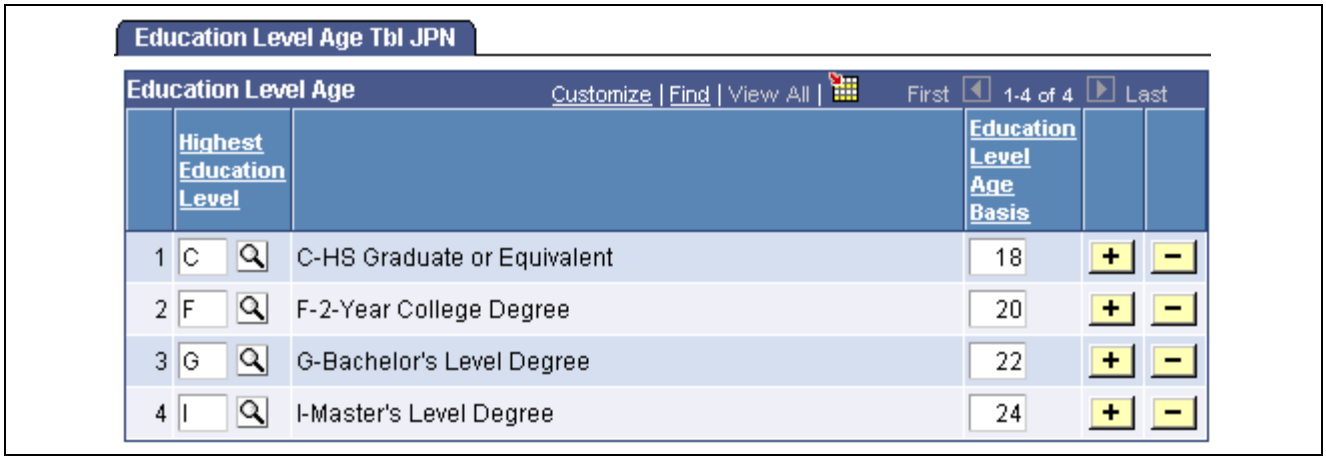
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Pages Used to Set Up Japanese Control Tables

Page Name	Object Name	Navigation	Usage
Education Level Age Tbl JPN (education level age table Japan)	EDLVLAG_TBL_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Education Level, Education Level Age Tbl JPN	Set up your company's education level age bases.
Calculation Rule Settings JPN	SETUP_SALCOMP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Calculation Rule Settings, Calculation Rule Settings JPN	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.
Load Postal Codes JPN	RUNCTL_POSTAL_JPN	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes JPN	Import Postal Code CSV files provided by Japan Post.
Postal Code Table	POSTAL_TBL_JPN	Set Up HRMS, Install, Product and Country Specific, Postal Codes JPN, Postal Code Table	Enter information to maintain Japanese postal codes or add data that did not import as expected.

Setting Up the Education Level Age Table

Access the Education Level Age Tbl JPN page.



Education Level Age Tbl JPN page

The system uses these age bases in the calculation of a worker's Education Level-Adjusted Birth Date, which is, in turn, used in the calculation of the worker's Education Level Age and education level age-related pay.

Education Level Age Basis This is the value you associate with the Highest Education Level that you selected in the first field. The system uses this in calculating a worker's Education Level-Adjusted Birth Date, which is used in the calculation of a worker's education level age.

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Note. The Highest Education Level values are translate values from the Highest Education Level table. You access the table to put workers' highest education levels on their Personal History page in Personal Information. If you change any of these translate values (inactivate them, for example), you will need to change any worker records that were using the value to use another value. If you add a translate value and you want to associate an education level age basis with it, you must also add it to this page and allocate an Education Level Age Basis to keep it synchronized with the Highest Education Level table. If you don't add it, and you use the new Highest Education Level value—in Personal Data, Personal Profile, for example—the system will not be able to calculate the worker's Education Level - Adjusted Birth Date (it will remain blank). Consequently, the system will not be able to calculate the worker's Education Level Age.

Setting Up the Postal Code Table

Access the Load Postal Codes JPN page.



Load Postal Codes JPN page

Note. Before using this page, you must download and extract the CSV file from Japan Post's website and post it to a FTP server located at your site. The CSV file must be encoded in Shift-JIS character set. You must define URL data in the PeopleTools Utilities menu before using this Load Postal Code process.

See Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Specifying the Address Format for a Country, page 139.

URL Identifier Select the FTP Uniform Resource Locator (URL) where the CSV file that contains the postal codes is located.

All Prefectures Select this option to load postal data for all prefectures.

Note. Because there are more than 120,000 postal codes rows, consider batch performance when importing all rows.

Selected Prefecture Select this option to load postal codes for a specific prefecture.

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Load Results

If the length of Address1 or Address AC1 is more than 55 characters, the fields are left blank. Also, if the length of Address1 or Address AC1 is too long and divided into multiple rows, only the first row is imported and the rest of the rows are printed on the log reports as unimported rows.

If you want to remove “Not listed as below” as the Address 1 and AC Address 1, register these text strings in the Strings Table; the Program ID is HGJPPSTL. Set the text that you want to remove to *String Text* fields.

All rows might not appear when there are multiple rows for a single postal code with the same State, City, Address1, but different Address1_AC because of different pronunciation.

If expected data is not loaded, add it or edit it on the Postal Code JPN page.

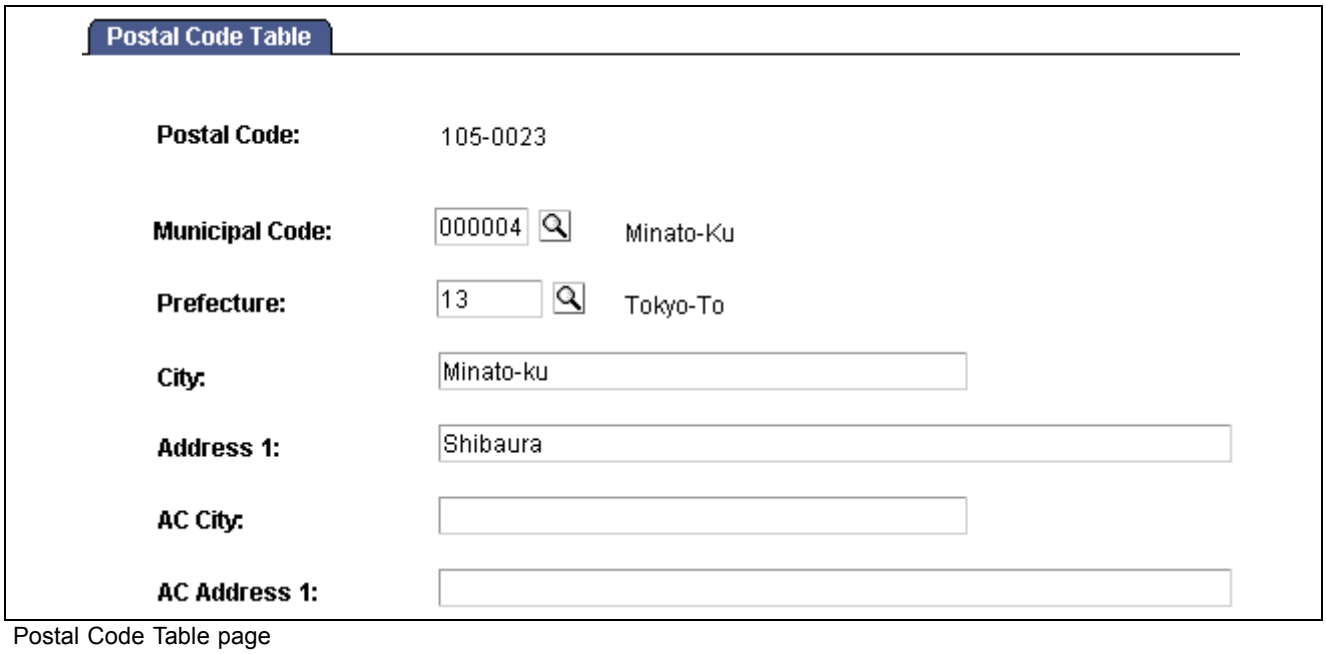
Postal Code Load Process Log Reports

After completion of this process, the system generates a process log report that lists the number of rows imported, the number of rows not imported, and a detailed reason for the latter. Possible reasons for not importing rows include:

- The import file was not found.
- The file is formatted incorrectly.
- The import file is for a different prefecture from the one specified in the Selected Prefecture field.

Maintaining the Postal Code Table

Access the Postal Code Table page.



Postal Code Table page

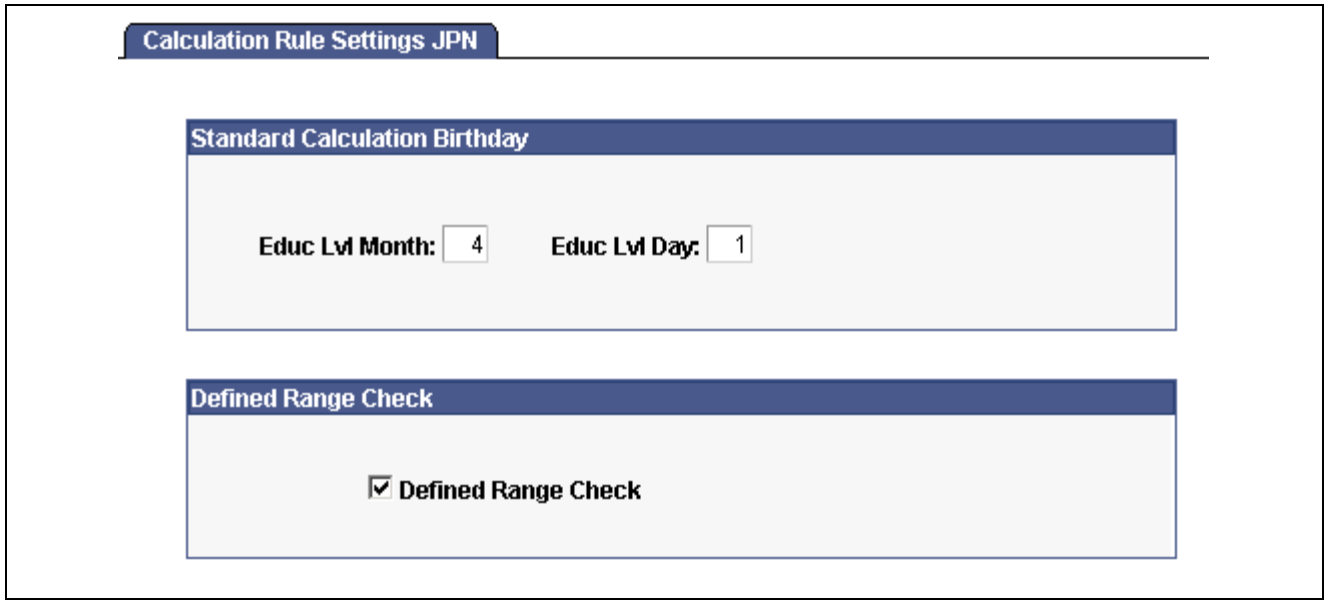
Municipal Code Enter the code for the Japanese municipality that this postal code belongs to.

Prefecture Select the prefecture for this postal code from the list.

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Establishing Japanese Salary Component Settings

Access the Calculation Rule Settings JPN page.



Calculation Rule Settings JPN page

Standard Calculation Birthday

This is the single date, or anniversary, on which your workers' education level ages increment by one.

Educ Lvl Month (education level month) — Enter the month, where January = 1, February = 2 and so on. This sets the month of your organization's Standard Calculation Birthday, the date on which all workers' company years of seniority increment by one year. It is used in the calculation of each worker's Education Level Age.

Educ Lvl Day (education level day) — This is the day of the month of the Standard Calculation Birthday. For example, Month 4, Day 1 sets the Standard Calculation Birthday as April 1.

Defined Range Check — Select to ensure the system checks that any record added to a Job Data - Compensation page with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table.

The check applies to both a manually added record and an automatically added record.

Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on a worker's Compensation page.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Compensation Information

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(NLD) Loading Dutch Postal Codes

To load Dutch postal codes, use the Postal Codes NLD component (RUN_POSTAL_NLD).

This section discusses how to import postal codes into the Postal Code table.

Page Used to Load Postal Codes

Page Name	Object Name	Navigation	Usage
Load Postal Codes NLD	RUNCTL_POSTAL_NLD	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes NLD	Import postal codes into the NLD Postal Code table in your human resources system.

Importing Postal Codes Into the Postal Code Table

Access the Load Postal Codes NLD page.



Load Postal Codes NLD page

The Dutch postal authority provides a postal code table to which you can subscribe. The Load Postal Code Table process loads all of the postal codes provided in a source file by the Dutch Post (TPG Post) into your human resources system.

Report Request Parameters

Initial Postal Code Loadfile Enter the initial postal code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.

Update Postal Code File Enter the updated postal code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.

Run Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

(ESP) Setting Up Spanish Control Tables

To set up Spanish control tables, use the Insurance Company Table component (INSUR_COMPANY_ESP) and the Industry Activity Table component (INDUSTRY_ACT_ESP).

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If you do business in Spain, enter the information that is required by the Spanish government concerning your organization's primary industry activity and the insurance company that you use for workplace accidents or illnesses.

The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the work center number information to report worker information to the Spanish Social Security National Institute *(Instituto Nacional de la Seguridad Social)*.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

Pages Used to Set Up Spanish Control Tables

Page Name	Object Name	Navigation	Usage
Insurance Company	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company	Enter information about your organization's insurance company.
Industry Activity	INDSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity	Define the codes that are needed by your organization.

(GBR) Setting Up National Insurance Prefixes for the U.K.

This section provides an overview of national insurance prefixes and discusses how to:

- Review national insurance prefixes.
- Update national insurance prefixes.

Understanding National Insurance Prefixes

Starting in the tax year 2004/2005, the Inland Revenue requires that employers' year-end reporting contains valid national insurance prefixes only. Submissions with invalid national insurance prefixes will be rejected.

Use the delivered setup table to define valid national insurance prefixes. When you enter a person's national insurance code on the Biographical Details page, the system validates the prefix against this national insurance prefix table.

The format of national insurance numbers is defined on the National ID Type Table page, which is described in this PeopleBook.

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See Also

Chapter 12, "Setting Up Personal Information Foundation Tables," Defining National ID Types, page 282

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data

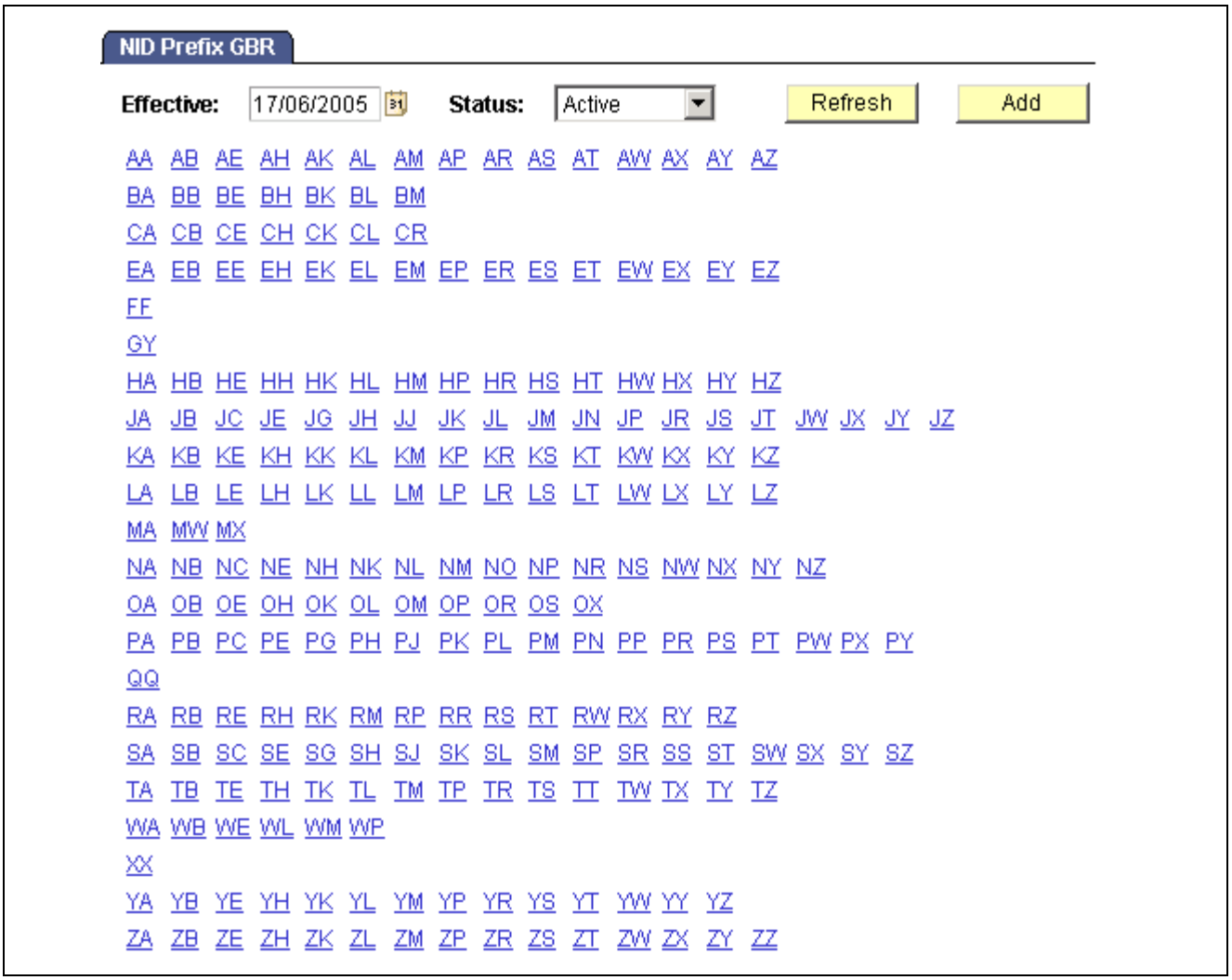
Pages Used to Set Up National Insurance Prefixes

Page Name	Object Name	Navigation	Usage
NID Prefix GBR	NID_PREFIX_GBR	Set Up HRMS, Install, Product and Country Specific, NID Prefix GBR	View the existing NID prefixes.
NID Prefix Details	NID_PR_GBR_SEC	Click a NI prefix link or click the Add button on the NID Prefix GBR page.	Set up a new NID prefix or change the status of an existing prefix.

Reviewing National Insurance Prefixes

Access the NID Prefix GBR page.

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NID Prefix GBR page

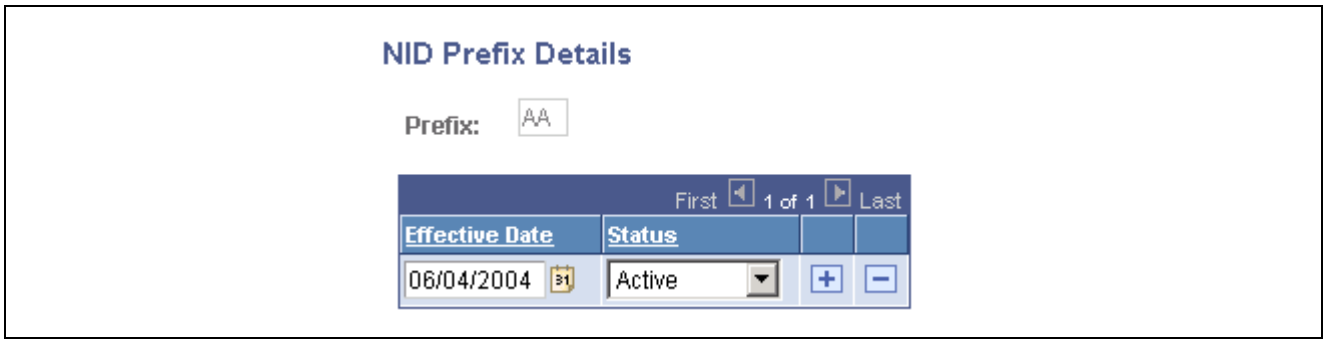
By default, this page lists the NID prefixes that are active as of the current date. Click the NID prefix link to view and update the effective date and status of the selected NID prefix.

Effective and **Status**	To display NID prefixes that are active as of a different date or to display NID prefixes with a different status, update the Effective field and/or the Status field and click the Refresh button
Refresh	Click to refresh the page. Use this button when you change the Effective or Status fields.
Add	Click to add a new NI prefix. The NID Prefix Details page appears.

Updating National Insurance Prefixes

Access the NID Prefix Details page.

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NID Prefix Details page

Use this page to add a new NID prefix or change the status of an existing NID prefix. To change existing prefixes, add a new row.

Select the date that the prefix becomes *Active* or *Inactive* and select the status in the Status field.

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CHAPTER 18

Setting Up and Working with Market Pay

This chapter gives an overview of the market pay and discusses how to:

- Set up geographical regions and the market pay matrix.
- Map and load data into the matrix.

Understanding Market Pay

This section discusses:

- Market pay functionality.
- The market pay process flow.

Market Pay Functionality

Market Pay functionality in PeopleSoft Enterprise Human Resources assists you in using salary survey data as a guide for awarding competitive compensation to your workers. Market pay is a range of compensation information, including the different elements of compensation such as base, variable, and total compensation which may vary by geography. With PeopleSoft Market Pay functionality, you can define market pay by geography.

When you use the market pay functionality, you can:

- Define geographic areas to relate finalized market data to workers.

  You can further distinguish geography by country, state, province, and city.
- Create a market pay matrix and associate it with one or multiple job codes.
- Upload data from existing salary survey tables into the market pay tables, which preserves the existing functionality.
- Import salary survey data from PeopleSoft Enterprise Workforce Rewards if your organization licenses that application.
- Store conclusion market data in the form of a matrix.

The Market Pay Process Flow

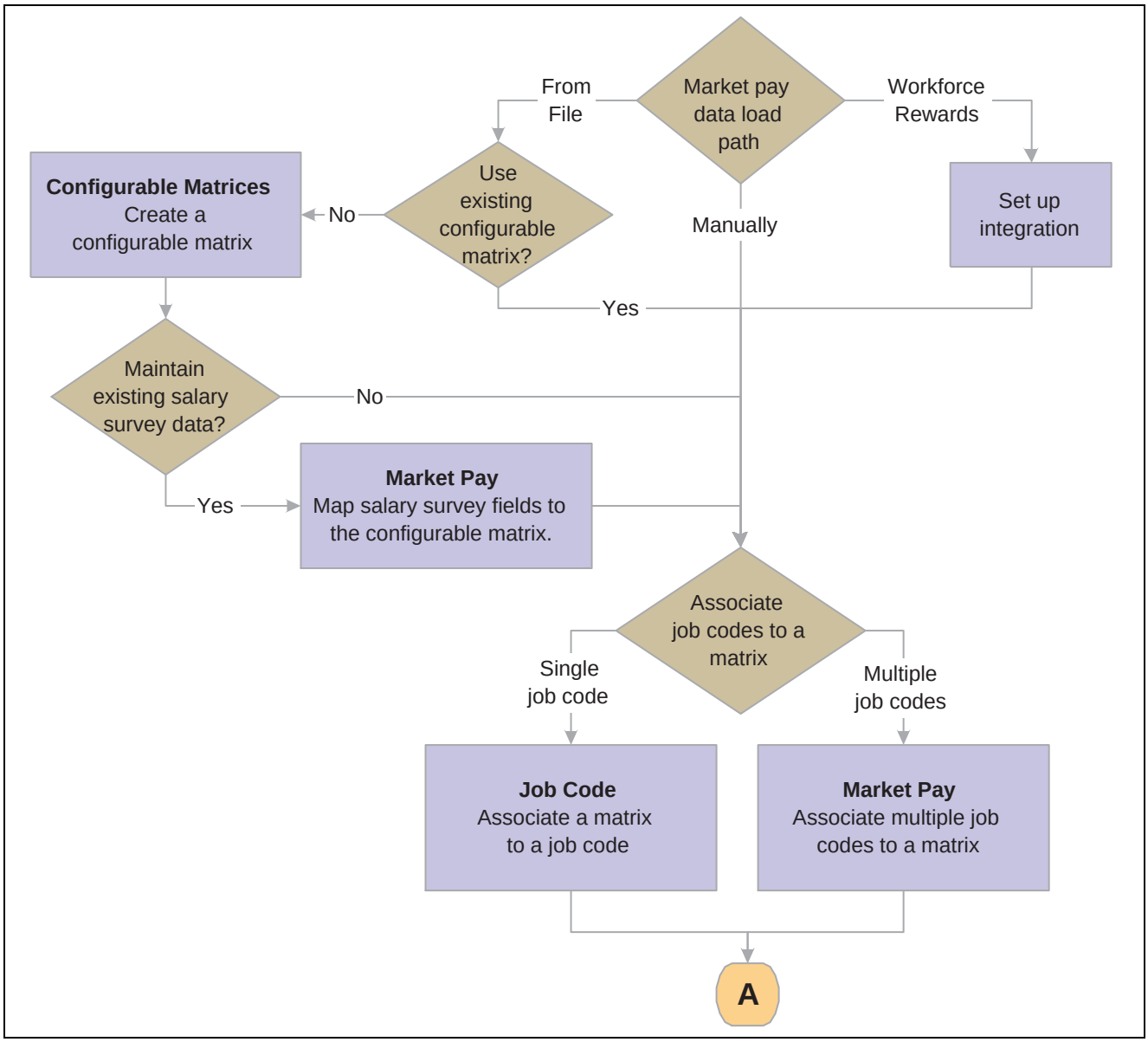
Follow these steps to set up the market pay functionality:

1. Define geographical areas.
2. Select an existing configurable market pay matrix, or create a new one.

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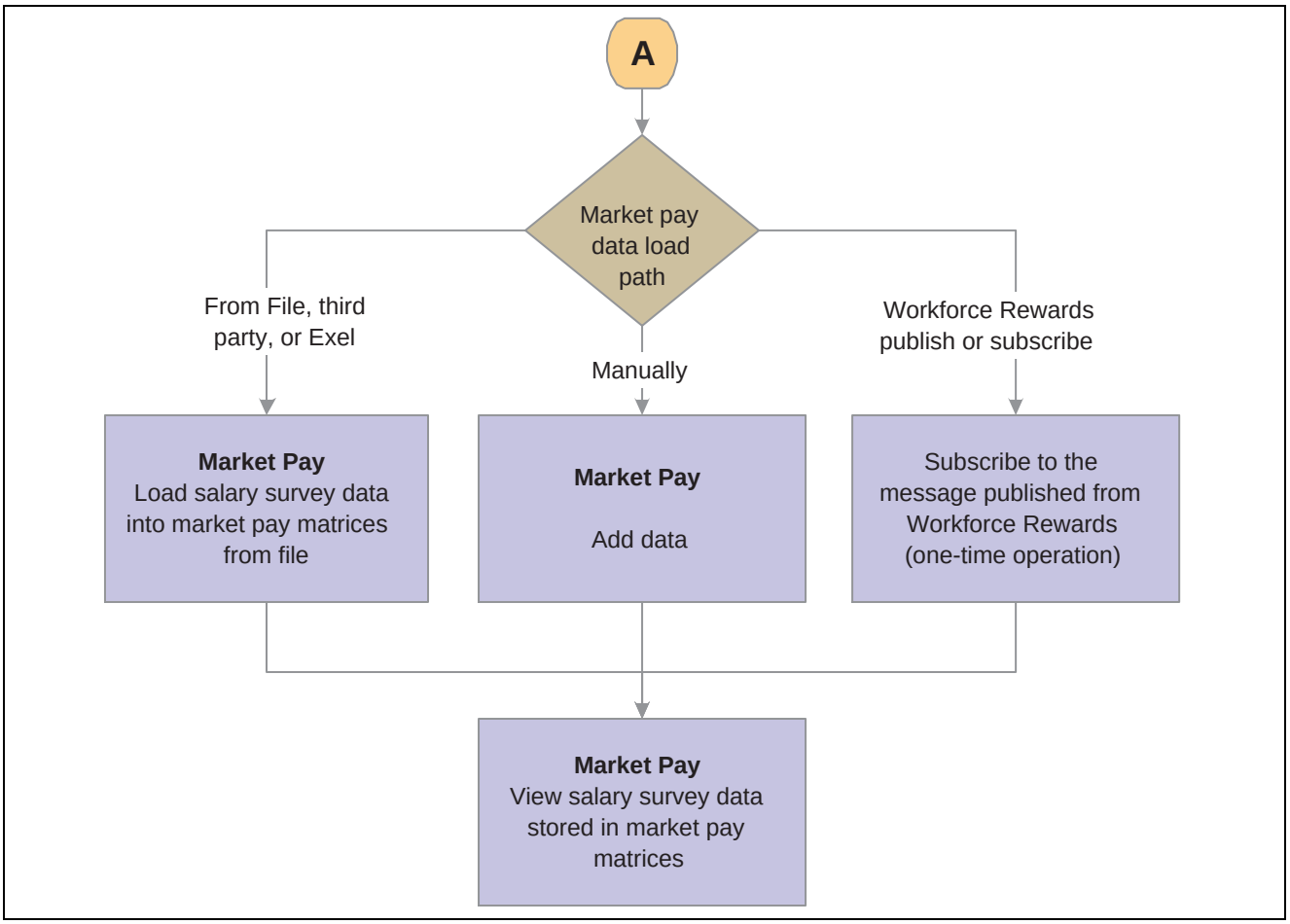
3. (Optional) Map existing salary survey data fields to a configurable matrix definition.
4. Associate a market pay matrix to job codes.
5. Load market pay data by one of three methods:
   - Load data from file using an automated process.
   - (Workforce Rewards users only): Subscribe to message published from Workforce Rewards.
     Set up Integration Broker messaging to subscribe to the message published by Workforce Rewards.
   - Manually enter data.
6. View market pay data online by job code.

These diagrams illustrate the market pay process flow.



Creating a configurable matrix and associating job codes

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Loading data into the market pay matrix

Prerequisites

These tasks are prerequisites to setting up and using market pay matrices:

1. Create job codes for jobs in your company.

   See Chapter 13, “Setting Up Jobs,” page 293.

2. Assign job codes to workers during the hiring process.

   See *PeopleSoft Enterprise Human Resources PeopleBook: Administer Workforce*

3. Conduct salary surveys and analyze salary data.
4. Set up the integration with Workforce Rewards if you plan to import salary data from that application using the COMP_MKT_RATE_SYNC Integration Broker message and service operation.

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Setting Up Geographical Areas and Market Pay Matrices

To set up geographical areas and matrices, use the Define Geographical Areas (GEOGRAPHY_TBL) and Define Matrices (WCS_LK_TBL_DEFN) components.

This section provides an overview and discusses how to:

- Define geographical areas for market pay matrices.
- Set up a market pay matrix definition.
- Define inputs for market pay surveys.
- Define outputs for market pay surveys.
- Specify search keys.
- View or enter output data content.
- View matrix results.

Understanding Market Pay Matrices

PeopleSoft delivers these matrices:

- MARKET_PAY
- WFR_SURVEY_DATA

  The system uses this matrix if you import salary data from the Workforce Rewards application.

You can set up additional configurable matrices to include market pay survey data.

Note. If you have maintained survey matches in PeopleSoft, you can continue to do so by selecting the delivered Market Pay matrix or by creating a new matrix with fields such as Survey Provider and Survey Job Code. These fields enable you to create ad hoc survey participation reports at any time. You create the reports based on the requirements of your survey providers.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices"

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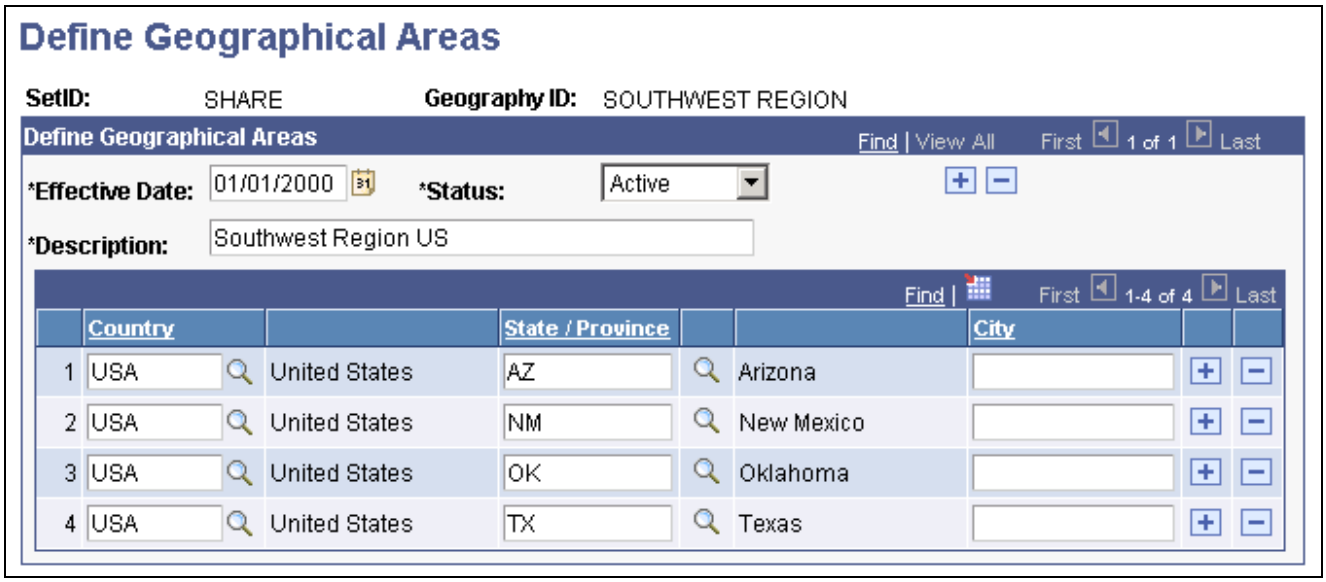
Pages Used to Set Up Geographical Areas and Market Pay Matrices

Page Name	Object Name	Navigation	Usage
Define Geographical Areas	GEOGRAPHY_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Geographical Areas	Define geographical areas by city, state, province, and country. Use these areas to organize market pay data.
Matrix Definition	WCS_LK_TBL_DEFN	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition	Set up a market pay matrix definition.
Inputs	WCS_LK_TBL_INPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, Inputs	Define inputs for market pay surveys.
Outputs	WCS_LK_TBL_OUTPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, Outputs	Define outputs for market pay surveys.
Search Keys	WCS_LK_TBL_KEYS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, Search Keys	Specify the search keys to be used to match worker data used in market pay surveys.
Load Configurable Matrix Keys	WCS_LK_TBL_KEY_SEC	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, Search Keys Click the Load Values from Prompt link.	Automatically load search keys for specific sources using a prompt table.
Data Content	WCS_LK_TBL_DATA	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, Data Content	View or enter values for the output data.
View	WCS_LK_TBL_VIEW	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition, View	View the matrix as of the *last* saved version.

Defining Geographical Areas for Market Pay Matrices

Access the Define Geographical Areas page.

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Define Geographical Areas page

You can enter a geography as broad as an individual country, or you may target a specific country, state, province, or city. You can have one or more rows of country, state, province, or city data. However, you cannot list the same combination of country, state, province, or city within the same geographical area.

Warning! Use care when listing the same combination of country, state, province, or city in different geographies, as this may result in conflicting information when combined with worker data.

Effective Date You may change geographic definitions.

Status Select *Active* or *Inactive*.

Description Enter your company-defined name.

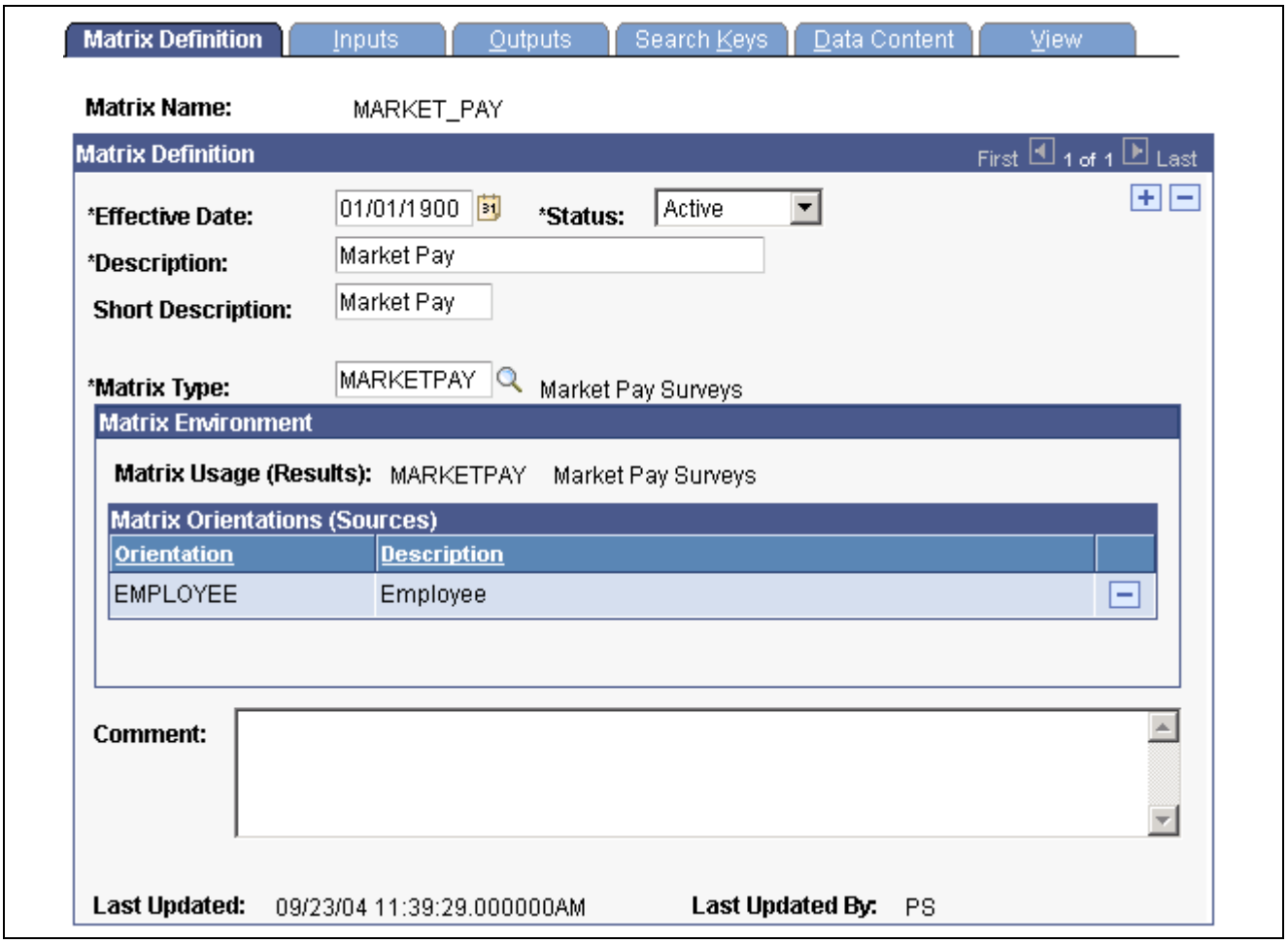
Country and **State/Province** Select a value from the available listing.

City Enter the name of the specific city. The spelling is not validated so you must enter the name with capitalization and punctuation.

Setting Up a Market Pay Matrix Definition

Access the Matrix Definition page.

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Matrix Definition page

Status Select *Active.* The default value for all configurable matrices is *Inactive*. You must change the status to Active in order to use the matrix.

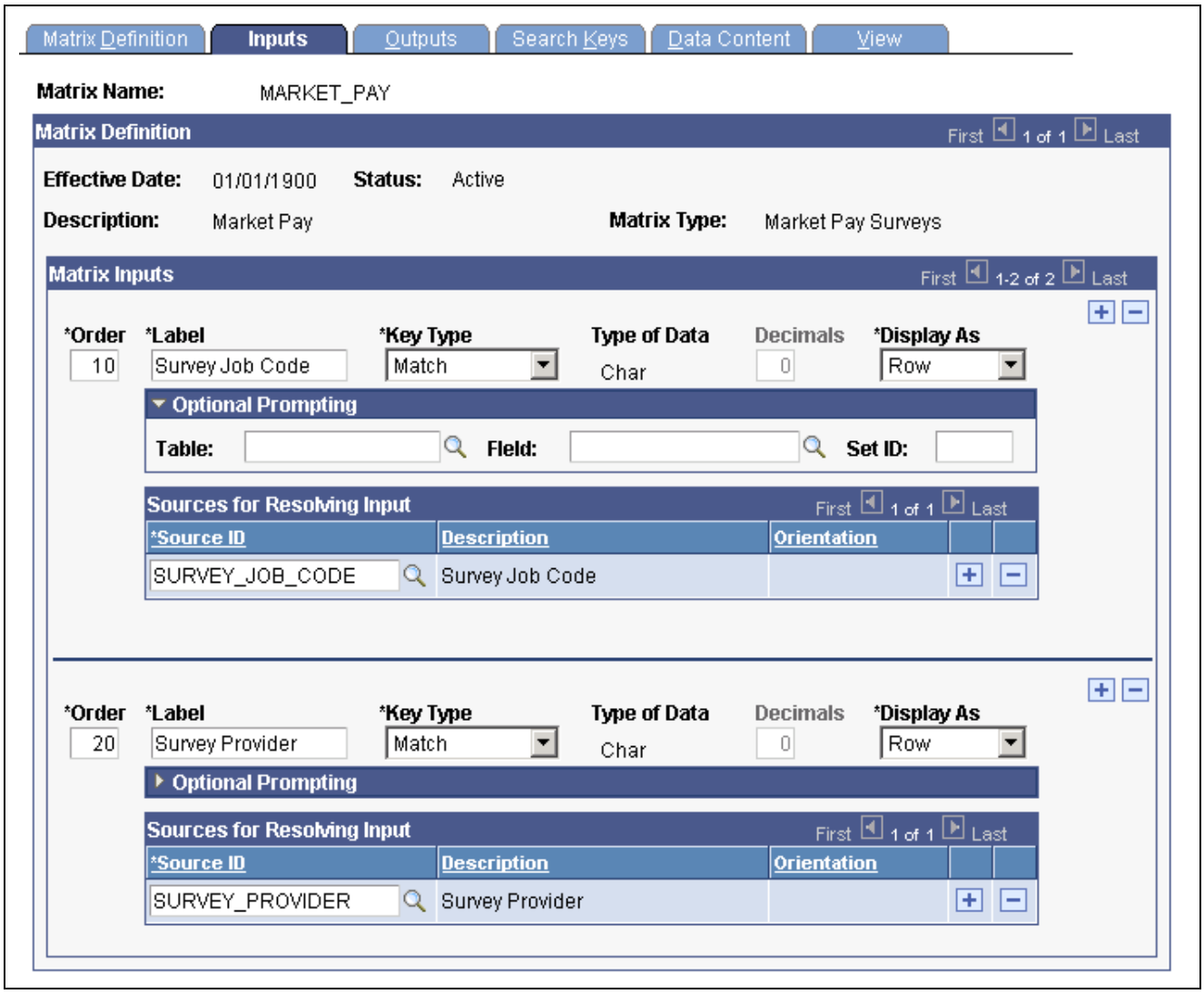
Effective Date Enter a date that is equal to or less than the date you want to link it to one or more job codes.

Matrix Type Select *MARKETPAY*.

Defining Inputs for Market Pay Surveys

Access the Inputs page.

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Inputs page

Sources for Resolving Input

Source ID Select the source for the market pay data. The maximum number of inputs for each matrix is 15. Common types of inputs include:

- Geographical Area
- Survey Provider
- Survey Job Code

Optional Prompting

If you specify GEOGAREA as the source ID, you can enter prompt values in this group box. Enter GEOGRAPHY_TBL as the table and GEOGRAPHY_ID as the field. There is no automatic validation of key values for geographical areas.

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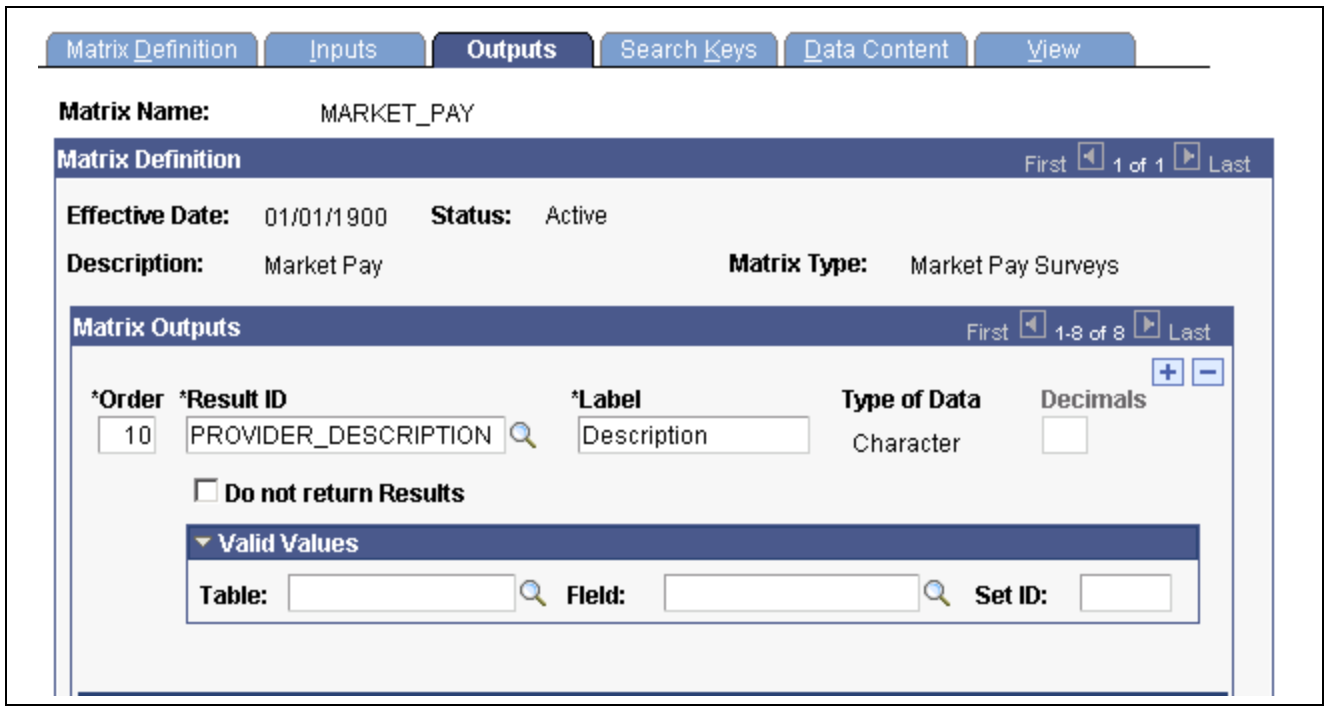
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Predefined Source IDs and Result IDs for Configurable Matrices"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices," Defining Sources Based on Geographical Areas

Defining Outputs for Market Pay Surveys

Access the Outputs page.



Outputs page

Result ID

Select an output for the market pay matrix. Typical outputs include currency, base, variable, and total compensation. You can have a maximum of 30 outputs for each matrix.

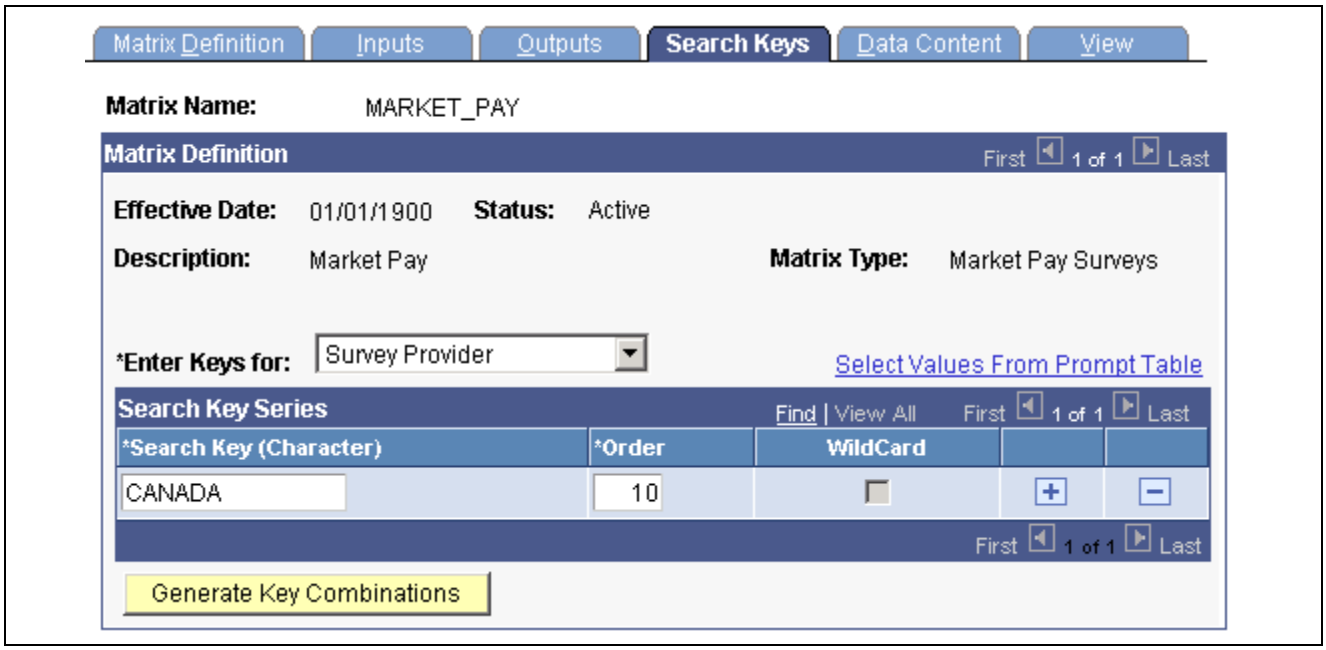
These system-delivered values have default names, however, you can edit them to the label that best suits your business.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Predefined Source IDs and Result IDs for Configurable Matrices".

Specifying Search Keys

Access the Search Keys page.

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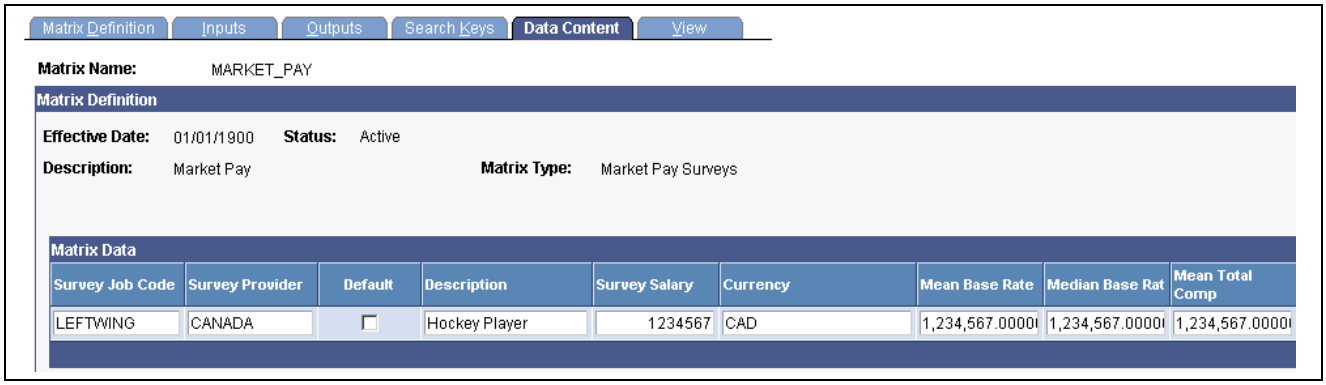
Search Keys page

Use this page to enter the key values against which worker data is matched. Suitable search keys for a market pay matrix are *Geographical Area* or *Survey Provider*.

Note. You can create a matrix without specifying any search keys and output data values. For example, you might want to define a template for a matrix and then load values from other sources such as a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you receive a warning.

Viewing or Entering Output Data Content

Access the Data Content page.



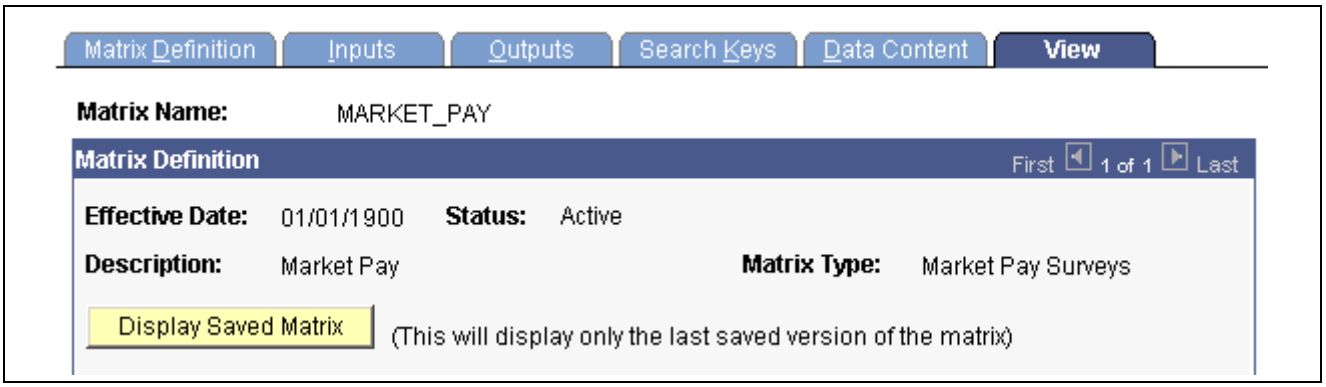
Data Content page

Use this page to view input and output fields. You may leave the data values blank for the loading of market pay data from a file or Workforce Rewards. You may also enter the data manually.

Viewing Matrix Results

Access the View page.

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View page

After you have entered all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results generated are from the *last saved* version of the matrix.

Important! This page displays only the *last saved* version of the matrix.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices".

Mapping Data and Loading the Matrix

To map market pay data and load the matrix, use the Define Salary Survey Mapping (SP_SURV_MAP_TBL), Associate Market Pay to Job Codes (SP_SAL_SURV_TBL), Load Market Pay Data From File (SP_SURVLOAD_TBL) and Report Market Pay by Job Code (SP_MPAY_RPT_TBL) components.

This section discusses how to:

- Map salary survey data.
- Associate market pay data to job codes.
- Associate market pay data to a single job code.
- Load market pay data from a file.
- Load market pay data from Workforce Rewards.
- Load market pay data manually.
- Report market pay data by job code.

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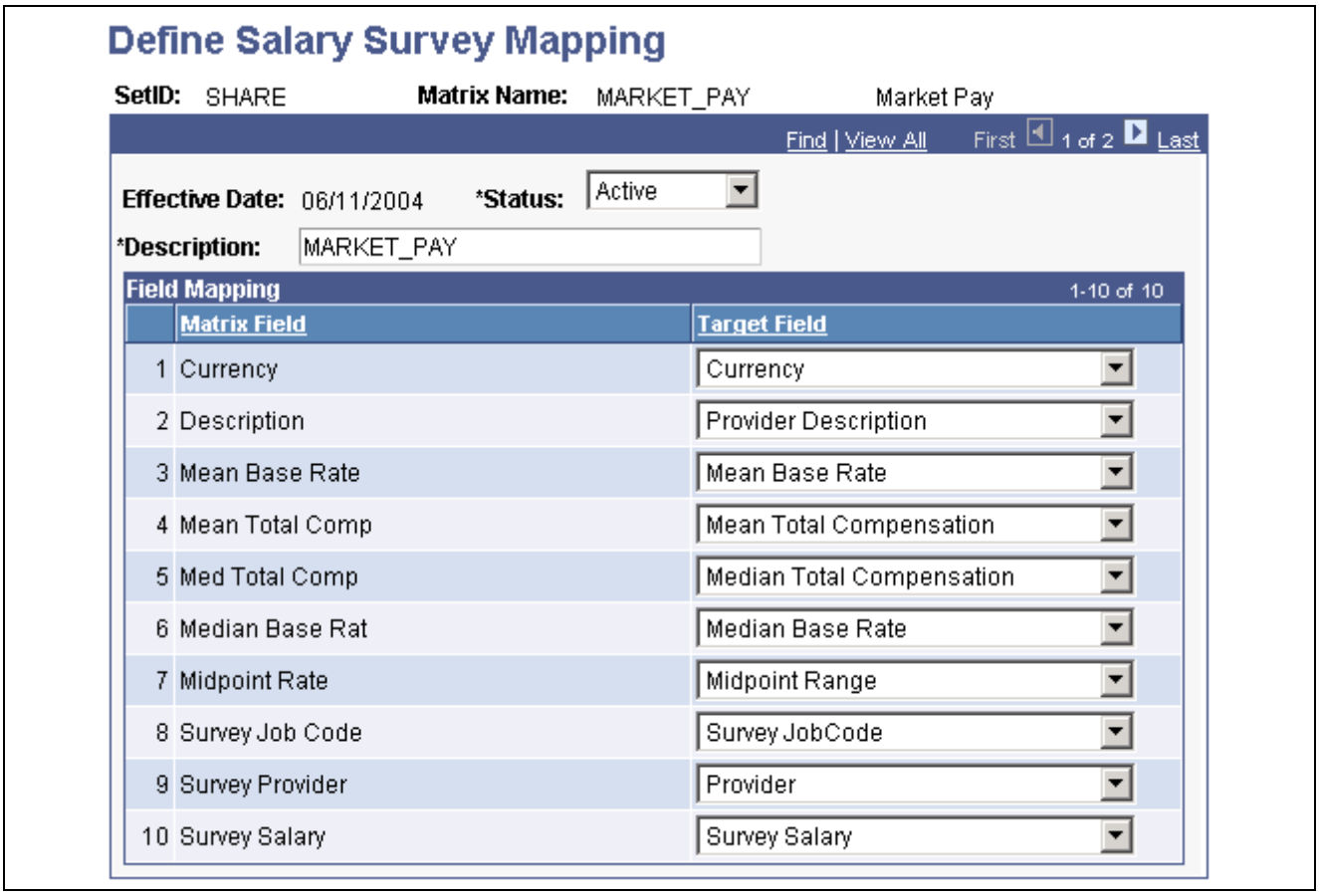
Pages Used to Map Data and Load the Matrix

Page Name	Object Name	Navigation	Usage
Define Salary Survey Mapping	SP_SURV_MAP_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Salary Survey Mapping	Map market pay matrix fields to existing salary survey fields.
Associate Market Pay to Job Codes	SP_SAL_SURV_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Codes	Associate market pay matrices to specific job codes.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code using the Job Code table.
Load Market Pay Data From File	SP_SURVLOAD_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Load Market Pay Data From File	Load market pay data from files to overwrite existing data or add new data.
Report Market Pay by Job Code	SP_MPAY_RPT_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Report Market Pay Data by Job Code	This effective-dated report displays all the market pay definitions ever associated with a particular job code.

Mapping Salary Survey Data

Access the Define Salary Survey Mapping page.

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Define Salary Survey Mapping page

Note. The MARKET_PAY and WFR_SURVEY_DATA matrices are delivered with the system. You can also define configurable matrices to include market pay survey data.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Defining and Maintaining Configurable Matrices.

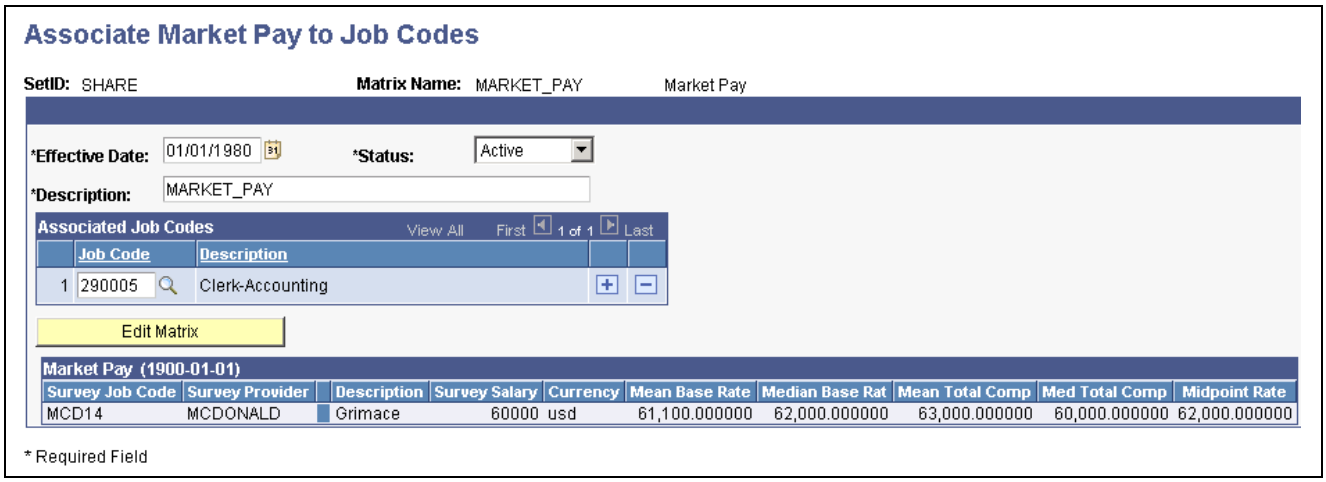
Matrix Field The system displays the values from the Matrix Definition page.

Target Field Select a value. These values come from the Job Code table.

Associating Market Pay Data to Job Codes

Access the Associate Market Pay to Job Codes page.

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Associate Market Pay to Job Codes page

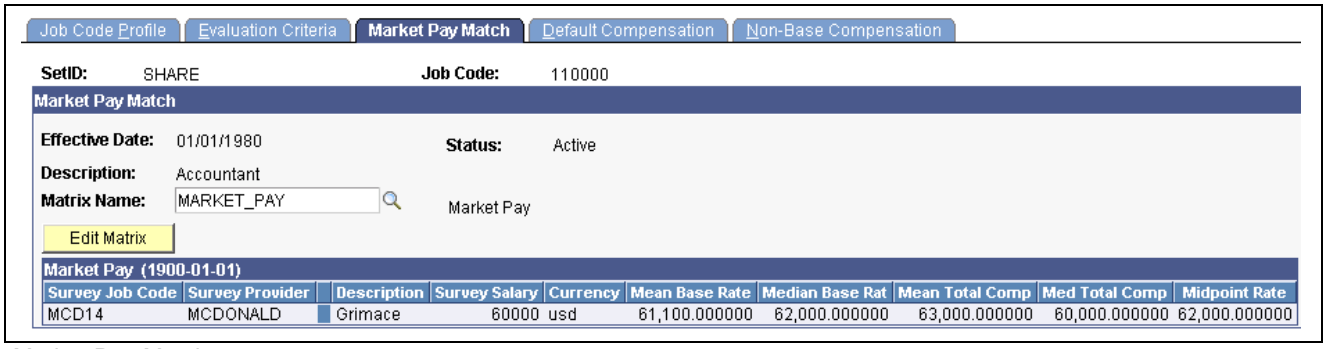
Click the Add button to create a new association between market pay data and job codes. Click Search to find existing values.

Job Code Select the job codes to which you want to associate the market pay matrix. You may link multiple job codes to one market pay matrix. However, a single job code can only be associated to one market pay matrix at a given time.

Edit Matrix Click this button to access the Data Content page in the Matrix Definition component, where you can add, modify, or delete the Matrix Data field information.

Associating Market Pay Data to a single Job Code

Access the Market Pay Match page.



Market Pay Match page

Note. You must be in Correct History mode to see new effective-dated matrix data for a job code. You can have only one market pay matrix associated with a single job code at a given time.

Matrix Name Select the market pay matrix that you want to associate with this job code.

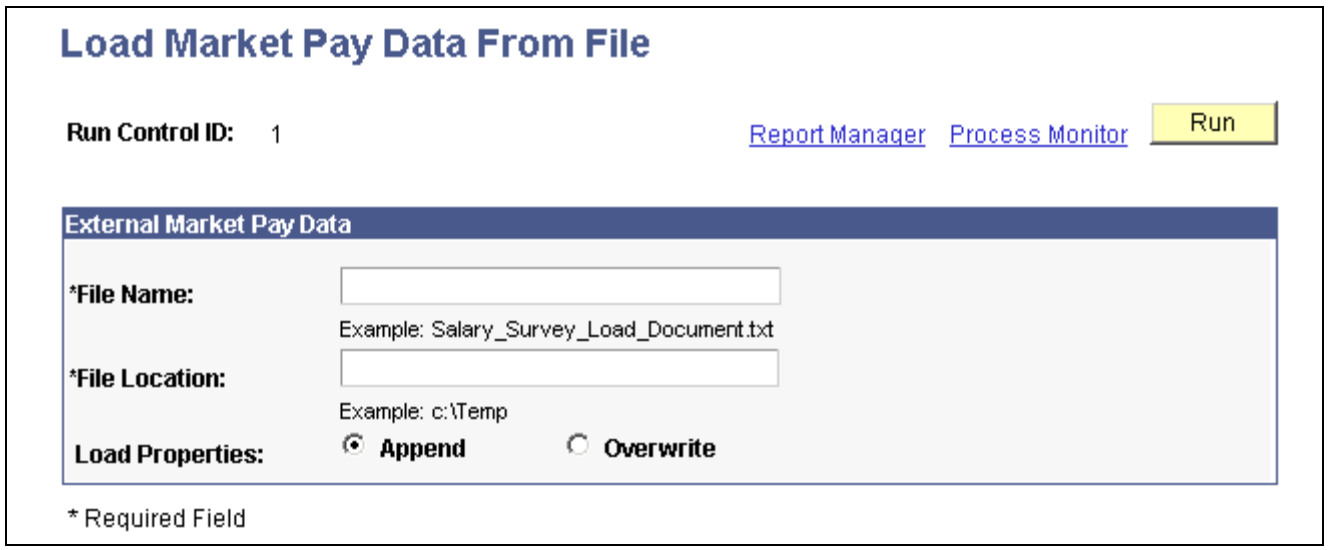
Edit Matrix Click this button to access the Data Content page on the linked matrix, where you can view and edit values associated with this matrix.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Entering Data Content Fields.

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Loading Market Pay Data from a File

Access the Load Market Pay Data From File page.



Load Market Pay Data From File page

Required fields for the *input file* are SETID, EFFECTIVE DATE (date in the format yyyy-mm-dd), EFFECTIVE STATUS, DESCRIPTION, JOBCODE, MATRIX ID, The fields must be in the order shown. Also the fields in the matrix must follow the matrix ID and also be in the same order as they are in the matrix. We recommend that you open the file and verify the date format, as some utilities such as Excel might reformat your date differently than is displayed. You can format the date the correct way by defining it manually in Excel.

File Name Enter the name of the file from which you want to import the market pay data.

File Location Enter the location of the import file. You can also specify a machine name for a location in the format "\\machinename\directory".

Load Properties Select Append to add the market pay information to the existing file.

Select Overwrite to replace the data that is already in the system with the data that is in the file.

Loading Market Pay Data From Workforce Rewards

You can load market pay data by using the COMP_MKT_RATE_SYNC Integration Broker message and service operation published from Workforce Rewards. These new target market rates come from the WA_MKT_RATE_TBL.

Note. The COMP_MKT_RATE_SYNC service transaction loads the market rates into a delivered configurable matrix definition. If you want to load the data to a matrix with different fields, you would have to create a new message and service operation.

See *PeopleSoft Enterprise Workforce Rewards PeopleBook: "Managing Market Compensation"*

Loading Market Pay Data Manually

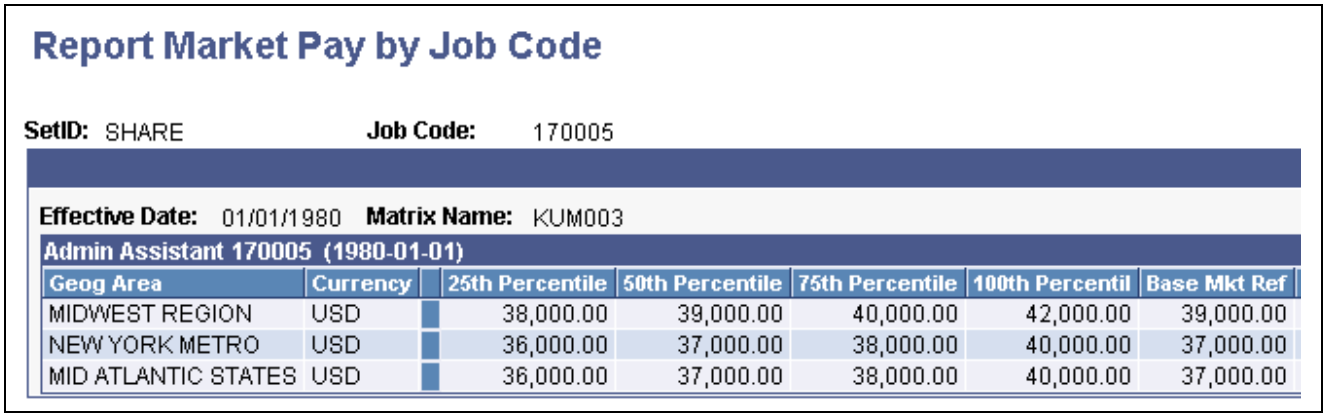
Access the Data Content page of the appropriate matrix.

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Manually enter the market pay data into the Matrix Data group box.

Viewing Market Pay Data by Job Code

Access the Report Market Pay Data by Job Code page.



Report Market Pay by Job Code

SetID: SHARE **Job Code:** 170005

Effective Date: 01/01/1980 **Matrix Name:** KUM003

Admin Assistant 170005 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref
MIDWEST REGION	USD	38,000.00	39,000.00	40,000.00	42,000.00	39,000.00
NEW YORK METRO	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00
MID ATLANTIC STATES	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00

Report Market Pay by Job Code page

This page displays the current market pay data as well as previous and future market pay data when available.

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CHAPTER 19

Setting Up Pay Calendars

This chapter discusses how to:

- Create balance IDs.
- Create pay run IDs.
- Create pay calendars and FLSA calendars.

Note. The information in this chapter applies to Oracle's PeopleSoft Enterprise Payroll for North America and Oracle's PeopleSoft Enterprise Payroll Interface. The information in this chapter does not apply to Oracle's PeopleSoft Enterprise Global Payroll.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

Creating Balance IDs

To create balance IDs, use the Balance ID Table (BALANCE_ID_TABLE) component.

This section provides an overview of balance IDs and discusses how to:

- Define balance IDs.
- View setIDs established for each company.
- Specify the quarter by company and year for each Balance Year ID.

Understanding Balance IDs

You can maintain balances by calendar year, fiscal year, benefit year, or any other method you want. Specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

Note. You must set up one balance ID with the Bal for Calendar Year (balance for calendar year) option selected for each company for which you process payroll.

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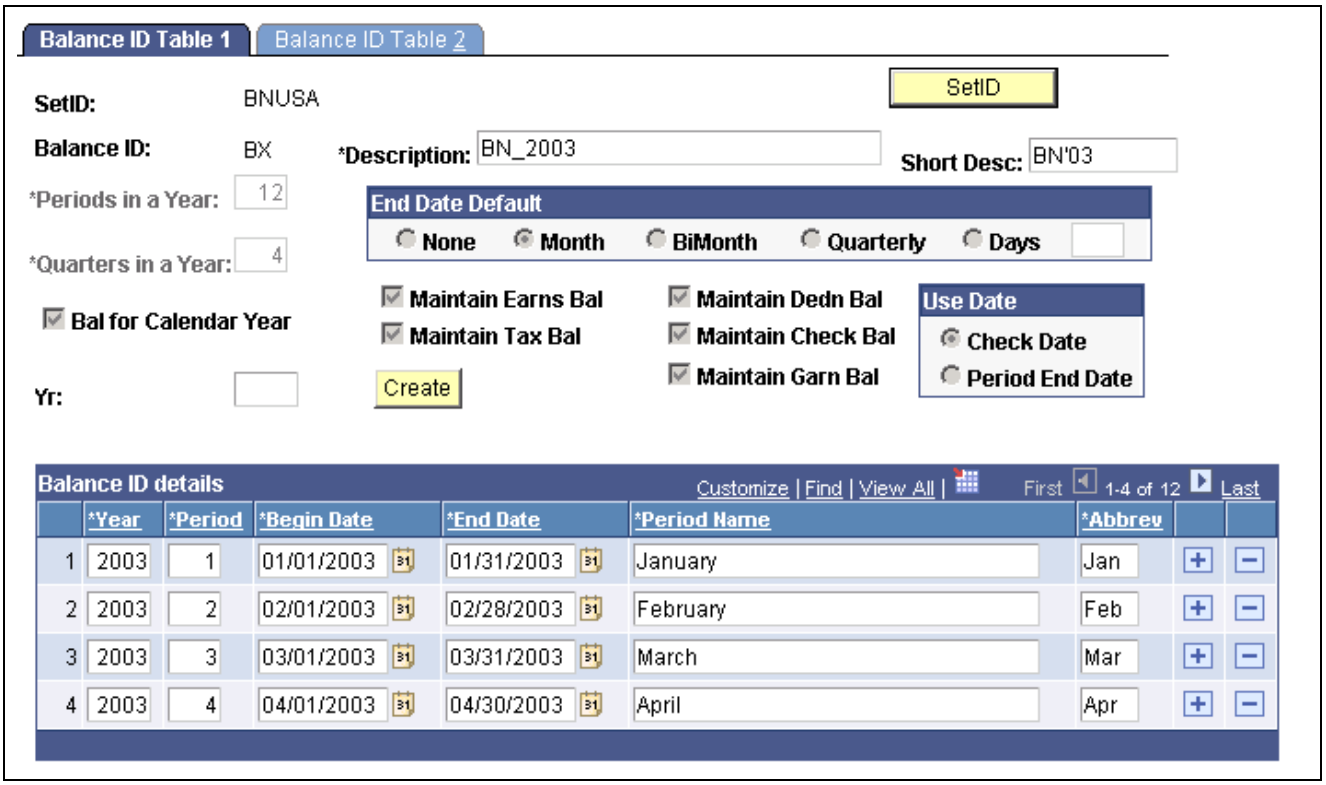
Pages Used to Create Balance IDs

Page Name	Object Name	Navigation	Usage
Balance ID Table 1	BALANCE_ID_TBL1	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 1 • Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 1	Create cycles for payroll processing according to pay group and define your balance year.
SetID - Comments	BALANCE_ID_PU	Click the SetID button on the Balance ID Table 1 or Balance ID Table 2 page.	View the setID established for each company.
Balance ID Table 2	BALANCE_ID_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 2 • Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 2	Define the actual quarter definition by company and year for each Balance Year ID.

Defining Balance IDs

Access the Balance ID Table 1 page.

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Balance Id Table 1 page

Creating a Calendar Year Balance ID

To create a balance ID for the calendar year:

1. Select the Bal for Calendar Year check box.
2. Enter a year in the Year field.
3. Click the Create button.
4. Save the page.

All other fields become unavailable for entry. The system automatically creates the balance ID details for twelve periods in the year, four quarters in the year, and the end date default of *Month*.

Creating a Non-Calendar Year Balance ID

If you are creating a non-calendar year balance ID, you must specify values in the Periods in a Year/Quarters in a Year, End Date Default, Use Date, and Balance ID Details fields. You must also select the balances to be maintained.

Entering Values

SetID Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The setID for the Balance ID Table component is specified on the Company Table − Company Location page.

Balance ID Entered on the Balance ID Table search page. Identifies a balance period, for example CY for Calendar Year, FY for Fiscal Year, or BY for Benefit Year. Once you establish a balance ID it should not be changed.

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Periods in a Year — If you are not setting up a balance ID for a calendar year, specify the number of periods in a year.

Quarters in a Year — If you are not setting up a balance ID for a calendar year, specify the number of quarters in a year.

Bal for Calendar Year (balance for calendar year) — Select if you are setting up a balance ID for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for Description and Short Desc) to become unavailable for entry. All balance types are automatically selected for the calendar year, and the Check Date option is automatically selected. However, the Yr field and Create button appear and become available for entry.

Yr (year) — Enter the year for which balances are to be created.

End Date Default

If you are not setting up a balance ID for a calendar year, use this group box to specify the end date to apply for the calendar year.

None — Select if you do not want a specific end date for the calendar year.

Month, BiMonth, Quarterly, Days — Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.

Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, Maintain Garn. Bal — If you are not setting up a balance ID for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating.

Note. Each of these balances is maintained for the year being defined. For example, if you are defining a fiscal year and Maintain Earns Bal was selected, earnings balances for the fiscal year are maintained.

Use Date

If you are not setting up a balance ID for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Check Date — Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your check date was June 23, 2007, the balance would be included in this fiscal year. If, however, the check date were July 1, 2007, the balance would be in the next fiscal year.

Period End Date — Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your pay period end date was June 23, 2007, the balance would be included in this fiscal year. If, however, the pay period end date were July 1, 2007, the balance would be in the next fiscal year.

Create — Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

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Balance ID Details

If you are not setting up a balance ID for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Note. For the first entry, enter values in the Year, Period, Begin Date, End Date, Period Name and Abbrev. fields; after you have entered this information, the values in the Year, Period, Begin Date and End Date fields are set by default automatically for any additional rows, based on the values entered in the previous row.

Year, Period, Begin Date, End Date, Period Name Enter the year, period, begin date, end date, and period name for the balance type.

Abbrev (abbreviation) Enter the abbreviation for the period name.

Viewing SetIDs Established for Each Company

Access the SetID - Comments page.

Comments

Balance SetID Customize | Find | View 100 | First 1-5 of 723 Last

SetID	Set Control Value	Record Group ID	Record (Table) Name
AUS	AUS	PY_01	BALANCE_ID_TBL
AUS01	AUS01	PY_01	BALANCE_ID_TBL
AUS01	KAM	PY_01	BALANCE_ID_TBL
AUS01	KAT	PY_01	BALANCE_ID_TBL
AUS01	KBI	PY_01	BALANCE_ID_TBL

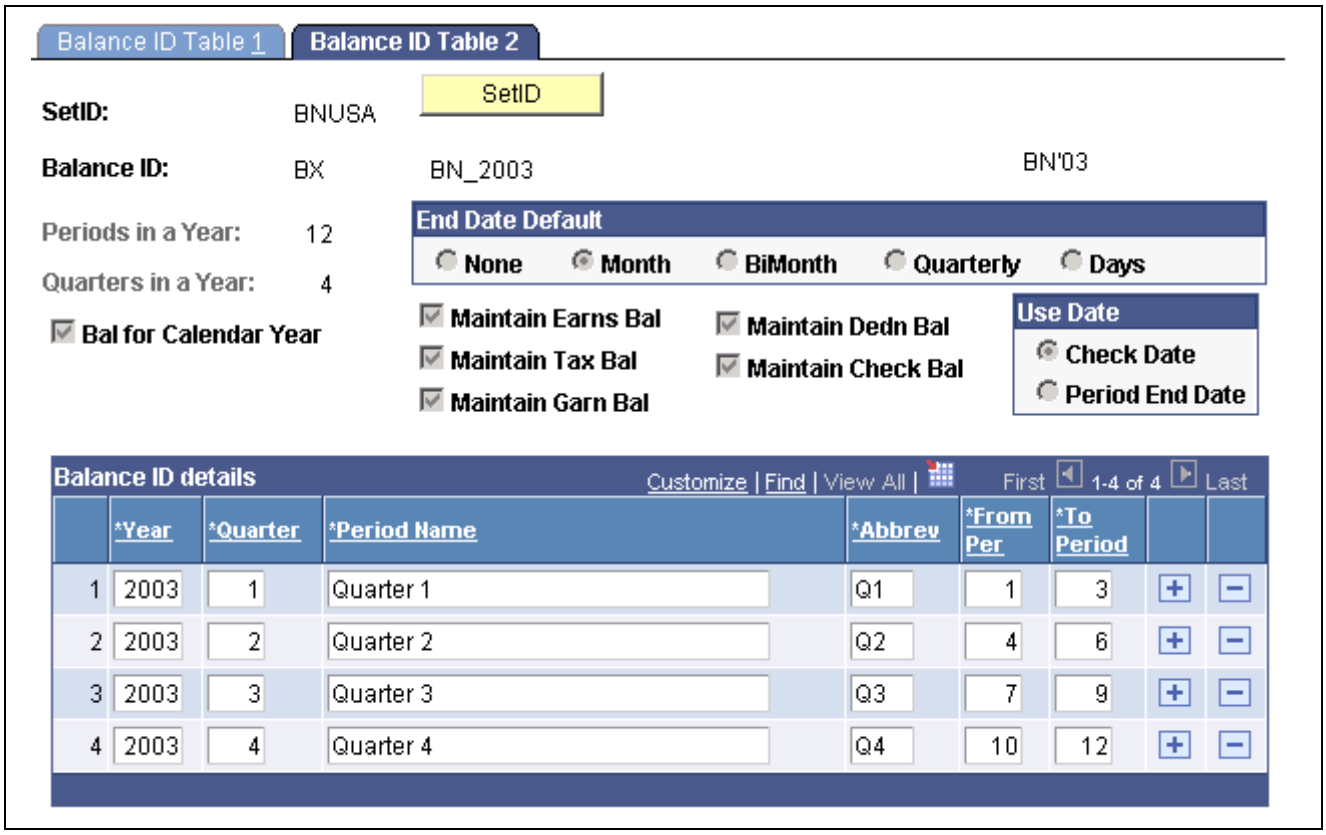
Comments page

The SetID page displays the setID established for each company. This helps you to know which setID to enter for a specific company.

Specifying the Quarter by Company and Year for Each Balance Year ID

Access the Balance ID Table 2 page.

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Balance Id Table 2 page

If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a calendar year balance ID type on the Balance ID Table 1 page, you must enter a value for the Year, Quarter, Period Name, Abbrev, From Period, and To Period fields. For each row that you add after the first, the Year, Quarter, and From Period fields are set by default, based on the value in the Quarters in a Year field.

See Also

Chapter 19, “Setting Up Pay Calendars,” Defining Balance IDs, page 418

Creating Pay Run IDs

To create pay run IDs, use the Pay Run Table (PAY_RUN_TABLE) component. Use the PAY_RUN_TABLE component interface to load data into the tables for this component.

This section provides an overview and discusses how to create pay run IDs.

Understanding Pay Run IDs

Use pay run IDs to indicate to the system which pay calendar entries to process together. A pay run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same pay run ID.

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Generally, all calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

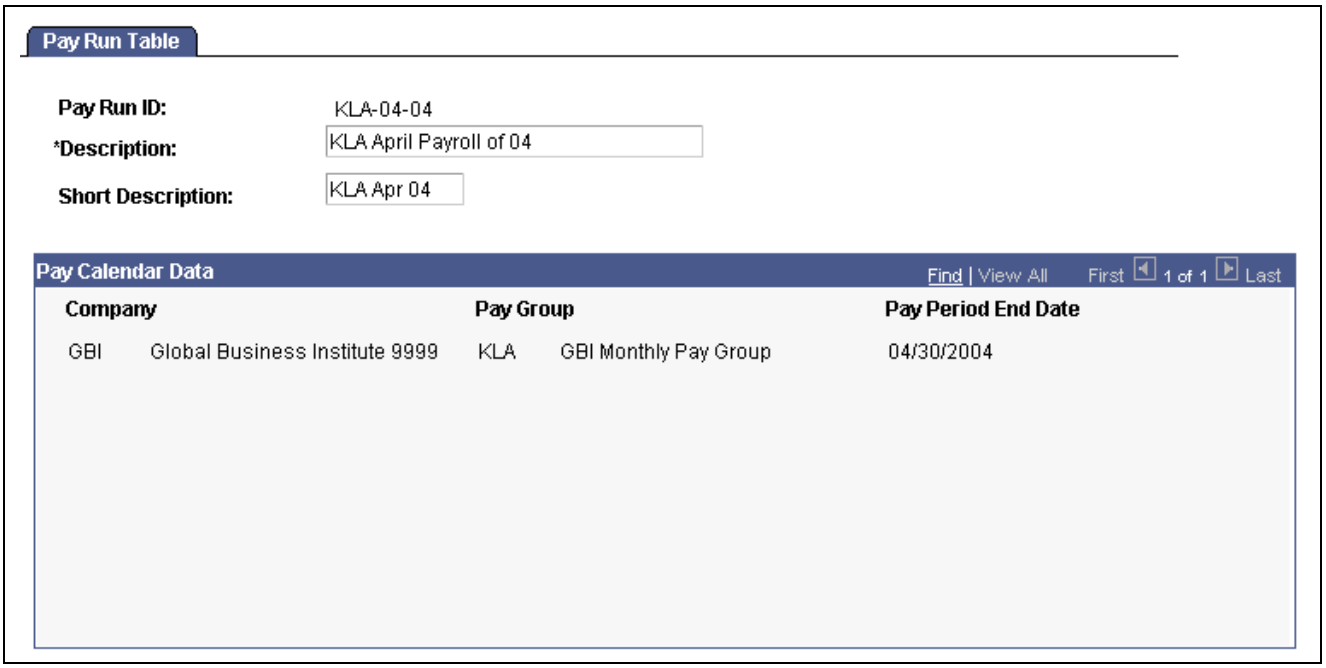
Note. A pay run ID must be unique throughout payroll history. You must create pay run IDs in the Pay Run table before you enter them on the pay calendar. The pay run ID may be up to 10 characters. PeopleSoft suggests that you use as many of the 10 available characters as is necessary to ensure that your pay run ID is easily identifiable.

Page Used to Create Pay Run IDs

Page Name	Object Name	Navigation	Usage
Pay Run Table	PAY_RUN_TABLE	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Run Table, Pay Run Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Run Table, Pay Run Table • Set Up HRMS, Product Related, Benefits NLD, Pay Run Table, Pay Run Table, Pay Run Table	Create pay run IDs to combine pay calendar entries from different pay groups for processing.

Creating Pay Run IDs

Access the Pay Run Table page.



Pay Run Table page

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Short Description Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the pay run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.

Company, Pay Group, and **Pay Period End Date** The Pay Calendar Data group box displays all the pay calendar entries grouped under the pay run ID. After you enter the pay run IDs on the Pay Calendar table, return to this page to check the pay calendar data assigned to each pay run ID.

Creating Pay Calendars and FLSA Calendars

To create pay calendars and FLSA calendars use the Create Pay Calendars (RUNCTL_PAY_CAL_BLD), FLSA Calendar Table (FLSA_CALENDAR), Initial FLSA Calendar (RUNCTL_FLSACALPD) components. Use the FLSA_CALENDAR component interface to load data into the tables for the FLSA Calendar Table component.

This section provides overviews of pay calendars and FLSA calendars and discusses how to:

- Set up FLSA calendars.
- Build pay calendars automatically.
- Build pay calendars manually.
- (USF) Review interface status and periods for federal leave accrual processing.
- Select error processing options.

Understanding Pay Calendars

Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the pay calendar, representing one year of processing.

This section discusses:

- Pay run ID assignment.
- Pay calendar creation.
- Automatic pay calendars.
- Manual pay calendars.

Pay Run ID Assignment

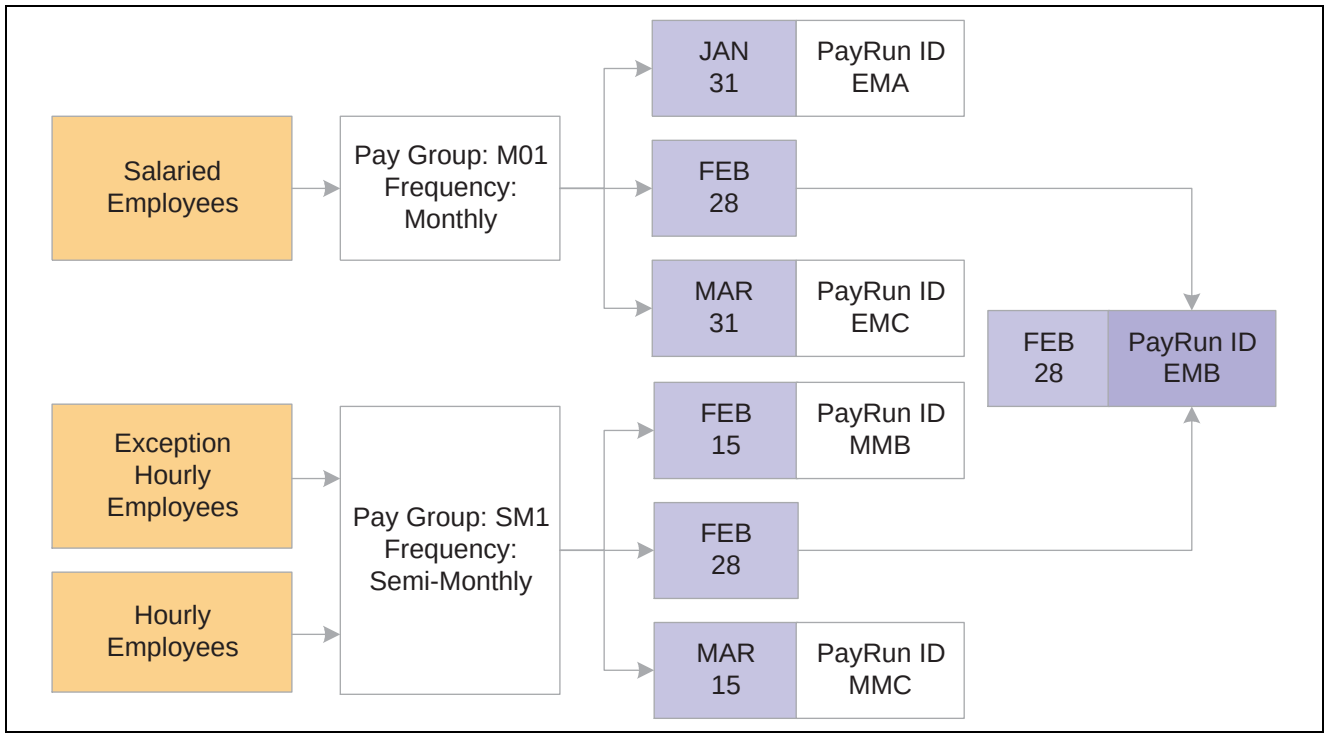
To process payrolls, the pay calendar entry being processed must be assigned a pay run ID. Generally, all pay calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different pay run ID for each Pay Period End Date on the Pay Calendar Table component.

Note. All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on the Pay Group Table – Process Control page. If this condition is not met, the system cannot transfer any paysheets with errors for the pay run ID.

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If you have a semi-monthly and a monthly pay calendar and set up both to continue processing with errors, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule and Continue with Errors setting determine which groups can or can't be grouped together.

In the following illustration, CCB has assigned the same pay run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time. Both pay groups are set up for continue with errors processing.



Assigning pay run IDs

Pay Calendar Creation

Follow these steps to create pay calendars:

1. Set up a balance ID — required for the pay calendar.
2. Set up a pay run ID — required for the pay calendar.
3. Build the pay calendars — either automatically or manually.

You must create a calendar entry for every pay period for each pay group you set up. You must also assign a pay run ID to each calendar entry before you run the payroll.

Automatic Pay Calendars

To build pay calendars automatically, use the Pay Calendar Creation page followed by the Pay Calendar Table page:

1. Use the Pay Calendar Creation page to automatically build pay calendars.

   The Pay Calendar Creation page enables you to run the Calendar Build process (PSPCLBLD), which automatically generates the pay calendar entries for all or part of a year. To run the process:

   a. Set up the run control data.

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b. Run the process.

c. Review any error messages.

Follow the same procedure for all pay groups. Each time you run the Calendar Build process, the system deletes the run control data. Therefore, whenever you rerun the process, you must enter the data again.

2. Use the Pay Calendar Table page to manually complete the pay calendar entries.

   The Calendar Build process does not assign values to Pay Run ID, Accrual Percent, Reverse Accruals, Aggregate ID, Off-Cycle Calendar?, Off-Cycle Ded Override, General Ded Subset ID, Benefit Ded Subset ID, Benefit Deductions Taken, or General Deductions Taken fields on the Pay Calendar Table page. After you run the process, you must enter values for these fields manually. Although some of these fields are optional, you must assign a pay run ID to each calendar entry before you run the payroll.

Manual Pay Calendars

To build a pay calendar manually or to manually complete pay calendar entries for pay calendars that were built automatically, use the Pay Calendar Table page (PAY_CALENDAR_TABLE).

In general, you build stand alone, off-cycle pay calendars manually only to accommodate off-cycle processing, such as adjustments, online checks, or check reversals.

Understanding FLSA Calendars

You must define Fair Labor Standards Act (FLSA) calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. You must add the FLSA Calendar ID to the system before you can complete the Pay Group table. The FLSA calendar requirement does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them.

The same process that creates pay calendars also creates FLSA Calendars.

Follow these steps to create FLSA calendars:

1. Set up the FLSA calendar on the FLSA Calendar Table page.

   Enter the FLSA Calendar ID and specify period length and period start date.

2. Run the Calendar Build process from the Pay Calendar Creation page.

   If you did not set up the FLSA calendar before you ran the Calendar Build process, you can use the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA) to build FLSA calendars. You can also use this process if pay group FLSA status is updated or changed.

3. To view the FLSA periods, return to the FLSA Calendar Table page.

Note. The system creates the FLSA calendar for the entire calendar year. The pay calendar dates do not affect the FLSA calendar.

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Pages Used to Create Pay Calendars and FLSA Calendars

Page Name	Object Name	Navigation	Usage
Pay Calendar Creation	RUNCTL_PAY_CAL_BLD	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Create Pay Calendars, Pay Calendar Creation • Set Up HRMS, Product Related, Payroll Interface, Payroll, Create Pay Calendars, Pay Calendar Creation	Create pay calendars automatically. (After the pay calendars are built, use the Pay Calendar Table page to manually complete the pay calendar entries.)
FLSA Calendar Table	FLSA_CALENDAR	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, FLSA Calendar Table, FLSA Calendar Table	Set up FLSA calendars.
Create FLSA Cal Periods	RUNCTL_FLSACALPD	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Initial FLSA Calendar, Create FLSA Cal Periods	Run the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA), which creates FLSA calendars for existing pay groups and pay calendars.

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Page Name	Object Name	Navigation	Usage
Pay Calendar Table	PAY_CALENDAR_TABLE	• Payroll for North America, Payroll Processing USA, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing CAN, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing USF, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Calendar Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Pay Calendar Table	Manually build a single pay calendar. Manually complete pay calendar entries for calendars that were created automatically. Review pay calendars.
Payroll Status	GVT_PAY_STATUS_SEC	Click the Federal button on the Pay Calendar Table page.	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

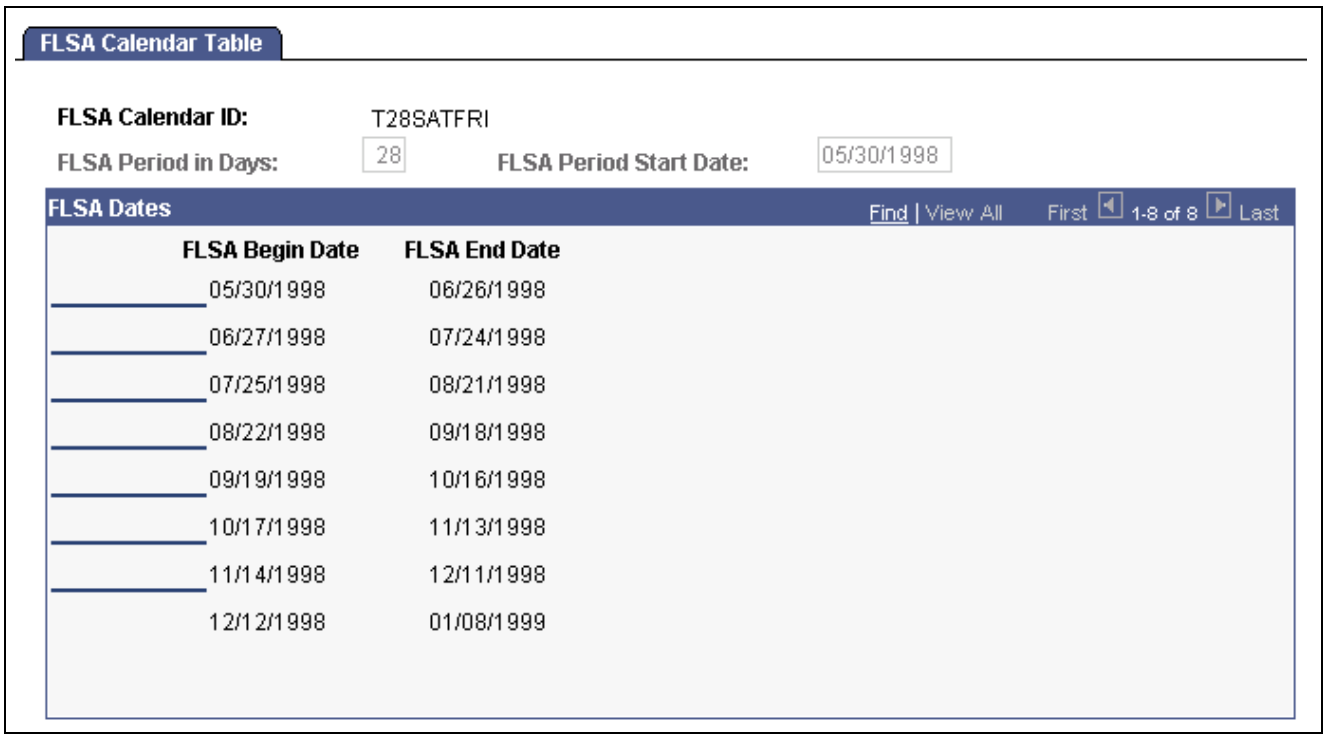
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Page Name	Object Name	Navigation	Usage
Pay Confirm Options	PAY_CALENDAR_TBL2	• Payroll for North America, Payroll Processing USA, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Options • Payroll for North America, Payroll Processing CAN, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Options • Payroll for North America, Payroll Processing USF, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Optionse • Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Confirm Options • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Pay Confirm Options	Select whether to bypass payroll messages during the Pay Confirmation process.
Pay Calendar Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Calendar, Pay Calendar Report	Generate a report that lists information from the Pay Calendar Table component, which contains the cycles that you create for payroll processing by pay group. Each entry in the table corresponds to a pay period for a pay group.
Open/Close Pay Calendar	RUNCTL_PAY130	Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Open/Close Pay Calendar, Open/Close Pay Calendar	(USA) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.
Open/Close Pay Calendar	RUNCTL_130CN	Payroll for North America, Year-End Processing CAN, Year-End/NewYear Preparation, Open/Close Pay Calendar, Open/Close Pay Calendar	(CAN) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.

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Setting Up FLSA Calendars

Access the FLSA Calendar Table page.



FLSA Calendar Table page

FLSA Calendar ID The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of 14, MON-SUN, would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.

FLSA Period in Days Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.

FLSA Period Start Date Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

Note. After you create the FLSA calendar using the Calendar Build process, the FLSA Calendar Table page becomes display-only. Each row in the FLSA Dates group box displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections.

See Also

Chapter 19, "Setting Up Pay Calendars," Understanding FLSA Calendars, page 426

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USA) Setting Up Additional U.S. Payroll Functionality," Setting Up for FLSA Calculation

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Building Pay Calendars Automatically

Access the Pay Calendar Creation page.



Pay Calendar Creation page

Note. Use the Pay Calendar Creation page to set up and run the Calendar Build process. Once the calendars are built, use the Pay Calendar Table page to assign pay run IDs and other information.

Note. You must set up the calendar year balance ID before creating calendars.

Pay Period End Date Enter the first pay period end date for the pay calendar. For example, for a semi-monthly payroll for 2006, enter *01/15/2006*. To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter *03/15/2006*.

Check Dt Days From Pay End Dt Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to *3*. If the pay period end date is January 31 and the check date is January 30, enter *-1*. Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.

Pay Periods Per Year The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.

Pay Year (USF) This field appears only for U.S. federal customers.

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The IRR process requires a pay year. When processing IRRs, the IRR Fiscal Data accumulator identifies all monies that come from the pay year. Enter the pay year to which the pay calendar applies.

(USF) Define Years

This group box appears only for U.S. federal customers.

Calendar Yr Run (calendar year run) This value is used by federal leave processing on particular leave types for which accrual begins with the calendar year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the leave plan calendar year. For example, for a monthly payroll there are twelve pay calendars in a year. January would be the starting point, so enter *1* in this field.

Pay Yr Run (pay year run) This value is used by federal annual leave accrual processing on leave types for which accrual begins with the pay year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the pay year for leave accrual processing.

Fiscal Yr Run (fiscal year run) This value is used by federal annual leave accrual processing on leave types for which accrual begins with the fiscal year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the fiscal year for leave accrual processing.

Leave Yr Run (leave year run) This value is used by federal annual leave accrual processing only. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the annual leave year.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

See Also

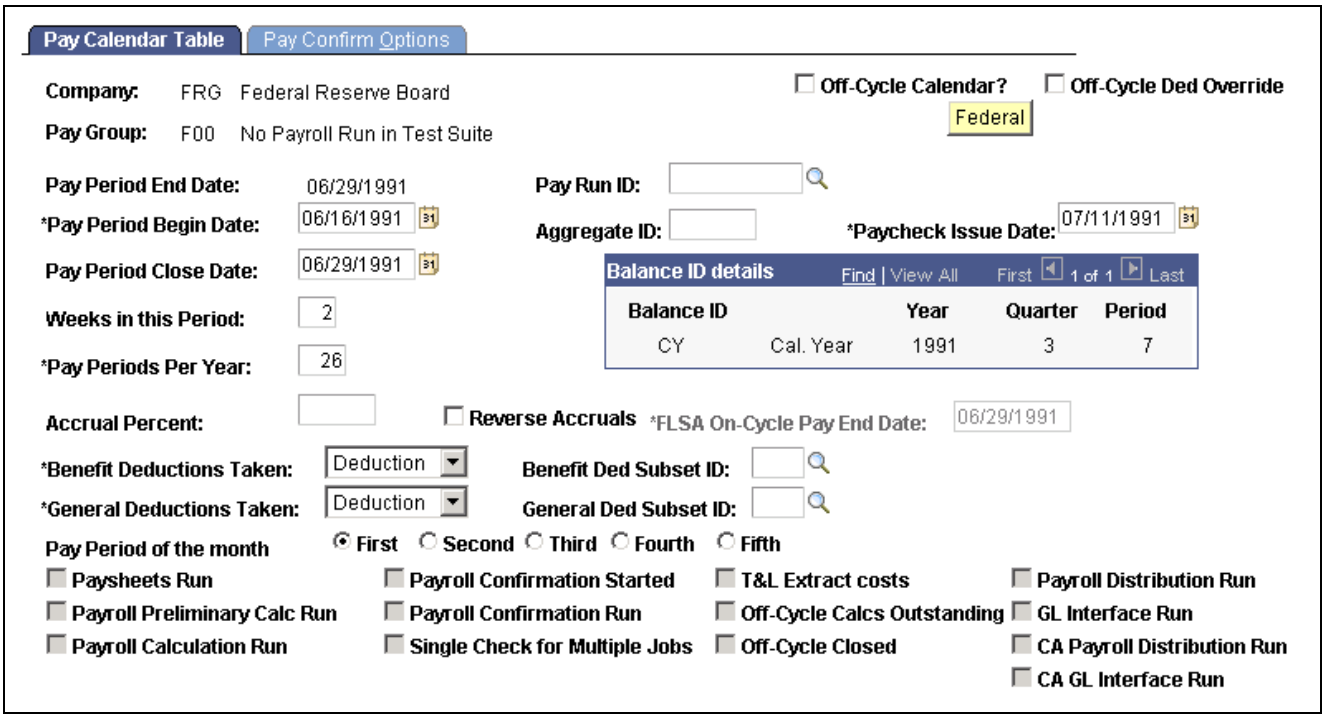
Chapter 19, “Setting Up Pay Calendars,” (USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing, page 437

Chapter 19, “Setting Up Pay Calendars,” Understanding Pay Calendars, page 424

Building Pay Calendars Manually

Access the Pay Calendar Table page.

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Pay Calendar Table page

Off-Cycle Calendar? Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.

Off-Cycle Ded Override (off-cycle deduction override) For an off-cycle run, select this check box to specify that the Pay Calculation process should use the deduction override process to determine deductions.

If Off-Cycle Calendar is selected and Off-Cycle Ded Override is cleared, then the deduction override evaluation process is bypassed during pay calculation. That means that employee-level benefit or general deduction override will not take effect. This might be useful for an off-cycle bonus run.

Federal (USF) Click this button to access the Payroll Status page. This button appears only for U.S. federal customers.

Pay Period End Date The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Period Begin Date Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether

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a holiday falls within the pay period and determine if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Run ID

Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same pay run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a pay run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a pay run ID.

Aggregate ID

(USA) Enter an aggregate ID to indicate aggregate taxation. Entering a value here tells the system to aggregate taxation for the entire pay group.

Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period, such as a temporary staffing agency paying employees for multiple assignments within a weekly pay period. The system aggregates all pay calendars with the same aggregate ID value (including off-cycle payrolls) for the purposes of tax calculations. All wages paid on calendars with the same aggregate ID are combined, then annualized and taxed accordingly.

Note. If you add stand-alone off-cycle calendars to be aggregated together, the pay period end date must be the day after the first confirmed check's pay period end date.

If you enter the same aggregate ID on multiple pay calendars, then for a given employee, each succeeding check (whether off-cycle or on-cycle) calculated under each of these pay calendars is aggregated with all of the already-calculated qualifying checks of the previous pay calendars which were set up using the same aggregate ID.

If a pay calendar has a unique aggregate ID, then for a given employee, succeeding off-cycle and on-cycle checks are aggregated with any already-confirmed qualifying off-cycle checks for that pay calendar.

To aggregate taxation across checks, you must also set up the earnings code with *Specified on Paysheet* specified as the tax method and you must manually specify *Aggregate* as the tax method on off-cycle paysheets.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "(USA) U.S. Tax Methods and Calculations," Aggregate Taxation of Multiple Checks.

Paycheck Issue Date

Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation.

Note. The system updates employee balances (such as taxes, deductions, and earnings) based upon the check date on the pay calendar you are processing with , not the check date on the paysheet or check. These dates are often the same, but not always.

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Weeks in this Period Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.

Pay Periods Per Year Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year.

Example: If you set up a deduction for $100 per month, the system multiplies $100 by 12 to arrive at $1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of $100 per pay period. For semi-monthly employees, the system divides the deduction by 24.

For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the Pay Periods Per Year field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year.

The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year.

Note. For monthly and semi-monthly pay calendars, the Pay Periods Per Year field is unavailable for entry; the only valid values are *12* and *24*.

Balance ID Details This group box displays the year, quarter, and period applicable to the pay period for each balance ID for which you're maintaining balances.

Accrual Percent Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger Interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the Reverse Accruals check box and leaving the Accrual Percent field clear. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.

Reverse Accruals Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the Accrual Percent field clear. If the Accrual Percent field is not clear, you must clear the Reverse Accruals check box.

Note. The Accrual Percent field and Reverse Accruals check box are not applicable to PeopleSoft Payroll for North America for E&G.

FLSA On-Cycle Pay End Date Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect

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on FLSA check box on the Earnings Table – General page is not set to None), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.

Benefit Deductions Taken Select a value to indicate how to take benefit deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take benefit deductions.
- *Deduction:* Select this value if you want to use the regular benefit deductions defined on the Deduction Table pages for these employees. This is the default value.
- *Subset:* Select this value if you want to use a specified benefit deduction subset. If you select this value, you must specify the subset ID in the Benefit Ded Subset ID (benefit deduction subset ID) field.

General Deductions Taken Select a value to indicate how to take general deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take general deductions.
- *Deduction:* Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees. This is the default value.
- *Subset:* Select this value if you want to use a specified general deduction subset. If you select this value, you must specify the subset ID in the General Ded Subset ID (general deduction subset ID) field.

Pay Period of the Month Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: *First, Second, Third, Fourth,* and *Fifth.*

Benefit Ded Subset ID (benefit deduction subset ID) Specify the subset ID if you selected Subset in Benefit Deductions Taken.

General Ded Subset ID (general deduction subset ID) Specify the subset ID if you selected Subset in General Deductions Taken.

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

The background programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

Off-Cycle Closed After an on-cycle payroll is confirmed for the next pay period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar.

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Note. You can use the Open/Close Pay Calendar process (PAY130 or PAY130CN) to open the calendar (clear the off-cycle closed check box) to process year end adjustments. After the adjustments are processed, run the PAY130 or PAY130CN to close the calendar. This process only opens or closes the last on-cycle calendar of the year.

Payroll Distribution Run	Selected when the non-commitment accounting GL distribution has been run.
GL Interface Run	Selected when the (non-commitment accounting) accounting lines have been created.
CA Payroll Distribution Run (commitment accounting payroll distribution run)	Selected when the commitment accounting GL distribution has been run.
CA GL Interface Run (commitment GL interface run)	Selected when the commitment accounting GL Interface has been run.

Note. You should run the GL interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL Interface Run or CA GL Interface Run is selected, you cannot rerun the process until resetting the check box. The GL interface check boxes have no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL interface Run is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Deductions," Creating Deduction Subsets

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Working with Checks and Direct Deposit"

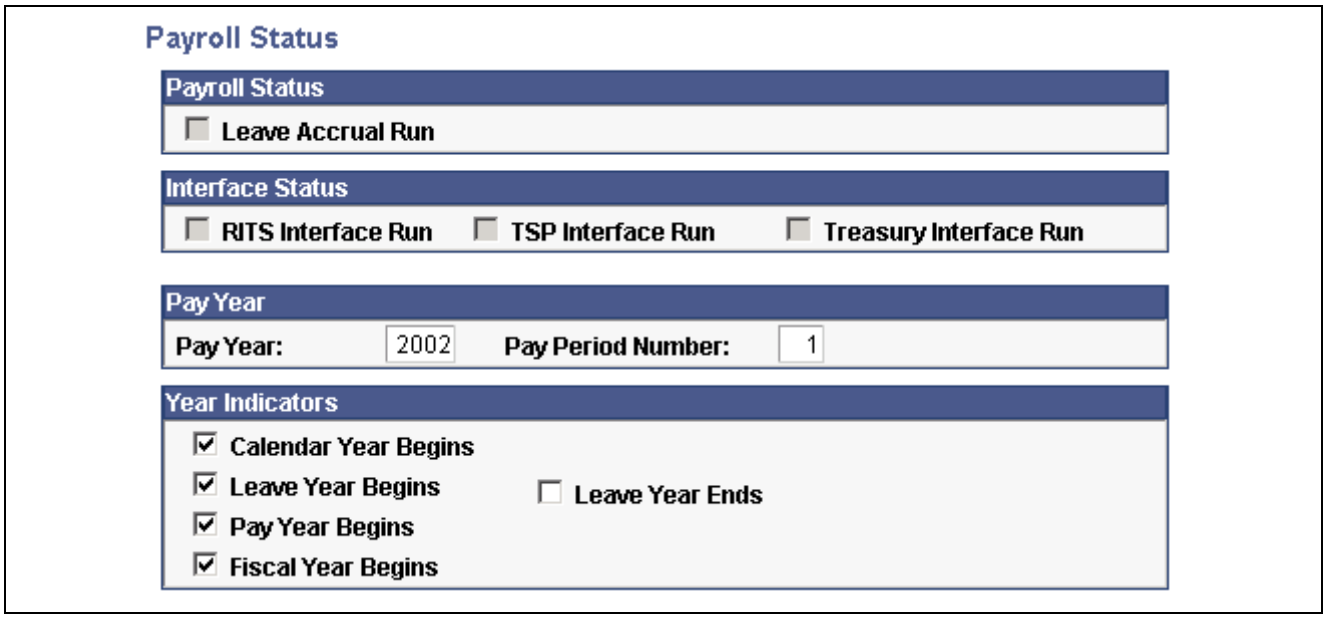
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Deductions"

(USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing

Access the Payroll Status page.

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Payroll Status page

Payroll Status

Leave Accrual Run This check box is updated by the Leave Accrual process that you run after payroll is confirmed.

Interface Status

The check boxes in this group box indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar. The system updates these fields.

Pay Year

Pay Year The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the pay year to which this pay calendar applies.

Year Indicators

The system completes the first four check boxes based on the run control parameters you enter when you run the Calendar Build process. If you need to change these values, you can manually update the calendar after it is built.

Calendar Year Begins This check box is used by federal annual leave accrual processing only. If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box.

Leave Year Begins This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box.

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Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

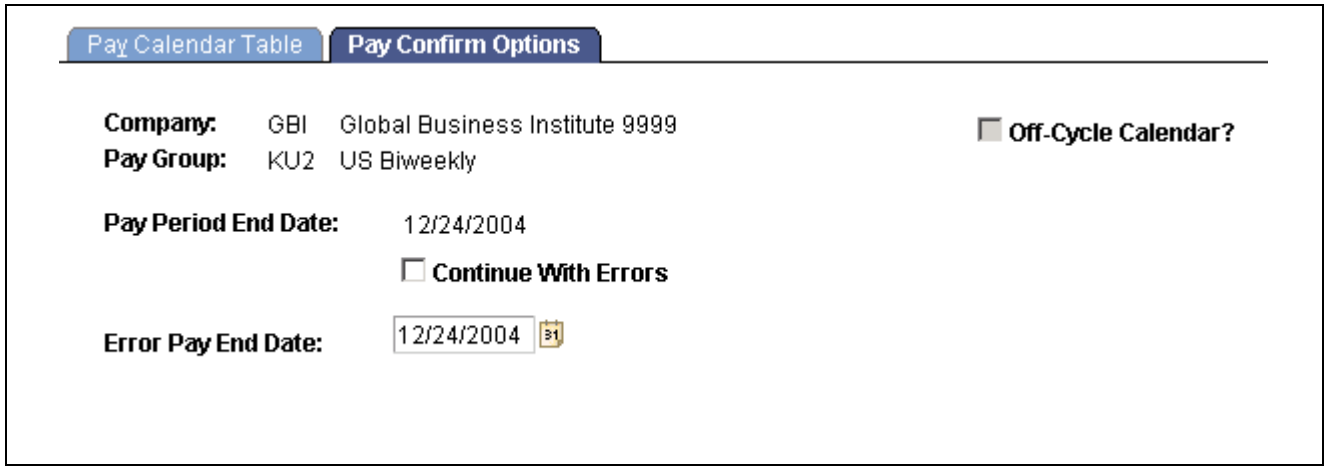
Pay Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.

Fiscal Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.

Leave Year Ends This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Selecting Error Processing Options

Access the Pay Confirm Options page.



Pay Confirm Options page

Off-Cycle Calendar? If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is cleared.

If you select this option, you must process the pay calculation for the transferred paysheets using the run parameters on the left side of the run control page. If you do not select this option, the system assumes that you are linking the transferred paysheets to an existing off-cycle paysheet that is linked to an on-cycle calendar.

Continue With Errors Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.

Error Pay End Date Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during

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the regular pay run. Be sure that you have an off-cycle pay calendar set up for the pay end date that you select.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Setting Up the Payroll Process," Setting Up Continue with Errors Processing

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Calculating Pay," Reviewing Payroll Messages and Correcting Errors

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CHAPTER 20

Setting Up Company Tax Tables for North America

This chapter discusses how to:

- (USA) Set up the Company State Tax table.
- (USA) Set up the Company Local Tax table.
- (CAN) Set Up the Canadian Company Tax table.
- Define tax locations.

Note. The tax tables discussed in this chapter are required for both the Payroll for North America and Payroll Interface applications. The PeopleBook for each of these applications discusses additional tax data setup that is specific to the application.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Setting Up Payroll Tax Tables"

PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook, "Setting Up Tax Data"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(CAN) Canadian Tax Method Calculations"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USA) U.S. Tax Methods and Calculations"

(USA) Setting Up the Company State Tax Table

To set up the Company State Tax table, use the Company State Tax Table component (CO_STATE_TAX_TBL) or Agency State Tax Table USF component (CO_STATE_TAX_TBL) and Tax Collector Table component (TAX_COLLECTOR_TBL).

This section discusses how to:

- Define states where you collect or pay taxes.
- Identify the voluntary disability plans.
- Enter general ledger account numbers for state taxes.

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Pages Used to Set Up the Company State Tax Table

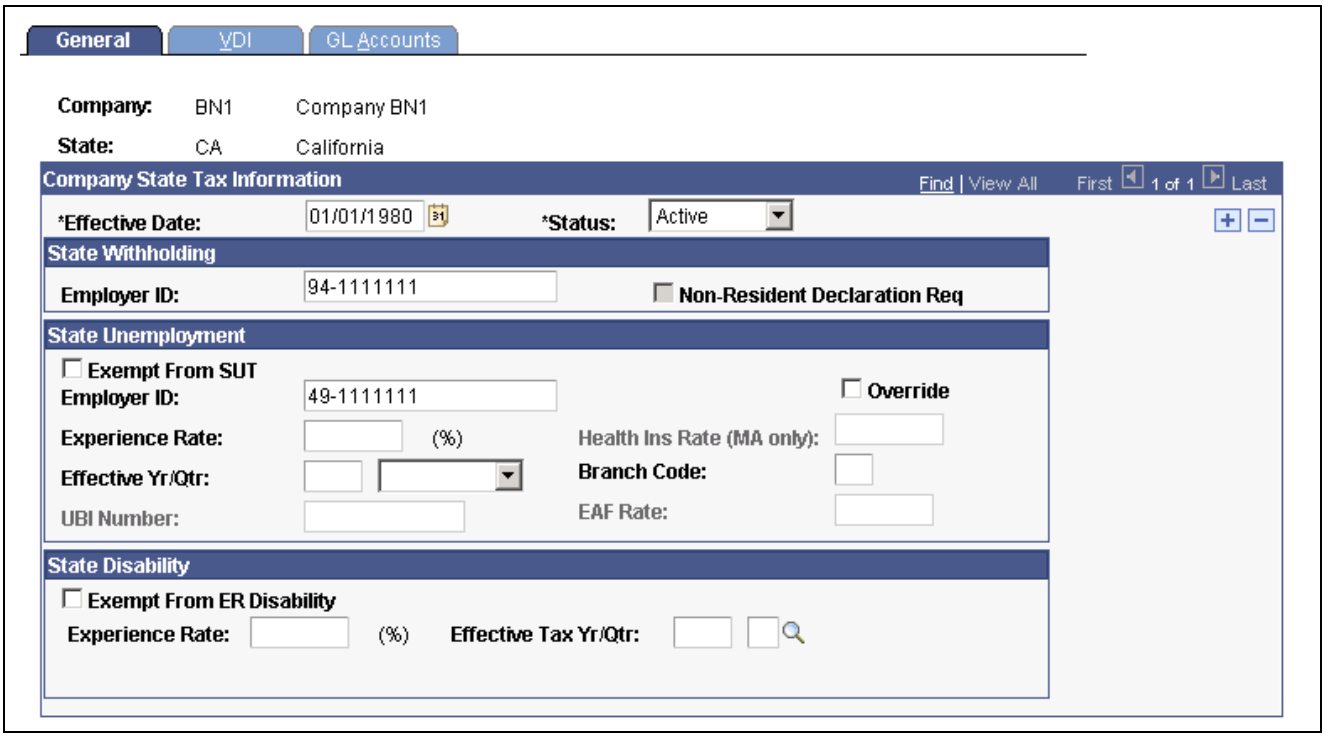
Page Name	Object Name	Navigation	Usage
General	CO_STATE_TAX_TBL	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, General • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, General • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, General	Set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.
VDI	CO_STATE_TAX_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, VDI • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, VDI • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, VDI	Identify the voluntary disability plans associated with the company.
GL Accounts	CO_STATE_TAX_TBL3	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, GL Accounts • Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, GL Accounts • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, GL Accounts	Enter your general ledger account numbers for state taxes.

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Page Name	Object Name	Navigation	Usage
Company State Tax Report	PRCSRUNCNTRL	• Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company State Tax, Company State Tax Report • Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency State Tax USF, Company State Tax Report	Run TAX704 to print information from the Company State Tax Table, which identifies the states in which your company collects and pays taxes.

Specifying States Where You Collect or Pay Taxes

Access the Company State Tax Table - General page.



Company State Tax Table - General page

The State field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

Employer ID Enter your state employer ID for state withholding.

Non-Resident Declaration Req This check box is selected or cleared by default according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

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State Unemployment

Exempt From SUT Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on the State Tax Data page.

See "Setting Up SUT Exemptions To Generate Data for the TAX002 and TAX810 Reports" at the end of this section.

Employer ID Enter your state employer ID for state unemployment.

Experience Rate The experience rate you enter in the State Unemployment group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the Effective Yr/Qtr field. This enables you to have different rates within a single calendar year.

Override (MA only.) The Massachusetts standard Health Ins Rate is set by default from the State Tax table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select this check box and enter the correct Massachusetts Health Ins Rate.

Health Ins Rate (MA only) (MA only.) If you select Override, enter the correct Health Ins Rate.

Branch Code This field is informational for Arizona. TAX860AZ.SQR appends the branch code to the end of the state EIN.

UBI Number (unified business ID number) If the company you're adding is in Washington State, enter the UBI number assigned. Used for quarterly reporting for companies in the State of Washington only.

EAF Rate (employment administration fund rate) If the company you're adding is in Washington State, enter the EAF rate used to calculate an additional tax for the Employment Administration Fund, which finances work search assistance and training for the unemployed. Used for quarterly reporting for companies in the State of Washington only.

State Disability

Exempt From ER Disability Select this check box if employees in this state are exempt from employer-paid state disability tax. This field is for informational purposes only and is not used by the system.

Experience Rate The experience rate you enter in the State Disability group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in Effective Tax Yr/Qtr. This enables you to have different rates within a single calendar year.

Note. You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error "SUT rate not found on Company/State Tax table" during Pay Calculation. This error occurs regardless of the pay end date you are processing.

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Employer ID (E&G) Enter the appropriate employer ID for state disability grouping in California, Michigan, and Minnesota. The T002CAHP, T002MIHP, and T002MNHP reports are grouped by employer ID if you enter the employer ID here and select the Separate Tax Report check box on the run control page. The report lists state withholding, state unemployment, and state disability.

Setting Up SUT Exemptions To Generate Data for the TAX002, TAX810 and TAX860 Reports

The TAX002, TAX810, and TAX860 reports are generated based on SUT wages. When you select the *Exempt From SUT* field on this page, the system does not generate taxable wages, and the TAX002, TAX810, and TAX860 reports will contain no data.

Perform the following to generate taxable earnings, enabling the TAX002, TAX810, and TAX860 reports to produce the required wage detail reporting data, while still remaining exempt from State Unemployment Taxes:

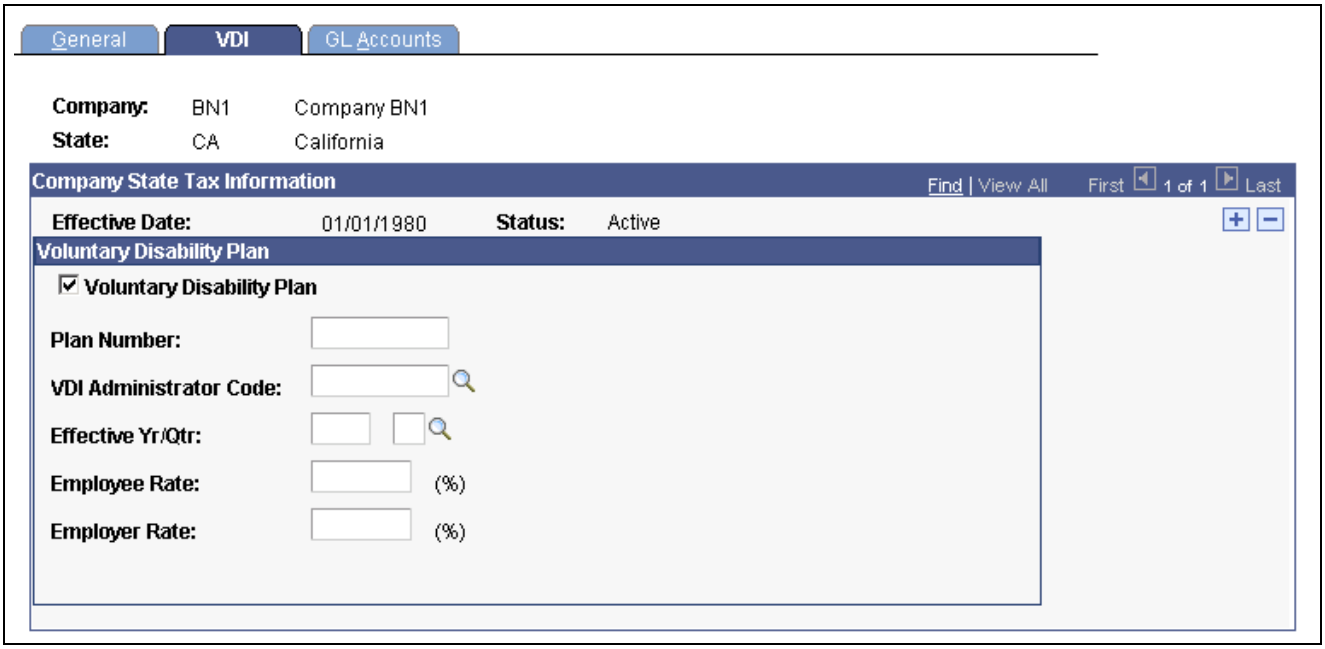
1. Ensure that the Company Exempt from SUT field on the Company Table-FICA/Tax Details page is cleared.
2. Leave the Exempt From SUT field on the Company State Tax Table - General page cleared.

   These steps should ensure that the Exempt From SUT field on the State Tax Data page remains clear for each employee. Verify that the Exempt From SUT field is clear on all three pages.
3. Enter a dummy number in the State Unemployment Employer ID field on the Company State Tax Table – General page.
4. Enter a value of *0* (zero) in the State Unemployment Experience Rate.

After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX002, TAX810, or TAX860 report can report the SUT subject wages.

Identifying Voluntary Disability Plans

Access the Company State Tax Table - VDI page.



Company State Tax Table - VDI page

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Voluntary Disability Plan Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.

Plan Number Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on Form W-2.

VDI Administrator Code Select the code that identifies the administrator of the voluntary disability plan. You maintain VDI Administrator Codes on the VDI Administrator table.

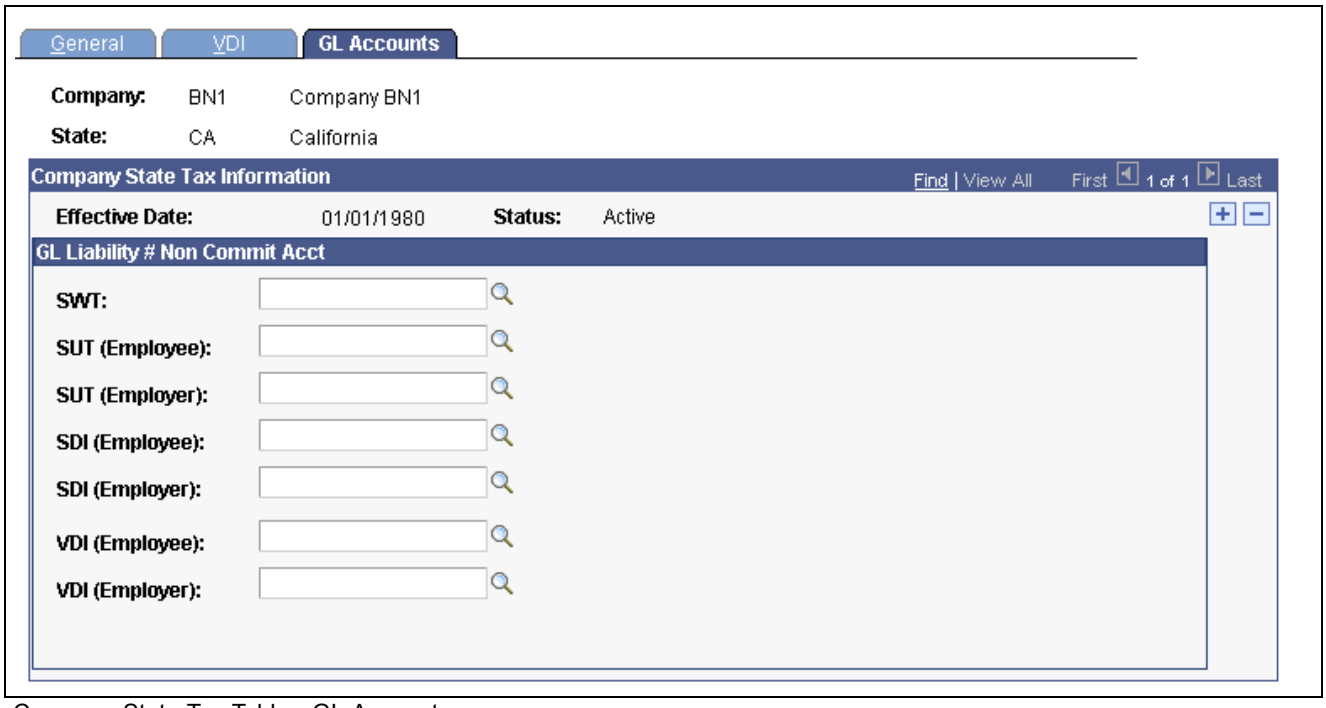
Employee Rate Enter the employee-paid rate.

Employer Rate Enter the employer-paid rate.

To set up VDI with a rate of zero so that you can track the VDI wages, enter *99.99999* as the Employee Rate and Employer Rate on this page.

Entering General Ledger Account Numbers for State Taxes

Access the Company State Tax Table - GL Accounts page.



Company State Tax Table - GL Accounts page

Enter the general ledger account numbers, if applicable, for the following company liabilities:

SWT State Withholding liabilities.

SUT (Employee) State Unemployment employee liabilities.

SUT (Employer) State Unemployment employer liabilities.

SDI (Employee) State Disability employee liabilities.

SDI (Employer) State Disability employer liabilities.

VDI (Employee) Voluntary Disability employee liabilities.

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VDI (Employer) Voluntary Disability employer liabilities.

(USA) Setting Up the Company Local Tax Table

To set up the company local tax table, use the Company Local Tax Table component (COMP_LOCAL_TAX_TBL).

This section discusses how to set up company local tax table entries.

Note. You must complete the Company Local Tax table before local tax data for employees is entered because the locality field on the Local Tax Data page is edited against this table.

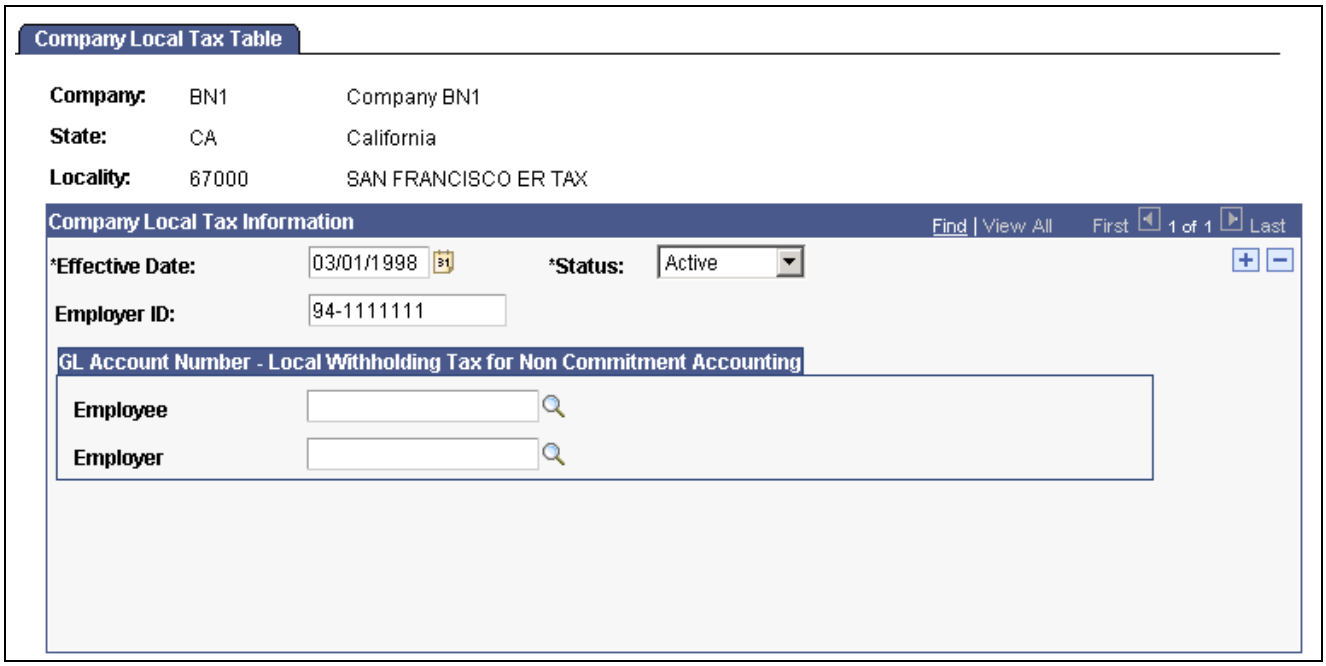
Pages Used to Define an Entry for the Company Local Tax Table

Page Name	Object Name	Navigation	Usage
Company Local Tax Table	COMP_LOCAL_TAX_TBL	• Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Company Local Tax Table, Company Local Tax Table • Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Agency Local Tax Table USF, Company Local Tax Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Local Tax Table, Company Local Tax Table	Set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.
Company Local Tax Report	PRCSRUNCNTRL	• Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company Local Tax, Company Local Tax Report • Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency Local Tax USF, Company Local Tax Table	Run TAX705 to print information from the Company Local Tax Table, which identifies the localities for which your organization collects and pays taxes.

Setting Up Company Local Tax Table Entries

Access the Company Local Tax Table page.

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Company Local Tax Table page

Employer ID This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax table.

GL Account Number - Local Withholding Tax for Non Commitment Accounting

These accounts are General Ledger accounts for use with local withholding tax; they are only used by the PayGL01 process. Only GL information not subject to Commitment Accounting would use these accounts.

Employee and **Employer** If you have general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

(CAN) Setting Up the Canadian Company Tax Table

To set up Canadian company tax information, use the Canadian Company Tax Table component (CO_CAN_TAX_TABLE) and the Wage Loss Plan Table component (WAGELS_PLN_TBL).

This section discusses how to:

- Set up the Canadian Company Tax table.
- Define wage loss plans.

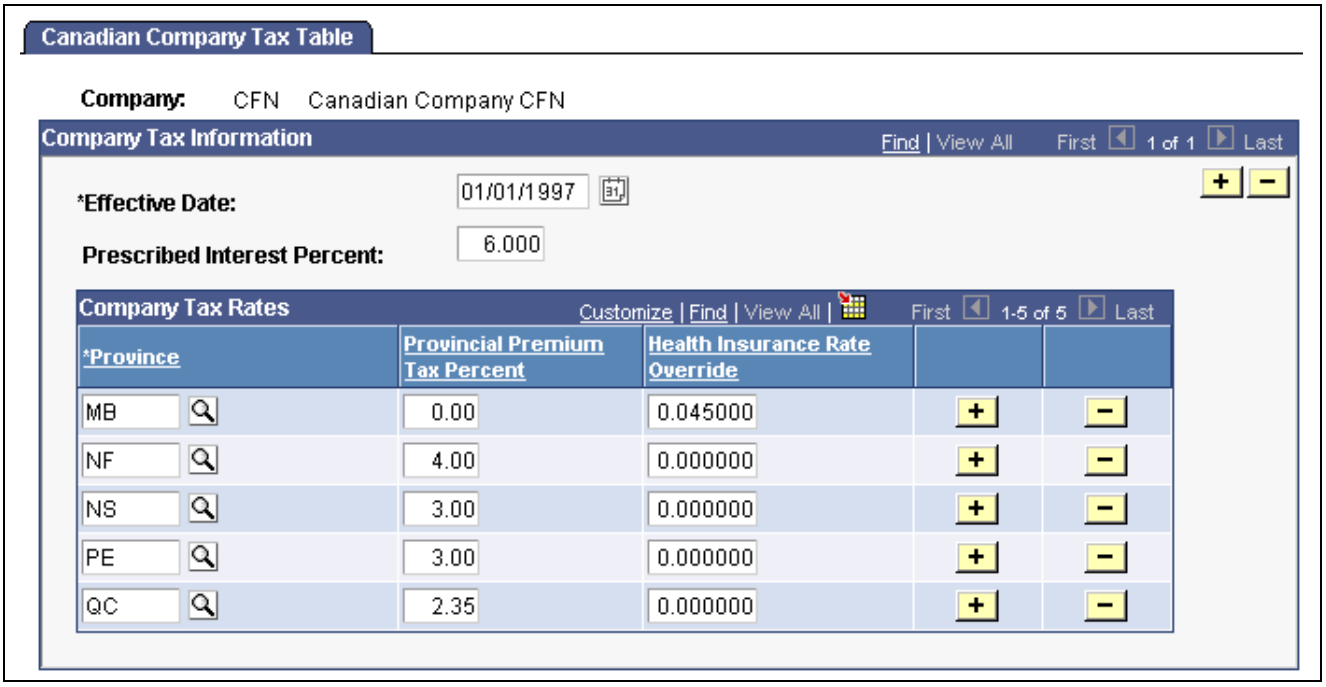
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Pages Used to Set Up the Canadian Company Tax Table

Page Name	Object Name	Navigation	Usage
Canadian Company Tax Table	CAN_USR_TAX_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Company Tax Table, Canadian Company Tax Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Tax Table CAN, Canadian Company Tax Table	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.

Setting Up the Canadian Company Tax Table

Access the Canadian Company Tax Table page.



Canadian Company Tax Table page

Company Tax Information

Prescribed Interest Percent If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government.

Company Tax Rates

Province Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.

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Provincial Premium Tax Percent Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.

Health Insurance Rate Override Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

Note. It is your responsibility to update all rates on the Canadian Company Tax table.

Warning! It is your responsibility to update the Prescribed Interest Percent field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Defining Tax Locations

To define tax locations, use the Tax Location Table component (TAX_LOCATION_TBL). Use the TAX_LOCATION_TBL component interface to load data into the tables for this component.

This section provides an overview of tax locations and discusses how to:

- Establish the locations for which you process payroll and taxes.
- Associate provinces, states, and localities with the tax location code.

Understanding Tax Locations

The system sets up federal, state, and local employee tax data and tax distribution data according to the information you specify in the Tax Location table. In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

Note. If you've selected Automatic Employee Tax Data on the Installation table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.

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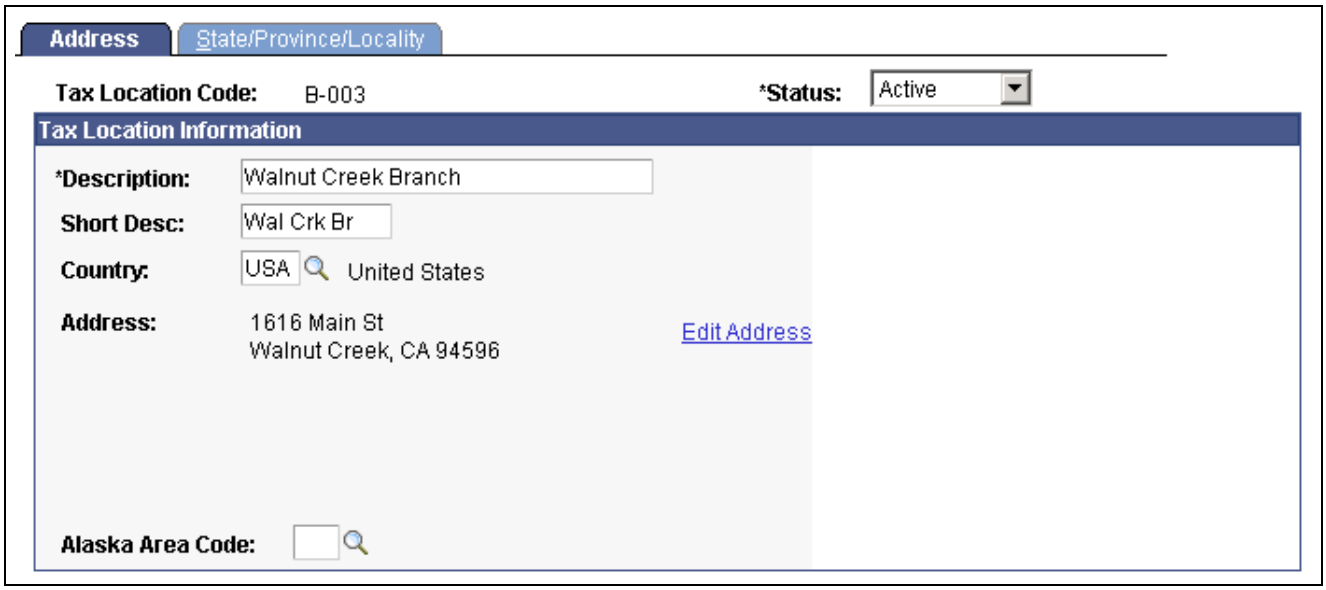
Pages Used to Define Tax Locations

Page Name	Object Name	Navigation	Usage
Tax Location Table - Address	TAX_LOCATION_TBL1	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, Address • Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, Address • Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, Address	Establish the locations for which you process payroll and taxes.
Tax Location Table − State/Province/Locality	TAX_LOCATION_TBL2	• Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, State/Province/Locality • Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, State/Province/Locality • Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, State/Province/Locality	Associate a province or any number of states, localities, and linked localities with the tax location code.
Tax Location Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Tax Location, Tax Location Report	Generate PAY718 that lists information from the Tax Location table.

Establishing the Locations for Which You Process Payroll and Taxes

Access the Tax Location Table - Address page.

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Tax Location - Address page

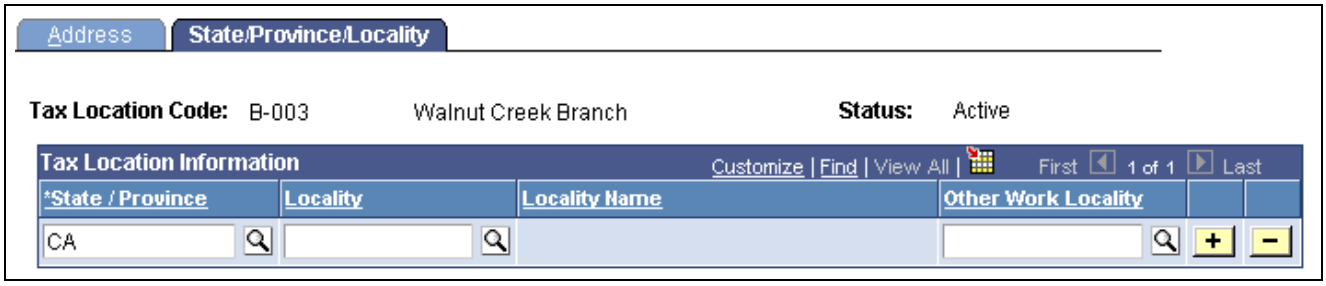
Tax Location Code Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.

Alaska Area Code If applicable, select an Alaskan area code.

Note. If you select Automatic Employee Tax Data on the Installation table and assign a Tax Location ID to each employee in the Job data, each employee's tax data is set by default on the Employee Tax Data page and the Employee Tax Distribution page.

Associating Provinces, States, and Localities with the Tax Location Code

Access the Tax Location Table − State/Province/Locality page.



Tax Location Table - State/Province/Locality page

State Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any.

The states you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

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Locality The localities you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Other Work Locality Use this field only where multiple local taxes apply in one location, such as:

- Paducah, KY and McCracken County, KY.
- Earned Income Tax, and Emergency and Municipal Service Tax in Pennsylvania.

  To form further links in a locality chain:

  - Add another row with the same state.
  - Enter the other work locality from the previous row in Locality.
  - Enter the new work locality.

Note. You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

Note. Locality and Other Work Locality are not required in Canada, because a Canadian employee can be taxed in only one province at a time, and there are no locality taxes in Canada.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," page 207

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Maintaining Payroll Data," Understanding Split Local Tax Distribution for KY, AL, and OR

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CHAPTER 21

Setting Up Vendors

This chapter provides an overview of vendor tables and discusses how to enter vendor information.

Understanding Vendor Tables

This section discusses vendors and the integration between HRMS and Enterprise Payables.

Vendors

A vendor is any agency or organization that the company sends money to on behalf of a worker or that the company uses to withhold money from a person's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the Vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integration with Enterprise Payables

Enterprise Payables, Enterprise Payroll for North America and Enterprise Human Resources, Manage Base Benefits use Integration Broker to populate each other's Vendor tables.

Note. If you are using PeopleSoft Enterprise Payables to pay your vendors, we recommend that you enter and update vendors in the Vendor table through PeopleSoft Payables and export the Vendor table to PeopleSoft Human Resource Management System (HRMS).

Warning! If you update vendors through the HRMS tables, the contact information is exported to the Payable system. However, any changes to existing vendor bank information that are made through HRMS will not be exported to the Payables system.

Integration Points

Before using the integration to maintain the Vendor table, configure the Integration Broker nodes and activate the appropriate queues, handlers, and routings for these service operations:

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Service Operation	Description
VENDOR_FULLSYNC	Payables publishes all contents of the Vendor table to the HRMS Vendor table.
VENDOR_SYNC	Payables publishes updates in the Vendor table to the HRMS Vendor table.

To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository on Customer Connection.

See Also

Interactive Services Repository in the Implementation Guide section of Customer Connection.

Chapter 39, "Working with Integration Points in Enterprise HRMS," page 871

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Integrating with PeopleSoft Payables," Maintaining Vendor Information

Entering Vendor Information

To enter vendor information, use the Vendor Control (VENDOR_CONTROL), Vendor Information (VNDR_ID), Provider/Vendor Table (PROVIDER_TABLE), Payee Table (GARNISH_PAYEE_TBL), and Payee Table USF (GVT_GARNISH_PAYEE) components.

This section provides an overview of vendor setup pages and discusses how to:

- Identify vendor prefixes.
- Enter basic vendor information.
- Enter vendor address information.
- Display alternate names for use on payments.
- Identify vendor locations.
- Enter bank account information.
- Enter payment processing information.
- Enter vendor contact information.
- Enter benefit policy information.
- (USF) Enter garnishment payee contact information.
- (USF) Enter garnishment payee distribution information.

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Understanding Vendor Pages

To enter vendor information, you will complete the following pages:

- Vendor Control
- Vendor Information
- Addresses
- Locations
- Contacts
- Policy Information

Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Locations

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

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Pages Used to Set Up Vendors

Page Name	Object Name	Navigation	Usage
Vendor Control	VNDR_CNTRL	Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Control	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information	VNDR_ID1	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Vendor Information • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Vendor Information	Enter basic vendor information.
Addresses	VNDR_ADDRESS	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Addresses • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter a vendor's address information.
Alternate Names	VNDR_ADDR_ALTN	Click Alternate Names on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Addresses • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter any alternate name for use on payments.

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Page Name	Object Name	Navigation	Usage
Phone Information	VNDR_ADDR_PHN	Click Telephone on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Addresses • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email ID	VNDR_ADDR_EMAILID	Click Email ID on the Addresses page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Addresses • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter a vendor's email addresses.
Locations	VNDR_LOC	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter address and remittance information.

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Page Name	Object Name	Navigation	Usage
Bank Accounts	VNDR_BANK_ACCOUNT	Click Bank Accounts on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter banking information for the vendor.
Bank Address	VNDR_BANK_ACCT2	Click Bank Accounts on the Locations page and Bank Address on the Bank Accounts page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter the bank's address information. The bank's Country defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.

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Page Name	Object Name	Navigation	Usage
Phone Details	VNDR_BANK_ACCT3	Click Bank Accounts on the Locations page and Phone Details on the Bank Accounts page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter phone information for the bank.
Comments	VNDR_LOC_COMMENTS	Click Comments on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter notes or comments about locations.

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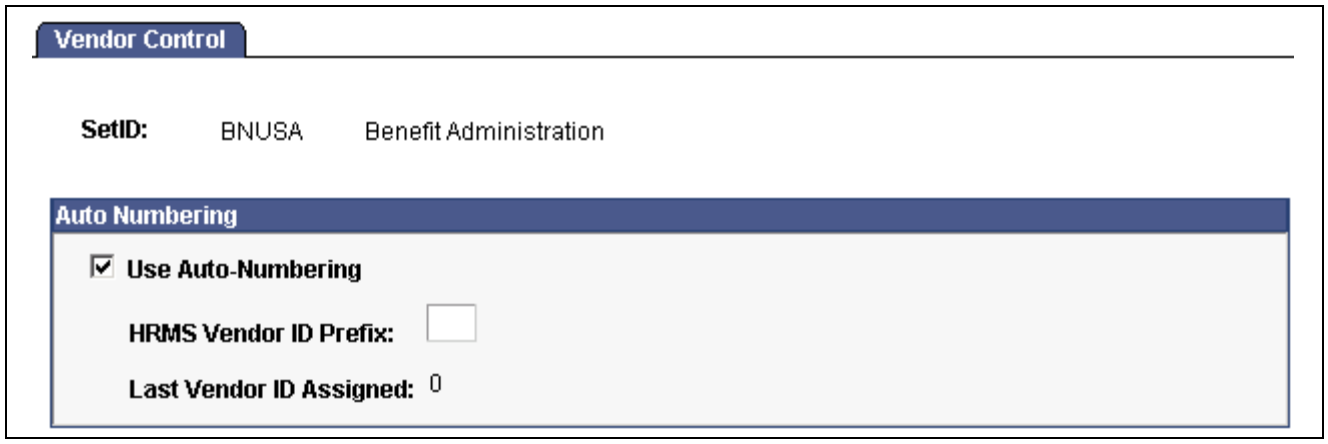
Page Name	Object Name	Navigation	Usage
Payment Options	VNDR_PAY	Click Payment Options on the Locations page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter payment processing rules for the vendor location.
Contacts	VNDR_CNTCT	• Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Contacts • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Contacts	Enter a vendor's contact person. Enter more than one phone number if necessary.
Phone Information	VNDR_CNTCT_PHN	Click Phone Information on the Contacts page. • Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts • Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Contacts • Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Contacts	Enter a contact's telephone information.

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Page Name	Object Name	Navigation	Usage
Policy Information	VNDR_POLICY	• Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Policy Information • Set Up HRMS, Product Related, Payroll for North America, AP-Vendor, Vendor Information, Policy Information	Enter information about policies and whom to contact about them.
Garnishment Payee	GVT_GARN_PAYEE	Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee	Enter garnishment payee contact information for U.S. federal government.
Deduction Distribution Information	GVT_GARN_DIST_SEC	Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee Click the Distribution Information button on the Garnishment Payee Table page.	Enter garnishment payee distribution information for U.S. federal government.

Identifying Vendor Prefixes

Access the Vendor Control page.



Vendor Control page

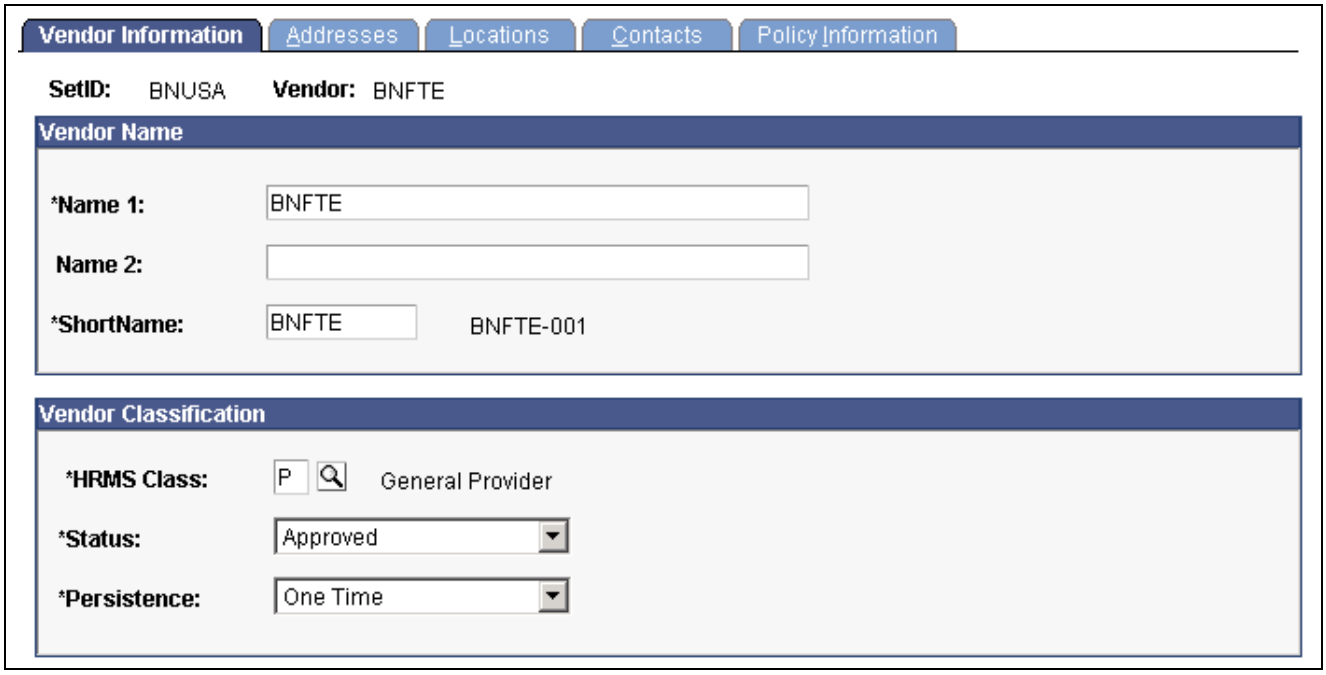
Use Auto-Numbering PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.

HRMS Vendor ID Prefix If you selected the auto-numbering check box, enter a prefix that is used identify HRMS vendors.

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Entering Basic Vendor Information

Access the Vendor Information page.



Vendor Information page

Name 1 Enter the payee name as it should appear on the check.

HRMS Class (HRMS classification) This field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.

It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers.

Available values are:

- *Credit Card Supplier (C)*
- *General Deduction (D)*
- *Garnishment Payee (G)*
- *National Health Service Provider (H)*
- *Industrial Insurance Board Provider (I)*
- *Imp Partner Provider (M)*
- *General Provider (P)*
- *Tax Collector (T)*

For benefit providers, select *P* for General Provider.

Status For HRMS vendors, select *Approved*. The other values are used by Enterprise Payables.

Persistence For HRMS vendors, select *Regular*. The other values are used by Enterprise Payables.

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Entering Vendor Address Information

Access the Addresses page.



Vendor Information - Addresses page

Address Type

Enter the one or more addresses for the vendor.

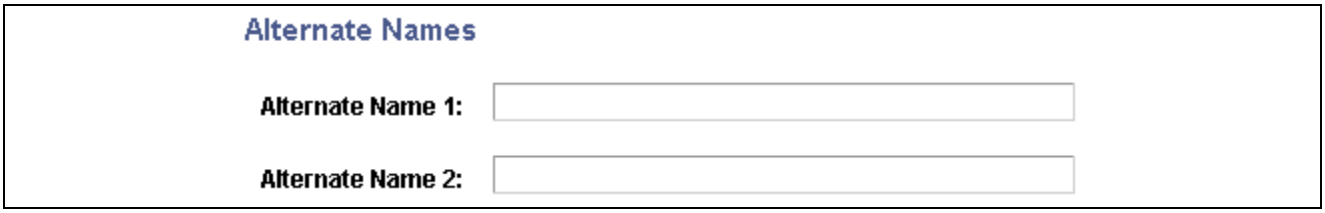
If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers.

Premium Payment and *Remittance* are the only valid address types for deduction recipients. If any other address type is displayed for this vendor, contact your Accounts Payable department.

Premium Payment t generally applies to benefit deductions and *Remittance* applies to all other types of deductions including taxes.

Displaying Alternate Names for Use on Payments

Access the Alternate Names page.



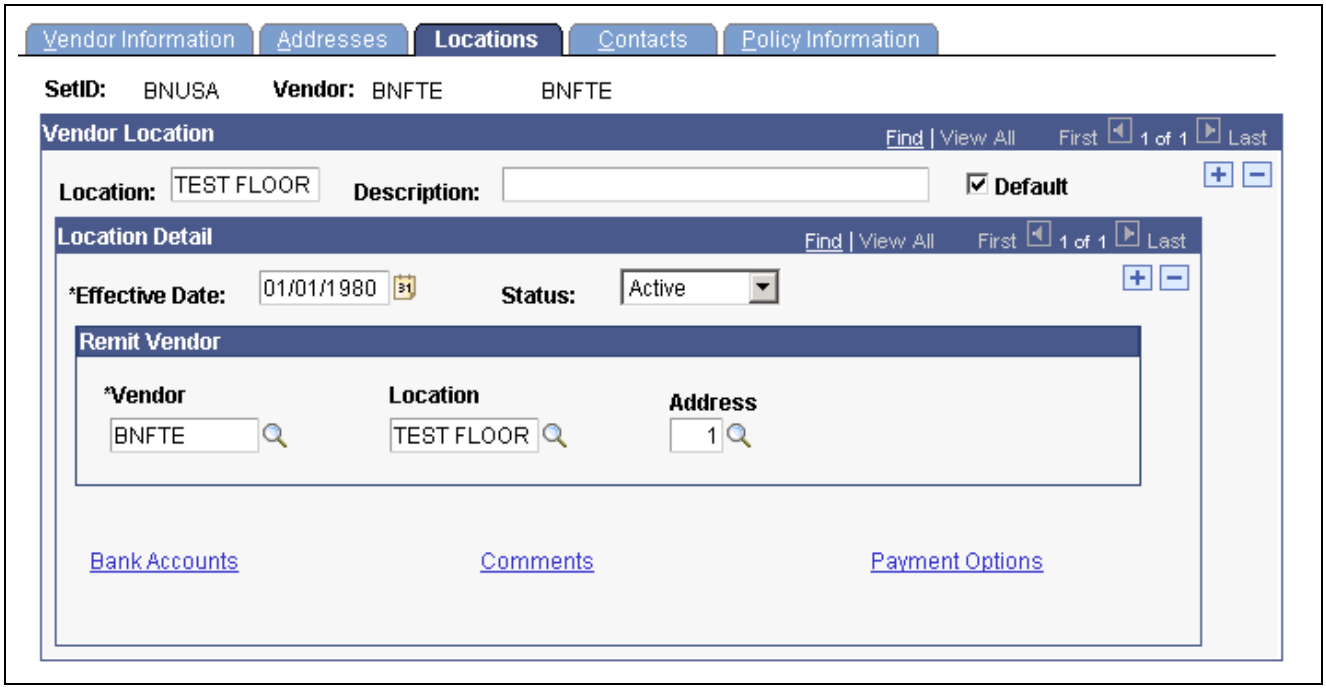
Alternate Names page

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Alternate Name 1 and **Alternate Name 2** — When the system generates payments for the location using this address, Enterprise Payables needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Identifying Vendor Locations

Access the Provider/Vendor Table - Locations page.



Vendor Information - Locations page

Location — Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.

Default — Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.

Remit Vendor — This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.

Bank Accounts — Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.

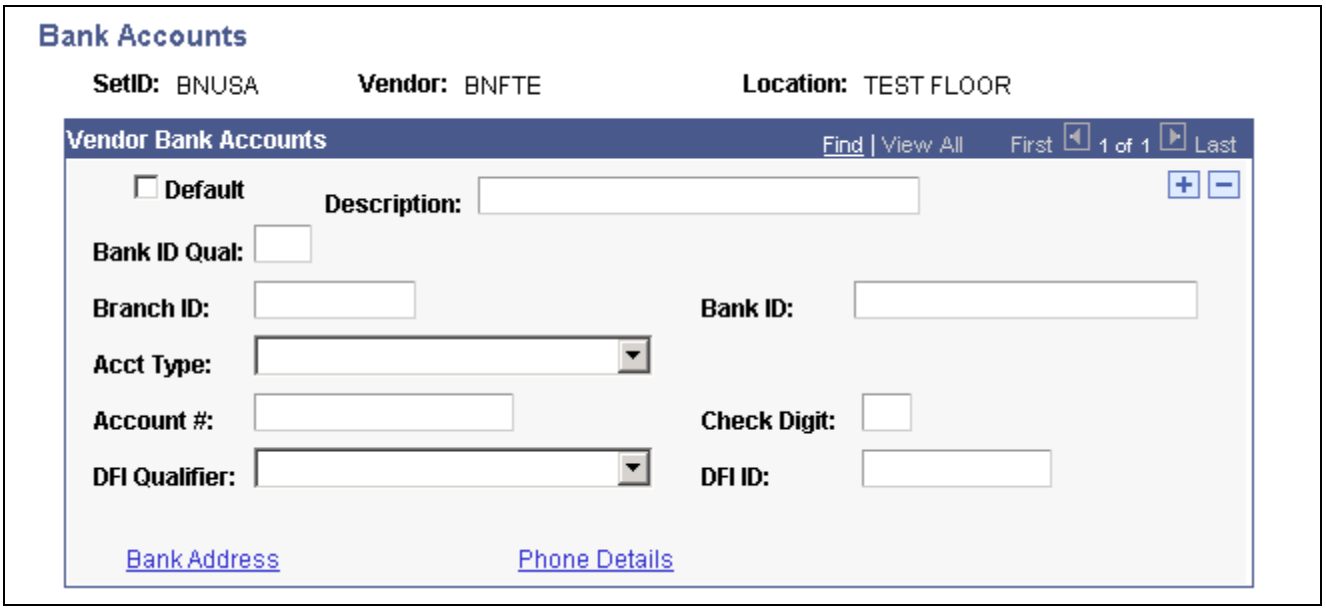
Comments — Click this link to display the Comments page.

Payment Options — Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Entering Bank Account Information

Access the Bank Accounts page.

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Bank Accounts page

Default The Default check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.

Bank ID Qual The country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.

Branch ID The branch ID for the bank, if appropriate.

Bank ID The Bank ID for the bank.

Acct Type The account type for the bank, *Bond, Checking Account,* and *Life Insurance,* for example.

Account # The vendor's bank account number.

Check Digit The check digit used by the bank.

DFI Qualifier If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the DFI ID field.

- *Transit Number:* The DFI ID is exactly 9 digits, plus check digit calculation.
- *Swift ID:* The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code.
- *CHIPS ID:* The DFI ID is 3 or 4 digits.
- *Canadian Bank Branch/Institute* and *Mutually Defined:* No validation for DFI ID.

The DFI Qualifier determines the format of the bank's DFI ID.

DFI ID The bank's DFI ID. The format is determined by the value displayed in the DFI Qualifier field.

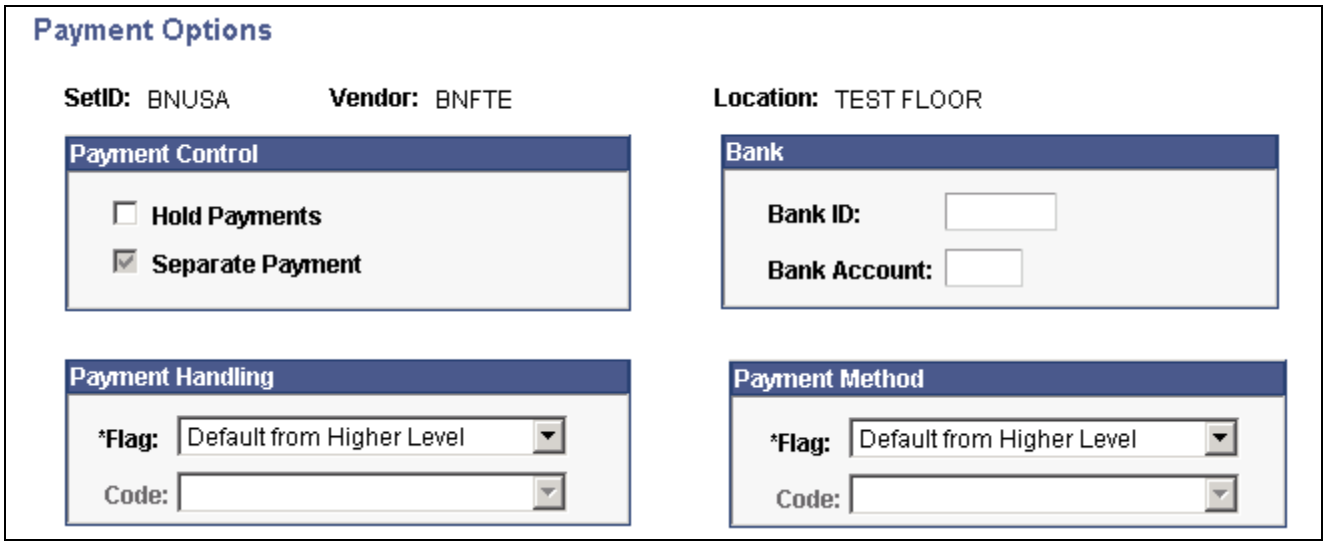
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Bank Address Select Bank Address for the Bank Address page.

Phone Details Select Phone Details for the Phone Details page.

Entering Payment Processing Information

Access the Payment Options page.



Payment Options page

Payment Control

Hold Payments If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.

Separate Payment If this check box is selected, PeopleSoft Payables creates a separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Bank ID The code for the bank from which you want to make payments for this vendor.

Bank Account The account from which payments will be made to this vendor.

Payment Handling

Flag This field determines the payment handling instructions.

- *Default from Higher Level:* The payment handling instructions for the vendor come from the control hierarchy.
- *Specify at this Level:* The payment handling instruction for the vendor appears in the Code field.

Code If you select Specify at this Level in the Flag field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor:

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- *High Dollar Payment.*
- *Internal Distribution.*
- *Regular Payments.*
- *Route to Purchasing.*

Payment Method

Flag

This field determines the payment method:

- *Default from Higher Level:* The payment method for the vendor comes from the control hierarchy.
- *Specify at this Level:* The payment method for the vendor appears in the Code field.

Code

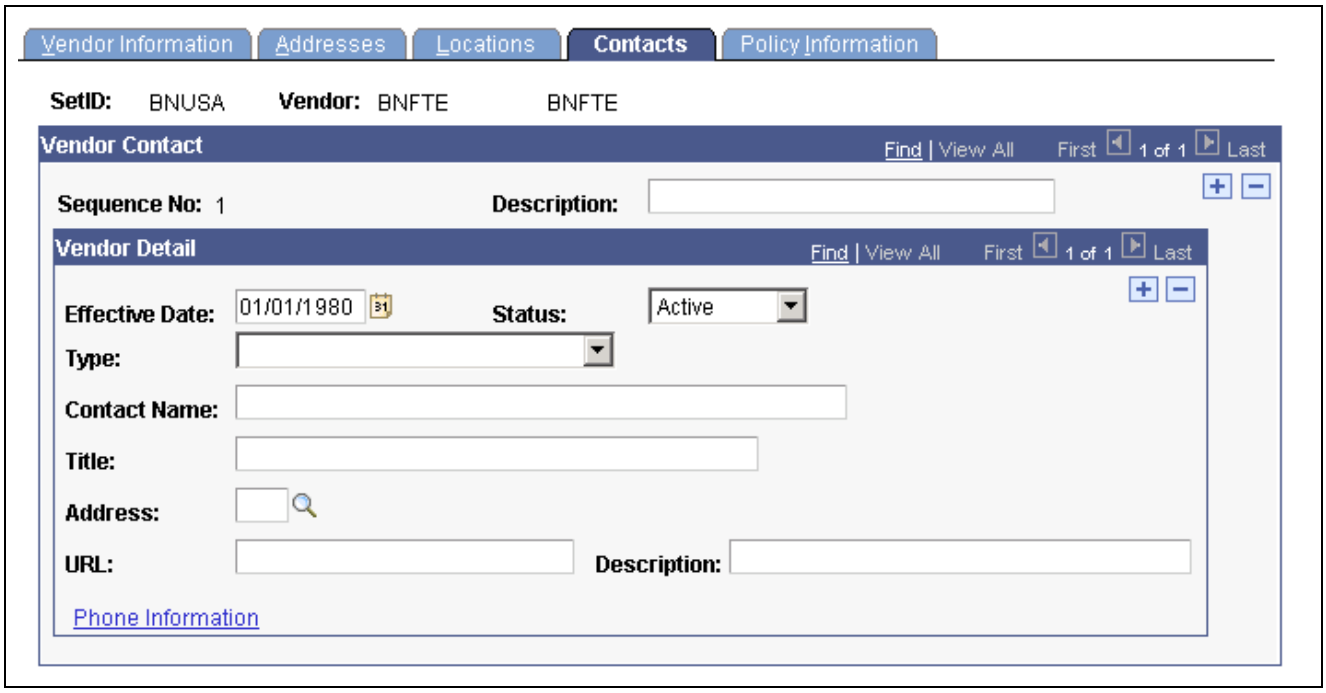
If you select Specify at this Level in the Flag field, this field displays the payment method for this vendor:

- *Automated Clearing House.*
- *Customer Initiated Draft.*
- *Direct Debit.*
- *Draft - Customer EFT.*
- *Electronic Funds Transfer (EFT).*
- *Giro - EFT.*
- *Giro - Manual.*
- *Letter of Credit.*
- *Manual Check.*
- *System Check.*
- *Treasury Wire Flat File.*
- *Vendor Initiated Draft.*
- *Wire Report.*

Entering Vendor Contact Information

Access the Contacts page.

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Vendor Information - Contacts page

Sequence No (sequence number) This number is automatically assigned to this contact.

Type Select the type of contact.

Address Select one of the addresses that you entered on the Addresses page.

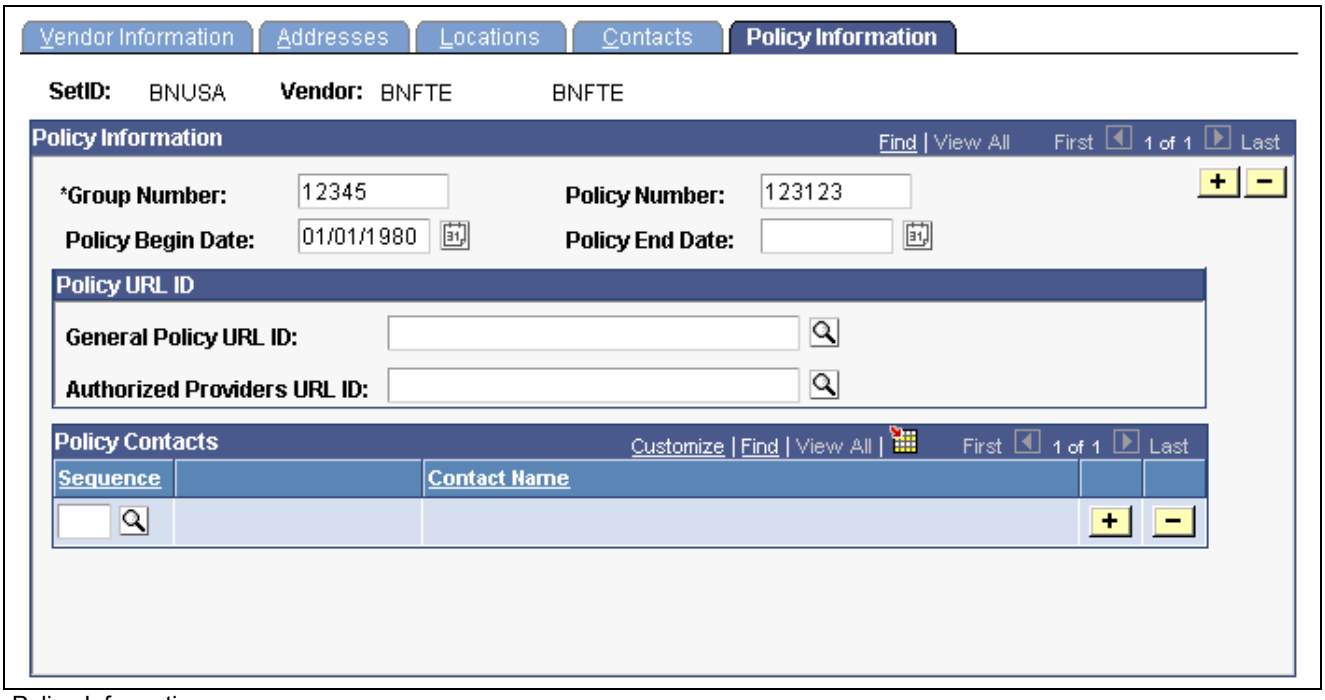
URL Enter the contact's website address.

Phone Information Click this link to display the Provider/Vendor Table - Contacts: Phone Information page.

Entering Benefit Policy Information

Access the Provider/Vendor Table - Policy Information page.

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Policy Information page

General Policy URL ID Select the vendor's website address that provides general policy information.

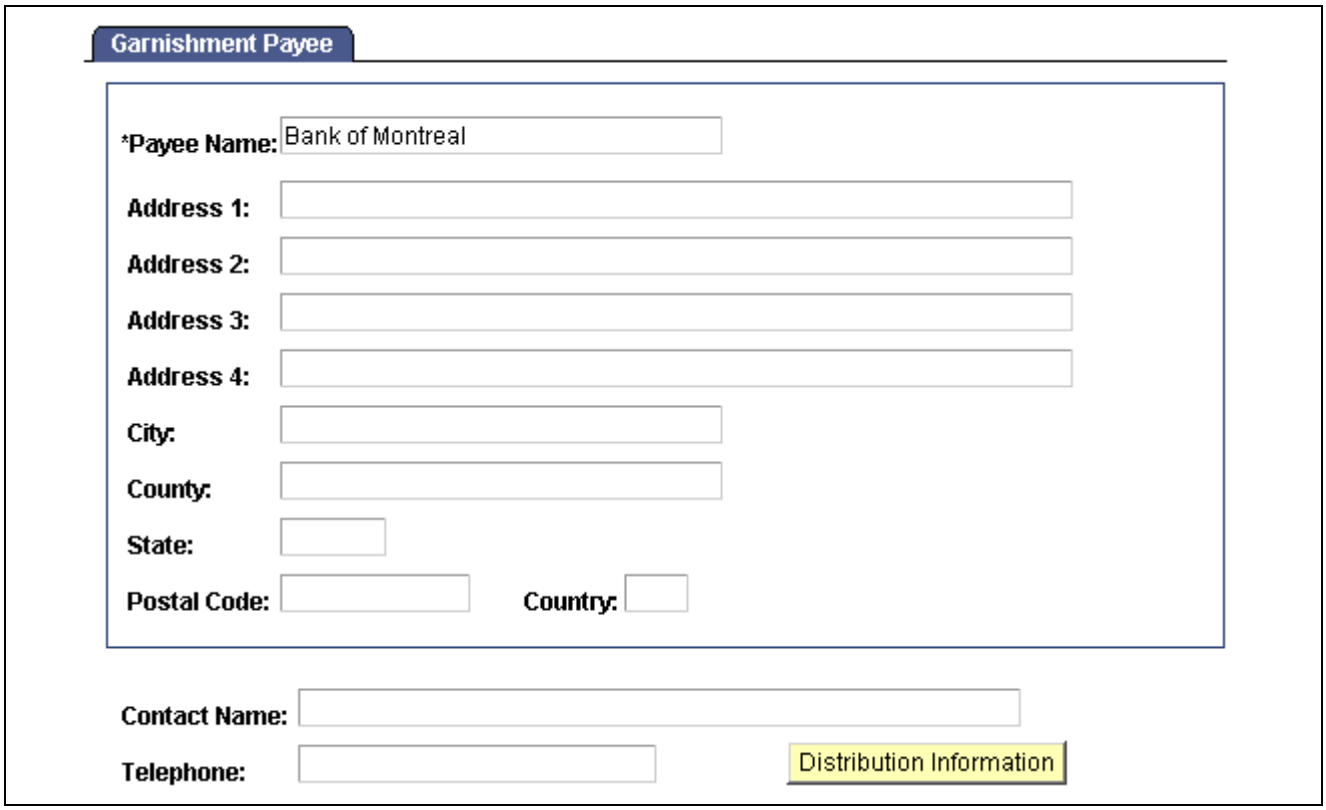
Authorized Providers URL ID Select the vendor's website address that contains a list of authorized participating providers

Sequence Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the Contact Name automatically appears.

(USF) Entering Garnishment Payee Contact Information

Access the Garnishment Payee page.

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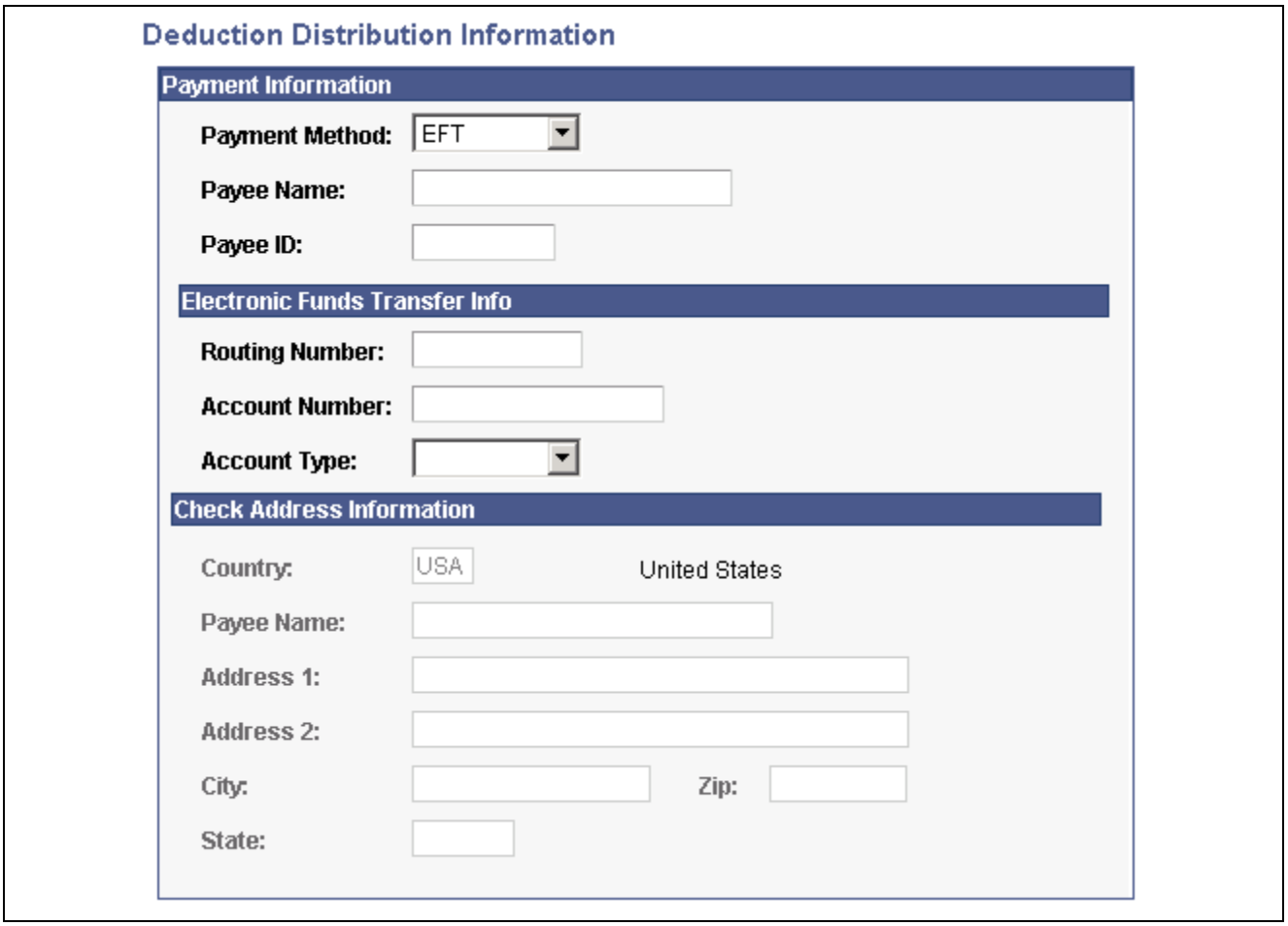
Garnishment Payee page

Distribution Information Click this button to access the Deduction Distribution Information page.

(USF) Entering Garnishment Payee Distribution Information

Access the Deduction Distribution Information page.

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Deduction Distribution Information page

Enter the payment information.

Payment Method For EFT distributions, select EFT as the payment method and specify the remittance state and FIPS code in addition to the account information.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Administering Garnishments," Entering Garnishment Deduction Distribution Information

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Administering Garnishments," (USA) Specifying EFT Information for Child Support Garnishments

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CHAPTER 22

Setting Up and Working with Group Definitions

This chapter provides an overview of group build and discusses how to:

- Set up group definitions.
- Set up group security.
- Refine groups in PeopleSoft applications.
- View group results and reports.
- Purge group results.

Understanding Group Build

This section discusses how to:

- Use the group build feature.
- Create a group.

Using the Group Build Feature

The Group Build feature provides a standard way to create groups of people in HRMS. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 though 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Base Compensation and Budgets module. You define the group only once.

You can define groups in Group Build and use those groups in HRMS applications such as:

- PeopleSoft Enterprise Time and Labor
- PeopleSoft Enterprise Benefits Administration
- PeopleSoft Enterprise Stock Administration
- ePerformance
- The following PeopleSoft Enterprise Human Resources business processes:
  - Manage Base Compensation and Budgeting
  - Report Total Compensation

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- Manage Variable Compensation
- Manage Labor Administration

Creating a Group

Creating a group in PeopleSoft HRMS involves three steps:

1. Define the population that belongs to the group.
2. Set up group security.
3. Refine dates and other application-specific parameters in individual PeopleSoft applications (if necessary).

Note. These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft HRMS.

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.

Groups for Manage Variable Compensation

To use an existing review group later in the Manage Variable Compensation business process, link the existing group ID to a node in the Variable Compensation Group Tree in the Manage Variable Compensation business process.

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID *NOGROUP* is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID of *NOGROUP* in the Group Build application.

Setting Up Group Definitions

To set up group definitions, use the Group Build Records and Fields component (GB_REC_FIELD), Group Criteria component (GB_CRITERIA_TABLE), Group Build - Group Definition component (GB_GRP_DEFN_TABLE), and Group Build from Co./Dept. component (RUNCTL_GBP003).

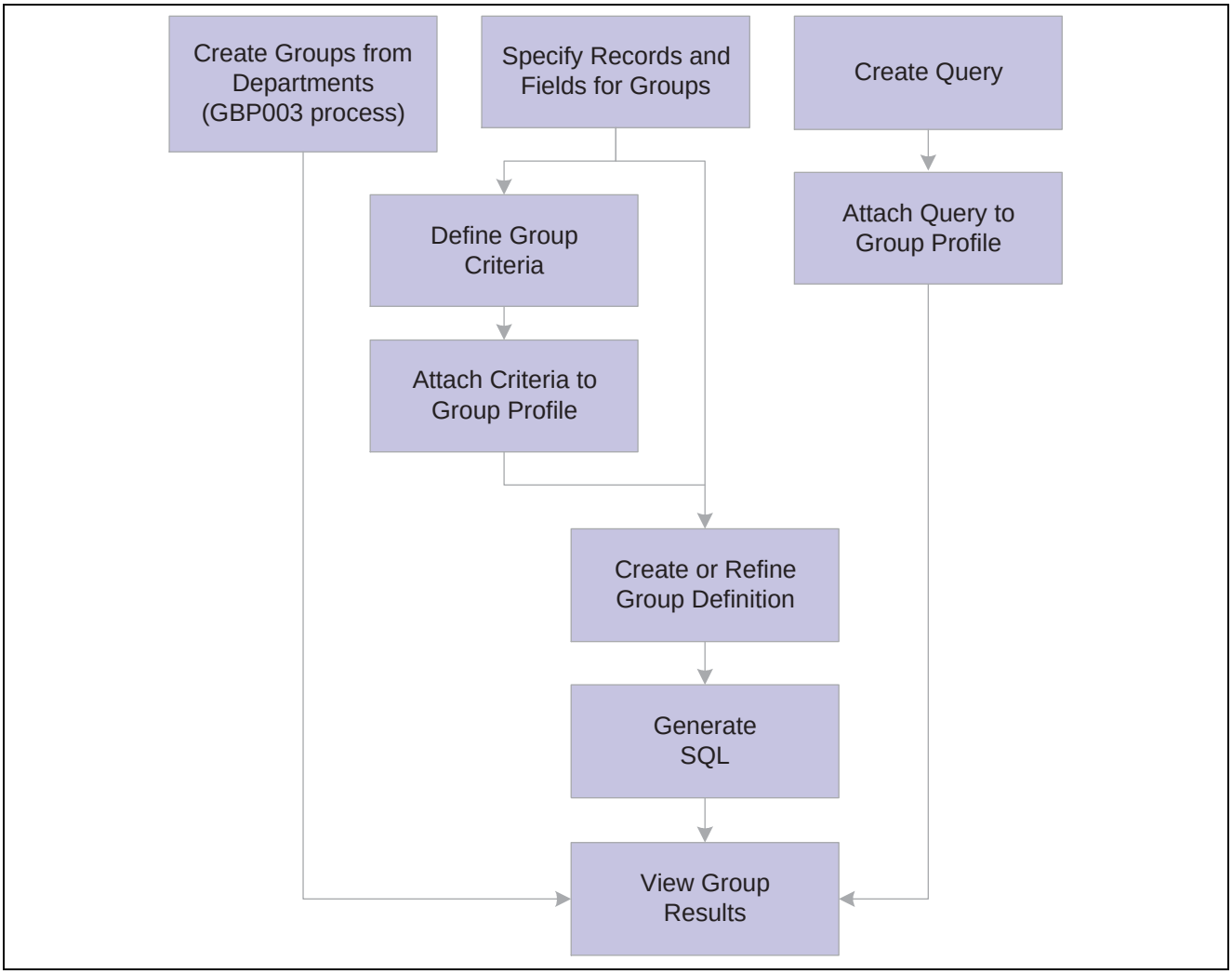
This section provides overviews of group definitions, query definition, and automatic generation of department groups and and discusses how to:

- Select fields for use in group criteria and definitions.
- Define a group criteria.
- Create a group profile.
- Specify records, fields and field values for a group.
- View records, fields, and field values for a group.
- View and sort group members.
- Create groups from departments.

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Understanding Group Definitions

This graphic shows the methods available to define and create groups:



Group definition methods

To define a group's population:

1. (Required unless using a query.) On the Group Build Records and Fields component (GB_REC_FIELD), select the fields for each record available to make them available to create group criteria on the Group Criteria page (GB_GRP_CRIT1_TBL) and Group Definition page (GB_GRP_DEF2_TBL).

   See Chapter 22, "Setting Up and Working with Group Definitions," Selecting Fields For Use in Group Criteria and Definitions, page 480.

2. (Optional) Create a group criteria on the Group Criteria page.

   Group criteria are like building blocks of records and fields that you can use repeatedly to create different groups. For example, if your organization operates several business processes based on workers' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

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Record Name	Field Name
Job	Department
Job	Union Code

See Chapter 22, "Setting Up and Working with Group Definitions," Defining a Group Criteria, page 481.

3. Attach a group criteria ID or query to the group definition on the Group Profile page (GB_BRP_DEFN1_TBL).

   On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.

   - Using a group criteria ID.

     If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can use only one group criteria per group.

     See Chapter 22, "Setting Up and Working with Group Definitions," Creating a Group Profile, page 482.

   - Using PeopleSoft Query.

     If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the thirty-two records that are available through the Group Criteria page or Group Definition page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.

     See Chapter 22, "Setting Up and Working with Group Definitions," Understanding Query Definition for Group Build, page 479.

4. Define or refine the group by selecting records, fields, and field values on the Group Definition page.

   If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Criteria. You can also add any other records, fields, and values that you want to include in the group's definition.

   If you've included a query in the group definition, you can't make any further selections on the Group Definition page.

   You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

   See Chapter 22, "Setting Up and Working with Group Definitions," Specifying Records, Fields, and Field Values for a Group, page 484.

Note. Only the fields that you select on the Group Build Records and Fields component are available on the Group Definition page.

Note. Once you have saved a Group ID, you must give yourself access to that group on the Security By Group page (GB_GRP_SEC_TBL) or Security By Operator page (GB_GRP_SEC_TBL) or else you will be unable to access the group in the Group Build - Group Definition component (GB_GRP_DEFN_TABL).

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See Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Group Security, page 490.

Understanding Query Definition for Group Build

Use PeopleSoft Query with Group Build to define a group to access many more tables than the thirty-two tables that are available on the Group Criteria page or the Group Definition page.

When you define a query to use in group definitions, the following rules apply:

- The first record you insert into the query must be the Group Build view (GB_QRY_LINK_VW).

  The system uses this view to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.
- You must select the following four fields from the GB_QRY_LINK_VW record:
  - EMPLID
  - EMPL_RCD
  - EFFDT
  - EEFFSEQ
- You must have at least one criterion for a record that you add in PeopleSoft Query.
- You can't define fields that are returned by the SQL statement.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You can't use a prompt as an expression.

  You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).
- The maximum length of the expression is 254 characters.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Understanding Automatic Generation of Groups by Department

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides the Group Build Construction SQR process (GBP003) for translating your departmental structure into group format. With this process, you create new groups that correspond to your existing company, setID, and department structure.

For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new *Group USA 10200.*

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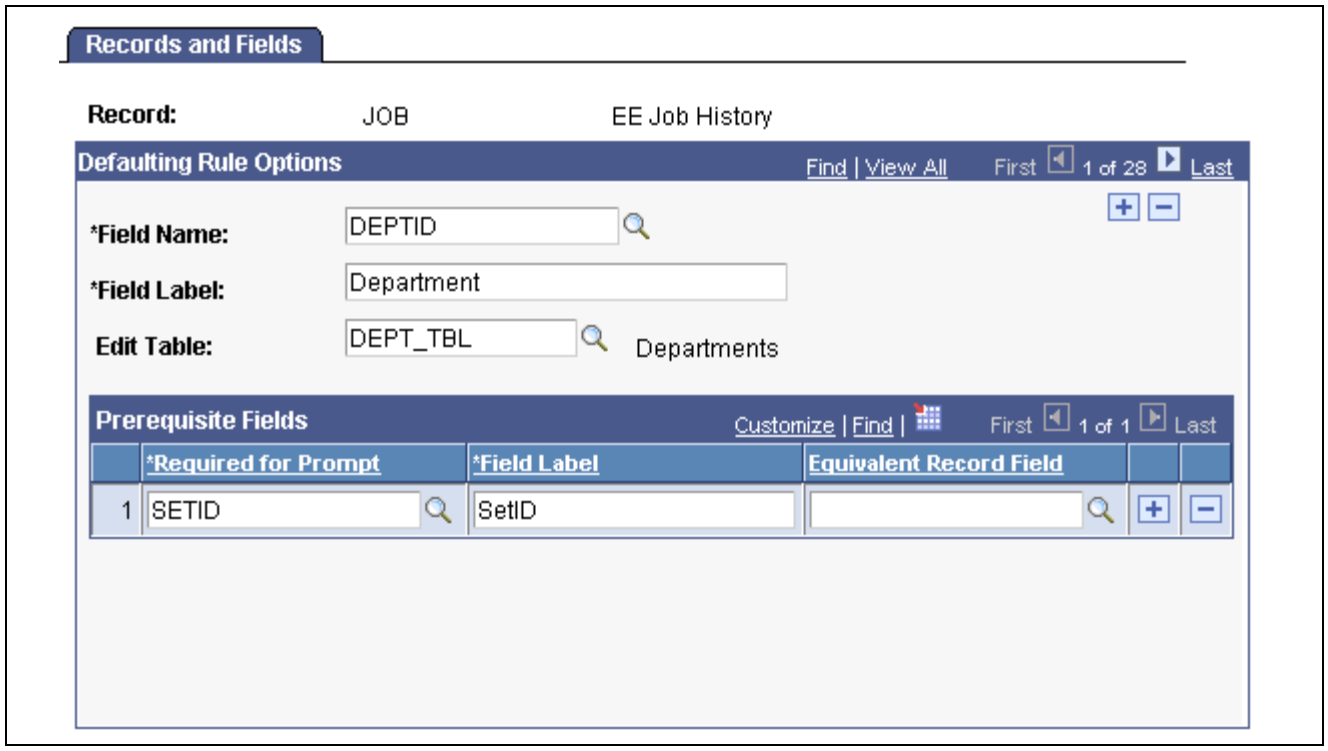
Pages Used to Define Groups

Page Name	Object Name	Navigation	Usage
Records and Fields	GB_REC_FIELD	Set Up HRMS, Common Definitions, Group Build, Group Build Records and Fields, Records and Fields	Select fields for use on the Group Criteria page and Group Definition page.
Group Criteria ,	GB_GRP_CRIT1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Criteria	Create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.
Group Definition Comments Sec	GB_GRP_CRIT1_SEC	Click the Comments link on the Group Criteria page.	Enter free-form comments about a Group Criteria definition.
Group Profile	GB_GRP_DEF1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Profile	Create a group profile. (Optional) Attach an existing group criteria ID or query to a group definition.
Group Definition	GB_GRP_DEF2_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Definition	Specify the records, fields, and field values to define a group or refine a group criteria.
Group Build Definition View	GB_GRP_DEF1_SEC	Click the Comments link on the Group Profile page or the Group Definition page.	View the records, fields, field values, and operators that you've specified for the group definition.
Group Result	GB_GROUP_RES_SEC	Click the Group Visualize button on the Group Definition page.	View and sort the members of the groups that you've built on the Group Build pages.
Group Build From Co. & Dept (group build from company and department)	RUNCTL_GBP003	Set Up HRMS, Common Definitions, Group Build, Group Build From Co./Dept.	Create groups from departments by running the Group Build Construction SQR process (GBP003) to translate your existing company and department structure into group format.

Selecting Fields For Use in Group Criteria and Definitions

Access the Records and Fields page.

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Records and Fields page

For the record you selected on the search page, choose the fields you want to make available for creating group criteria on the Group Criteria page and on the Group Definition page. The system makes only those fields that you select here available on the Group Criteria page.

Defaulting Rule Options

Field Name and **Field Label** — Select the field name that you want to have available for use as group criteria. After you select a field name, its description appears in Field Label; you can change this description.

Edit Table — Select the field's edit table—the table from which the field is prompted.

Prerequisite Fields

Required for Prompt and **Field Label** — Select the field that prompts for the group criteria fields, if required.

For example, if the defaulting rules field is Department, select SETID because before you can select a department, you need to select the department's setID. The appropriate Field Label and Equivalent Record Field appear when you select the Required for Prompt field.

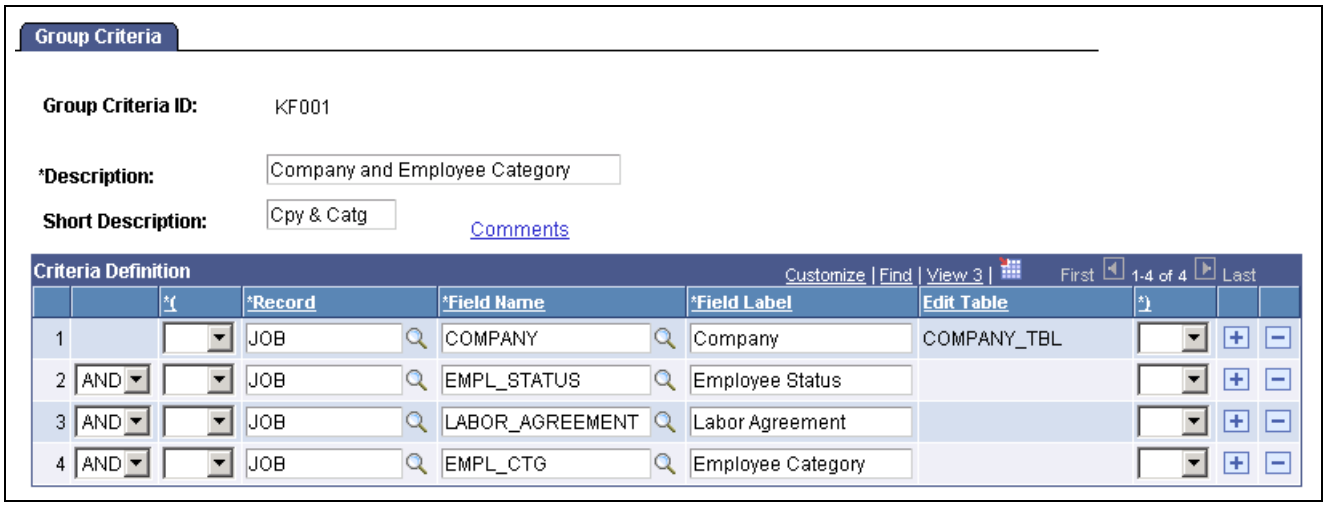
Equivalent Record Field — Select the Required for Prompt field's equivalent. For example, the department's equivalent of SETID is SETID_DEPT

Sometimes the equivalent field is the same as the Required for Prompt field or there is no equivalent field. If there is no equivalent field, leave this field blank.

Defining a Group Criteria

Access the Group Criteria page.

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Group Criteria page

AND/OR This field appears only if you add a second row of data to the page. Use it to tell the system how to process the records and fields that you enter on this page. Values are *AND* (the default) and *OR*.

(Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is *none*.

Record Select the record name to include in the group criteria definition. The system displays a list of the records you made available on the Group Build Records and Fields component.

Field Name Enter the field name to include in the group criteria definition. The system displays a list of the fields you made available on the Group Build Records and Fields component for the record that you selected in the Record field.

Field Label The system fills in this field when you press TAB to move out of Field Name. You can change the entry.

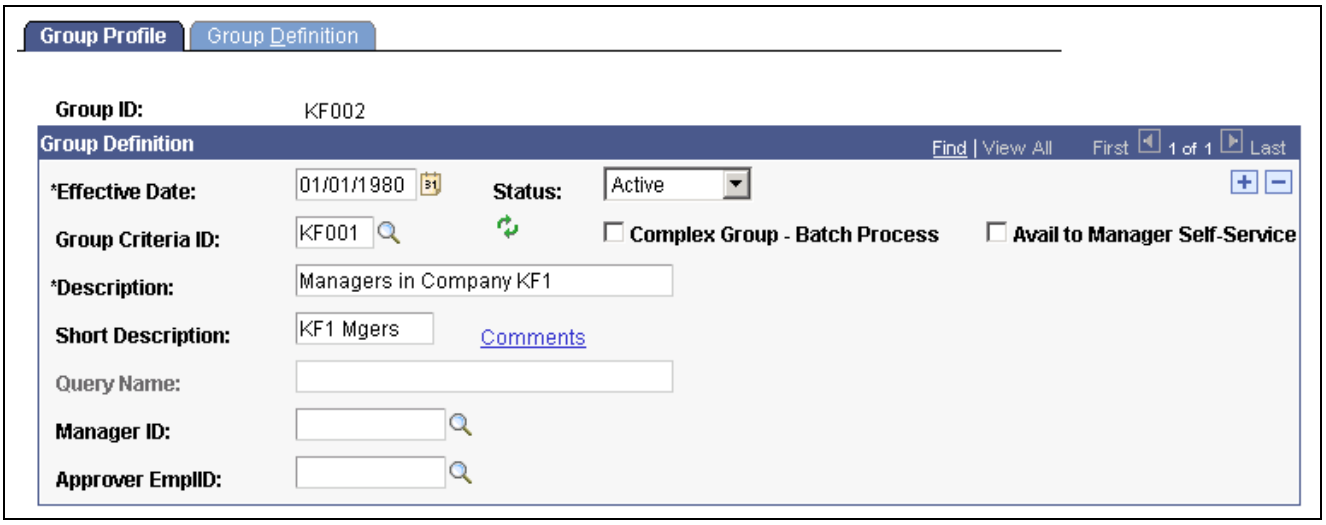
Edit Table The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of Field Name.

) Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Creating a Group Profile

Access the Group Profile page.

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Group Profile page

Group ID Enter or select the group ID on the search page.

Note. The group ID *NOGROUP* is used for Variable Compensation plans without groups. It is a reserved group ID; you cannot create a Group ID of *NOGROUP* in the Group Build application.

Group Criteria ID To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.

If you changed the Group Criteria ID, click the Refresh button to repopulate the Group Definition page with new values.

Complex Group - Batch Process Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes.

PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page.

Avail to Manager Self-Service Select this check box if you plan to use Group ID as an access type for any manager self-service transaction.

Comments Click this link to enter free-form comments on the Group Build Definition View page and to view the where clauses defined on the Group Definition page.

Query Name To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank.

Warning! When you access the list of options in this field, all existing queries that include the record GB_QRY_LINK_VW appear. However, the Group Build process works only with queries that have the fields EMPLID, EMPL_RCD, EFFDT, and EFFSEQ. If you select a query that does not contain those fields, the system will not display the Launch Count and Group Visualize buttons on the Group Definition page.

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See Chapter 22, "Setting Up and Working with Group Definitions," Understanding Query Definition for Group Build, page 479.

Manager ID

Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200, enter the department manager's ID here. You can also use this field to designate the leader of a project team.

Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups.

If you selected the Avail to Manager Self-Service check box, Manager ID is required.

Approver EmplID (approver employee ID)

If you're planning to use this group in the Variable Compensation Administration by Groups business process, enter the employee ID of the person who approves awards for this group. The system displays a list of values.

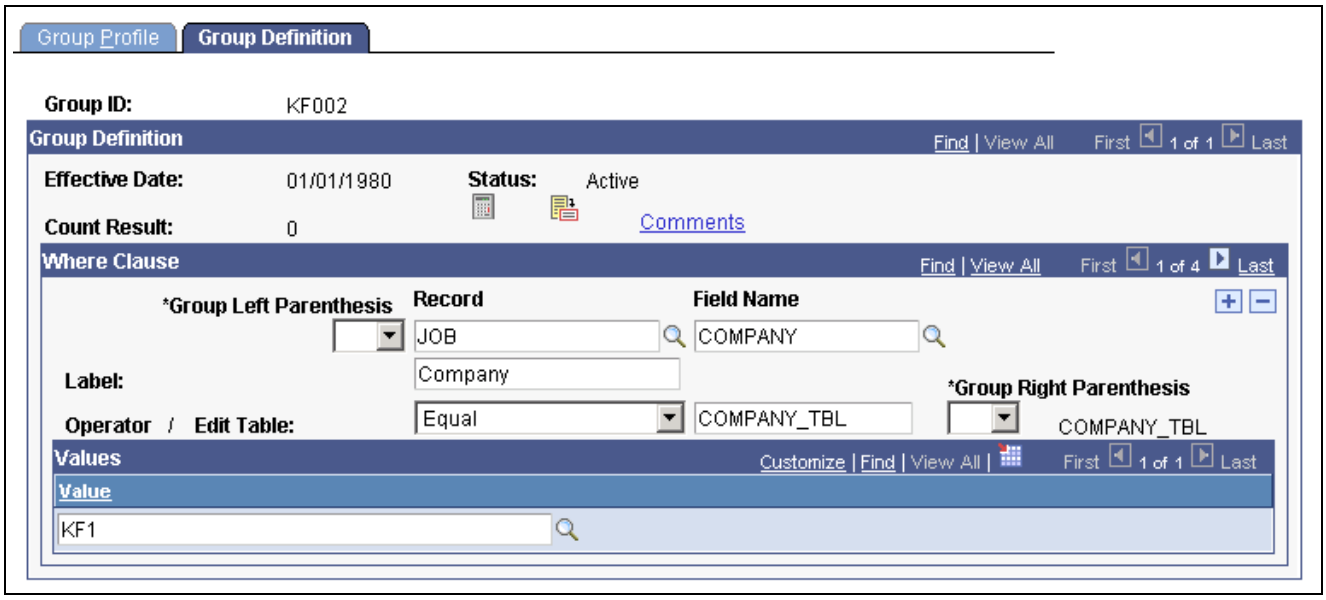
If you selected the Avail to Manager Self-Service check box and are using workflow with self-service transactions, Approver EmplID is required.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Specifying Records, Fields, and Field Values for a Group

Access the Group Definition page.



Group Definition page

Group Definition

You can use this page in combination with a group criteria entered on the Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

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The system populates the Group Definition page with the record and field names from the Group Criteria page. You can't change the record and field names on this page. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Criteria page. You can add more records, field names, and field values to the definition.

- If you aren't using a Group Criteria ID.

  Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.

- If you entered a query on the Group Profile page.

  You can't refine a group that is based on a query.



After you save the page, click the Launch Count button to compute how many members are in the group. If you selected the Complex Group - Batch Process check box on the Group Definition - Group Profile page, clicking Count sends the group to PeopleSoft Process Scheduler to be generated.

If this is a complex group that you have already generated, clicking Count retrieves the number of rows in the group.

Count Result When you click the Count button, the system displays the number of members in the group. If you used effective-dated records in the group definition, the group might include more than one row of data per employee. Each data row counts as one item in the Count Result.



Click the Group Visualize button to build the group and to access the Group Result page, where you get a list of all group members.

Comments Click this link to access the Group Build Definition View page where you can enter comments or view the where clause that you defined on the Group Definition page.

Where Clause

Record Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Criteria definition, you can't change the entry.

Field Name Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the Record field. If you entered a group criteria ID on the Group Profile page, the system populates this field and you can't change the entry.

Label The system populates this field when you move out of the field.

Operator Define the field values to include in or exclude from the group. See the following Valid Operators table.

Note. *(JPN)* If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job − Effective Date to *Current.* If you select *Current,* you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to *Current* here, you can run processes to extract other than current data by using the As of Date on the process page.

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Edit Table The system uses edit tables to validate the data that you entered in certain fields. If the Field Name that you entered is linked to an edit table, the system populates this field.

Note. If the Field Name that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.

Value Select a field value from the list.

Valid Operators

Operator	Description
<	Less than.
<=	Less than or equal to.
<>	Less than or greater than.
=	Equal to.
>	Greater than.
>=	Greater than or equal to.
Between	
Current	
EFFDT<	Effective date is less than.
EFFDT<=	Effective date is less than or equal to.
EFFDT>	Effective date is greater than.
EFFDT >=	Effective date is greater than or equal to.
In List	
Is Null	Field value equals 0.

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Operator	Description
Like	
Max	Maximum.
Min	Minimum.
Not Btw	Not between.
Not Equal	
Not In	Not In List
Not Like	
Not Null	Field value does not equal 0.

Defining Groups with Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data
- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

  For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

  For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

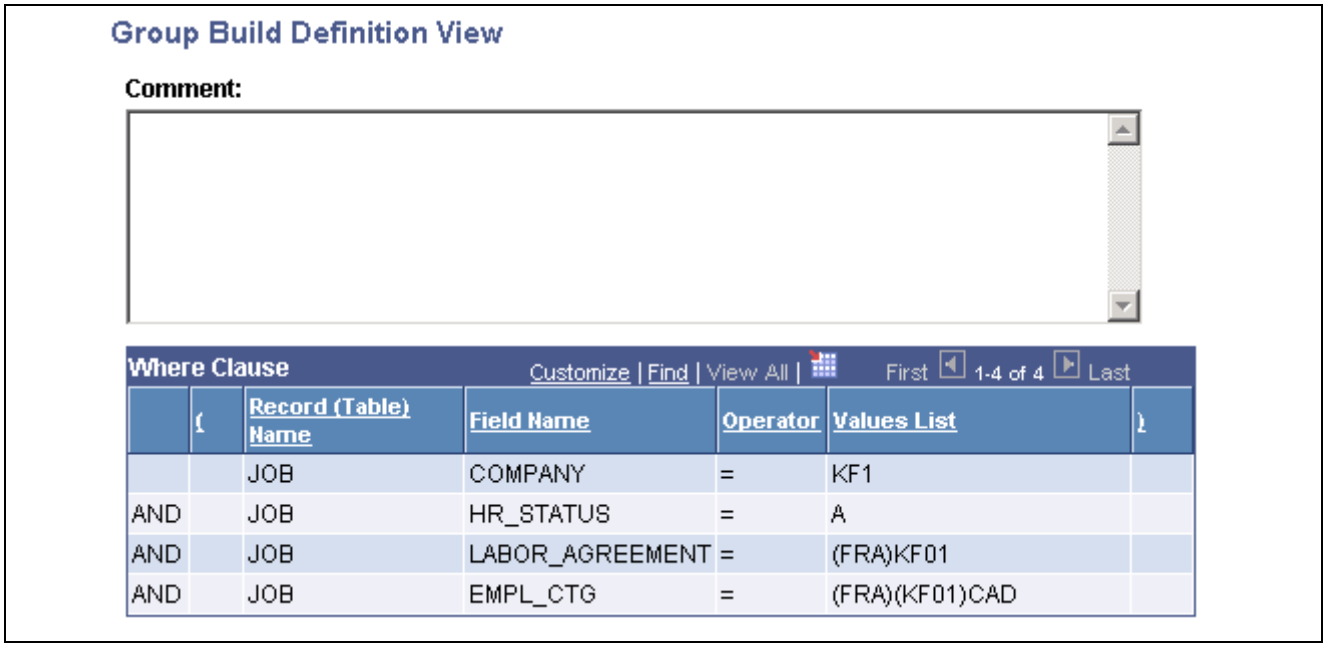
If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

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Operator	Description
Effdt<=	Effective date is less than or equal to.
Effdt>=	Effective date is greater than or equal to.
Effdt<	Effective date is less than.
Effdt>	Effective date is greater than.

Viewing Records, Fields, and Field Values for a Group

Access the Group Build Definition View page.



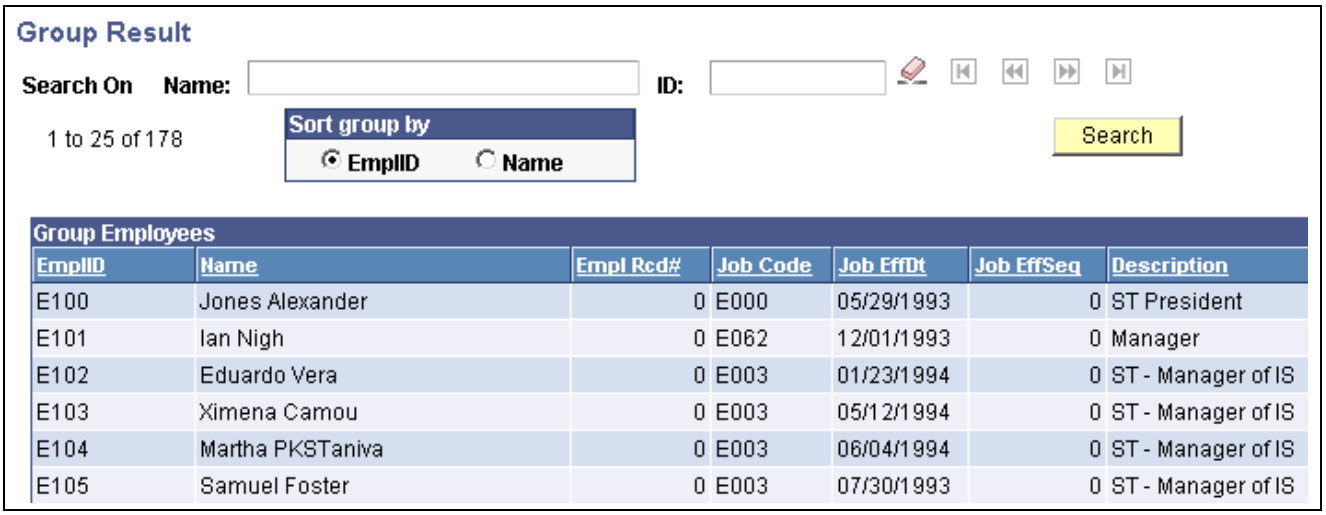
Group Build Definition View page

Where Clause View the where clause as defined on the Group Definition page.

Viewing and Sorting Group Members

Access the Group Result page.

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EmplID	Name	Empl Rcd#	Job Code	Job EffDt	Job EffSeq	Description
E100	Jones Alexander	0	E000	05/29/1993	0	ST President
E101	Ian Nigh	0	E062	12/01/1993	0	Manager
E102	Eduardo Vera	0	E003	01/23/1994	0	ST - Manager of IS
E103	Ximena Camou	0	E003	05/12/1994	0	ST - Manager of IS
E104	Martha PKSTaniva	0	E003	06/04/1994	0	ST - Manager of IS
E105	Samuel Foster	0	E003	07/30/1993	0	ST - Manager of IS

Group Result page

Using Group Member Chunking Controls

Because the number of group members could be very large, the system loads members into this page in chunks. You can determine the number of rows in a chunk in the Maximum Number of Rows for Scrolling field on the Installation Table. You manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

Important! Group Build automatically joins the JOB, COMPENSATION, PERSON, and PER_ORG_ASGN tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.

When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition JOB.EFFDT <= Given Date is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name — Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered.

You can use the wild card *%* to help select a record. For example, to search for all employees named John enter *%John*.

ID (employee ID) — Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.

Sort group by — Select whether you want the members to appear in order by EmplID (employee ID) or Name.

Note. (JPN) The Sort group by feature is disabled when Japanese Kanji character sets are used in a Non-Unicode database with Japanese as the base language and login language.



Click the Refresh Search Fields? button to clear all previously entered search criteria from the filter fields.

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Search Click the Search button to display the results of a new search. To the left of the Sort group by group box, the system displays which rows are visible compared to the total number of rows. For example, *1 to 4 of 4* means that rows 1 through 4 are displayed out of a total of 4 rows.

Note. After you click Search, the button disappears from the page until you click the Refresh Search Fields? icon.

Creating Groups From Departments

Access the Group Build from Co. & Dept. page.

Run the Group Build Construction SQR process (GBP003) to translate your departmental structure into group format.

When the process is complete, you can use the Group Build pages to view the groups and verify that they were generated correctly.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," Understanding Automatic Generation of Groups by Department, page 479

Setting Up Group Security

To set up group security, use the Group Security Default component (GB_GRP_DEFN_TABLE), Security By Group component (GB_GRP_SEC_TABLE), and Security By Operator component (GB_OPR_SEC_TABLE).

This section provides an overview of group security and discusses how to:

- Set up default component access.
- Set up security by group.
- Set up security by operator.

Understanding Group Security

Because you can group people together in any manner that suits your needs, including across companies or departments, groups have their own security structure that is separate from, and overrides, data permission security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes people in department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

Note. User profiles must have an associated person in order to be given security access to groups (the system will not list user IDs that don't have a person associated with them). This ensures that the security is assigned to a person and the activities involving the group can be tracked by the person. Assign people to user profiles on the User Profiles component in PeopleTools security.

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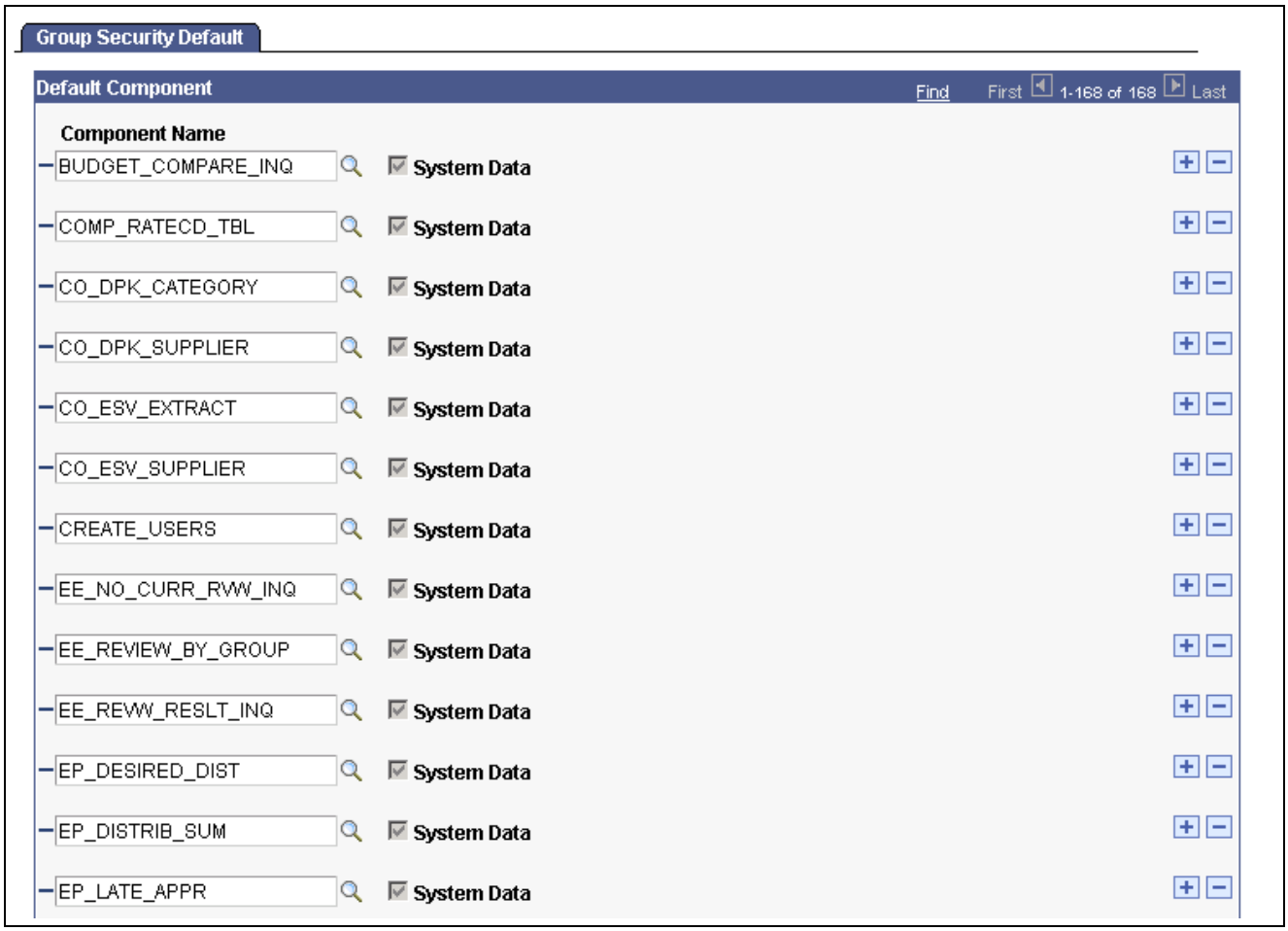
Pages Used to Set Up Group Security

Page Name	Object Name	Navigation	Usage
Group Security Default	GB_GROUP_DFT_TBL	Set Up HRMS, Common Definitions, Group Build, Group Security Default	Set up default component access. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Security By Group	GB_GRP_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security by Group	Set up security by group. Specify the users who have security access to the selected group ID and the components that the user can access for the group.
Security By Operator	GB_OPR_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security By Operator	Set up security by user. Specify the groups that the selected user can access and the components that the user can access for the group.

Setting Up Default Component Access

Access the Group Security Default page.

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Group Security Default page

Component Name The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups.

Components can refer to groups in one of two ways:

- The page contains a field that prompts the user to supply a group ID.
- The page displays a list of people who belong to a particular group.

When you define group security for a particular group or user, you can import this default list into the Security By Group and Security By Operator pages. Then you can selectively delete components to make them unavailable to that group or user.

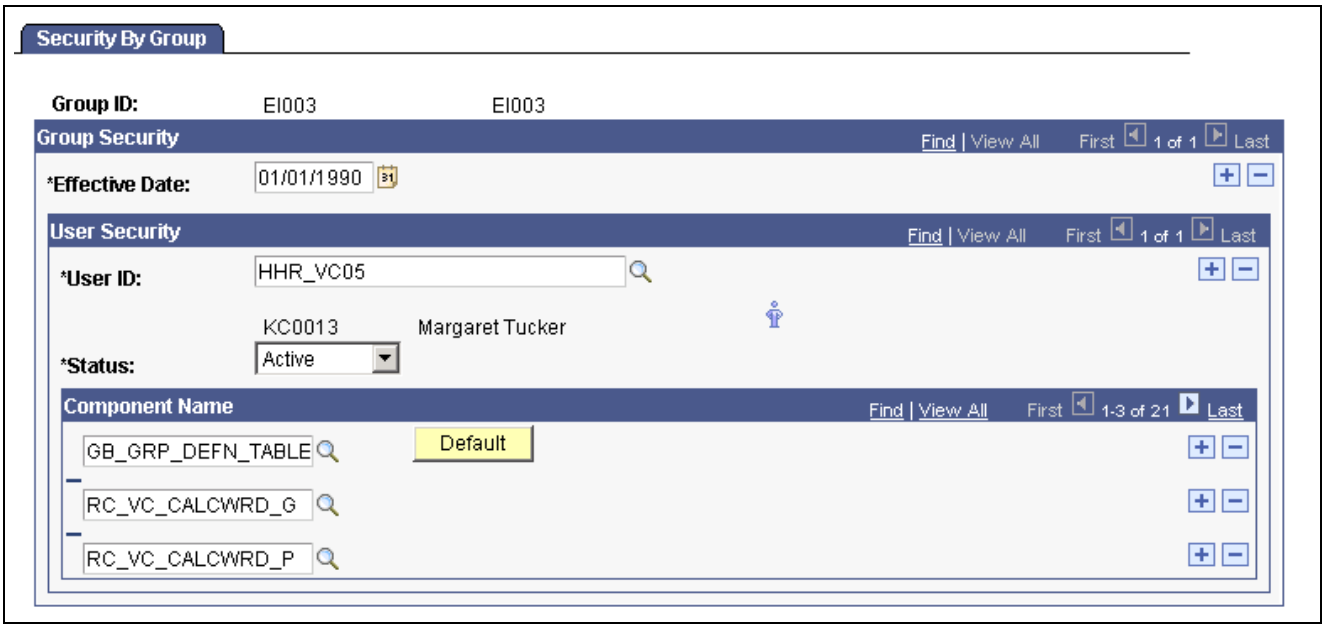
To keep a particular component from appearing on the Security By Group or Security By Operator page, delete its name from the list.

System Data View whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and cleared if the component is modified. You can't change this field.

Setting Up Security By Group

Access the Security By Group page.

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Security By Group page

Effective Date The date on which the security configuration takes effect. The default is to today's date. Change the date to grant security access as of a different date.

User ID Select the ID of a user whose group access you want to set up or change.

If you know a person's ID but not the matching user ID, click the Get Employee ID button to search for the person's user ID. The system displays the Search Operator ID box. Enter the ID and click OK to add the person's user ID to the user list, if it isn't already on the list.

If you don't know the person's ID, click the Look up EmplID icon to search for it. The system displays a Look up EmplID page that you can use to search for the ID you want.

Status Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.

Component Name Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.

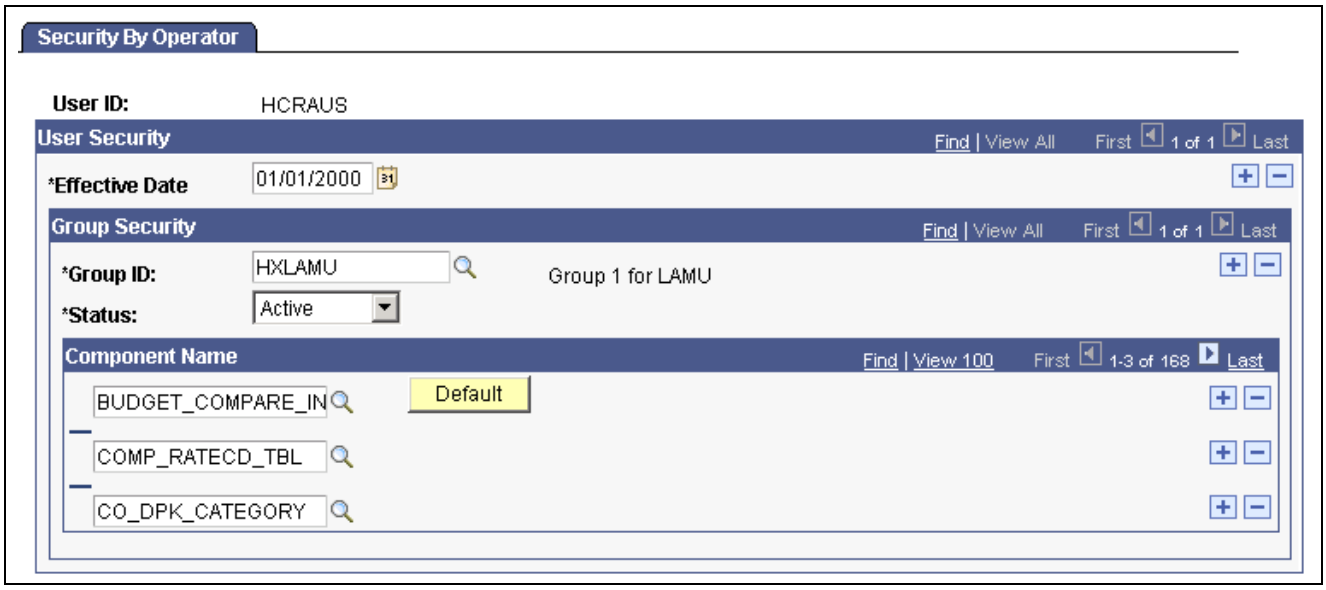
Default Click this button to assign this user access to the current group from any default component listed on the Group Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group.

See Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Default Component Access, page 491.

Setting Up Security By User

Access the Security By Operator page.

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Security By Operator page

Effective Date The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.

Group ID Enter the ID of the group to which you want to control this user's access.

Status Select *Active* to grant the user access to the group or *Inactive* to remove the user's access.

Component Name Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.

Default Click this button to assign this user access to the specified group from any default component listed on the Group Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group.

See Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Default Component Access, page 491.

Refining Groups in PeopleSoft Applications

After you create the group definition, you refine group members at the application level.

You can define a group as of:

- A point in time.

  Some processes select only group members as of an effective date specific to the process. In this case, if the group is created with all job historical rows, the system selects only the data as of the effective date.

- A period of time.

  Some processes select group members who have job data between a from and a through date.

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See Also

Appendix A, "Group Build Implementation for Developers," Building Applications or Batch Programs that Include Group Build Functions, page 877

Viewing Group Results and Reports

This section provides an overview of group membership and discusses how to view complex group results.

Understanding Group Membership

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides an inquiry page and reports that you can use to view group members.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," Viewing Group Results and Reports, page 495

Common Elements

Group ID Enter the ID of the group whose members you want to view.

As Of Date The report lists the members who belong to the group as of the current date, or as of the date you specify in the Refinement Date field.

Refinement Date If the group definition includes effective-dated records, enter the date for which you want the records run. For instance, you might want to run a group with an effective date of 1/1/1990, but run the effective-dated rows in the group as of 2/15/1998. In that case, you would select a Group As of Date of 1/1/1990 and a Refinement Date of 2/15/1998.

If you leave this field blank, the system will run the group as of the current date.

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Pages Used to View Group Results and Reports

Page Name	Object Name	Navigation	Usage
Complex Group Results Summary	RSLT_SMRY_PNL	Set Up HRMS, Common Definitions, Group Build, Complex Group Results Summary	View the status of the complex groups that you created in the Group Definition component. You must already have run the background process to create the group.
Group Overlapping	RUNCTL_GBP001	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups.
Group Membership	RUNCTL_GBP002	Set Up HRMS, Common Definitions, Group Build, Group Membership	Run the Group Membership report (GBP002). This report lists the members of selected groups.

Viewing Complex Group Results

Access the Complex Group Results Summary page.

You can designate any group as a complex group by selecting the Complex Group - Batch Process check box on the Group Definition - Group Profile page. The system creates complex groups by background process and notifies you when processing is complete.

Purging Group Results

This section provides an overview of the group results and discusses how to:

- Purge usable results.
- Purge unusable results.

Understanding Group Results

Each time you generate and execute a group, the system stores the results in the Group Result Table. The next time you execute the same group, the system checks to see if the group's definition and date parameters have changed since the last time you ran the group. If they have, the system deletes the old results from the Group Results Table and saves the new results.

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Pages Used to Purge Results

Page Name	Object Name	Navigation	Usage
Group Results Purge	RUNCTL_GBP004	Set Up HRMS, Common Definitions, Group Build, Group Results Purge	Delete (purge) the results of a previous version of a group from the Group Results Table.
Unusable Group Results Purge	RUNCTL_GBP005	Set Up HRMS, Common Definitions, Group Build, Unusable Group Results Purge	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Purging Usable Results

Access the Group Results Purge page.

The Group Results Purge process deletes *usable groups* —groups with results in the Group Results Table that are still in sync with the current group definition and can potentially be retrieved by the system.

Group ID Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

Purging Unusable Results

Access the Unusable Group Results Purge page.

The Unusable Group Results Purge process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

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CHAPTER 23

Administering the HRMS System

This chapter discusses how to:

- Analyze portal navigation.
- Restrict the deletion of IDs.
- Refresh and audit Human Resources data.

Analyzing Portal Navigation

To analyze portal navigation, use the Portal Analysis component (RUNCTL_PORTAL).

This section discusses how to analyze HRMS portal navigation.

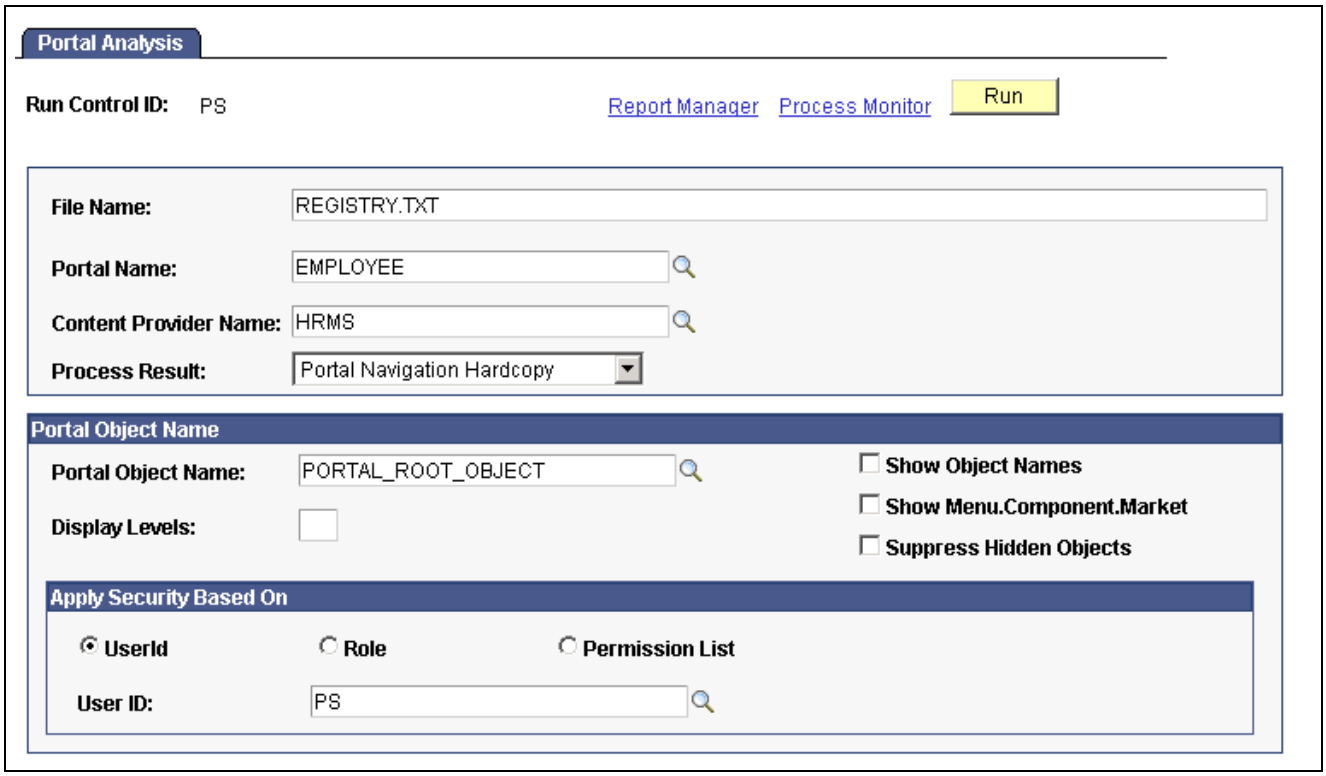
Page Used to Analyze Portal Navigation

Page Name	Object Name	Navigation	Usage
Portal Analysis	RUNCTL_PORTAL	Set Up HRMS, System Administration, Utilities, Portal Analysis, Portal Analysis	Analyze the portal navigation structure for users, roles or permission lists.

Analyzing Portal Navigation

Access the Portal Analysis page.

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Portal Analysis page

File Name Enter the name of the file you want the process to create and populate with the portal analysis. The process will distribute the file to the reporting repository.

Portal Name Enter the name of the portal you want to analyze.

Content Provider Name Select *HRMS* in the Content Provider Namefield to analyze HRMS portal navigation.

Process Result Select the processing result from the following options:

- *Portal/Menu Path*

  The result creates a straight list of the portal and menu paths. This result does not use the other values on the page so the system hides them when you select this option.

- *Portal Navigation Hardcopy*

  This result gives you more options and can create a more hierarchical view of the navigation.

Portal Object Name Select the portal object name.

Display Levels Enter the number of portal levels to print. Leave empty to print all the levels.

Show Object Names Select to display the object names of the CREFs or folders.

If you leave this check box clear, the process will just display the labels.

Show Menu.Component.Market Select to display the CREFs menu, component, and market information.

Suppress Hidden Objects Select to keep the process from including hidden objects.

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If you leave this check box clear, the system identifies hidden objects with the following text preceding the object name: *hidden*.

Apply Security Based On

Select to analyze the portal navigation for the security access assigned to a *UserId*, *Role*, or *Permission List*. Select the userID, role, or permission list to use.

Restricting the Deletion of IDs

To restrict the deletion of IDs, use the ID Delete Control component (ID_DEL_PRVNT_TABLE).

This section discusses how to prevent the deletion of IDs from critical records.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information," Changing and Deleting IDs

Page Used to Restrict the Deletion of IDs

Page Name	Object Name	Navigation	Usage
ID Delete Control	ID_DEL_PRVNT_TABLE	Set Up HRMS, System Administration, Database Processes, ID Delete Control, ID Delete Control	Enter records from which an ID should not be removed during an ID deletion or change. This ensures that the information is stored for historical purposes.

Refreshing and Auditing Human Resources Data

To refresh and audit Human Resources data, use the Refresh EMPLOYEES Table component (RUN_PER099), PERSONAL_DATA Settings component (PERSON_DT_SETUP), Refresh Personal Data component (RUN_PERS_REFRESH), Update Personal Data-Future component (RUN_PERSDATA_FUT), Refresh Name Display Values component (NAME_DISPLAY_RC), and the Core HR Data Integrity Audit component (RUN_PER900).

This section discusses how to:

- Refresh the EMPLOYEES table.
- Select refresh options for the Personal Data component.
- Refresh the PERSONAL_DATA table.
- Refresh the PERSONAL_DATA table with future-dated data.
- Refresh name display values.
- Audit Human Resources data for integrity.

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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information," Refreshing Tables to Facilitate Reporting

Pages Used to Refresh and Audit Human Resources Data

Page Name	Object Name	Navigation	Usage
Parameters	RUNCTL_ASOF_DATE	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table, Parameters	Refresh the PS_EMPLOYEES snapshot table as of the selected date.
PERSONAL_DATA Settings	PERSON_DT_SETUP	Set Up HMRS, System Administration, Database Processes, PERSONAL_DATA Settings, PERSONAL_DATA Settings	Select the data that you want to include in the refresh snapshot of the Personal Data component (PERSONAL_DATA). The fewer options you select, the faster the system can refresh the table. You must make these selections when you install HRMS. PeopleSoft only uses EmplID and Name data. Select the options you need to meet your ad hoc reporting and query needs.
Refresh Personal Data	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Refresh Personal Data, Refresh Personal Data	Refresh the Personal Data component. The Refresh Personal Dat component (PERS_REFRESH) loads the data types that you selected on the PERSONAL_DATA Settings page.
Update Personal Data-Future	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Update Personal Data-Future, Update Personal Data-Future	Run this process shortly after midnight to update the Personal Data component. The process will update data with future dated information that has become current. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

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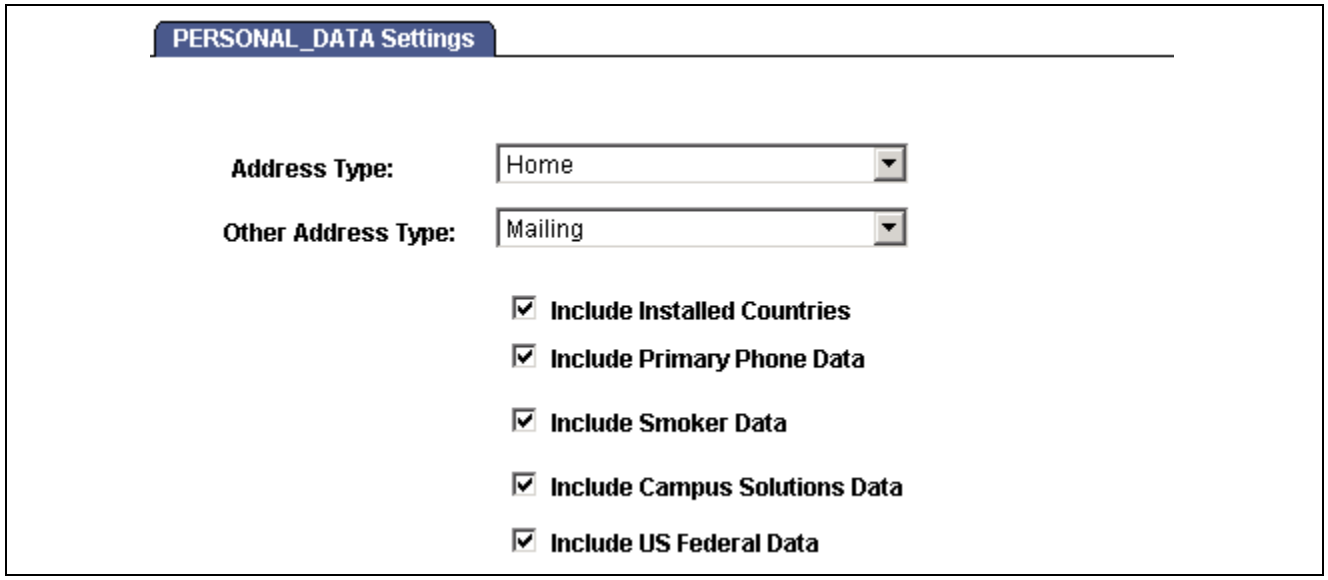
Page Name	Object Name	Navigation	Usage
Name Display Refresh	NAME_DISPLAY_RC	Set Up HRMS, System Administration, Database Processes, Refresh Name Display Values, Name Display Refresh	Refresh all records with the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the PeopleCode definition of those fields. You can choose to update records with all name format types or just with one name format type.
HR Core Integrity Audit	HRAUDIT	Set Up HRMS, System Administration, Database Processes, Core HR Data Integrity Audit, HR Core Integrity Audit	Initiate the Core Human Resources Data Integrity Audit.

Refreshing the Employees Table

Access the Parameters page.

Selecting Refresh Options for the Personal Data Component

Access the PERSONAL_DATA Settings page.



PERSONAL_DATA Settings page

Address Type Select which address type to refresh.

Other Address Type Select a secondary address type to refresh.

Include Installed Countries Select to include the information in the country-specific group boxes for those countries that you've installed on the Installation Table - Country Specific page.

Include Primary Phone Data Select to include the information in the PERSONAL_PHONE record.

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Include Smoker Data	Select to include the information in the PERS_SMOKER record.
Include Campus Solutions Data	Select to include the information in the PERSON_SA record.
Include US Federal Data	Select to include the information in the PERS_DATA_USF record.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Adding a Person

Refreshing the Personal Data Table

Access the Refresh Personal Data page.

Refreshing the Personal Data Table with Future-Dated Data

Access the Update Person Data-Future page.

Refreshing Name Display Values

Access the Refresh Name Display Values page.



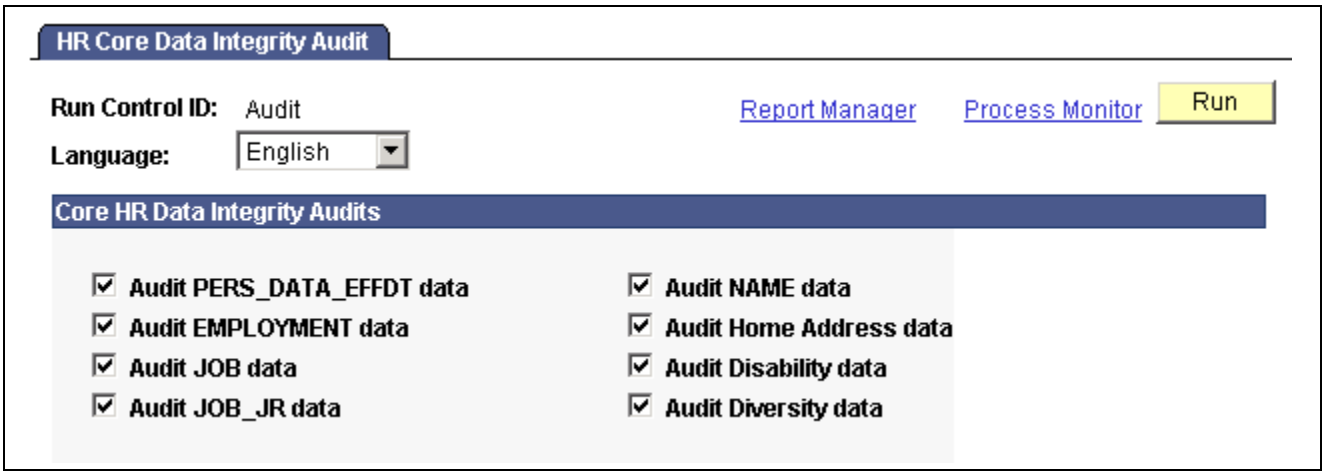
Name Display Refresh page

Select which records whose name fields format you want to update.

Auditing Human Resources Data for Integrity

Access the HR Core Data Integrity Audit page.

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HR Core Data Integrity Audit page

Select the HR tables you want to audit for integrity.

Using the Tables Accessed and Updated Report

This section describes the Tables Accessed and Updated report.

Understanding the Tables Accessed and Updated Reporting Utility

The Tables Accessed and Updated report:

- Analyzes the following PeopleSoft applications:
  - SQR reports.
  - COBOL programs.
  - Application Engine programs.
  - PS Query views.
- Reports the record names referenced by the SQL statements within the applications.
- Reports the way in which those records were accessed (for example, Select, Update, or Delete.)

Use this information to:

- Understand a program's functionality and how it manages your data.
- Assess the impact of proposed customizations.
- Determine the underlying database privileges require to execute a program.
- Identify every batch process that uses or alters a specific record.

Troubleshooting the Tables Accessed and Updated Report

Because of the flexibility of the programming environments and the rich set of meta-SQL available in PeopleTools, the table list created by the Tables Accessed and Updated report may sometimes be incomplete. The list will be incomplete when:

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- The SQR allows the use of dynamic substitution tables.

  Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of SQR.

- The SQR incorporates the construction of SQL clauses within string variables that can then be used in SQL statements and resolved by the SQR at runtime.

  The Tables Accessed and Updated report can't detect this style of coding, however there aren't many table references found within these kinds of clauses.

- The SQR references libraries through syntax that includes (#INCLUDE) SQC files.

  If an included module is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.

- The COBOL programs reference libraries through syntax that calls (CALL ... USING) routines in other modules.

  If the module called is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.

- The Application Engine program contains the meta-SQL phrase %Execute() with platform-specific procedural logic (such as Microsoft SQL Server "Transact-SQL" or Oracle "SQL-Plus").

  The Tables Accessed and Updated report reports such usage as unanalyzed.

- The Application Engine program uses a PeopleCode step.

  The Tables Accessed and Updated reports any use of PeopleCode as unanalyzed, whether or not it contains SQL statements.

- The Application Engine program contains forms of meta-SQL that contains dynamic object references.

  Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of meta-SQL.

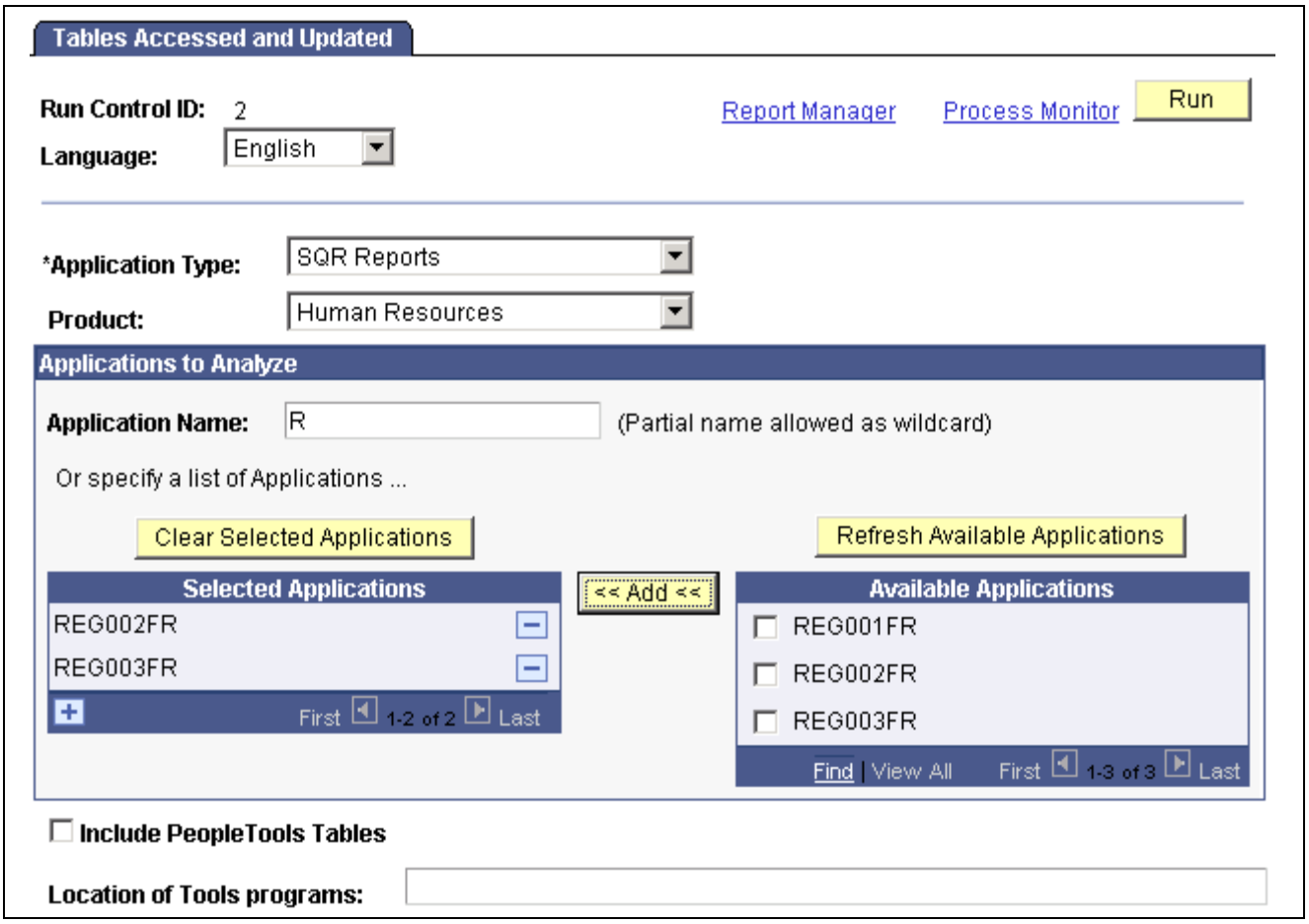
Page Used to Run the Table Access and Updated Report

Page Name	Object Name	Navigation	Usage
Tables Accessed and Updated	TAU_RUN_CONTROL	Set Up HRMS, System Administration, Utilities, Tables Accessed and Updated, Tables Accessed and Updated	Use the Table Access Utility page to run the Tables Accessed and Updated report.

Running the Tables Accessed and Updated Report

Access the Tables Accessed and Updated page.

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Tables Accessed and Updated page

Application Type Select the type of application to analyze in the report. The options are:

- *AppEngine Programs*
- *SQR Reports*
- *COBOL programs*
- *Queries*

Product To restrict the analysis to applications in on product, select it here.

Application Name Enter part or all of the name of the application or applications you want to analyze. Enter a *?* to report on all applications in the product.

Note. Depending on the application type, there could be over a thousand applications in a product.

You can run the report using just the information you enter here or you can use this value as search criteria to create a list of applications using the Available Applications and Selected Applications group boxes.

For example, when you select *SQR Reports*, *Human Resources*, and enter *R* in the Application Name field and run the utility, the report will analyze the REG001FR, REG002FR, and REG003FR reports. To refine the search, click

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the Refresh Available Applications button and select which of the three reports to analyze and add them to the Selected Applications list.

Refresh Available Applications and **Available Applications**

Click Refresh Available Applications to populate the Available Applications group box with applications that match the search criteria you entered in the Application Name field. Select the applications you want to analyze.

Note. A small number of applications are not associated with normal run control pages (for example, one-time conversion routines or system setup utilities used during installation) and the system will not display them in the Available Applications list. You can enter these applications in the Selected Applications list using the insert button and entering the application's name.

Add

Click to add the applications you selected in the Available Applications list to the Selected Applications list.

Once you've added items to the Selected Applications list, you can enter new search criteria in the Application Name field and refresh the Available Applications list.

Clear Selected Applications and **Selected Applications**

The report will analyze all the applications included in the Selected Applications list. You can add or remove applications using the insert and delete icons.

Click the Clear Selected Applications button to clear the list of applications you've selected for analysis.

Include PeopleTools Tables

Select to include PeopleTools tables in your analysis. PeopleTools tables define all PeopleSoft objects and manage system behavior, and include this such as related language control, currency conversions, and Process Scheduler activity.

Location of Source Code

If you are analyzing COBOL programs, enter the path to the COBOL source code's location on the server.

Note. The system only makes this field available when you select to analyze a COBOL program.

Location of Tools programs

If you are analyzing SQR programs and are *excluding* PeopleTools tables, enter the path to the PeopleTools SQR components' location on the server.

Note. The system only makes this field available when you select to analyze SQR reports.

Testing Component Interfaces Using the Invoke Core CIs Utility

This section describes how to test component interfaces.

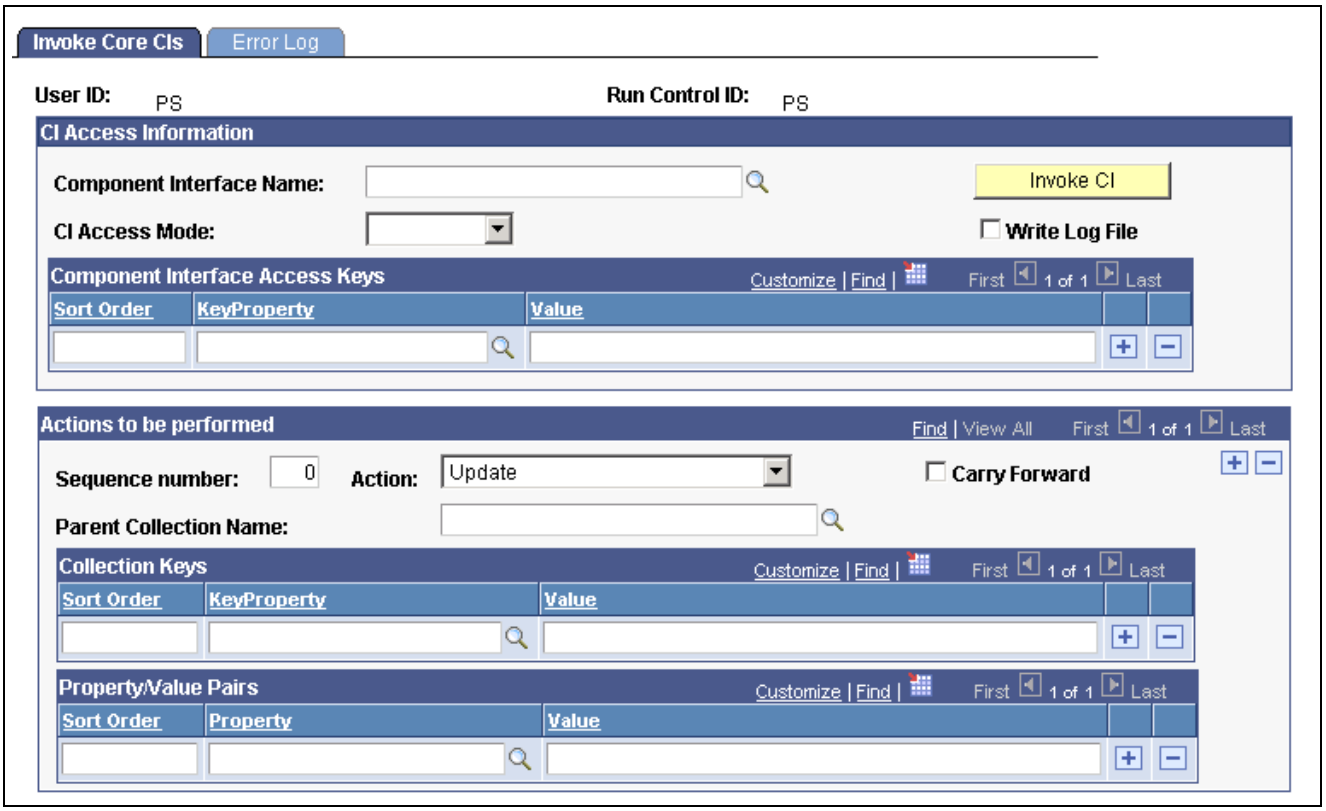
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Pages Used to Test Component Interfaces Using the Invoke Core CIs Utility

Page Name	Object Name	Navigation	Usage
Invoke Core CIs	RUNCTL_CCI	Set Up HRMS, System Administration, Utilities, Invoke Core CIs, Invoke Core CIs	Use this page to launch a component interface with sample data to test if it executes in the manner in which you want it to.
Error Log	RUNCTL_CCI2	Set Up HRMS, System Administration, Utilities, Invoke Core CIs, Error Log	After invoking a component interface, use this page to review any errors.

Testing Component Interfaces

Access the Invoke Core CIs page.



Invoke Core CIs page

CI Access Information

Component Interface Name Select the name of the component interface you want to test.

Invoke CI When you've entered all of the necessary information, click to invoke the CI and test it using the information entered on this page.

CI Access Mode Select one of the following access modes:

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- *Create*: Select to create a new row of data in the component with the key values that you enter in the Component Interface Access Keys grid.
- *Find*: Select to find a list of data rows that match the search criteria you enter in the Component Interface Access Keys grid.
- *Get*: Select to find a single row of data that match the search criteria you enter in the Component Interface Access Keys grid.

Write Log File Select to create a log file of the component interface test.

Sort Order, **KeyProperty**, and **Value** The component interface's key properties are the search keys of the underlying component's search record. Select with key fields to use in the search in the KeyProperty field and enter the value of the field to use in the search in the Value field.

If you are searching by more than one key field, indicate the order in which the system should sort the results.

If you are testing the CI using the Create action mode, use all the key properties.

Actions to Be Performed

Sequence Number Indicate the order in which the system should execute this action using the component interface.

Action Select the action to invoke using the CI:

- *Delete*: Select to delete data rows that match the values you enter in this group box.
- *Get*: Select to retrieve data rows that match the values you enter in this group box.
- *Insert*: Select to insert a new data row with the values you enter in this group box.

  For example, if the current row is dated November 12, 2005 and you want to enter a row effective January 1, 2004 while still maintaining the November row as the current row, select this option.
- *Invoke Method*:

  Select to execute the method for the CI. A method, for instance, can execute PeopleCode. For example, in Salary Planning, the calculation of the salary increase of each employee can be executed on-line or using a batch program. The bact program will execute the method CI_SALARY_PLAN_GRP.Methods.SalPlanGrp.
- *Update*: Inserts a new, effective dated row in effective-dated components or updates the data in components that are not effective dated.
- *Update no Insert*: Select to update the existing row of data.

Carry Forward Select this option to update any rows in the component that are more current than the row you are inserting using the CI.

Parent Collection Name Select the collection (which corresponds to a record) in which you want to update data.

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Sort Order, **KeyProperty**, and **Value**	(Collection Keys) Select the key field or fields for the scroll and enter the value of the row upon which you want to execute the action.
Sort Order, **Property**, and **Value**	(Property/Values Pairs) Select the fields in the collection and the field values that you want to use in the action.

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CHAPTER 24

Registering Interfaces

This chapter provides an overview of the HCM interface registry and discusses how to:

- Manage the HCM interface registry.
- Register new interfaces.
- Implement registered interfaces.
- Consume registered interfaces.
- Maintain the registry folder structure.
- Test services.
- View and register transformation maps.
- Map HCM services to Integration Broker.

Note. The *HCM Service Framework User Guide* red paper, which is posted on Oracle's PeopleSoft Customer Connection, provides additional technical information for developers, architects, and development managers who design, implement, maintain, or develop applications that leverage the HCM Service framework.

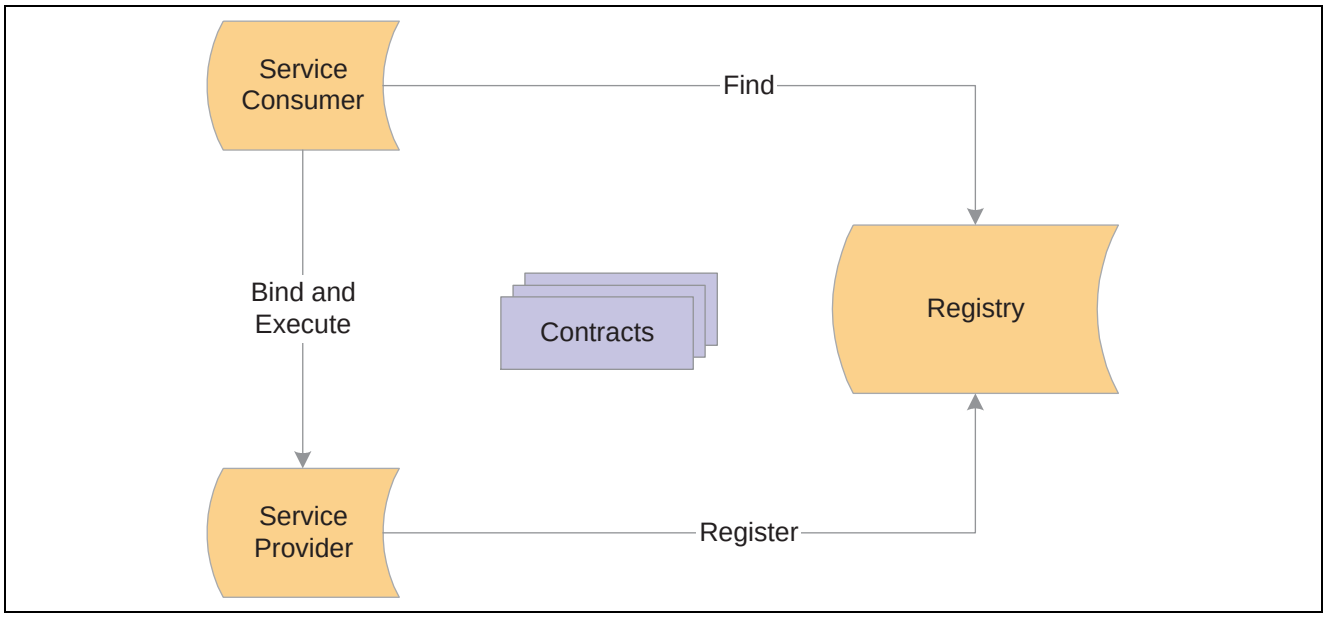
See Also

HCM Service Framework User Guide

Understanding the HCM Interface Registry

The HCM interface registry holds all the interface specifications for available services in the Service Oriented Architecture (SOA). It stores contracts from service providers and provides those contracts to interested service consumers. The service provider registers the interface, the consumer locates the interface in the registry and uses the information to bind and execute the contract between the consumer and the provider.

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The service consumer finds an interface in the registry and the registry provides the information necessary to bind and execute the service

The service consumer is an application, service, or some other type of software module that requires a service. It is the entity that initiates the location of the service in the registry, binding to the service over a transport, and executing the service function. The service consumer executes the service by sending it a request formatted according to the contract.

The service provider is the service, the network-addressable entity that accepts and executes the requests from consumers. It can be a mainframe system, a component, or some other type of software system that executes the service request. The service provider publishes its contract in the registry for access by service consumers.

To set up and use an interface registry:

1. Set up the interface contract and register the interface using the Registration Wizard (Setup HRMS, System Administration, HCM Registry, Registry Wizard).
2. Implement the interface in the providing application.
3. Set up the consuming application to invoke registered interfaces.

Setting Up Interface Contracts

An interface contract specifies the way a consumer of a service will interact with the provider of the service, including the format of the request and response from the service. The HCM registry is populated with the existing interface contracts within HCM. To add new interfaces to the registry, you must first define the contract between the services.

To define an agreement between services, follow these steps:

1. Determine the interface details (such as signature, exceptions, and warnings).
2. Register the interface under the provider object identifier.
3. Set the interface status to *Active*.

Note. Register interfaces using the HCM registry's Registration Wizard.

Interfaces fall into one of the following categories:

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- Services
  - Synchronous request/response (services)

    Services interfaces are procedural invocations and can be local and remote.
  - Asynchronous publish/subscribe (events)

    Events can be notifications (outbound) or consumption (inbound) and are based on messaging and integration points.
- sqlViews (views)

  Views are read only and are SQL-based.
- Types

  Types represent the complex data types used in service invocations. The following types are supported for service invocations in API:
  - Primitives (native PeopleCode data types), such as string, date, number, boolean, hexbinary, and arrays.
  - Complex types, as defined in the registry or arrays of any complex type.

  Note. While you can use all primitive types in service invocations natively, all complex types must be explicitly defined and registered in the registry.
- Exceptions

  Exceptions are fatal errors that can occur during service execution and require special handling by the PeopleCode program. Service providers must identify exceptions that they believe can occur so that the consumer code can manage the exception.

  Define exceptions and register them in the interface registry.

Managing the HCM Interface Registry

To mange the HCM interface registry entries, use the Service Registry component (HMCR_IFC_REGISTRY).

This section discusses how to:

- Register and maintain SOA interfaces.
- Use the HCM interface registry.
- View WSDL code for registry folders.
- Review registry folder audit results.
- Review registry and interface details.
- View WSDL or XSD code for registry entries.
- View RegistryDoc.

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Pages Used to Manage the HCM Interface Registry

Page Name	Object Name	Navigation	Usage
HCM Interface Registry	HMCR_IFC_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Service Registry, HCM Interface Registry	Review the HCM registry and modify existing entries.
<Registry Folder Label>	HMCR_IFC_FLDR_ACT	Set Up HRMS, System Administration, HCM Registry, Service Registry, HCM Interface Registry Click on an interface folder.	Generate and audit the WSDL for a selected interface folder.
Audit - <Registry Folder Label>	HMCR_IFC_AUD_RSLT	Set Up HRMS, System Administration, HCM Registry, Service Registry, HCM Interface Registry Click on an interface service.	Review the results of a registry folder audit.
Interface Registry - Details	HMCR_WSDL_VIEWER, HMCR_IVW_VIEWER, HMCR_TYPE_VIEWER	Set Up HRMS, System Administration, HCM Registry, Service Registry, HCM Interface Registry Click on an interface for a service, sqlView, type, or exception.	Review registry and interface details about a selected interface.
<Registry Entry Name>	HMCR_WSDL_RAW_SEC	Set Up HRMS, System Administration, HCM Registry, Service Registry, HCM Interface Registry Click on an interface for a service, and then click on the Show WSDL button; or, click on an interface for a type or exception, and then click on the Show XSD button.	View WSDL code for a service registry entry, or view XSD code for a type or exception registry entry.

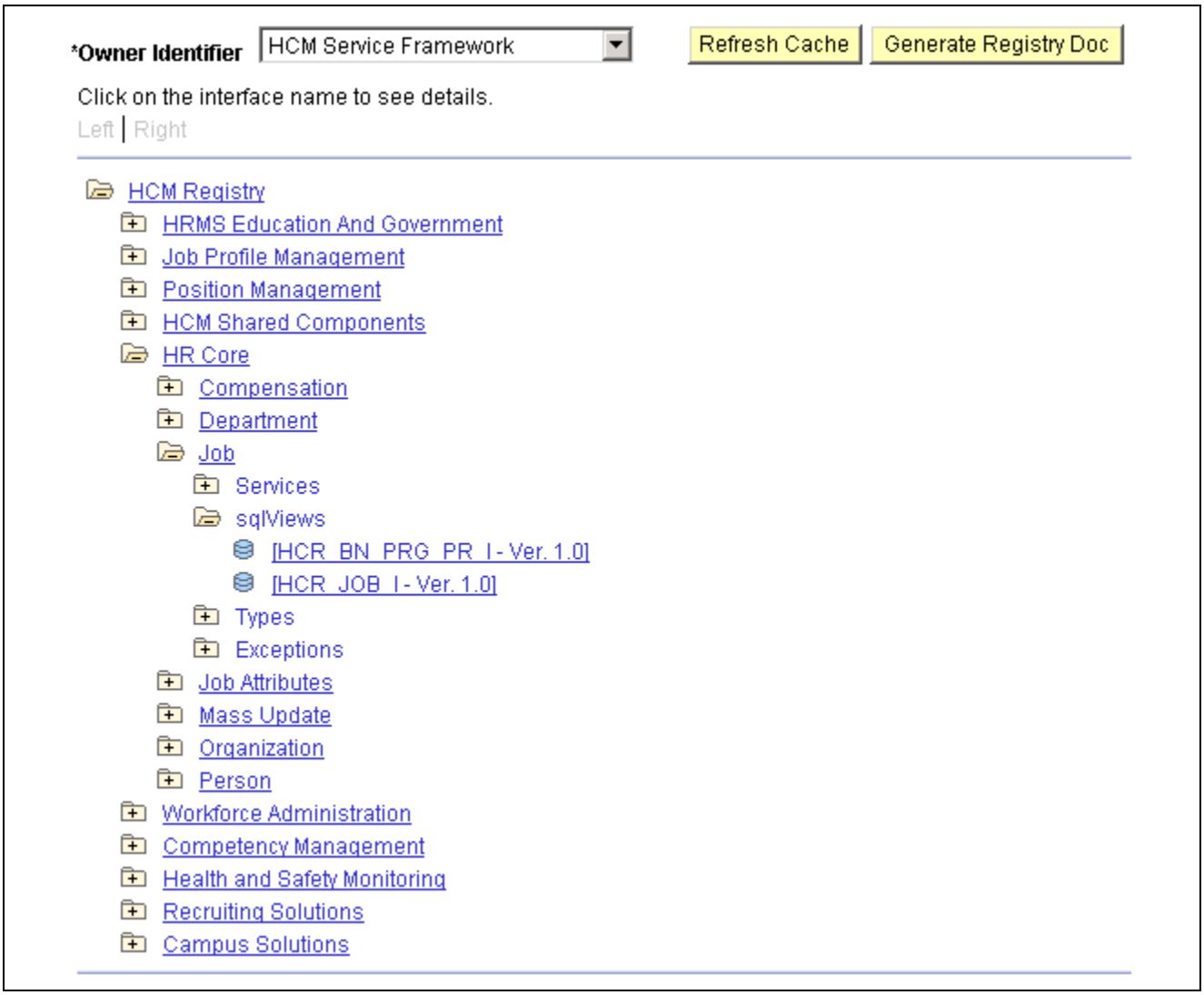
Using the HCM Interface Registry

Access the HCM Interface Registry page.

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HCM Interface Registry page (1 of 2)



HCM Interface Registry page (2 of 2)

The registry lists all the content owners and their interfaces in a tree format. Each tree leaf represents a registered interface. Registered interfaces are grouped by interface folders. Click a registered interface to review interface information on the Details page.

Owner Identifier Select an owner identifier.

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The registry displays all interfaces (public and private) defined for the selected content owner in addition to all public interfaces defined by owners other than the selected owner.

Refresh Cache Click this button to manually refresh the cache where services, types, exceptions, and SQL views are stored whenever you make a change to the registry. You must refresh the cache when a definition is modified, added, or deleted. You must also refresh the cache when an external cache has to be imported.

Generate Registry Doc Click this button to generate RegistryDoc for the selected HCM interface registry. The system generates RegistryDoc in HTML and provides the View RegistryDOC link for you to access the data. The RegistryDoc enables you to view or introspect the registry without having to open the registry, thus offering a quicker view into the registry.

Note. RegistryDoc generation relies on configuration of PeopleTools Process Scheduler and report nodes. You should set the directory that acts as the report repository in a shared mode.

View RegistryDoc Click this link to view RegistryDoc that you have generated. The system opens a new browser window, which displays the registry API content in HTML format.

Searching the Registry

Use the Search capability to look up a registry when:

- You do not know the exact name for or the navigation to the service, sqlView, type, or exception.
- You want to search for the descriptions for a specific word or pattern of a word.

Search Descriptions Select this check box to search descriptions of registry entries for an exact word that you specify in the Search Filter field.

Select this check box and the Search Descriptions check box to search descriptions of registry entries for the word pattern that you specify in the Search Filter field.

Wildcard Search Select this check box to search registry entries for the word pattern that you specify in the Search Filter field.

Select this check box and the Search Descriptions check box to search descriptions of registry entries for the word pattern that you specify in the Search Filter field.

Search Filter To search registry entries for an exact match of a service, sqlView, type, or exception, enter a value in this field without selecting any check boxes. The system lists the registry entry.

To search registry entries for a word pattern, enter the word pattern in this field and select the Wildcard Search check box. The system lists registry entries that match the pattern that you entered.

To search descriptions of registry entries for an exact word, enter the word in this field and select the Search Descriptions check box. The system lists registry entries with descriptions that contain the exact word.

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	To search descriptions of registry entries for a word pattern, enter the word pattern in this field and select both the Search descriptions and Wildcard Search check boxes. The system lists registry entries with descriptions that match the pattern that you entered.
Search	Click this button to retrieve the registry entries that match your search criteria.
Link	Click the link to access the details of the registry.

Viewing WSDL Code for Registry Folders

Access the <Registry Folder Label> page.



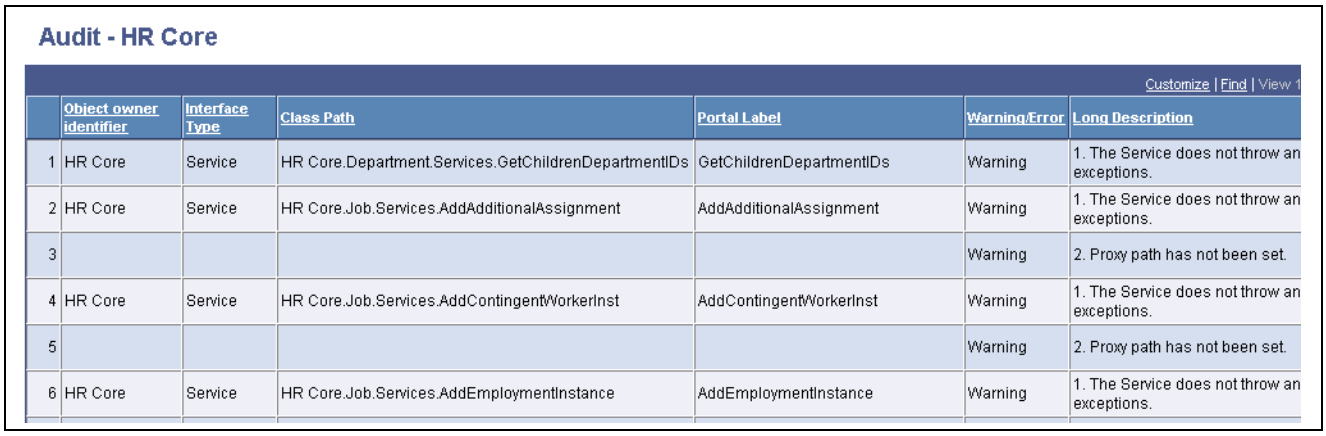
<Registry Folder Label> page

Use the View WSDL group box to review the WSDL that the system generated for the selected registry folder. Click the Run Audit button to run an audit on the registry folder. The system displays the Audit - <Registry Folder Label> page for you to review the results of the registry folder audit.

Reviewing Registry Folder Audit Results

Access the Audit - <Registry Folder Label> page.

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Audit - HR Core

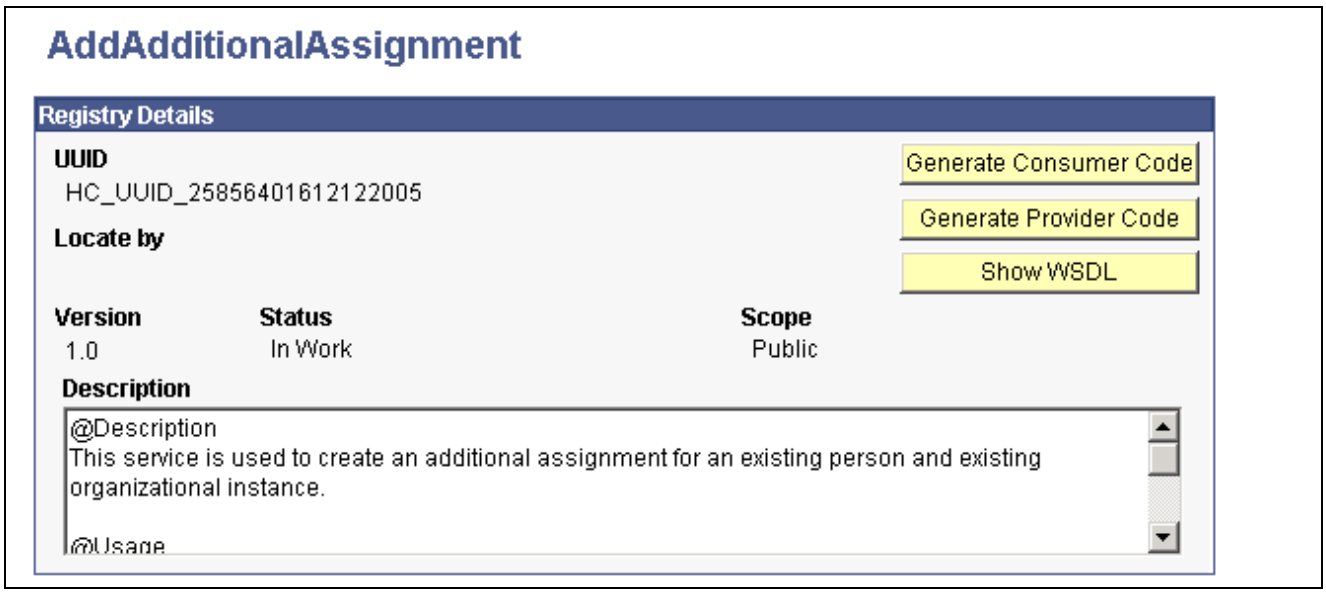
Customize | Find | View 1

	Object owner identifier	Interface Type	Class Path	Portal Label	Warning/Error	Long Description
1	HR Core	Service	HR Core.Department.Services.GetChildrenDepartmentIDs	GetChildrenDepartmentIDs	Warning	1. The Service does not throw an exceptions.
2	HR Core	Service	HR Core.Job.Services.AddAdditionalAssignment	AddAdditionalAssignment	Warning	1. The Service does not throw an exceptions.
3					Warning	2. Proxy path has not been set.
4	HR Core	Service	HR Core.Job.Services.AddContingentWorkerInst	AddContingentWorkerInst	Warning	1. The Service does not throw an exceptions.
5					Warning	2. Proxy path has not been set.
6	HR Core	Service	HR Core.Job.Services.AddEmploymentInstance	AddEmploymentInstance	Warning	1. The Service does not throw an exceptions.

Audit - <Registry Folder Label> page

Reviewing Registry and Interface Details

Access the Interface Registry - Details page.



AddAdditionalAssignment

Registry Details

UUID

HC_UUID_25856401612122005

Generate Consumer Code

Generate Provider Code

Show WSDL

Locate by

Version: 1.0

Status: In Work

Scope: Public

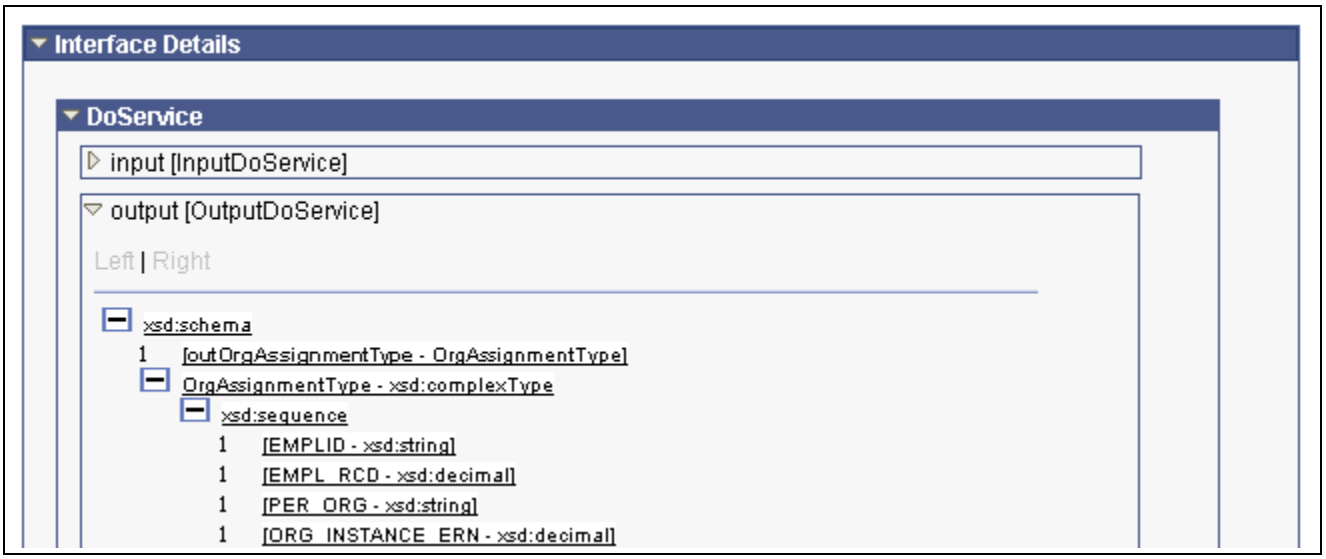
Description

@Description
This service is used to create an additional assignment for an existing person and existing organizational instance.

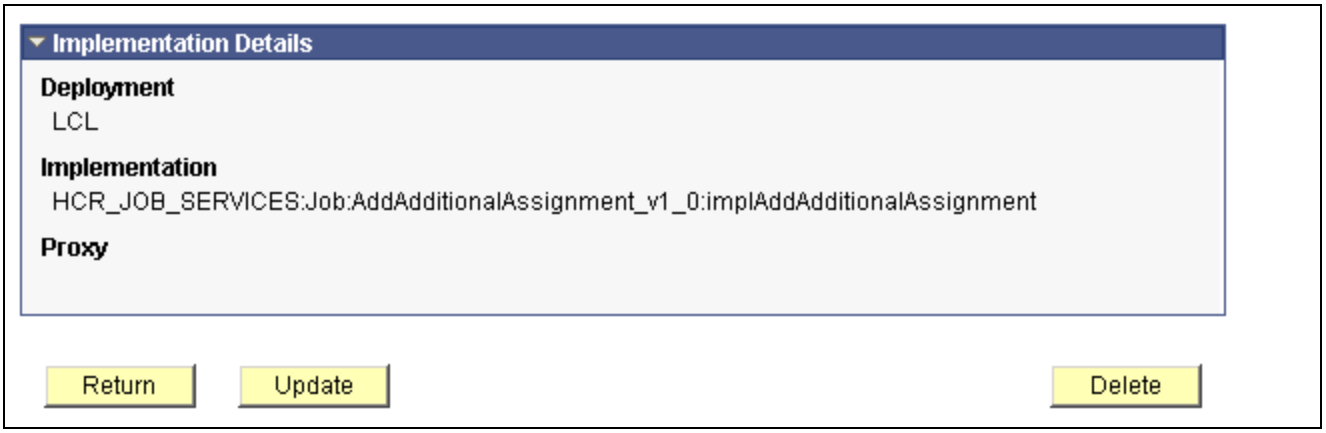
@Usage

Interface Registry - Details page (1 of 3)

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Interface Registry - Details page (2 of 3)



Interface Registry - Details page (3 of 3)

Note. The Interface Registry - Details page is slightly different for each type of interface (services, sqlViews, types, and exceptions).

Registry Details

UUID The UUID is the interface's unique identifier for a service within the registry. The system generates this identifier.

Locate By The system automatically displays this value where applicable.

Version Each registry entry has a version type. You can have multiple versions of an entry when you require multiple version of an interface.

Status An interface can have one of the following statuses within the registry:

- *Requested*

  The interface has been requested by a party but has not been implemented.

- *In Work*

  The interface is currently being defined.

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- *Active*

  The interface is ready for use.

- *Deprecated*

  The interface has been replaced by a more current version, but is still supported.

- *Retired*

  The selected version of the interface has been retired.

Note. The status of an interface is specific to the entry version.

Scope

This field indicates who can reference this version of the interface:

- If the interface is *Public*, it can be used by any application.
- If the interface is *Private*, it can only be used within the provider module.

Generate Consumer Code

Click to generate the consumer stub code for this registry entry. Use this code to implement the service.

See Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 532.

Generate Provider Code

Click to generate the provider stub code for this registry entry. Use this code to implement the service.

See Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 532.

Show WSDL

Click this button to generate Web Services Definition Language (WSDL) code for the service registry entry. WSDL code provides you with all the details about the service that is needed for consuming a service. The system displays the <Registry Entry Name> page where you can view the WSDL code.

Note. Definitions for sqlViews, types, and exceptions do not have WSDL viewing capability.

Show XSD

Click this button to generate XSD code for a type or exception registry entry. XSD code contains the definition of a particular type, which is information that is necessary for consuming complex types. The system displays the <Registry Entry Name> page where you can view the XSD code.

Note. Definitions for services and sqlViews do not have XSD viewing capability.

Run Audit

Click this button to run an audit of the selected registry folder. Audits ensure that the registry is clean. They also enable you to monitor discrepancies between implementation and contracts. The system displays the Audit - <Registry Folder Label> page, where you can review the results of the audit.

Interface Details

Interfaces are defined using an XSD schema. The schema for each interface type is stored in the registry. The system generates the schema during registration.

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Note. The schema defines the details of sqlView interfaces, not the database view that implements the view interface. The database view must match the properties defined in the schema.

Service interface types have operations called DoServices. A DoService has one or more input, output, and outfault element and each element is defined by either one or more simple or complex type.

Exception Details

Review a service interface's exception details and the associated messages.

Implementation Details

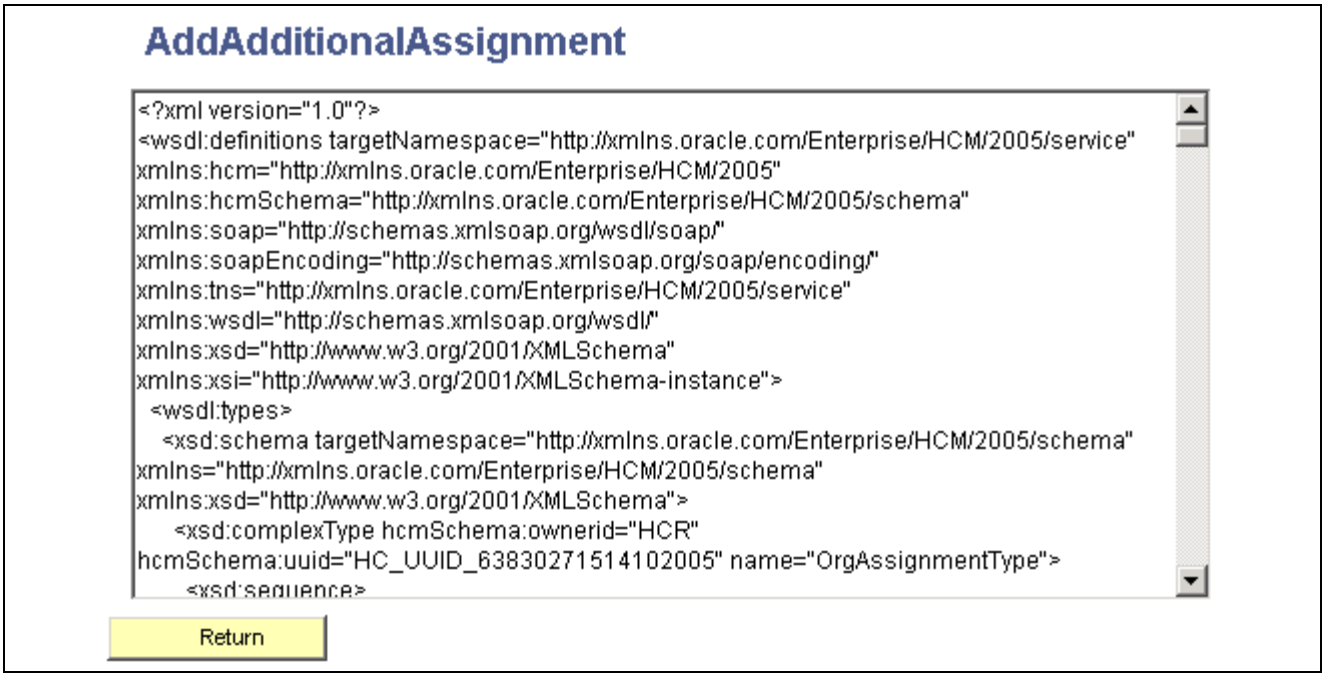
In the Implementation Details group box, review the fully qualified application class path that implements class for this type or exception. The class path includes a branch indicating the version of this type. The version attribute of the registry entry must match the version in the class path of the type class.

Note. For sqlView interfaces, the Implementation Details box displays the database view implementing the interface view.

Note. All exceptions must extend the class *baseException*, which extends the PeopleTools built-in exception class.

Viewing WSDL and XSD Code for Registry Entries

Access the <Registry Entry Name> page.



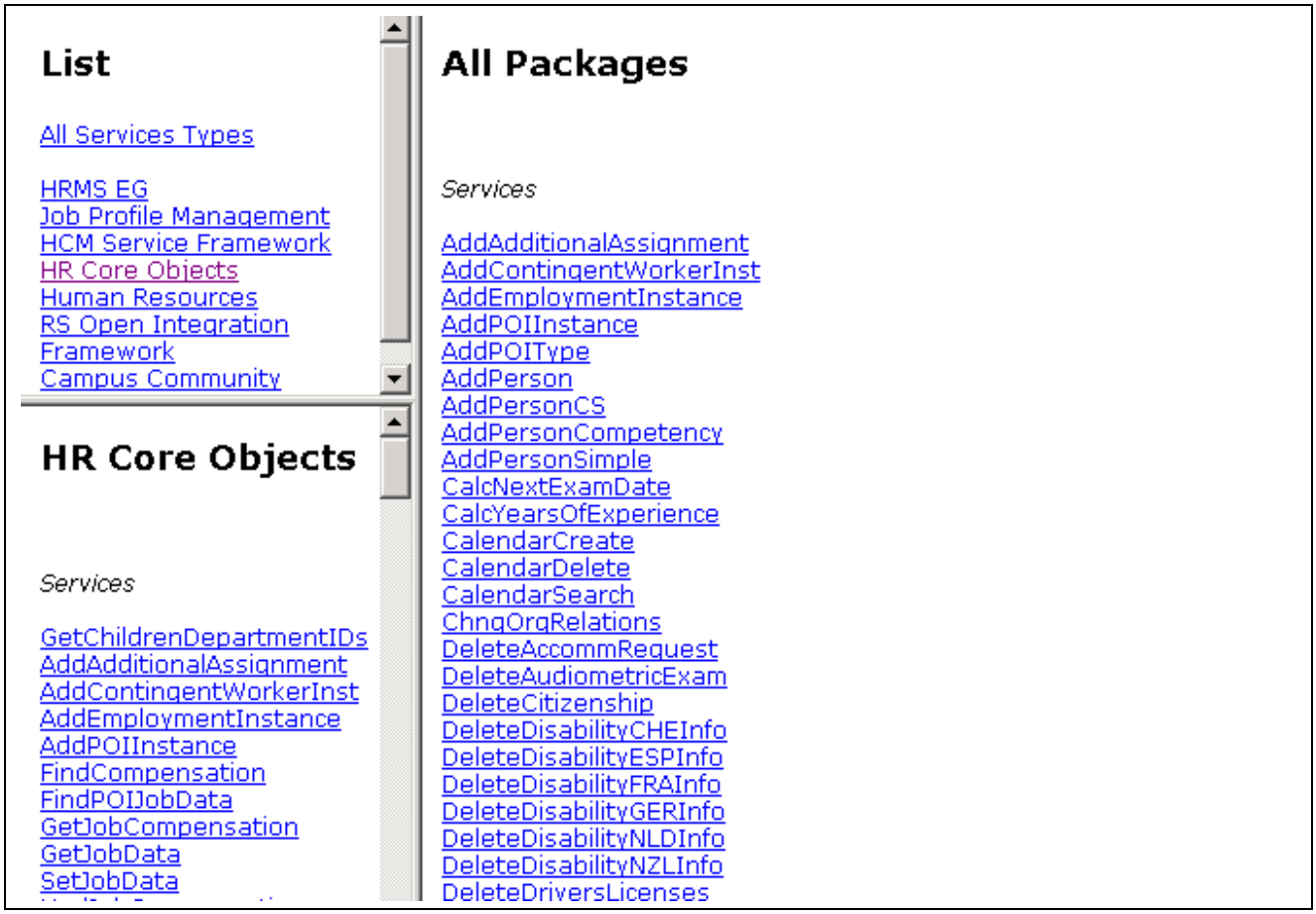
<Registry Entry Name> page

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Viewing RegistryDoc

To view RegistryDoc, click the Generate Registry Doc button on the HCM Interface Registry page. The system generates the RegistryDoc and displays the View RegistryDoc link.

Click the View RegistryDoc link. The system opens a new browser window, which displays the registry API content in HTML format.



Viewing the RegistryDoc

The page contains three frames. The upper left frame lists the root packages within the RegistryDoc. Click a link for a root package in the upper left frame to view for a list of all of the services, sqlViews, types, and exceptions that are associated with the selected root package. The system displays the details of the selected root package within the lower left frame. The right frame displays the services, sqlViews, types, and exceptions for all root packages.

Click a link in the lower left frame or the right frame to view service, sqlView, type, or exception details.

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AddAdditionalAssignment 1.0

View WSDL 1.1

Service description

This service is used to create an additional assignment for an existing person and existing organizational instance.

Service usage

This service accepts an OrganizationalAssignmentType as input. Also, there is a boolean flag, IgnoreBlanks, which depending on how it is set the service will act accordingly. If set to True then any blank values in the OrganizationalAssignmentType are ignored. If set to False, then any blank values will be treated as an attempt to blank out the existing value. This service returns the updated OrganizationalAssignmentType as an output.

Service properties

UUID	HC_UUID_25856401612122005	**Owner Id**	HR Core Objects
Path	HR Core.Job.Services.AddAdditionalAssignment		

Service attributes

Scope	Public	**Status**	In Work
Deployment	Local	**Deployment Node**	LOCAL_NODE
Implementation Path	HCR_JOB_SERVICES:Job:AddAdditionalAssignment_v1_0:implAddAdditionalAssignment		
Proxy Path			

Interface operation details

Service Operation Name	DoService
Input Parameters	
Name	**Type**
inIgnoreBlanks	boolean
inOrgAssignmentType	OrgAssignmentType
Output Parameters	
Name	**Type**
outOrgAssignmentType	OrgAssignmentType

Method Signature

DoService(&inIgnoreBlanks As boolean, &inOrgAssignmentType As OrgAssignmentType, &outOrgAssignmentType As OrgAssignmentType)

Viewing service details

From a service details page, click on the View WSDL link to view WSDL code for the selected service.

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```
<?xml version="1.0" ?>
- <wsdl:definitions targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
    xmlns:hcm="http://xmlns.oracle.com/Enterprise/HCM/2005"
    xmlns:hcmSchema="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
    xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
    xmlns:soapEncoding="http://schemas.xmlsoap.org/soap/encoding/"
    xmlns:tns="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
    xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
    xmlns:xsd="http://www.w3.org/2001/XMLSchema"
    xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  - <wsdl:types>
    - <xsd:schema targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
        xmlns="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
        xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      - <xsd:complexType hcmSchema:ownerid="HCR"
          hcmSchema:uuid="HC_UUID_63830271514102005" name="OrgAssignmentType">
        - <xsd:sequence>
            <xsd:element minOccurs="1" name="EMPLID" type="xsd:string" />
            <xsd:element minOccurs="1" name="EMPL_RCD" type="xsd:decimal" />
            <xsd:element minOccurs="1" name="PER_ORG" type="xsd:string" />
            <xsd:element minOccurs="1" name="ORG_INSTANCE_ERN" type="xsd:decimal" />
            <xsd:element name="POI_TYPE" type="xsd:string" />
            <xsd:element name="CMPNY_DT_OVR" type="xsd:string" />
            <xsd:element name="CMPNY_SENIORITY_DT" type="xsd:date" />
            <xsd:element name="SERVICE_DT_OVR" type="xsd:string" />
            <xsd:element name="SERVICE_DT" type="xsd:date" />
```

Viewing WSDL code for a selected service

If a service or type refers to another complex type or exception, click on the type link on the details page to view type or exception details.

OrgAssignmentType 1.0

Type description

-

Type usage

-

Type properties

UUID	HC_UUID_63830271514102005	**Owner Id**	HR Core Objects
Path	HR Core.Job.Types.OrgAssignmentType		

Type attributes

Scope	Public	**Status**	In Work
Implementation Path	HCR_JOB_TYPES:Job:OrgAssignmentType_v1_0:OrgAssignmentType		

Type class properties

Name	Type
EMPLID	string
EMPL_RCD	decimal
PER_ORG	string
ORG_INSTANCE_ERN	decimal
POI_TYPE	string
CMPNY_DT_OVR	string
CMPNY_SENIORITY_DT	date

Viewing type details for a selected service

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Registering New Interfaces

To register new interfaces, use the Registration Wizard component (HMCR_WZ_REGSRV).

This section discusses how to:

- Enter interface information in the Registry Wizard.
- Enter interface specifications.
- Implement the interface.

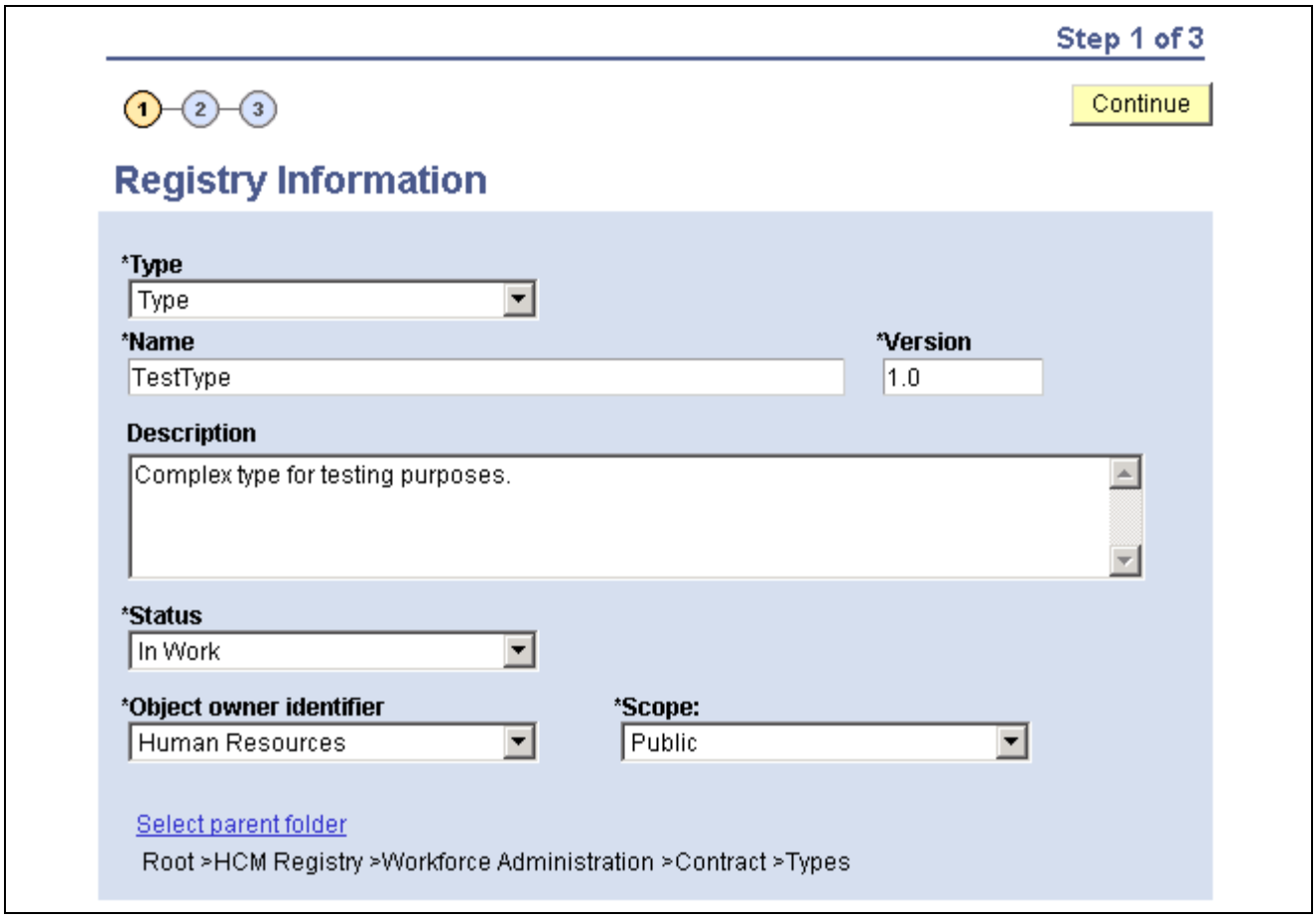
Pages Used to Register New Interfaces Through the Registration Wizard

Page Name	Object Name	Navigation	Usage
Registry Information	HMCR_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Registry Information	Enter information about a new interface.
Interface Specification	HMCR_WZ_STEP2	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Interface Specification	Enter details about the new interface.
Implementation	HMCR_WZ_STEP3	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Implementation	Complete the registration of the new interface by implementing the interface.

Entering Interface Information in the Registry Wizard

Access the Registry Information page.

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Registry Information page

Type Select the interface type.

Note. The pages in this component and the information you enter can vary depending on the type of interface you select here.

Name Enter a meaningful name for the interface using the following guidelines:

- One word (no spaces).
- Mixed case.
- In one of the following formats, depending on the interface type:

  in the format , <Noun>Exception, <Noun>Service, or <Noun>sqlView, depending on the type of interface you are registering.

  - For Type interfaces: <Noun>Type.
  - For Service interfaces: <Verb><Noun>.
  - For Exception interfaces: <Noun>Exception.
  - For Interface Views: <Noun><Noun>.

Note. Users see the name you enter here on the registry tree so make sure that the name is clear and meaningful.

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Version Indicate the interface version using the format n.n.

You can have multiple active versions of an interface.

Status Select the status of this version of the interface:

- *Requested*

  The interface has been requested by a party but has not been implemented.

- *In Work*

  The interface is currently being defined.

- *Active*

  The interface is ready for use.

- *Deprecated*

  The interface has been replaced by a more current version, but is still supported.

- *Retired*

  The selected version of the interface has been retired.

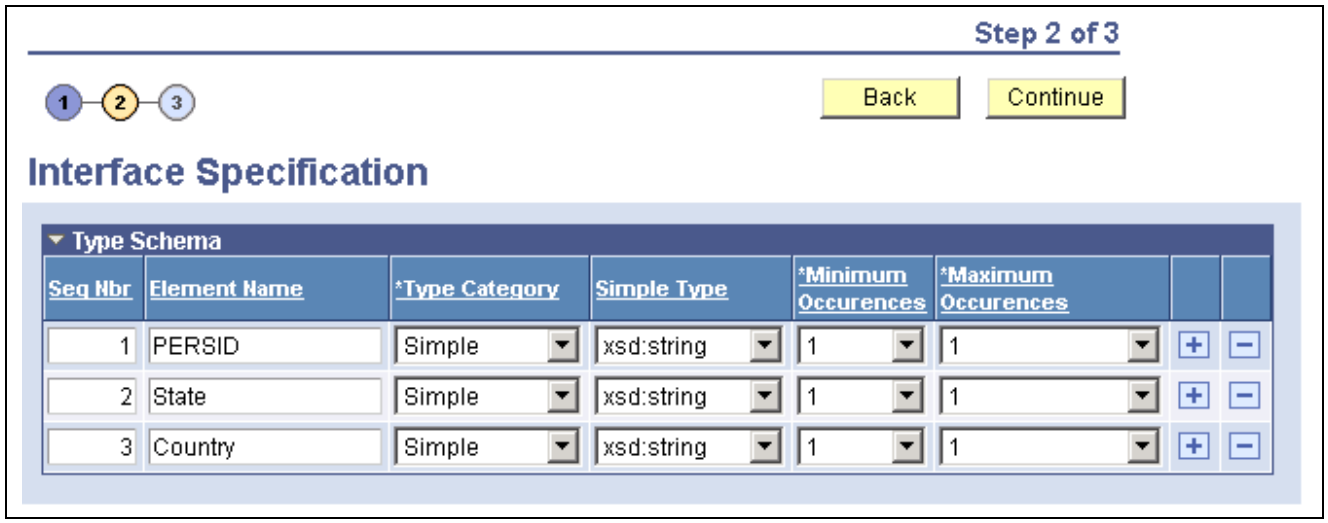
Object owner identifier Select the interface provider.

Scope Indicate if the interface is *Public* (available to everyone) or *Private* (available only to the provider application).

Select parent folder Click this link to access the registry folder structure and select the folder within which the new interface will reside. Group interfaces by feature.

Entering Interface Specifications

Access the Interface Specification page.



Interface Specification page

Note. The system displays a different version of this page depending on what type of interface you're registering. See the Registering Services section for information on how to use this page to register service interfaces.

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Initialize from Implementation

If you are basing the Interface View definition on an interface that has already been implemented, click Initialize from Implementation and select the view. The system populates the elements with the fields from the fields in the view's record.

Note. The system only displays this link when you register Interface Views.

Seq Nbr (sequence number)

Indicate the order in which the element should occur.

Element Name

Enter the element name. An element is a property of the interface. Element names must be one word, mixed case, and self-describing.

Note. If you are implementing an Interface View, you must add an element to correspond with each field in the view's record.

Note. Service interface elements are descriptive items that identify the parameter in a given position. While the position of the elements must correspond to a parameter, it does not have to be a PeopleSoft field name.

Type Category

Select the element category. Categories indicate whether the element's data type is simple or complex. A simple datatype is a system-delivered data format. Complex datatypes reference other interface types already in the registry.

Note. Always select *Complex* for Exception elements.

Note. The system selects *Simple* for Interface Views and this field is unavailable for entry.

Simple Type

If the element is simple, select the element's system-delivered data format type:

- *xsd:string*
- *xsd:date*
- *xsd:number*
- *xsd:boolean*

Complex Type

If the type is complex, select the registered element to which it refers.

Note. If the interface is an exception, you must select *ExceptionType* from the Service Framework folder.

Minimum Occurrences

Indicate the minimum number of times this element can occur. Select *0* if the occurrence is optional and *1* if the element must occur at least once.

Note. You must select *1* for Exception elements.

Maximum Occurrences

Indicate the maximum number of times the element can occur.

Note. You must select *1* for Exception elements.

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Registering Services

When you register a service, enter the follow information in the four group boxes:

- DoService Request

  When a service interface will be used to request information, use the fields in this grid to define the service's request parameters.

- DoService Response

  When a service interface will be used to respond to requests for information, use the fields in this grid to define the service's request parameters.

- Exceptions

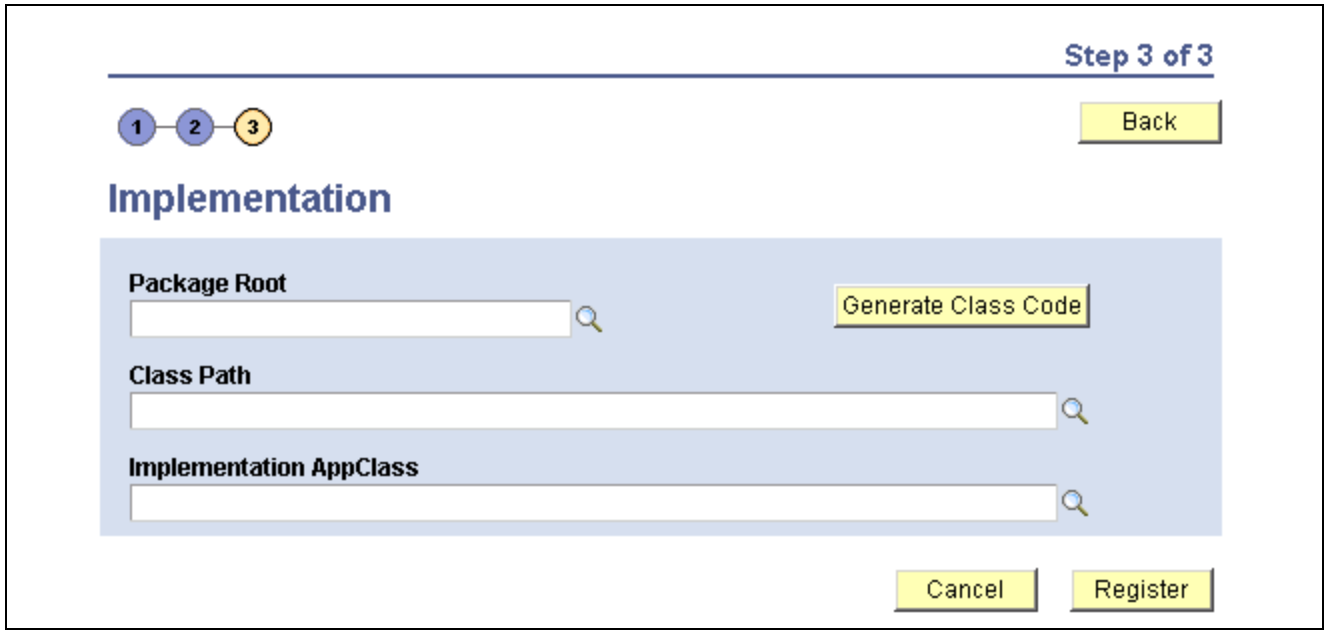
  List all of the exceptions defined for the service interface. You can only select exceptions that have already be added to the registry.

- Warnings

  List all of the warnings and messages that could be logged during the execution of the service and that are meaningful to the consumer.

Implementing the Interface

Access the Implementation page.



Implementation page

Note. The system displays a different version of this page depending on what type of interface you're registering. See the Registering Interface Views section for information on how to use this page to register interface views.

Deployment and **Deployment Node**

The system displays this field only when you register a Service interface.

Indicate if the service is *Local* (resides in the same database as the consumer) or *Remote* (resides outside the consumer's database).

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If the service is remote, select the deployment node.

Package Root Select the provider's root package. The root suffix depends on the interface type you are registering:

- For Type interfaces: <ownerID>_TYPES.
- For Exception interfaces: <ownerID>_EXCEPTIONS.
- For Service interfaces: <ownerID>_SERVICES.

Class Path Select the class path to the appropriate version of your type class.

Implementation AppClass Once you have implemented the class, return to the registry to select the interface's application class. Do not select a value when you initially register the interface; wait until you have implemented the interface.

See Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 532.

Note. If you are implementing a Service interface, populate this field only if the service is local.

Generate Class Code Click to generate the PeopleCode for the implementation AppClass. You can copy and paste the code into your application class object when you implement the interface.

See Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 532.

Note. The system does not display this button when you register Service interfaces.

Register Click to register the interface definition. When the system successfully registers the definition it will display the interface's UUID.

Registering Interface Views

Interface View After you have implemented a sqlView for this interface, return to this page and select the view that corresponds to this Interface View.

See Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 532.

Related Language Interface View The system displays the related language view defined in for the implementation in Application Designer, if one exists.

Implementing Registered Interfaces

After you have registered the interface, implement it in the providing application. The providing application must implement the interface accurately so that the consumer application does not encounter any unexpected behavior.

This section discusses how to:

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- Implement types.
- Implement services.
- Implement exceptions.
- Implement SQLViews.

Implementing Types

To implement a registered type interface:

Note. Implement registered types as PeopleCode application classes.

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_TYPES.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.

2. Create the application class that is implementing the interface type.

   When you create the application class, you must ensure that it:

   - Extends the baseType class.
   - Imports the package with the baseType parent class definition.
   - Exposes a read-only property UUID with the type *string*.
   - Has a UUID property that contains the correct UUID of the corresponding registry entry.
   - Instantiates any array properties defined in the class as array properties with 0 elements.
   - Implements the following mandatory public methods: toXmlNode, toXmlNodeString, fromXmlNode, and truncateType.

3. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the interface type.

   The generated type stub code includes the following mandatory methods:

   ```
   method toxmlNode(&parentNode As XmlNode);
   method fromXmlNode(&parentNode As XmlNode);
   method toXmlNodeString(&nodeName As string) Returns string;
   method TruncateType();
   ```

   The system uses the XML mandatory methods to marshal and unmarshal the type to or from an xml representation, which is required in order to use this type in a remote service invocation. The *truncateType* mandatory method resents the value of all type elements.

4. Access the registry entry for the type interface in the Registry Wizard and add the application class to the type's implementation details.

Implementing Services

Consumer programs cannot directly instantiate service implementation classes. Due to late binding and remote procedure call support, the framework delays the resolution of the implementation class name until run-time so the only information available to service consumers during design is the interface name.

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At run-time, the service manager resolves the interface name into the implementation class name using the registry lookup functionality. Depending on the implementation details defined in the registry, the service manager will return to the consumer either an instance of a local implementation class or a proxy class for the remote implementation.

Because of these considerations, the providing application needs to supply the following two application classes to fully implement a service:

- An interface that consumer applications can refer to during design.
- An implementation class that the service manager can bind to during run-time.

Note. Implement registered services as PeopleCode application classes.

To implement a registered service interface:

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_SERVICES.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions. Use the third (application class) level to define an interface and an implementation for the service.

2. Create two application classes to implement the service, an interface and an implementation class.
3. Select the registry entry for this service and click the Generate provider Code button. The system displays a page with three group boxes containing code:

   - Interface peoplecode

     Copy and paste the interface PeopleCode into the interface application class.

   - Implementation peoplecode

     Copy and paste the implementation PeopleCode into the implementation application class. The implementation code generated is only a skeleton the actual logic for the application class. The development team must therefore modify the implementation class to meet the providing application's needs.

   - Proxy peoplecode

4. Confirm that the interface and implementation classes contain the necessary information.

   The two applications serve different functions. The interface class is an abstract definition and details what methods and properties the implementation class will have to have to comply with registered specifications, but it does not contain the implementation details. The implementation class actually implements the interface, providing the executable code for the abstract method definitions.

   The interface application class must:

   - Have names identical to the name of the registered service.
   - Extend the baseService class.
   - Imports the baseService parent class definition.
   - Contain a constructor method that creates an instance of the parent baseService class.
   - Define an abstract DoService method with the signature matching the signature of the registered service.

5. Confirm that the implementation of the service:

   - Implements the interface.

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- Provides a concrete implementation of the DoService method.

  When a development team decides to provide a service, they create an interface and implementation class that implements it.

- Imports the interface that it implements, as well as the types and exceptions it is working with.

  This happens once you generate the provider code.

- Throws exceptions in accordance with the registered interface contract in order to handle errors.

- Can log warnings in accordance with the interface contract.

  The interface application class provides details of all warnings that were generated when the service was executed.

- Uses the API2CI framework to abstract from the component interface specifics, if the implementation is component interface-based.

  Component interface-based services need to import the CI library (which is provided with the registry) using this code:

  ```
  import HMCR_API2CI
  ```

  If you are using a DoService method, you need to declare two local objects: ciHandler and ciIdent. ciHandler is the class managing all access to a component interface since you cannot directly manipulate a component interface. ciIdent defines the unique attributes of each ciHandler instance.

6. Access the registry entry for the service interface and add the implementation application class to the type's implementation details.

Note. You can use services to organize multiple other services to execute an business task. This is called aggregating services. The aggregating service is the service responsible for managing the business transaction, housekeeping, and performing the save professing so these processes are run only once, improving overall performance. When a service is running another service in aggregation mode, the calling service (the aggregating service) sets the RunAggregated flag on the called service, causing the called service to skip the housekeeping and save processing.

Implementing Exceptions

PeopleSoft delivers a baseException class providing the default exception handling, which is on the PeopleTools exception class. The baseException class constructor takes the following parameters:

- An instance of a service log.
- A message set number and message number.
- Default message text.
- Message parameters 1–5 or "Null" when none.

The base Exception class constructor executes the following logic:

- Adds PSMessages collection to the service log.
- Creates a PeopleTools exception for the provided message set and message number.

To implement a registered type interface:

Note. Implement registered exceptions as PeopleCode application classes.

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1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_EXCEPTIONS.

   Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.
2. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the exception.
3. Confirm that the exception implementation contains the following:
   - A link to an entry in the PeopleTools message catalog.
   - Default error processing.
   - Exception-specific error processing, where necessary.

   Note. The exception's registry entry defines the exception name, the fault message structure, and the exception semantics (description).
4. Confirm that the implementation of the exception class:
   - Name is identical to the registry entry name.
   - Extends the baseException and import the baseException class definition.
   - Contains a constructor that:
     — Takes an instance of a LogType as a single parameter and imports the LogType class definition.
     — Facilitates the default error processing by wan of an instance of a parent class.
     — Assigns the correct UUID of the corresponding registry entry to its UUID property.
   - Exposes a read-only property UUID with a type of *string*.

Implementing SQLViews

To implement a registered sqlView interface:

Note. Implement registered sqlView interfaces as PeopleSoft record definitions with a type of *view*.

1. Create fields on the record definition to correspond to each field in the registered sqlView interface.
2. Run SQL Create to create the view in the database.
3. Open the sqlView registry entry and add the implementation record name to the registry entry.

   When you are creating a new interface view, you must use the Registry Wizard component. When you are updating an existing view, you must use access the registry and click the Update button. The system then displays the Registry Wizard component.

   See Chapter 24, "Registering Interfaces," Registering New Interfaces, page 527.

Consuming Registered Interfaces

This section provides an overview of registered interface consumption and discusses how to:

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- Invoke service interfaces.
- Set up stale data checks in service calls.
- Pool component interfaces.
- Consume collection-sized interfaces.
- Bind complex types to and from portal pages.
- Consume SQLViews.

Understanding Registered Interface Consumption

If there is an interface in the registry that your application needs to use, you must create code in PeopleCode events in the consuming application to invoke the interface.

Note. You can click the Generate Consumer Code button on the Registry Details page for the registered service to generate all the code the consuming application needs. Cut and paste the code into the consuming application's PeopleCode Event (for example, SavePostChange PeopleCode). Confirm that the generated code meets the criteria set out in these steps and make any necessary modifications.

Note. You can only place the code for manipulative services such as *Set*, *Add,* or *Delete* in the SavePostChange PeopleCode of a single field in a component. You cannot spread out manipulative service calls over several PeopleCode events. You must also not place manipulative service calls in FieldChange PeopleCode.

Invoking Service Interfaces

Consuming applications invoke service interfaces in four steps:

1. Import, declare, and create framework classes, service classes, and type classes.
2. Bind to the service implementation using the Service Manager's LocateService method.

   At runtime, the Service Manager determines the appropriate implemented interface application class and returns an instance of it to the consuming application for invocation as follows:

   a. The import statement in the consumer code indicates which registered interface is required.

   b. The registered interface contains information about which implemented interface class is required.

   c. The Service Manager's LocateService method returns an instance of the implementation class.

   Note. The LocateService method requires the service name and the service version in order to bind to the appropriate service.

   The consumer code only needs to know which registered interface it is using. The provider application specifies which implemented class should be returned to the consumer. This enables the provider to make changes to the implemented interface without impacting the consumer.
3. If you are invoking a type interface, the consumer application needs to set the properties of the type class in the input parameters prior to passing it to the DoService call.

   The type interface registry entry describes the properties of the type class. The consumer can map properties individually from the consuming application to the type class properties.
4. Invoke the DoService method of the service implementation class, passing the parameters as defined in the service signature.

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The service signature defines the zero or more input and output parameters that need to be passed to the service. Parameters can be simple types (such as string, number, date, or boolean) or complex types defined and registered as types in the interface registry:

- When the service requires complex types as parameters, the consumer needs to import the type class, declare it as a local variable and instantiate it using the Create instruction.
- When the service requires simple types, the simple types only need to be declared by the consumer.

5. Catch and manage exceptions.

   The consumer code must invoke all services within a try-catch block. All code executed in between the try and the catch statement is in a protected area so that any exceptions thrown during service execution will immediately return control to the catch statement in the consumer code. The consuming application can then react to the exception.

   The consumer code can catch specific exceptions or the baseException, which is the parent class to all registered exceptions.

   Note. The consuming code should always catch for baseException to catch exceptions not specific to the service.

6. Analyze the service execution log for relevant information.

   During service execution, the registry framework collects all warnings and messages issued by the provider and exposes them to the consumer as a service execution log. The consumer can query the execution log and take action based on the warnings and messages, if necessary.

   Each service has a property called ExecutionLog. The property has an array of LogType called Log. The LogType has the following attributes:

   - DEFAULT_TEXT
   - MESSAGE_SET_NBR
   - MESSAGE_NBR
   - MESSAGE_SEVERITY

   The service's Log class has a generic method ShowLog() to display the content of the execution log.

Note. All consumer PeopleCode runs within the scope of a consumer component session. Any services that the system invokes during the component runtime will also run within this transaction scope. If the service execution encounters fatal errors, the system will roll back the entire component transaction unless the errors are specifically caught as exceptions. For example, if the a component in the consumer application uses two services invoked by the SavePostChange PeopleCode and one executes successfully while the other throws a fatal error, the system will not save any data to the component from either service.

Setting Up Stale Data Checks in Service Calls

If the service call is updating the component in the consumer application with an action of *Add*, you do not need to set up a check for stale data and you can invoke the service in Component.SavePostChange PeopleCode..

However, if the service is to update prior selected data, you need to set up a stale data check to ensure that the underlying data has not been modified during user interaction on the consumer side. To do this, create a *Get* service in the Component.PostBuild PeopleCode and a *Set* service in the Component.SavePostChange PeopleCode.

If the registry detects a discrepancy in the data, it will cause an error, which can be caught using baseException.

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Pooling Component Interfaces

Several services may use the same instance of a component interface in their implementations. To improve performance, you can pool component interfaces. Component interfaces must be scoped to one local PeopleCode event, but within that event the code can send several calls to services using the same open component interface.

The system then passes the component interface pool to the Service Manager's LocateService method. If a requestor is only issuing one service call in a Peoplecode Event, the system passes NULL as a component interface pool.

Consuming Collection-Sized Services

You can set up services to operate on items or on collections (row sets). If the consuming application is working with a collection of rows, you must set up the consuming application to pass the entire collection to the service. The service removes any items that are not passed into the service in the collection. If consumer passes an empty collection, it will effectively remove all the data rows in the provider implementation.

Use a collection-sized *Get* service to populate the collection type class, manipulate it, and pass it back to the *Set* service.

Binding Complex Types To and From the Portal Pages

All services work with simple or complex types as parameters. Simple types are available as PeopleCode data types. The provider application implements complex types as application classes. It is not possible to view application class properties directly on a page so it is necessary for the consumer application to create pages based on Rowset.Row.Record.Field objects and map the type class properties to the fields.

In the consumer code, set up a call to the helper method *PopulateToRowset* to bring all data from the type class instance to the user interface of the consumer component. Set up a call to the helper method *PopulateFromRowset* to bring all values from the rowset used in the user interface of the type class.

Note. Not all type classes provide helper methods and not all helper methods will work in all consumer components. In these cases, you will need to write your own logic to bind the type class values to the consumer user interface.

Consuming SQLViews

Consuming applications can use registered sqlViews directly without binding. Use registered sqlViews for the following:

- Search views.
- Prompting.
- Related display.

Maintaining the Registry Folder Structure

To administer the HCM interface registry, use the Administer Service Registry component (HMCR_CONTENT_ADMIN).

This section discusses how to maintain the registry folder structure.

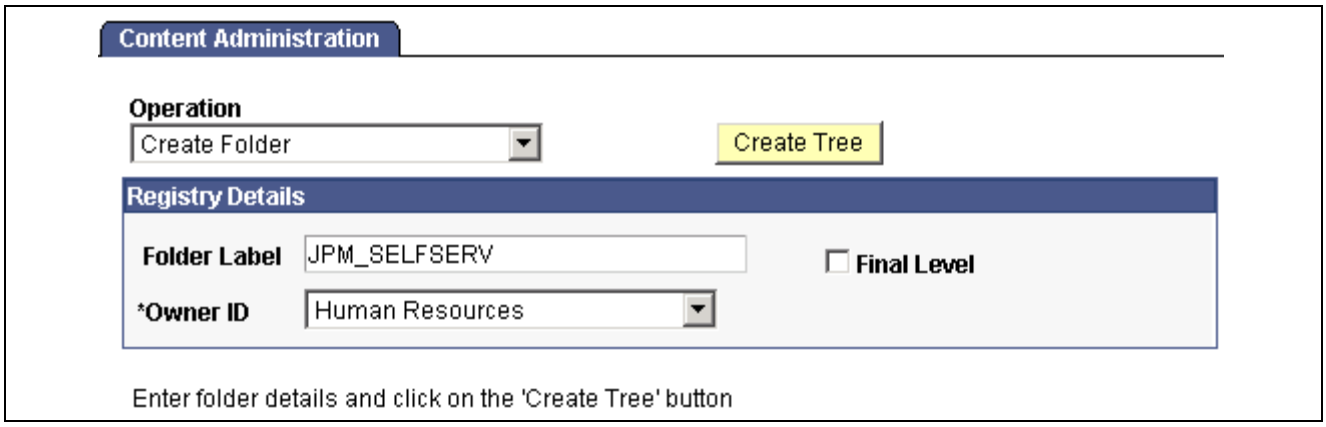
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Page Used to Maintain the Registry Folder Structure

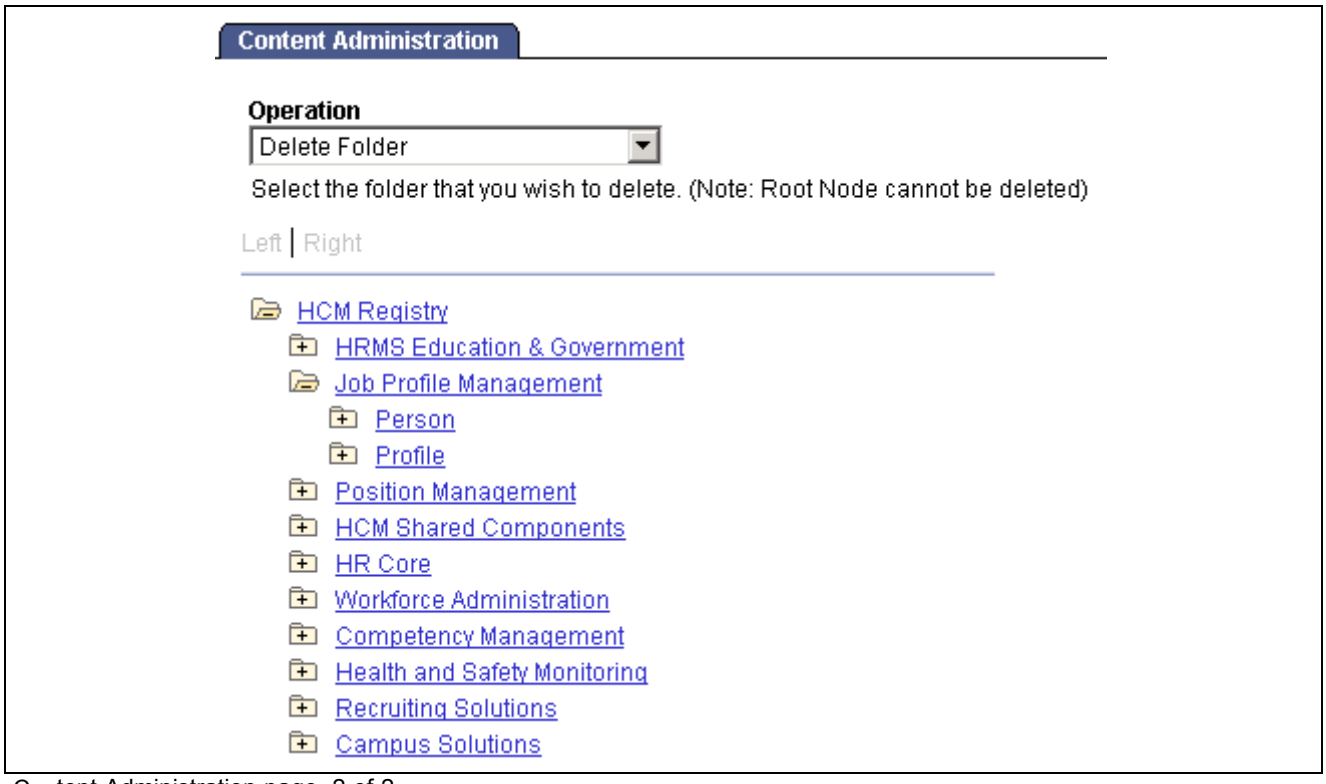
Page Name	Object Name	Navigation	Usage
Content Administration	HMCR_CONTENT_ADMIN	Set Up HRMS, System Administration, HCM Registry, Administer Service Registry, Content Administration	Add or delete folders from the registry.

Maintaining the Registry Folder Structure

Access the Content Administration page.



Content Administration, 1 of 2



Content Administration page, 2 of 2

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Create Folders

To create a new folder, select *Create Folder* in the Operation field and enter the folder's registry details.

Folder Label Enter the folder label that will appear in the registry.

Owner ID Select the folder content's owner ID from the list of options.

Final Level Indicate if the folder is a final folder. A final folder can not have any child folders other than the folders for the four interface types. If you make this folder a final folder, the system will create the four interface folders.

If you leave this check box clear, the folder is a feature folder and you can add child folders to it.

Create Tree After you have entered the folder details, click the Create Tree button. When you click the button the system generates a new registry tree. Navigate through the tree and select the node under which the new folder should go.

You can only place a new folder under folders that have the same owner ID and that are not final level folders.

Delete Folders

To delete a folder, select *Delete Folder* in the Operation field. Expand the registry tree, locate the folder you want to delete, and click on it. You cannot delete a folder that contains registered interfaces within one if it's child folders.

Testing Services

To test newly created services, use the Service Tester component (HMCR_SRV_TESTER).

This section discusses how to test services.

Page Used to Test Services

Page Name	Object Name	Navigation	Usage
Service Tester	HMCR_SRV_TESTER	Set Up HRMS, System Administration, HCM Registry, Service Tester, Service Tester	Test newly created services in this generic component.

Testing Services

Access the Service Tester page.

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Service Tester page

Use this page to test newly created services through a generic component. For example, if you create a new service using the Registration Wizard component and the corresponding implementation code, you can use this page to test the service and ensure that service you are committing works as designed. The system returns the results of the service test in a new window as XML.

Add, Correction, or **Update/Display** — Select the mode that the service will run in. You can use these options to test the service running in the various modes.

Use Tree Input and **Use XML Input** — Select to populate inputs using an XML format (SOAP 1.2) or using the tree structure. When you click the Use XML Input button, the system converts the tree inputs to the corresponding SOAP document. This is useful for testing remote services, for populating the inputs of a larger service, and for copying an existing service to a new service test (similar to “save as” functionality).

Use Input Parameters as Output — Select this check box for services which have no input parameters but do update the input parameters that are passed in. This is valid only for local services because remote services cannot update inputs by reference. It is not recommended for local services but can be used where local services where this situation exists.

Run Service — Click this button to invoke the service request after you have populated the inputs. Upon completion of the service call, the system displays the outputs of the service in a new window as XML.

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Viewing and Registering Transformation Maps

To view transformation maps, use the Transformation Registry component (HMTF_TRF_REGISTRY). To register transformation maps, use the Register Transformation Map component (HMTF_WZ_TRF).

This section discusses now to:

- View transformation maps.
- Register transformation maps.

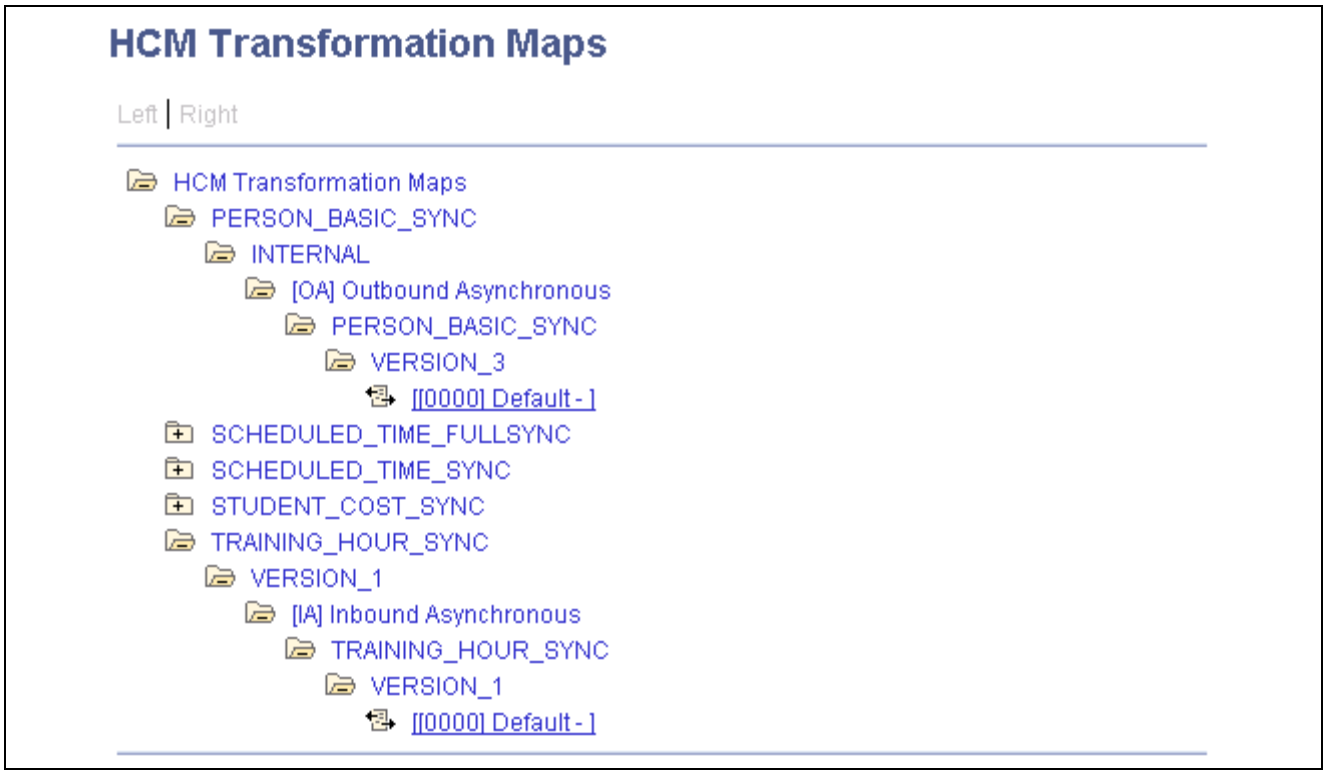
Pages used to View and Register Transformation Maps

Page Name	Object Name	Navigation	Usage
HCM Transformation Maps	HMTF_TRF_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, HCM Transformation Maps	View HCM transformation maps.
Transformation Map	HMTF_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, Register Transformation Maps, Transformation Map	Create transformation maps for messages from one message version to another.

Viewing Transformation Maps

Access the HCM Transformation Maps page.

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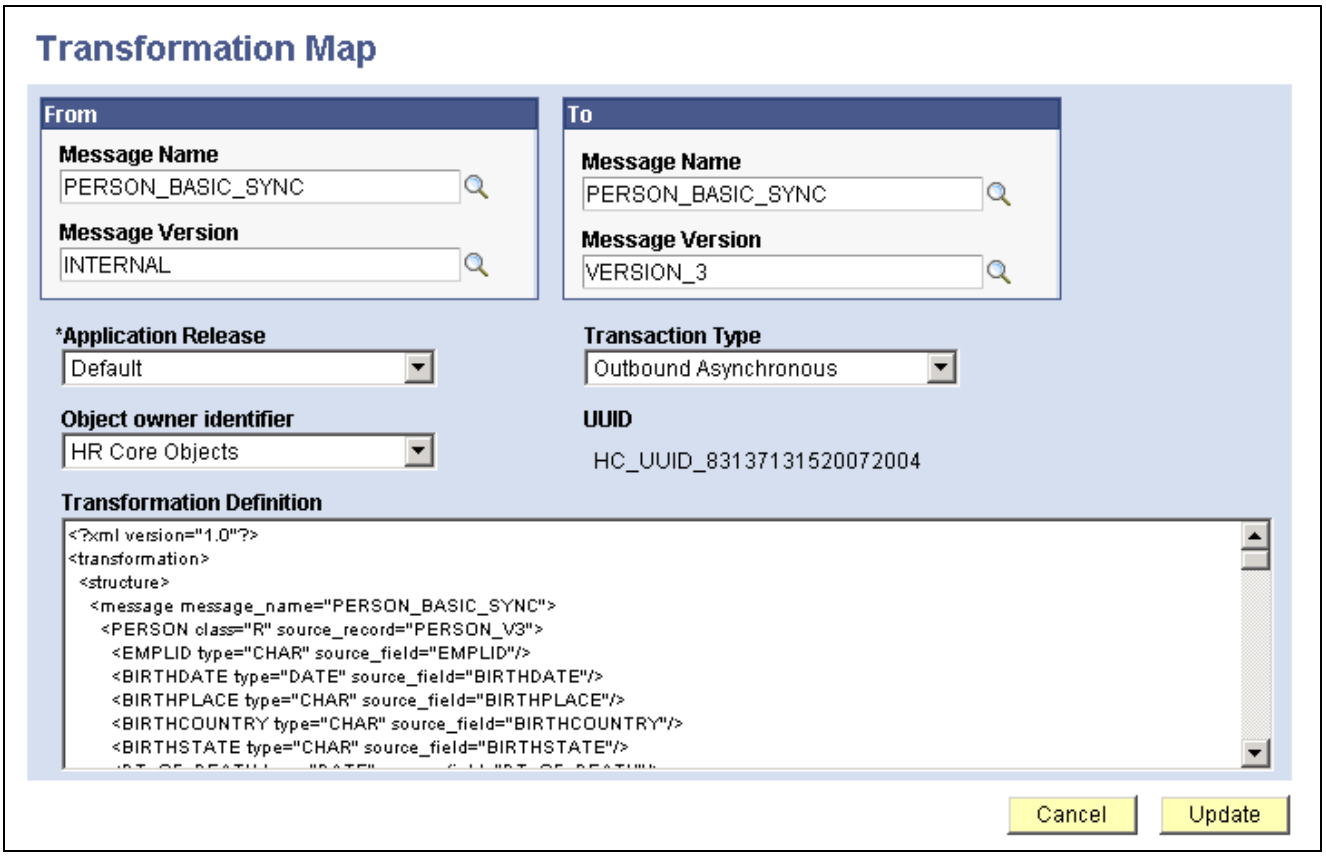
HCM Transformation Maps page

Use this page to view details of transformation maps, which instruct the system to convert incoming messages (From) into (To) a specific format. Primarily this is done because, between release, the record definitions may have undergone a change.

Registering Transformation Maps

Access the Transformation Map page.

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Transformation Map page

When you need to exchange information between two different release of a PeopleSoft Enterprise product you must perform transformations. With each release record definitions sometimes undergo changes. Transformations enable you to scale these problems by transforming messages from one release to another. Use this page to create transformation maps for messages from one release to another and from one version to another.

Message Name Select the message that needs to be transformed from one version to another.

Message Version Select the version of the message that needs to be transformed for one version to another.

Application Release Select which PeopleSoft Enterprise application release that the message belongs to. For example, specify whether the message is from the HRMS 8.3 system or the HRMS 8,8 system. The *Default* value is that the system use the current release of the product.

Transaction Type Select the type of transaction of the message, either *Inbound Asynchronous, Inbound Synchronous, Outbound Asynchronous,* or *Outbound Asynchronous.*

Object Owner Identifier Select the owner of the message object.

UUID The system displays a unique identifier for the transformation. The system generates this identifier.

Transformation Definition View the definition of the transformation in XML format.

Register Click this button to register the transformation.

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Mapping HCM Services to Integration Broker

This section provides an overview of HCM service mapping to Integration Broker and discusses how to:

- Map HCM services to Integration Broker.
- Delete mapped services.
- Use Integration Broker to provide web services.

Understanding HCM Service Mapping to Integration Broker

You can invoke HCM services from remote (non-PeopleSoft) systems. The SOA framework contains built-in functionality to process an incoming requests (services) and return the required response. This built in functionality gives you the ability to:

- Generate a web service automatically.
- Publish WSDL to the PeopleSoft repository.
- Publish WSDL to UDDI.
- Synchronize Integration Broker services with the Integration Services Repository (ISR) automatically.

PeopleTools Integration Broker serves as the transport mechanism for services. By mapping your HCM services to Integration Broker, you ensure that your HCM Interface Registry conforms to industry standards.

Mapping HCM Services to Integration Broker

This section discusses how to:

- Map an HCM Interface Registry folder to an Integration Broker service.
- Map an HCM service to an Integration Broker service operation.
- Map interface details.
- View service operation security.
- View service operation handlers.
- View service operation routings.

Mapping an HCM Interface Registry Folder to an Integration Broker Service

Initiate the mapping of HCM services to Integration Broker through the HCM Interface Registry. The system permits mapping at only third level folders, which are the lowest sub-categorization of HCM services for products.

To map the HCM Interface Registry metadata for a particular folder to an Integration Broker service:

1. Click the folder name link on the HCM Interface Registry page for a third level folder.

   The system displays the WSDL for that registry folder.
2. Click the Add to service repository button to add to the service repository.

   Provided that you have set up Integration Broker, the system displays details of the service.

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Note. The Delete from service repository button is available only when you have mapped the registry folder to the Integration Broker service repository, at which time the Add to service repository button becomes unavailable. This ensures that you can only perform the correct action.

The system automatically generates an Integration Broker service name for the folder. This service name is the UUID for the folder, which is unique string within the HCM Interface Registry and thus guarantees that each service has a unique name. Optionally, you can rename the Integration Broker service to give it a more meaningful name through the Service Administration component (PeopleTools, Integration Broker, Service Utilities, Service Administration). If you rename the service, the system still guarantees a unique name because the Service Alias field contains a copy of the UUID service name. This ensures that the delete process has a means of correlating the service with the HCM Interface Registry.

Note. *Do not* change the Service Alias field under any circumstances because it is critical to service delete processing.

Mapping an HCM Service to an Integration Broker Service Operation

Each HCM service that is in a registry folder on the HCM Interface Registry page is mapped to an Integration Broker service operation and can be found in the service that you have generated for the folder on the Services page (PeopleTools, Integration Broker, Integration Setup, Services). The system uses the name of the HCM service as the name for the service operation, unless that service operation already exists. If the service operation does already exist, an algorithm works within the length constraints of the Service Operation Name field (30 characters). The algorithm replaces the endmost characters with digits until it generates a unique name. The system retrieves the version for the service operation from the HCM Interface Registry.

Mapping Interface Details

The system maps each input and output interface to an integration Broker non-rowset based message, complete with generated schema. The system also assigns the version from the HCM Interface Registry. The base name for the messages is the HCM service name plus the suffix _IM or _OM to designate input or output interfaces, respectively (for example, ADDPOITYPE_IM) .

The system maps outfault interfaces to Integration Broker non-rowset based part messages. This is due to the limitation of Integration Broker having only one fault message per service operation. Therefore, the system creates all outfaults that are associated with a mapped HCM service within an Integration Broker container message. The system indicates outfault messages by using the suffix _FM (for example, ADDPOITYPE_FM).

Viewing Service Operation Security

The system assigns each service operation that you generate the standard HCSPSERVICE permission list. Access the permission list details for the web service on the Web Service Access page (PeopleTools, Integration Broker, Service Operations, General, click the Service Operation Security link).

Viewing Service Operation Handlers

The system assigns a handler to each service operation that you generate. The assigned handler references a generic handler class that is processing the incoming request, and generates the required response. The generic handler is HMCR_FRAMEWORK:IB_Framework:Handlers:IB_SyncRequestHandler. Access handlers for service operations on the Handlers page of the Service Operations component (PeopleTools, Integration Broker, Integration Setup, Service Operations).

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Viewing Service Operation Routings

Within the HCM Registry there is no indication of consumers for a given service, so the system does not generate routings during the mapping process. It is up to the development teams to create the necessary routings.

Deleting Mapped Services

Use the HCM Interface Registry to delete HCM services that you have mapped to Integration Broker. The system makes available the Delete from service repository button in the HCM Interface Registry only for folders that you have already added to the Integration Broker metadata.

The delete process removes the following objects from the Integration Broker metadata:

- WSDL
- Services
- Service operations
- Service operation security
- Service operation handlers
- Service operation routings
- Messages (input, output, fault container, and part)
- Message schemas

Using Integration Broker to Provide Web Services

One main reason for mapping HCM services to Integration Broker is to use Integration Broker's capability of providing web services. You can provide a web service only for service operations that you define as having any-to-local routing. You create these service operations, along with their handlers and routings, in the Service Operations component.

To set up any-to-local routings for service operations:

1. Access the Service Operations component (PeopleTools, Integration Broker, Integration Setup, Service Operations).
2. Select the Generate Any-to-Local check box in the Routing Actions Upon Save area of the General page.
3. Save the component.

   The system updates the Any-to-Local value of the Routing Status area to *Exists*.

   The system also generates the routing and displays it on the Routings page of the component.

You can publish as a web service any service that has at least one service operation defined as any-to-local.

To publish a qualifying service as a web service:

1. Access the Provide Web Service component (PeopleTools, Integration Broker, Web Services, Provide Web Service) to launch the Provide Web Service Wizard.

   The system displays the Select Services page.
2. Search for the service that you wish to publish as a web service.
3. Select that service in the returned search results, and then click the Next button.

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The system displays the Select Service Operations page.

4. Select the service operation for the service that you want to publish as a web service, and then click the Next button.

   The system displays the View WSDL page.

5. Click the View WSDL link for a service to view the WSDL that the system generated for the service.
6. Return to the View WSDL page and click the Next button.

   The system displays the Specify Publishing Options page.

7. Define where to publish the selected services.

   Select the Publish to UDDI check box or the WSDL Repository check box to publish the services to the corresponding location.

   The system displays the Provide Web Service - Results page.

8. View the WSDL generation log to confirm the results of the wizard.

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CHAPTER 25

Working with HCM Event Manager

This chapter provides an overview of the HCM (Human Capital Management) Event Manager feature, lists steps to implement it, and discusses how to:

- Define and register events.
- Create event handlers.
- Register event handlers.
- Test event handlers and events.
- Raise events.
- Monitor events.
- View event summaries.
- View help for Event Manager pages.

Understanding the HCM Event Manager

The HCM Event Manager is a feature and framework that enables you to define, implement, and run business logic for business events.

Using the Event Manager framework, you can define the business events that the system raises when you change certain data in application components or run certain PeopleTools Application Engine processes. You can also define the event handlers that the Event Manager framework executes to react to these specific event instances. *Raising* an event is the act of creating an event instance. If an event is raised, the Event Manager framework automatically executes the business logic for the registered event handlers of the event.

Advantages of the Event Manager Framework

Using the Event Manager framework has several advantages. One of the major advantages is improved processing performance. The Event Manager framework enables you to manage your business events around the business objects that define the events. By isolating the reactionary business logic within events and event handlers, you improve performance because you no longer have mainline business processes embedded with time-consuming code that runs in the background as part of its critical path. The Event Manager framework provides a simple mechanism for isolating, automatically processing, and monitoring the business logic asynchronously.

Another advantage is that you can define your own business events and build your own event handlers for these events with minimal impact to the delivered code.

A third advantage is that through the event monitoring components, you have much greater processing detail which assists when troubleshooting.

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Events and Event Handlers

Use the Event Registry component to register business events and register event handlers to business events so that they are available to the Event Manager framework. Business events are the functions in a business environment, such as adding a person, changing an employee's compensation rate, terminating an assignment, promoting an employee, and so on. PeopleSoft Human Resources delivers many events ready for use. You can also have a developer create and register additional events in PeopleTools Application Designer. After the events are created, you register events in the Event Registry component. Event handlers are modules of business logic that react to instances of particular events to which they are registered. You must register event handlers to events so that the Event Manager framework executes the event handlers whenever the event is raised. All properties and methods of the event instance (most notably the event keys) are available to the event handler during execution.

You can assign multiple event handlers to a single business event, and you can assign a single event handler to react to multiple events. When defining events in the Event Registry component, you can assign event handlers to function in either synchronous mode or asynchronous mode with respect to the process that raises the associated event. When a process raises a registered event, the Event Manager framework determines whether the event handlers that are registered to that event are synchronous or asynchronous. If an event handler is synchronous, the Event Manager framework executes that event handler inline as part of the process that raises the event. If the event handler is asynchronous, the Event Manager framework executes the event handler as a detached process that is out of the critical path of the mainline process. You can register both synchronous and asynchronous event handlers concurrently to the same event. The Event Manager framework executes the registered event handlers in whichever mode you configure them to operate, always executing synchronous event handlers first. When defining event handlers for registry in multiple events, you should include some code in the event handler to examine the Name property of the passed-in event object so that you know which type of event caused the event handler to be executed.

The Event Manager framework is based upon a simple notify and respond model. For the notification side, the Event Manager framework broadcasts that event has occurred, along with the data that caused the creation of the event instance. For the respond side, the individual applications link business logic into the Event Manager framework to respond to the business event. By linking PeopleTools Application Classes to the event in the Event Registry component, the Event Manager framework knows when to execute the registered event handlers for the event when the event is raised.

When you raise an event through a component or PeopleTools Application Engine process, the system creates a unique event instance for each business event. These event instances are a signal to the Event Manager framework that an event happened. Event instances are specific objects in the system and contain underlying data regarding the event occurrence. This data varies depending on the event.

An event handler that fails during execution causes a disruption to the execution of any other event handlers for that event or the mainline process. The Event Manager framework therefore provides many options for monitoring and troubleshooting event handlers and events. You can monitor event instances and the executions and exceptions of the event handlers through the Event Monitor component or the Event Summary component. You can also test event handlers and events outside of the mainline business process through the Handler Tester component and the Event Tester component.

Local and Remote Nodes

The Event Manger framework enables you to manage events that have influence over more than one database instance. You can use the Event Manager framework to process business events that occur on either a local or remote database (also called a node). A remote node can execute only event handlers that are implemented locally and registered to events in its local event registry. For example, an event that is raised in an HCM database might be important to a separate PeopleSoft Enterprise Learning Management (ELM) database or a PeopleSoft Financials database.

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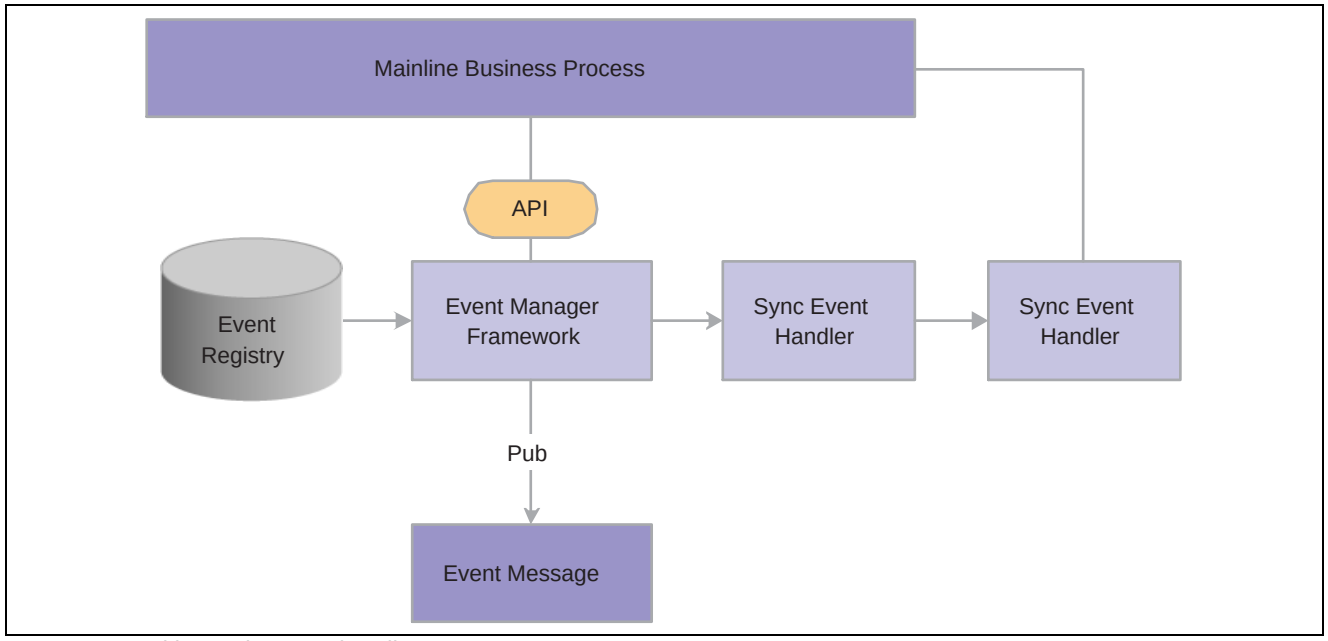
The Event Manager Framework is currently not integrated with the Service Oriented Architecture (SOA) distributed registry. Instead, each database has its own local event registry. Within a local event registry, you can define events that you can raise by local process as well as events of interest to applications on the local database that are raised by remote databases. To support the processing of an event in a remote database, remote databases must implement the Event Manager framework. Also, each local event registry must contain entries for the remote events of interest along with their associated local event handlers.

From the perspective of the Event Manager framework, virtually no difference exists between the way that asynchronous handlers are supported for remote events and local events. You register event handlers to events in the event registry, configuring the Event Manager framework to execute event handlers for events that are raised in the local database, a remote database, or both types of databases. Thus, a single event handler can respond to instances of the same event that are raised on the local database as well as a remote database.

Event handlers for remote events are by definition asynchronous. Thus, on the local database the Event Manager framework executes these remote events only after completing the execution of synchronous handlers that you have registered for the event.

Example: Local Event with Synchronous Event Handlers

This example illustrates the processing of a mainline business process on a local database using an event with two registered synchronous event handlers:



Local event with synchronous handlers

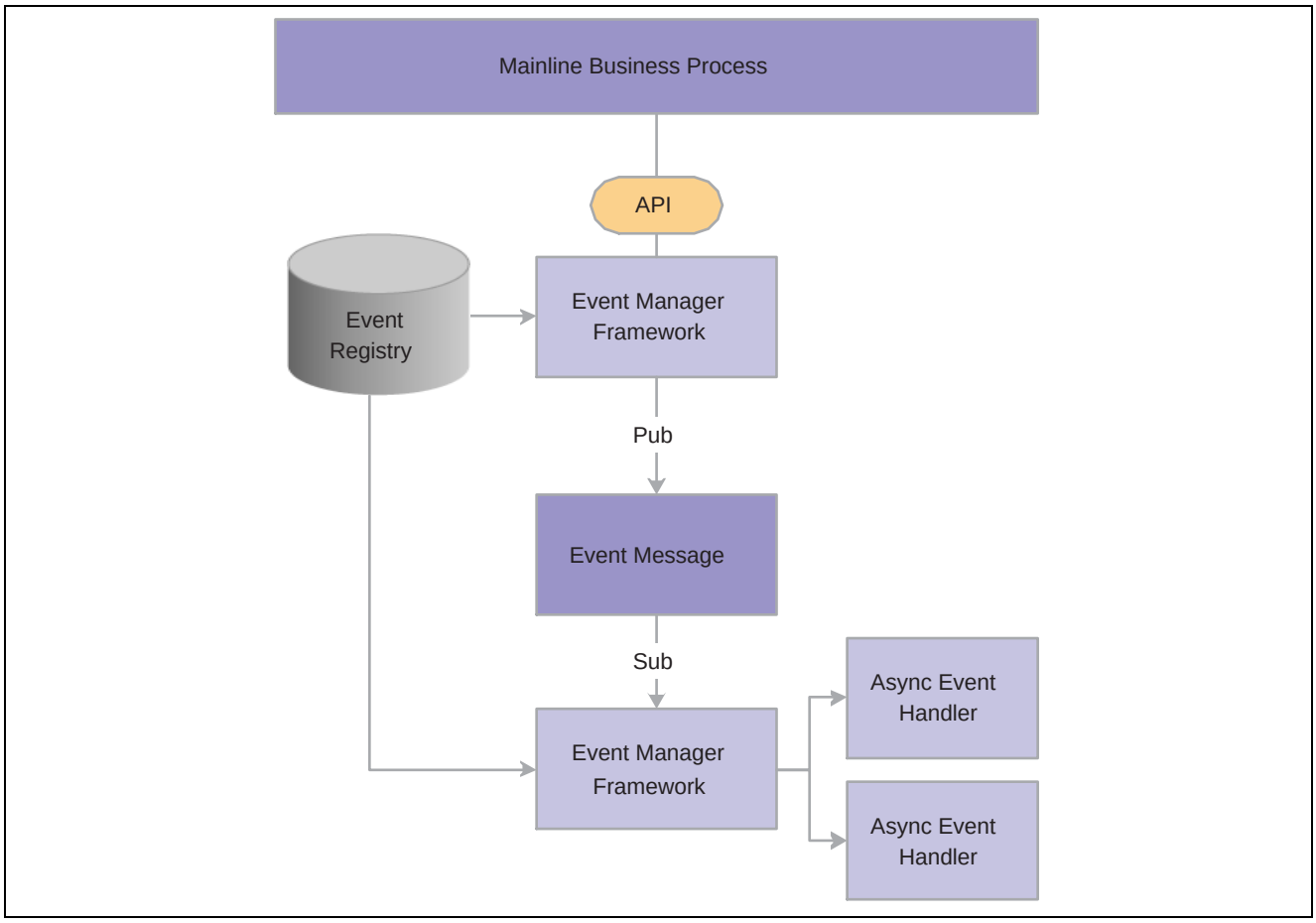
In this scenario, the mainline business process calls the application program interface (API) for the Event Manager framework to raise the event. The framework executes inline the two event handlers in order, publishes the generic PeopleTools Integration Broker event message, and then returns processing control back to the mainline business process.

Note. The generic PeopleTools Integration Broker event message contains coding that is similar to XML language that provides the event name, event keys, and node that raised the event.

Example: Local Event with Asynchronous Event Handlers

This example illustrates the processing of a mainline business process on a local database using an event with two registered asynchronous event handlers:

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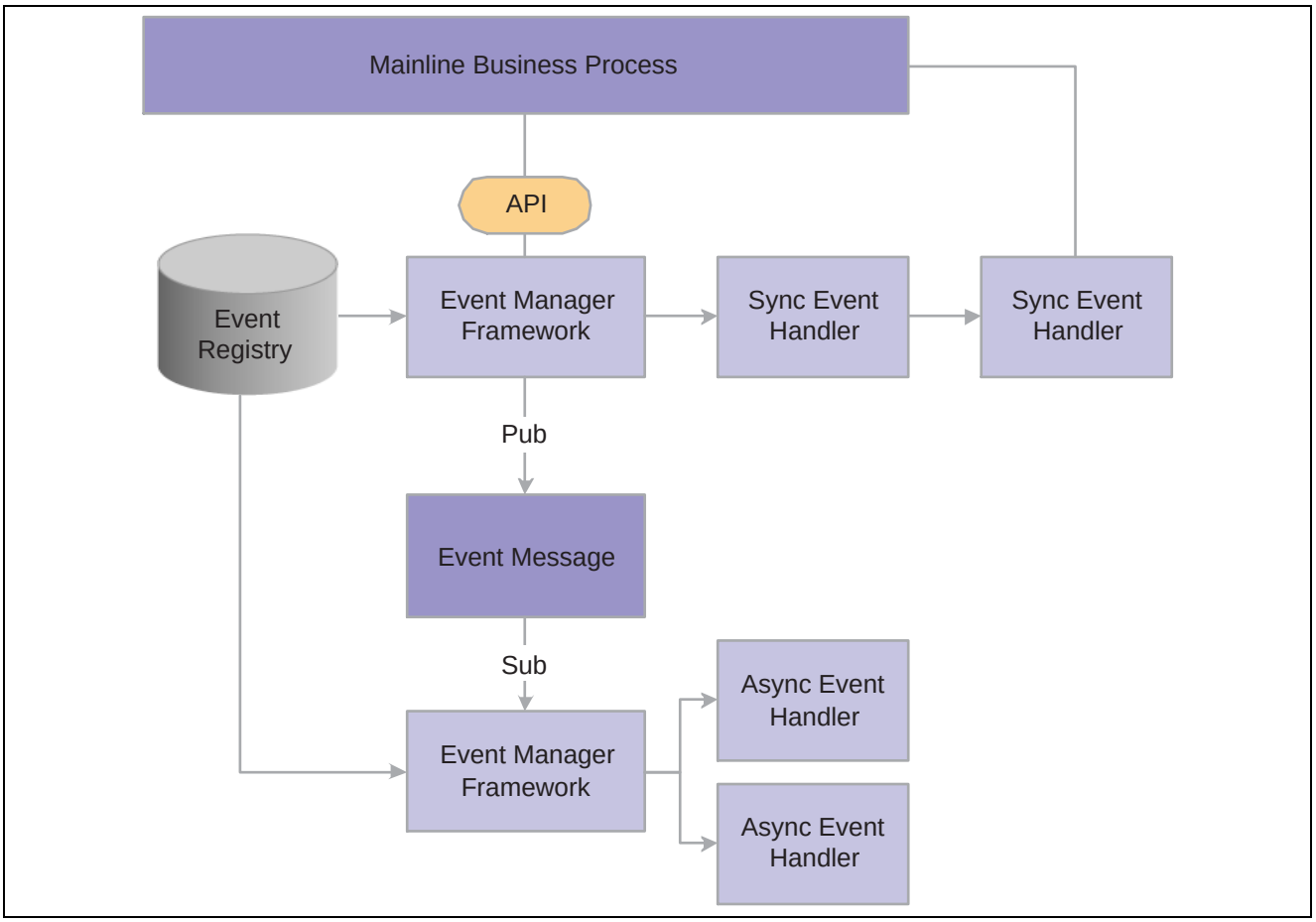
Local event with asynchronous handlers

In this scenario, the mainline process calls the API for the Event Manager framework to raise the event. The framework immediately publishes the generic PeopleTools Integration Broker event message, and returns processing control back to the mainline process without delay. A normal PeopleTools Integration Broker local subscription picks up the generic event message and invokes the framework to execute the asynchronous event handlers that are registered to the event.

Example: Local Event with Both Synchronous and Asynchronous Event Handlers

This example illustrates the processing of a mainline business process on a local database using an event with two registered synchronous handlers and two registered asynchronous event handlers:

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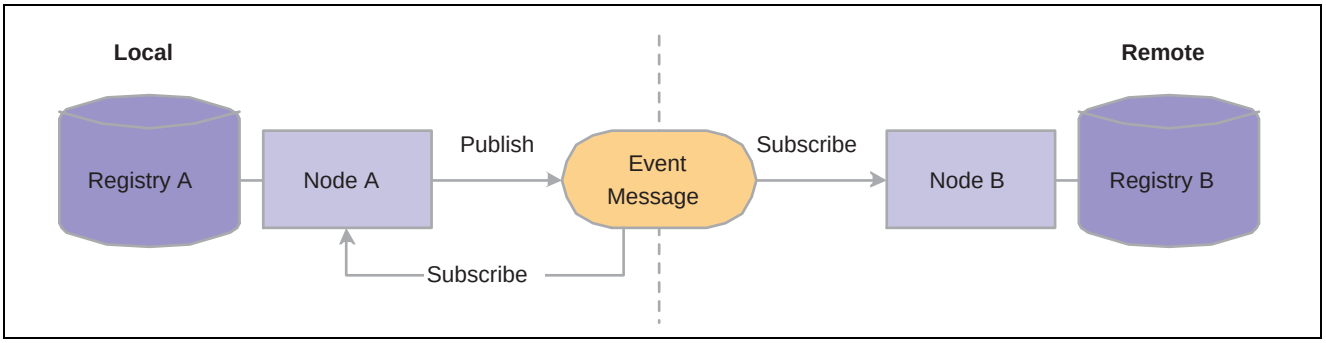


Local event with both synchronous and asynchronous handlers

In this scenario, the mainline process waits while the Event Manager framework executes the synchronous event handlers. The Event Manager framework executes the asynchronous event handler as detached processes launched by the local subscription to the generic PeopleTools Integration Broker event message.

Example: Remote Event

This example illustrates event processing that spans across local and remote databases:



Remote event

In this scenario, the event is registered in the local event registry (Registry A) and a remote event registry (Registry B).

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In Registry A, the event has both registered synchronous and asynchronous event handlers. The event handler that is registered to this event is set for a local source. When the event in raised in Registry A, the Event Manager framework logs the event (if it is configured for logging), publishes the generic event message, executes synchronous event handlers that are registered to the event, and then subscribes locally to the generic event message to execute asynchronous event handlers that are registered locally to the event.

Registry B has the same event active in its local event registry. The event handler that is registered to this event is set for a remote source. Because Registry B subscribes remotely to the same event message that Registry A publishes, Registry B logs the occurrence of the event and then executes the registered asynchronous handler.

Rules for Extending HCM Event Manager

When you are creating custom events and event handlers to extend the delivered objects within the Event Manager framework, you must adhere to the following rules to ensure that delivered upgrades and fixes do not affect your extension:

- Never indicate that the events that you develop are system data.
- Always create application classes for new event definitions in one or more new, nondelivered application packages, never in delivered application packages.
- Always create new event handlers in one or more new, nondelivered application packages, never delivered application packages.

Common Elements Used in This Chapter



Click the Help button to access the Page Help page, where you can view a detailed description of the current page.

Steps to Implement the HCM Event Manager

To implement the HCM event Manager into your application processing:

1. Identify the business events that drive the execution of your business logic and, if necessary, define a new event.

   In many cases, the event is already defined in the local event registry that is accessible through the Event Registry component. If the event is not yet defined, you must define a new business event. To define a new event:

   a. Create an Application Class in PeopleTools Application Designer.

      Generate the code for this application class through the Define Events page of the Event Registry component, or use the template code that is provided in this chapter.

   b. Register the event to the Event Manager framework through the Event Registry component.

2. Write the event handlers in PeopleTools Application Designer to execute the business logic that is specific to the event.

   To develop an event handler, create an Application Class with a method named ProcessEvent() that includes the Event Manager interface code that is provided in this chapter. Event handlers can be for one or more business events.

3. Register the event handlers to the event through the Event Registry component.
4. Test your event and its registered event handlers.

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To test event handlers and events:

a. Test the event handler in standalone mode through the Handler Tester component.

b. Test the event independent of the business process that raises the event through the Event Tester component.

c. Test the event in the context of the business process by executing the business process that raises the event through the component or PeopleTools Application Engine process.

The Event Manager framework automatically executes the registered event handlers for an event when you raise the business events.

Defining and Registering Events

To register business events and their event handlers, use the Event Registry (HCR_EM_REGISTRY) component.

This section provides an overview of new events and discusses how to:

- Create an application class for a new event.
- Register events to the Event Manager framework.

Understanding New Events

Occasionally, you need to create new events that you can raise in the system for use by the Event Manager framework. As stated in the chapter overview, the first step is to identify the business events that drive the execution of your business logic and, if necessary, define a new event. Recall that to define a new event you must:

- Create a new application class for a new event in PeopleTools Application Designer.
- Register the new event to the Event Manager framework through the Event Registry component.

If you want to register a new event handler to an existing business event, you can bypass this step.

Page Used to Define and Register Events

Page Name	Object Name	Navigation	Usage
Define Events	HCR_EM_REGISTRY	Set Up HRMS, System Administration, HCM Event Manager, Event Registry, Define Events	Register the business events that you want to be able to raise within the Event Manager framework.

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Creating an Application Class for a New Event

Each event in the Event Manager framework must have a corresponding application class. Use PeopleTools Application Designer to create a new application class for a new event. The application class can reside in any application package, but you must place it under the subpackage called *Events*. Depending on the nature of the business event, you should create the application class in either the Core HR application package or an application package that is owned by some other PeopleSoft product or module (such as a PeopleSoft Global Payroll country extension). The owner of the application package in which you define the application class for the event is the owner of the event and should therefore be responsible for creating and maintaining the code that raises the event.

To create a new application class for a new event:

1. Decide in which application package you will create the application class for the new event.

   When you have decided this, you can use the Define Events page of the Event Registry component to automatically generate the class definition code.

2. Select Set Up HRMS, System Administration, HCM Event Manager, Event Registry.
3. Select the Add a New Value tab.
4. Enter the name of the new event (for example, *MyNewEvent*) in the Event Name field, and click the Add button. The system displays the Define Events page.
5. Click the Generate Event Class Code button in the Event Class Definition group box to have the system automatically create the PeopleCode that is necessary to define the new application class for this event.

   See Chapter 25, "Working with HCM Event Manager," Registering Events to the Event Manager Framework, page 559.

6. Highlight all of the code in the Event Class Code group box, and copy it to your clipboard.

   Note that you will not be able to save the page because you have not yet created the required information about the application class.

7. Access PeopleTools Application Designer to edit the application package in which this new event definition resides.

   For example, perhaps you are creating an event application class in the HR_EVENT_MGR_DEMO root package.

8. Create the new application class for the new event in the *Events* subpackage.

   The name of the new application class must be the same as the event name that you defined in the Event Registry component. The root application package must contain a subpackage called *Events,* and you must create the application class as part of this subpackage. The structure of your application package, for example, might be HR_EVENT_MGR_DEMO:Events:MyNewEvent. Optionally, you can use second-level application packages to organize your application classes. Thus, if you use a second-level application package called Person to group all person-related events together, then the structure of your application package would be HR_EVENT_MGR_DEMO:Events:Person:MyNewEvent.

9. Double-click the new application class to edit the OnExecute PeopleCode program for it.
10. In the edit window that the system displays, paste the system-generated code that you copied from the Define Events page.

    For reference, you can use the following code to implement an event class definition:

```
import HCR_EVENT_MANAGER:Base:baseEvent;

class MyNewEvent extends HCR_EVENT_MANAGER:Base:baseEvent;
```

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```
   /* Constructor */
   method MyNewEvent(&EventName as string);

end-class;

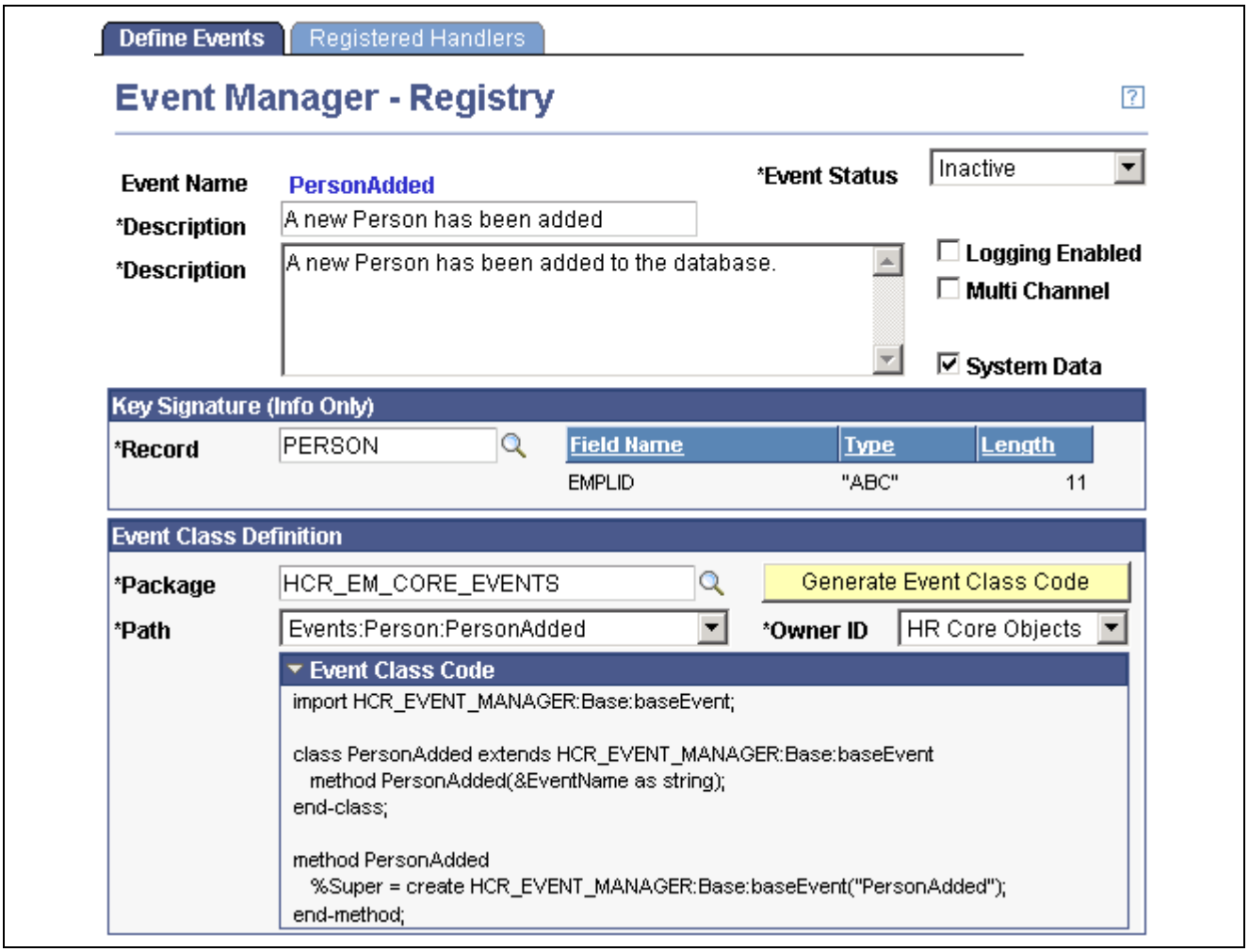
method MyNewEvent
   /+ &EventName as string +/
   %Super = create HCR_EVENT_MANAGER:Base:baseEvent("MyNewEvent");
end-method;
```

11. Click Save.

This completes the PeopleTools Application Designer portion of defining a new event.

Registering Events to the Event Manager Framework

Access the Define Events page.



Define Events page

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Important! The application class that you reference here must already exist in the database. If you are creating a new business event and have not yet created the associated application class, first use the Generate Class Code button to create the PeopleCode that you must use when creating the application class. Note that you will not be able to save the page because you have not yet created the required information about the application class. Create the application class for the event in PeopleTools Application Designer. Afterwards, return to this page to register the event with the Event Manager framework.

Event Name

The system displays the name of the business event that you want to be able to raise within the Event Manager framework. If you are adding a new business event, enter the name of the event when acccessing the component through the Add mode. You must use the same name that you gave to the event when defining the application class.

Important! The name that you assign to the business event must match the application class that you select for this event in the Path field in the Event Class Definition group box.

Event Status

Select whether the status of the event is *Active* or *Inactive.*The system only raises events in the local database that are active. Note that the system ignores inactive events that are raised in remote databases.

Description and (Long)**Description**

Enter a short and long description of the business event. The system uses the short description in search pages. You should provide enough detail of the business event in the long description so that anyone accessing the event knows what it represents.

Logging Enabled

Select to have the system write a row to a log table for each instance of this event. The system writes to the log each time that this event is raised in the local database. For events that are raised in remote databases, the system writes to the local log each time it receives a generic event message for this event.

Multi Channel

Select to have the system publish the generic event message for this event on any of the active queues that are available to the Event Manager framework. This enables you to process multiple instances of this event simultaneously through asynchronous event handlers that are registered to this event that are executing in parallel. Use this option for high-volume events that you process frequently and which are safe to process in parallel. Multichannel processing applies only to instances of this event that are raised in the local database. Selecting this check box also enables remote databases to process this event using synchronous handlers that are executing in parallel. Exection of synchronous event hanlders on the local database, however, remain single-threaded.

From a technical standpoint, when you select this check box and an event is raised in the local database, the system randomly selects one of the generic multichannel mesages for publication of the generic event message. PeopleSoft Human Resources delivers three multichannel generic messages: HCR_EM_EVENT_QUEUE_1, HCR_EM_EVENT_QUEUE_2, and HCR_EM_EVENT_QUEUE_3. Each of these messages is assigned to a different PeopleTools Integration Broker queue: HCR_EVENT_MANAGER_Q1, HCR_EVENT_MANAGER_Q2 and HCR_EVENT_MANAGER_Q3.

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Clear this check box to have the Event Manager framework execute asynchronous event handlers for this event as single-threaded. The system in this case always uses the default HCR_EM_EVENT message on the corresponding HCR_EVENT_MANAGER queue to publish the generic event message.

System Data This check box is selected for events that PeopleSoft Human Resources delivers with the application as system data. You should not modify these events unless otherwise instructed by PeopleSoft Human Resources.

Key Signature (Info Only)

This group box is primarily for information purposes. It displays the keys for the event and the record from which the system derives these keys.

When an event is raised, the system associates this set of keys with the event instance. These event keys enable an event handler to associate an event instance with a specific object in the database, such as a particular employee or job data row. Each instance of the event has the same event keys but different key values.

Record Select the record name that is most often associated with this event. The record that you select here must have the same keys as the event keys so that this information appears to all users who access this event. For example, if this event is usually associated with the Job Data component, select the *JOB* record. The system displays the keys for this record next to your selection. The Event Manager framework does not use these signature keys to raise an event but rather the event keys, making the event keys available to event handlers when this event is raised. The signature keys are for information purposes.

Field Name The system displays the name of the fields that are keys for the selected record.

Type The type of each field that is a key for the selected record.

Length The length of each field that is a key for the selected record.

Event Class Definition

The Event Manager framework requires that you represent each business event with a simple application class. Use this group box to establish the link between the business event and its application class.

Package Select the root application package that contains the application class that you created for the business event. The application class can reside within any application package; however, the application class must reside under a subpackage named *Events.*

Path Select the application class that represents the event. The system displays as possible values all application classes that reside within the selected package as part of the *Events* subpackage.

Important! The application class that you select must match the name that you have given for this event.

Owner ID By default, the system displays the owner of the application class, using the object owner ID value of the application package. If the application package does not have an object owner, you can select a value.

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Generate Event Class Code If you have not yet created the application class that represents this business event, click this button to automatically create the OnExecute PeopleCode for the new application class that you must create for the event in PeopleTools Application Designer. The system displays the PeopleCode for the OnExecute program in the Event Class Code group box. Copy this code to your clipboard and paste it into the edit window when creating the application class.

Because you have not yet created the application class and information about the application class is required on this page, you must cancel the page and return after you have created the application class.

Event Class Code

This group box displays the OnExecute PeopleCode for the new application class that you must create for the event in PeopleTools Application Designer. The group box appears when you click the Generate Event Class Code button.

Copy the generated code and save the page. Then open PeopleTools Application Designer and create the application class for the business event, pasting this code into the OnExecute program. Return to this page and select values for the Application Package and Path fields for the new application class that you just created in PeopleTools Application Designer.

Creating Event Handlers

An event handler is the application-specific code that responds to a particular type of event. You must register event handlers to events so that when an event is raised, the Event Manager framework executes the appropriate event handlers.

Requirements for Creating Event Handlers

To be compatible with the Event Manager framework, when creating event handlers, you must implement all business logic for the event handlers to abide by the following set of standards and code requirements:

- You must implement the entry point to the event handler in a method named ProcessEvent() within an application class.

  The Event Manager framework executes the ProcessEvent()method whenever the associated event is raised. Within the ProcessEvent() method, you are free to reference or execute code in other methods, classes, or function libraries. This application class can be an extension of any other application class if necessary.

- You can create the event handler in any new or existing application package within your application, but you must create the event handler under the *Handlers* subpackage.

- The application class and the application package that it resides in must be owned by the application, not the Event Manager framework.

- You must import the baseEvent class definition from the Event Manager framework application package into the application class that implements the event handler.

  The ProcessEvent() method in the application class of the event handler receives as an input parameter an instance of this baseEvent class object. This baseEvent class object represents the event instance that caused the Event Manager framework to execute the event handler, thus giving you access to the underlying properties and methods that are associated with the event that caused the Event Manager framework to execute the event handler. At a minimum, the event handler code must access the event keys to perform meaningful processing.

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- If you want to be able to communicate detailed errors, warnings, or any other messages back to the Event Manager framework, then you must populate the HandlerStatus property with appropriate entries.

  The HandlerStatus property is a complex property that is part of the baseEvent object that the Event Manager framework makes available to the event handler. The structure of this property is defined by HCR_EVENT_MANAGER:Base:Types:ExecStatusType. The property contains both an overall status indicator and an exception array. The Event Manager framework examines the contents of this property after executing this class and take appropriate action.

  The HandlerStatus complex type also carries a method that facilitates appending an entry to the ExceptionArray structure. This method is named AddException() and takes as an argument the structure defined by HCM_EVENT_MANAGER:base:Types:ExceptionType.

Note. The Event Manager framework automatically creates an exception entry that lists the event keys that were made available to the event handler. The system displays these event keys in the pages of the Event Monitor component.

The structure within the HandlerStatus property is:

- ExecutionStatus (string – values "S"uccess, "F"ail)
- ExceptionArray (array):

  EXCEPTION_TYPE (string – values "E"xception, "K"eys, "T"race)

  MESSAGE_SET_NBR (number)

  MESSAGE_NBR (number)

  MSG_SEVERITY (string – values "M"essage, "W"arning, "E"rror)

  MESSAGE_TEXT (string)

  EXPLAIN_TEXT (string)

Details of the baseEvent Class

When the Event Manager framework invokes the baseEvent class, it passes the baseEvent class into the ProcessEvent() method of the application class of the event handler. This enables you to use the properties and methods of the bass class to obtain more information about the event instance to direct internal processing of the event.

This table lists public properties of the event object that are of interest to application developers who are implementing the Event Manager framework:

Public Properties	Description
.Name	A string that is populated with the name (type) of the event instance. Examples are "AssignmentTerminated", "PersonAdded", and so on. If you are registering the same event handler to multiple events but these events have slightly different logic depending upon the exact event that is being processed, you can use this property to control your processing.
.EventID	A numeric that is populated with the unique serial number that identifies this event instance for an originating node. Generally, event handlers do not have any need for this property. The event handler uses this property primarily inside the framework for audit and monitoring purposes.

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Public Properties	Description
.KeyCount	A numeric that is populated with the number of keys associated with the event instance. The event keys are the name and value of each key field in the underlying data that caused the event to be raised. An example of event keys for an event that is raised by a change in Assignment (Job) data is EMPLID, EMPL_RCD, EFFDT and EFFSEQ. Thus, this property would contain the value 4. Normally, all instances of the same event type have the same keys.
.IsLocal	A Boolean set to True if the event was raised by an activity in the local database. (The term *local* is relative to the domain in which the event handler code is executing).
.EventNode	A string that is populated with the node name of the database in which the activity that raised the event occurred.
.HandlerTraceEnabled	A Boolean that indicates whether the user wants the current event handler to create trace and debug information in the event handler log.

This table lists public methods of the event object that are of interest to application developers who are implementing the Event Manager framework:

Public Methods	Description
.GetKeyList()	Returns an array of strings containing the key names for the event instance. For example, an event that is related to the Job record returns an array that contains the following elements: • EMPLID • EMPL_RCD • EFFDT • EFFSEQ

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Public Methods	Description
.GetKeyType(KeyName)	Returns a string containing a description of the data type of the requested event key (identified by KeyName). Possible returned values are: • NUMBER • CHAR • SIGNEDNUMBER • DATE • DATETIME • TIME For example: `&myType = &myEvent.GetKeyType("EMPLID");` &myType contains "CHAR".

.GetNumericKey(KeyName)	Returns the value of the requested event key, identified by KeyType as a numeric.
	For example:
	`Local Number &myKeyvalue;`
	`&myKeyValue = &myEvent.GetNumericKey⇒`
	`("EFFSEQ");`
	&myKeyValue contains 1.

.GetCharacterKey(KeyName)	Returns the value of the requested event key, identified by KeyType as a string.
	For example:
	`Local String &myKeyvalue;`
	`&myKeyValue = &myEvent.GetCharacterKey⇒`
	`("EMPLID");`
	&myKeyValue contains KU0010.

.GetDateKey(KeyName)	Returns the value of the requested event key, identified by KeyType as a date.
	For example:
	`Local Date &myKeyvalue;`
	`&myKeyValue = &myEvent.GetDateKey⇒`
	`("EFFDT");`
	&myKeyValue contains 2005-12-30.

.GetTimeKey(KeyName)	Not implemented.
.GetDateTimeKey(KeyName)	Not implemented.

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Event Handler Skeleton Code

You can use the following skeletal code as a starting point when building an event handler class:

```
import HCR_EVENT_MANAGER:Base:baseEvent;
import HCR_EVENT_MANAGER:Base:Types:ExceptionType;   /* Optional */

class myHandlerClass
   /* Dummy Constructor */
   method myHandlerClass ();

   method ProcessEvent(&inEvent As HCR_EVENT_MANAGER:Base:baseEvent);

private
   instance HCR_EVENT_MANAGER:Base:baseEvent &myEvent;   /* if you want to access ⇒
 the event elsewhere */

end-class;

method myHandlerClass
end-method;

method ProcessEvent
   /+ &inEvent as HCR_EVENT_MANAGER:Base:baseEventHandler +/

   /* The following 2 lines are required only if you want to pass detail info⇒
 about    */
   /* Errors, Warnings or other Messages back to the Event Manager framework. */
   Local HCR_EVENT_MANAGER:Base:Types:ExceptionType &myExceptionEntry;
   &myExceptionEntry = create HCR_EVENT_MANAGER:Base:Types:ExceptionType();

   &myEvent = &inEvent;  /* if you want to access  the event properties and⇒
 methods elsewhere in this class */
/* ================================================= */
/*------------------------ Business Logic goes here  ----------------------------⇒
 */
/* ================================================= */
End-method;
```

Within the preceding code, the following lines are the minimum lines that are required to interface an event handler named “myHandlerClass” to the Event Manager framework:

```
import HCR_EVENT_MANAGER:Base:baseEvent;

   method ProcessEvent(&inEvent As HCR_EVENT_MANAGER:Base:baseEvent);


method ProcessEvent
```


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Addressing Errors and Warnings

During execution, an event handler might encounter errors, warnings, or other issues that a user needs to be made aware of. In most cases, you want to pass this information back to the Event Manager framework so that users can view the information through the Monitor Events component. Although you do not have to pass this information back to the Event Manager framework, the more information that you do pass back, the easier it is for the administrator to resolve the problem.

The Event Manager framework uses a simple exception-array scheme to receive status information that is passed back to it from an event handler and subsequently displays that information in the Monitor Events component. The structure of the exception array is the same as the structure of a message in the message catalog. It contains a message set number, message number, severity level, message text, and explanation text in each row of the array. The message set number and message number are significant only if the information that you want to pass back to the Event Manager framework is described in a Message Catalog entry. If not, you can leave these two properties blank and just populate the message text, explanation text, and severity properties.

As mentioned previously, the event object that is passed into your event handler contains a complex property that is used to communicate the status of your event handler. At a minimum, you should populate the overall-status simple property with either (S)uccess or (F)ail prior to quitting your ProcessEvent() method. If you do not populate the overall status property, the Event Manager framework assumes that the event handler executed successfully. PeopleSoft recommends that you pass back information through the exception array of the complex property, although this is optional. For example, if the event object is passed into your handler as &inEvent, you populate the overall status property as:

```
&inEvent.HandlerStatus.ExecutionStatus = "S";     /* Handler terminated⇒
 successfully */
```

You never have to deal directly with the exception array that is embedded in the event object that the event handler receives. Instead, whenever you want to add an item to this array, you call the AddException() method, thus passing in an object that the system has already populated with exception information. This object that you pass in is an instance of the ExceptionType TypeClass. This class has the following properties:

- Message Set Number
- Message Number
- Message Severity
- Message Text
- Explain (Long) Text

The following example shows how to add a message to the exception array for a message that does not come from the Message catalog, assuming that the event object is passed into your event handler as &inEvent:

```
&myExceptionEntry = create HCR_EVENT_MANAGER:Base:Types:ExceptionType();

&myExceptionEntry.MESSAGE_SET_NBR = 0;
&myExceptionEntry.MESSAGE_NBR = 0;
&myExceptionEntry.MSG_SEVERITY = "M";
&myExceptionEntry.MESSAGE_TEXT = "Hello World!";
&myExceptionEntry.EXPLAIN_TEXT = "";

&inEvent.HandlerStatus.AddException(&myExceptionEntry);
```

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For a Message Catalog entry, you must include the message set number and the message number. You must also retrieve the text and explain text from the Message Catalog because substitution tokens might be involved that the Event Monitor framework cannot pass or resolve.

Note. If you use the AddException() method to create an exception array entry with the MSG_SEVERITY property set to (E)rror, then the system automatically sets the overall execution status indicator for the event handler to (F)ail. This means that you do not need to separately set the overall status property.

Note. The Event Manager framework executes all event handlers that you register to an event. If a particular event handler fails, the Event Manager framework still executes the remaining event handlers that are registered to the event. The Event Manager framework can catch exceptions that an event handler raises rather than terminating before it has finished executing all of the registered event handlers. However, the Event Manger framework does not contain any exception processing or error handling subsystems, and because of this you must ensure that event handler code does not raise an exception that the Event Manager framework cannot catch. One such exception is the PeopleCode error statement. Therefore, you must never raise an exception for an error statement in your event handler. Otherwise, the Event Manager framework stops and does not execute any remaining event handlers that are registered to the event.

Component Interface and SOA Service Exceptions

PeopleSoft Human Resources anticipates the use of Component Interfaces (CIs) and Service Oriented Architecture (SOA) services to be fairly common within event handlers. The Event Manager framework therefore provides assistance to facilitate passing exceptions from these sources back to the Event Manager framework and ultimately into the Event Monitor component.

The system displays exceptions that are raised by CIs or SOA services on the Handler Exceptions page of the Event Monitor component, much like any other exceptions that are written to the log. For severity information, the system prefaces the message with “[CI] ” or “[SOA]”, respectively.

The structure of the event-handler exception log is similar to the exception structure within PeopleTools for CIs and within the SOA framework for SOA services. Essentially, you must pass these exceptions back to the Event Manager framework when they arise. Two methods are available within the Event Manager framework that enable you to do this easily. One method is:

```
.HandlerStatus.AddCIException(&arrExceptions as array of Record, &Severity as⇒
 string)
```

This method copies all exceptions from a standard CI exception array to the exception log of the event handler according to the specified severity of the exception. Severity codes are (E)rror, (W)arning, and (M)essage.

You can specify multiple severity codes by concatenation. Thus, if you want to copy both errors and warnings, then specify a severity code of EW. A blank severity code causes the copying of all exceptions regardless of severity.

The structure of the exception array that is passed into this method is identical to the exception array that the FUNCLIB_CI version of the standard HCM CI wrapper uses. This is an array of Record.CI_EXCEPTIONS. If you’re using the FUNCLIB_CI wrapper, you can pass the exception array that you use with those functions into this method.

If you are calling a CI directly, then you need to first ensure that you have instructed PeopleTools to redirect CI exceptions from the screen to the %Session.PSMessages object. Then, you need to copy the items from PSMessages into an array of Record.CI_EXCEPTIONS so that these exceptions can be passed into this method.

Another method is:

```
.HandlerStatus.AddSOAException(&inException As HMCR_TYPES:ExceptionTypes:Exception⇒
```

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```
Type_v1_0:ExceptionType)
```

This method copies all exceptions from a standard SOA exception type structure to the exception log of the event handler.

When invoking SOA services, the system always executes them in a try/catch block. Typically, the event handler executes the services and catches certain defined exceptions that arise. A catch-all exception always catches any exceptions that have not been specifically called out.

SOA exceptions differ slightly from CI exceptions in that when invoking an SOA service, you manage only one (if any) exception. The exception that you pass into this method is the exception structure that you catch in your try/catch block.

The following example shows an SOA service invocation passing exceptions back to the Event Manager:

```
      *      try
      *        &MyService.MyServiceManager.LocateService(&ServiceName);
      *        &MyService.DoService();
      *          catch <NamedException1> &e1
      *                &myEvent.HandlerStatus.AddSOAException(&e1.ServiceException);
      *                --- other exception processing ---
      *          catch <NamedException2> &e2
      *                &myEvent. HandlerStatus.AddSOAException(&e2.Service⇒
Exception);
      *                --- other exception processing ---
      *          . . .
      *          catch HMCR_FRAMEWORK:ServiceFramework:baseClasses:baseException⇒
 &e0
      *                &myEvent. HandlerStatus.AddSOAException(&e0.Service⇒
Exception);
      *                --- other exception processing ---
      *      end-try
```

In this code, the items appearing as <NamedExceptionX> represent the application-specific exceptions that are registered in the SOA registry. These are exceptions that are known to be thrown by the indicated SOA service. The class named HMCR_FRAMEWORK:ServiceFramework:baseClasses:baseException is for the catch-all exception, defining the shape of the generic SOA exception.

Providing Trace/Debug Information

The Registered Handlers page of the Event Registry component provides a Trace check box to indicate whether to write trace/debug information to the execution log of the event handler. This functionality is available only when you set the Logging field for the event handler to the *All* value.

When you select the Trace check box, the event handler produces trace/debug in the handler execution log. The amount of trace/debug information that the system writes to the log is determined by the developer of the event handler. Generally, you must provide enough information so that anyone examining the event handler log can trace the path of the execution that the event handler has taken.

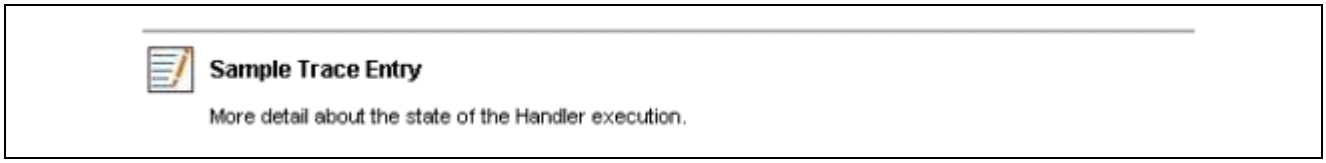
The system makes the selected value of this check box available to the event handler using the HandlerTraceEnabled Boolean property of the event. When this property is True, the event handler creates trace/debug entries in the exceptions structure. PeopleSoft software provides the following method to make the creation of these entries easier:

```
&myEvent.HandlerStatus.AddTraceEntry(&Heading, &Detail);
```

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In the preceding code, &Heading is the string that appears as the first line of the entry, and &Detail is a long string containing whatever detailed trace/debug information you want to create.

The system displays the trace/debug information in the Event Monitor component. For example:



Example of trace/debug entry in the Event Monitor component

This entry was from the following code:

```
&myEvent.HandlerStatus.AddTraceEntry("Sample Trace Entry","More detail about the⇒
 state of the Handler execution.");
```

No fixed rules are associated with the trace/debug entries that the event handler generates. This is a judgement call. You should provide whatever entries you think are useful to debug or troubleshoot the event handler code.

Create trace/debug entries only when the .HandlerTraceEnabled property is True. Thus, the code looks similar to:

```
 If &myEvent.HandlerTraceEnabled Then
     &myEvent.HandlerStatus.AddTraceEntry("Method ABC()", "No data returned for:⇒
" | &Emplid);
  End-If;
```

Sample Event Handler Code

This section provides an example of a working event handler that responds to the ProfileItemUpdated event.

This event handler examines the underlying event to determine whether the profile item that raised the event belongs to a Person profile. If so, and if the profile item represents a manager's evaluation of a competency, then the system deletes the corresponding item from the manager's To Do list. The application class is JPM_ItemHandler, which resides in an application package named JPM_SYNDICATION.

The code for this event handler is:

```
import HCR_EVENT_MANAGER:Base:baseEvent;
import HCR_EVENT_MANAGER:Base:Types:ExceptionType;    /* We'll be passing⇒
 exceptions back */

class JPM_ItemHandler
   /* Dummy Constructor */
   method JPM_ItemHandler();

   method ProcessEvent(&inEvent As HCR_EVENT_MANAGER:Base:baseEvent);

private
   instance HCR_EVENT_MANAGER:Base:baseEvent &myEvent;

end-class;

method JPM_ItemHandler
   /* Dummy Constructor */
end-method;
```

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```
method ProcessEvent
   /+ &inEvent as HCR_EVENT_MANAGER:Base:baseEvent +/

  Local HCR_EVENT_MANAGER:Base:Types:ExecStatusType &myStatus;

   /* We define the ExceptionType object because we want to pass detailed info    ⇒
    */
   /* about the execution of this method back to the Event Manager framework.     ⇒
     */
   Local HCR_EVENT_MANAGER:Base:Types:ExceptionType &myExceptionEntry;

  &myEvent = &inEvent;        /* Make the Event object available throughout the⇒
 class */

  /* Get the Event Keys - these vary, depending upon the Event - for this event,⇒
 there are 6 keys */
  Local Number &keyProfileID = &myEvent.GetNumericKey("JPM_PROFILE_ID");
  Local String &keyCatType = &myEvent.GetCharacterKey("JPM_CAT_TYPE");
  Local String &keyCatItemID = &myEvent.GetCharacterKey("JPM_CAT_ITEM_ID");
  Local String &keyCatQUAL1 = &myEvent.GetCharacterKey("JPM_CAT_ITEM_QUAL1");
  Local String &keyCatQUAL1 = &myEvent.GetCharacterKey("JPM_CAT_ITEM_QUAL2");
  Local Date &keyEffdt = &myEvent.GetdateKey("EFFDT");


  /*------------------------- Business Logic starts here  -------------------------⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
--- */
  /* The profile item that raised the event is identified by the keys above. */
  /* If this is a "Person" profile, and the Item is a Competency, and           */
  /* and the Evaluation Type is "M", then delete the corresponding entry  */
  /* from the manager's "To-Do" list.                                            ⇒
             */

  Local string &ProfileEmplid, &OwnerEmplid;

  If &keyCatType = "COMPETENCY" And &KeyCatQUAL1 = "M" Then
     SQLExec("SELECT EMPLID, JPM_OWNER_EMPLID FROM PS_JPM_PROFILE WHERE   JPM_⇒
PROFILE_ID = :1", &ProfileEmplid, &OwnerEmplid,  &keyProfileID);
     If All(&ProfileEmplid, &OwnerEmplid) Then

        /* This is a "Person" profile, and there is an Owner ID - delete the⇒
```

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```
 corresponding ToDo entry */
        SQLExec("DELETE FROM PS_JPM_TO_DO_LIST WHERE JPM_OWNER_EMPLID=:1 AND JPM_⇒
PROFILE_ID=:2 AND JPM_CAT_TYPE=:3 AND JPM_CAT_ITEM_ID=:4", &OwnerEmplid,   &key⇒
ProfileID, &keyCatType, &keyCatItemID);

     End-If;
  End-If;

   /* As an example - we'll send some detail status back to the Event Manager⇒
 Framework */
  &myExceptionEntry = create HCR_EVENT_MANAGER:Base:Types:ExceptionType();

  &myExceptionEntry.MESSAGE_SET_NBR = 9999;
  &myExceptionEntry.MESSAGE_NBR = 1234;
  &myExceptionEntry.MSG_SEVERITY = "M";
  &myExceptionEntry.MESSAGE_TEXT = "Hello World!";
  &myExceptionEntry.EXPLAIN_TEXT = "";
  &myEvent.HandlerStatus.AddException(&myExceptionEntry);

  &myExceptionEntry.MESSAGE_SET_NBR = 0;
  &myExceptionEntry.MESSAGE_NBR = 0;
  &myExceptionEntry.MSG_SEVERITY = "M";
  &myExceptionEntry.MESSAGE_TEXT = "Everything is Just Fine!";
  &myExceptionEntry.EXPLAIN_TEXT = "";
  &myEvent.HandlerStatus.AddException(&myExceptionEntry);

  If &myEvent.HandlerTraceEnabled Then
     &myEvent.HandlerStatus.AddTraceEntry("Sample Trace Entry","Trace Detail⇒
 Information.");
  End-If;
   /* -------------------------------  End of Example Detail Status ---------------⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
-------------- */

End-method;
```

To be compatible with the Event Manager framework, the framework requires the following lines from the preceding code to be present in event handler code:

```
import HCR_EVENT_MANAGER:Base:baseEvent;
import HCR_EVENT_MANAGER:Base:Types:ExceptionType;    /* We'll be passing⇒
 exceptions back */
```

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```
method ProcessEvent(&inEvent As HCR_EVENT_MANAGER:Base:baseEvent);


method ProcessEvent
```

Registering Event Handlers

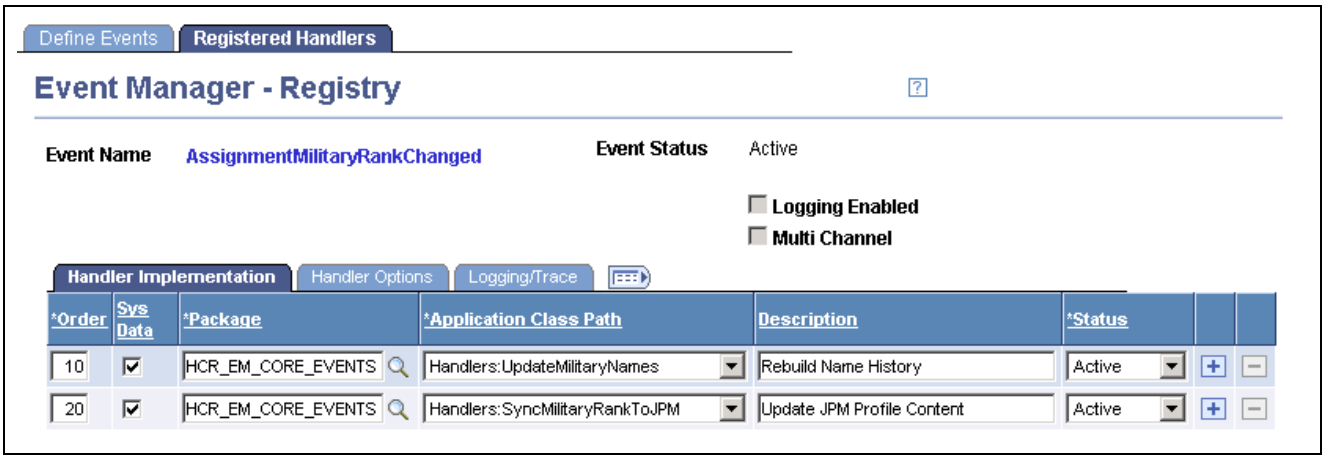
This section discusses how to register event handlers to business events.

Page Used to Register Event Handlers

Page Name	Object Name	Navigation	Usage
Registered Handlers	HCR_EM_REGISTRY2	Set Up HRMS, System Administration, HCM Event Manager, Event Registry, Registered Handlers	Register event handlers to the selected business event. The Event Manager framework executes event handlers according to the rules that you specify on this page whenever it receives notification that the specified type of event has been raised.

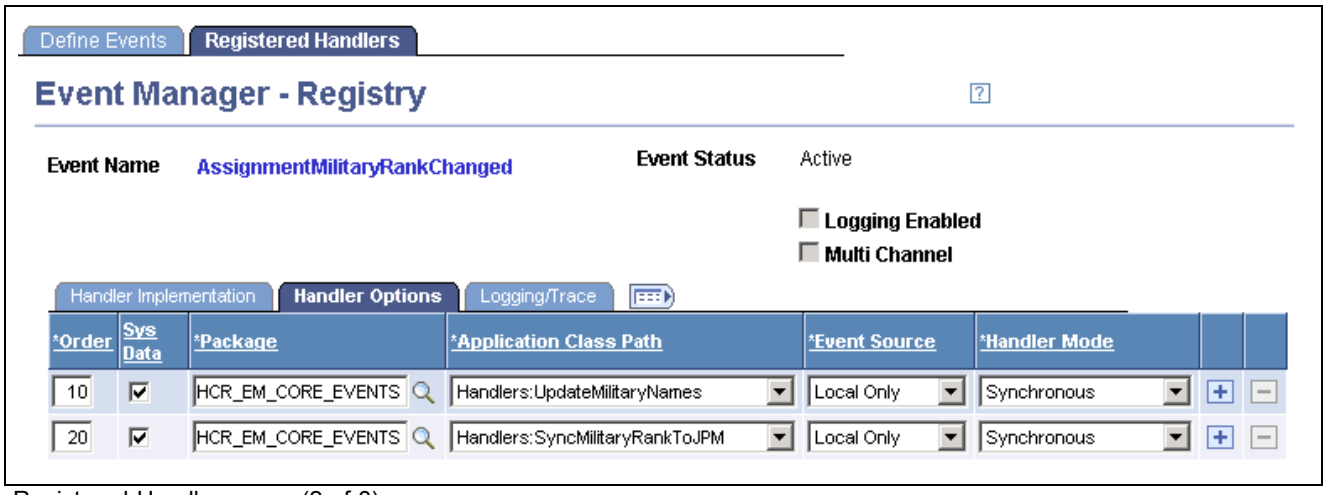
Registering Event Handlers to Business Events

Access the Registered Handlers page.

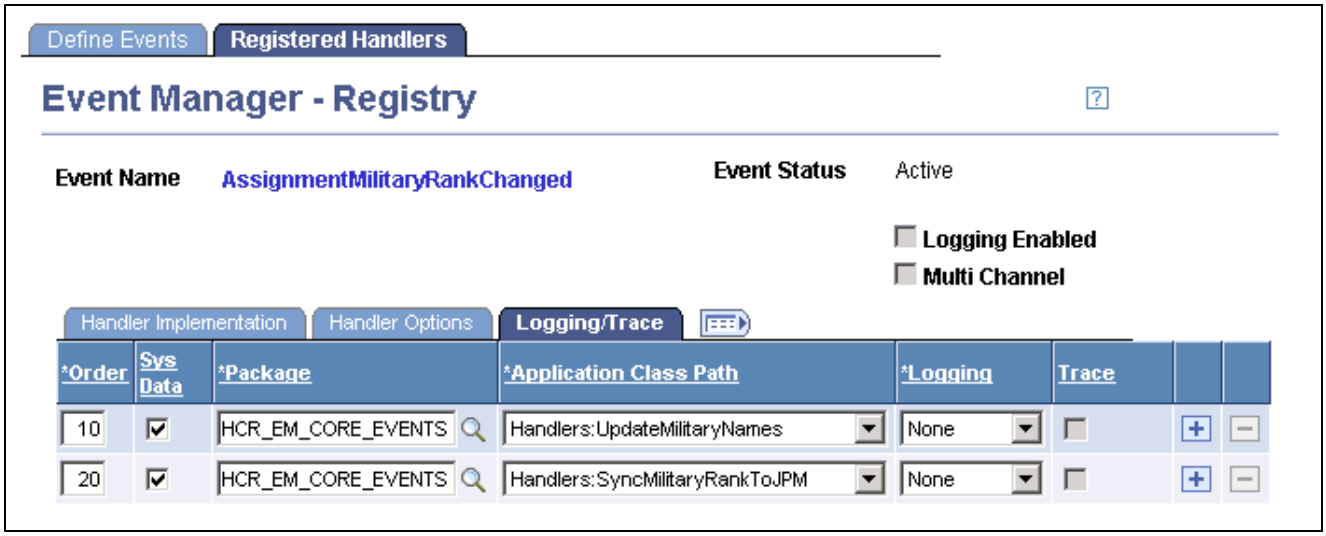


Registered Handlers page (1 of 3)

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Registered Handlers page (2 of 3)



Registered Handlers page (3 of 3)

Note. The number of different events to which you can register a particular event handler is not restricted.

Handler Implementation

Order

Enter a number to indicate the sequence in which the system executes the registered handlers when this event is raised. The execution sequence is important when more than one event handler is registered to an event.

Note. The sequence of event handler execution is relative to other event handlers that are operating in the same mode, either synchronous or asynchronous.

Sys Data (system data)

If this check box is selected, then PeopleSoft Human Resources delivers the event handler registration for this event as system data. You should not modify this system data unless PeopleSoft Human Resources instructs otherwise.

Package

Select the root application package that contains the application class for the event handler. The application class can reside within any application

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package; however, the application class must reside under a sub-package named *Handlers.*

Application Class Path Select the application class that implements the event handler. The system displays as possible values all application classes that reside within the selected package as part of the *Handlers* subpackage.

Description For information purposes, enter a short description of what the event handler does.

Status Select whether the status of the event handler is *Active* or *Inactive.* The system executes event handlers that are in *Active* status only when this event is raised.

Handler Options

Event Source Select the source from which you want the system to execute the event handler for this event. The Event Manager framework supports both local and remote events.

Possible values are:

- *Local & Remote:* Select to have the system execute the event handler for instances of this event that are raised in either the local database or remote databases.
- *Local Only:* Select to have the system execute the event handler for instances of this event that are raised in the local database only.
- *Remote Only:* Select to have the system execute the event handler for instances of this event that are raised in remote databases only.

Handler Mode Select the mode by which you want the system to execute the event handler for this event. This setting applies only to events that are raised in the local database.

Possible values are:

- *Asynchronous:* Select to have the system execute the event handler as a detached or background process. The process that raises the event *does not* wait for all registered asynchronous event handlers to execute.
- *Synchronous:* Select to have the system execute the event handler inline with the business process that raises the event. The process that raises the event *does* wait for all registered synchronous event handlers to execute.

Note. The Event Manager framework always executes synchronous handlers before asynchronous handlers, regardless of the values that you specify in the Order column.

Logging/Trace

Logging Select how you want the system to log execution of event handlers. This option applies only if you select the Logging Enabled check box for the selected event on the Define Events page.

Possible values are:

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- *All:* Select to log every execution of this event handler. This option is available only if you select the Event Logging check box for the event of the Define Events page.
- *Errors:* Select if you want to log execution of this event handler only when the execution fails. If you select this option for the event handler but do not enable logging for the event, then if the event handler fails, the system creates an event log entry along with the event handler log entry.
- *None:* Select if you do not want to log execution of this event handler.

Trace Select to include trace/debug entries in the execution log for this event handler. Use this option for debugging the event handler. This option is available only if you select to log all exceptions of the event handler by selecting the *All* value in the Logging field.

Testing Event Handlers and Events

This section provides an overview of event testing and discusses how to:

- Test an event handler.
- Test an event.

Understanding Event Testing

Generally in a production environment, you raise events by making a change to application data through a component or by running a PeopleTools Application Engine process. When the event is raised, the Event Manager framework executes the event handlers registered with the event as defined in the Event Registry component. When testing events, you should begin at the lowest level, which is the event handler, and then work your way up to the highest level, which is the business process that raises the event. Thus, to test events:

1. Test the event handler in standalone mode through the Handler Tester component.
2. Test the event independent of the business process that raises the event through the Event Tester component.
3. Test the event in the context of the business process by executing the business process that raises the event through the component or PeopleTools Application Engine process.

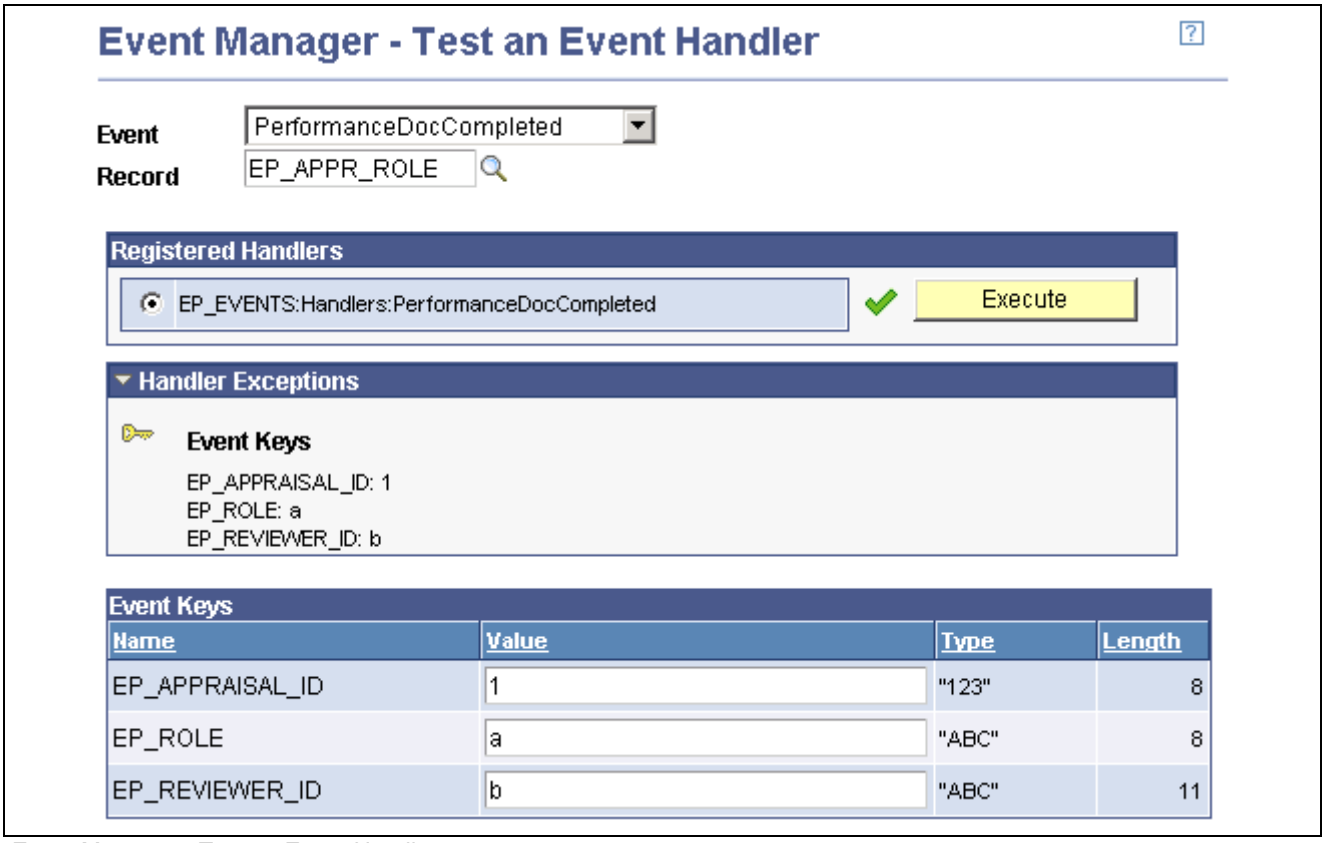
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Pages Used to Test Event Handlers and Events

Page Name	Object Name	Navigation	Usage
Event Manager - Test an Event Handler	HCR_EM_HNDLR_TEST	Set Up HRMS, System Administration, HCM Event Manager, Handler Tester, Event Manager - Test an Event Handler	Execute a single event handler as a standalone process without raising an event. Use this feature for testing and debugging event handlers.
Event Manager - Raise an Ad-Hoc Test Event	HCR_EM_TESTER	Set Up HRMS, System Administration, HCM Event Manager, Event Tester, Event Manager - Raise an Ad-Hoc Test Event	Raise a selected business event that you have defined on an ad hoc basis without invoking the business process that normally raises the event. This enables you to test events without having to perform the business operation that normally raises the event.

Testing an Event Handler

Access the Event Manager - Test an Event Handler page.



Event Manager - Test an Event Handler page

Event Select the event to which the event handler that you want to execute is registered. Event handlers must always execute within the context of an event.

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Record When you select an event, the system displays the default record that is associated with the event in the Key Signature group box on Event Registry component. The system uses the record to define event keys, which provides the key signature for this event. Typically, this is the record in the database from which a data change normally raises the event. You can select a different record besides the default record. The record must have the same keys as the record that normally raises the event.

The system displays in the Registered Handlers group box the event handlers that are registered with the selected event in the local database through the Event Registry component. The system also displays the keys in the Event Keys grid so that you can enter key values.

Registered Handlers

This group box displays the event handlers that you have registered with the selected event in the Event Registry component.

Execute Click to execute the selected event handler. Before you can execute an event handler, you must select the event, record, and event handler and enter the event key values that you want to pass to the event handler. Enter values for the event keys in the Values column of the Event Keys group box. You can execute only one event handler at a time.

The system executes the event handler immediately regardless of any settings in the Event Registry component. When testing an event handler through this page, the system does not raise an event, publish the generic PeopleTools Integration Broker message, or generate log entries.

The system displays the status of the event handler execution to the left of this button and displays any execptions that the event handler creates in the Handler Exceptions group box directly on this page.

 Indicates that you have not yet executed the event handler.

 Indicates successful execution of the event handler.

 Indicates that the system executed the event handler with a fatal error.

Handler Exceptions

Use this group box to view results of the event handler execution. The system displays event keys, exceptions, and trace information that is associated with the execution of the event handler.

 The system displays the event keys that the system used during the execution of the event handler. At a minimum, the system displays the event keys in the Handler Exceptions group box after execution of the event handler.

 The system displays the exception information that the system generated during execution of the event handler.

 The warnings that the system generated during execution of the event handler.

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The errors that the system generated during execution of the event handler.



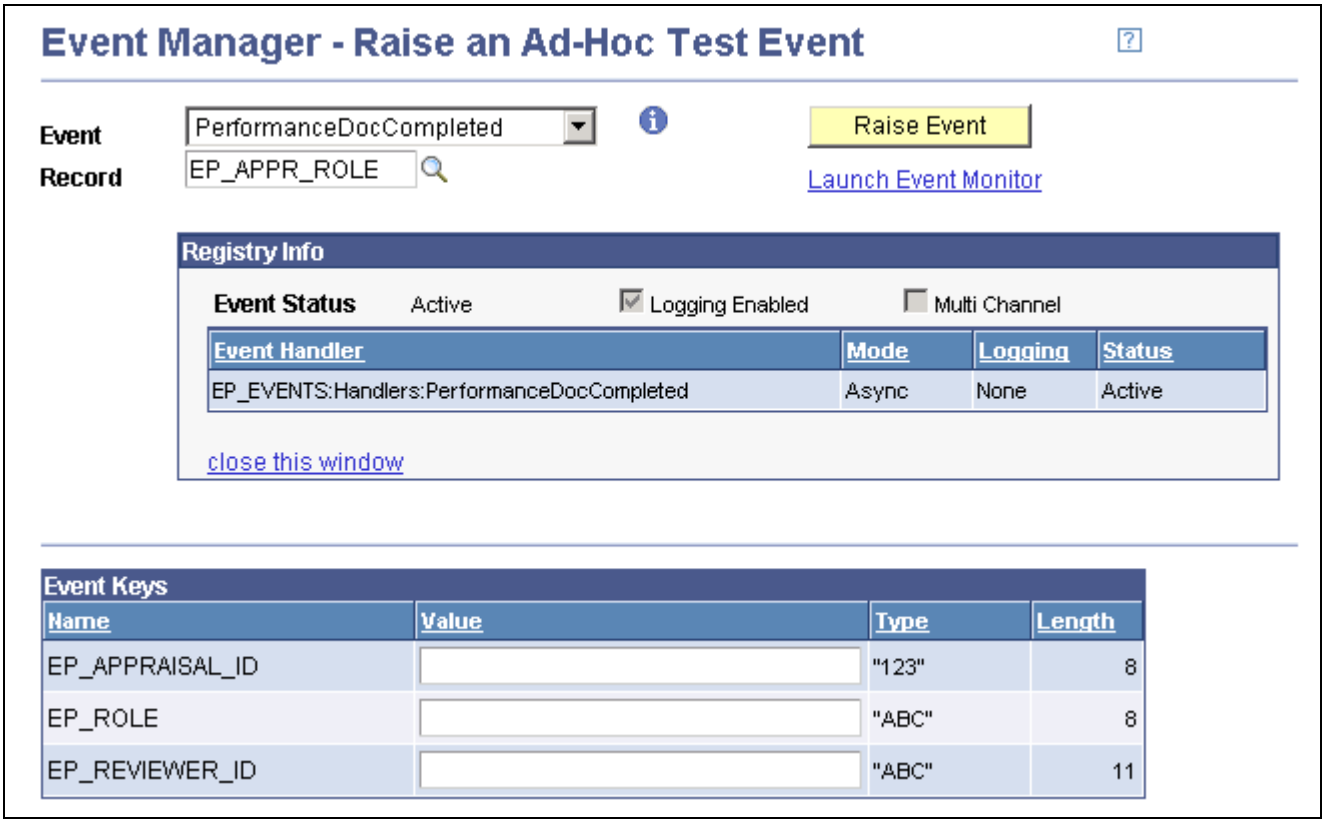
The trace information that the system generated during execution of the event handler.

Event Keys

Use this group box to enter values for each of the event keys that are part of the selected event and record. These are the values that the system passes into the event handler during the test. The system does not perform any validation on the data that you enter in the Value fields. Be sure to enter the correct format for data values and use uppercase or lowercase values for character data as appropriate. The system makes these key values available to the event handlers just as if you raised the event from within the application.

Testing an Event

Access the Event Manager - Raise an Ad-Hoc Test Event page.



Event Manager - Raise an Ad-Hoc Test Event page

Event Select the event that you want to raise. You can only raise events that are active in the local event registry. If you are unsure of the status of an event, select the event in the Event field and click the Event Info button.

Record When you select an event, the system displays the default record that is associated with the event in the Key Signature group box on the Event Registry component. The system uses the record to define event keys, which provides the key signature for this event. Typically, this is the record in the database from which a data change normally raises the event.You can select a different

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record besides the default record. The record must have the same keys as the record that normally raises the event.

The system displays the keys in the Event Keys grid so that you can enter key values.



Click the Event Info button to view select information from the Event Registry component about the selected event and its registered event handlers. The system displays the Registry Info group box, which contains the event details.

Raise Event

After you select a value in the Value field for each event key in the Event Keys grid, click this button to have the Event Manager framework raise the event with the specified event keys and their values.

The system processes the event and executes all active event handlers that you have registered to the event exactly as if you have raised it from the normal business process such as through a component or PeopleTools Application Engine process.

The local event registry settings as defined in the Event Registry component control the processing of the event. Depending on an event handler entry in the registry, the system executes active synchronous event handlers inline through this page and executes all asynchronous event handles through the generic PeopleTools Integration Broker message subscription.

The system displays a message below the Record field indicating whether you have successfully raised the event. This message also includes the event ID on the local node and, for multichannel events, the event channel.

Launch Event Monitor

After you raise the event, click this link to view the execution status of the raised event. The system launches the Event Monitor component in a new browser window and automatically displays information for this particular event instance.

See Chapter 25, "Working with HCM Event Manager," Monitoring Events, page 582.

Registry Info

Use this group box to view select information from the Event Registry component about the selected event and its registered handlers. The system displays this group box only if you select an event and click the Event Info button. To change any of this data, you must access the Event Registry component for the selected event.

Event Keys

Use this group box to enter values for each of the event keys that are part of the event that you are raising. The system does not perform any validation on the data that you enter in the Value fields. Be sure to enter the correct format for data values and use uppercase or lowercase values for character data as appropriate. The system makes these key values available to the event handlers just as if you raised the event from within the application.

Raising Events

After you determine that an occurrence of the business event exists that the event in the Event Manager framework represents, you can raise the event in the Event Manager framework.

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The Event Manager framework provides an API that creates and raises events. The API code is:

```
Import HCR_EVENT_MANAGER:Utils:EventFactory;
Import HCR_EVENT_MANAGER:Base:baseEvent;
Local HCR_EVENT_MANAGER:Utils:EventFactory  &myEventFactory;
Local HCR_EVENT_MANAGER:base:baseEvent  &myEvent;

&myEventFactory = create HCR_EVENT_MANAGER:Utils:EventFactory();
&myEvent = &myEventFactory.CreateEventObject("EventName");
&myEvent.RaiseEventFromRecord(&Record);
```

Pass the name of the event to the Event Factory, which returns an instance of the event object. Then execute the RaiseEventFromRecord() method on the event object, passing in the record object that is causing the event to be raised. The framework determines the event keys based upon the values of the key fields in the record object.

Important! Instantiating an event object does not automatically raise the event. You must invoke the event's RaiseEventFromRecord() method to raise the event and initiate subsequent Event Manager framework processing.

In the following example, assume that we have created an event called AssignmentMilitaryRankChanged. This event represents the business event of assigning or updating the military rank of a person's assignment (Job record) instance. Whenever the rank attribute of the assignment (Job record row) changes, we want to raise the event. Here is the pseudocode to add to the JOB_MIL.MIL_WORN_RANK:SavePostChange PeopleCode event for the Job component:

```
Import HCR_EVENT_MANAGER:Utils:EventFactory;
Import HCR_EVENT_MANAGER:Base:baseEvent;

Local HCR_EVENT_MANAGER:Utils:EventFactory &myEventFactory;
Local HCR_EVENT_MANAGER:Base:baseEvent &myEvent;
Local Row &Row;
Local Record &Rec;
Local Field &Fld;
Local Number &ThisRowNumber;
Local String &ThisRank;
Local Boolean &RaiseEvent;

&Row = GetRow();
&Rec = GetRecord();
&Fld = GetField();

/* --- Should we raise an event? --- */
If INSTALLATION.MILITARY = "Y" Then
   &RaiseEvent = False;
   &ThisRank = &Fld.Value;
   If &Row.IsNew Then
   <If there is a previous row, and it's Military Rank is not = &ThisRank> Then
      &RaiseEvent = True;
   <End-If>
   Else
   If &Row.IsDeleted Then
```

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```
      <If there is a previous row, and it's Military Rank is not = &ThisRank> Then
         &RaiseEvent = True;
       <End-If>
   Else
         /* Not deleted, and Not a new row - existing row was updated */
      If &Rec.IsChanged Then
         If &Fld.IsChanged Then
            &RaiseEvent = True;
         End-If;
      End-If;
   End-If;
   End-If;
If &RaiseEvent Then
   &myEventFactory = create HCR_EVENT_MANAGER:Utils:EventFactory();
   &myEvent = &myEventFactory.CreateEventObject("MilitaryRankEvent");
   &myEvent.RaiseEventFromRecord(&Rec);
   End-If;
End-If;
```

The lines in the preceding code that deal with the action of raising the event are:

```
Import HCR_EVENT_MANAGER:Utils:EventFactory;
Import HCR_EVENT_MANAGER:Base:baseEvent;

Local HCR_EVENT_MANAGER:Utils:EventFactory &myEventFactory;
Local HCR_EVENT_MANAGER:Base:baseEvent &myEvent;

   &myEventFactory = create HCR_EVENT_MANAGER:Utils:EventFactory();
   &myEvent = &myEventFactory.CreateEventObject("MilitaryRankEvent");
   &myEvent.RaiseEventFromRecord(&Rec);
```

Important! During the course of raising an event, the framework causes certain tracking and logging information to be stored in the database. Because of this, events can be raised only from PeopleCode events that normally allow database updates. More specifically, events can be raised only from SavePreChange, SavePostChange, and Workflow PeopleCode events.

Monitoring Events

This section discusses how to:

- Review event instances.
- Review event handler executions.
- Review event handler exceptions.

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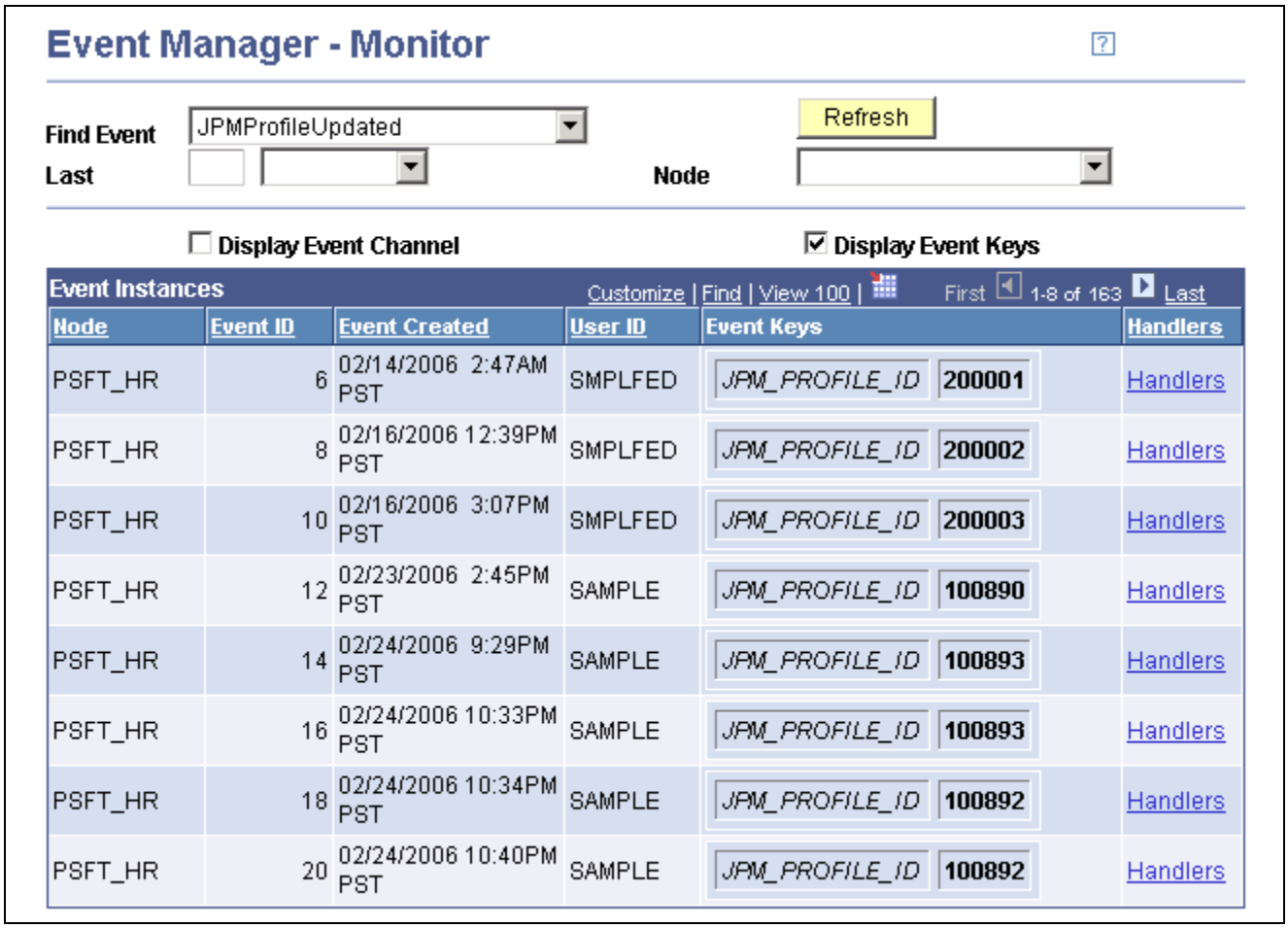
Pages Used to Monitor Events

Page Name	Object Name	Navigation	Usage
Event Manager - Monitor	HCR_EM_MONITOR	Set Up HRMS, System Administration, HCM Event Manager, Event Monitor, Event Manager - Monitor	Review the status of raised or processed business events and their associated event handler executions.
Event Monitor - Handlers	HCR_EM_MONITOR2	Set Up HRMS, System Administration, HCM Event Manager, Event Monitor, Event Manager - Monitor Click the Handlers link for an event instance on the Event Manager - Monitor page.	Review the details of registered event-handler executions on the local node for a selected event instance.
Event Monitor - Handler Exceptions	HCR_EM_MONITOR3	Set Up HRMS, System Administration, HCM Event Manager, Event Monitor, Event Manager - Monitor Click the Display Exceptions button on the Event Monitor - Handlers page.	View the keys, exceptions, and trace information that the selected event handler logged during execution and passed back to the Event Manager framework.

Reviewing Event Instances

Access the Event Manager - Monitor page.

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Event Manager - Monitor page

Search Criteria

Enter the search criteria for retrieving event instances. At a minimum, you must select at least one criterion to retrieve results. Use the remaining fields to narrow your search results.

Find Event Select the event from the local Event Registry component for which you want to review event instances.

Last Specify the time period in which the event was raised. For remote events, this is the time period in which the event appeared in the local node. In the first box, specify a numeric quantity. Then select a time qualifier: *Days, Hours,* or *Minutes.*

Node Select a node name to limit the search results to event instances of raised events within a specific node.

Refresh Click to refresh the list of event instances after changing any of the search critieria.

Display Event Channel Select to display the event channel on which the system published the genric event message. The system displays the Channel column in the Event Instances grid. This field is applicable only for events that are defined as multichannel on the node in which they are raised.

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Display Event Keys Select to display the event keys for each event instance. The system displays the Event Keys column in the Event Instances grid.

Event Instances

Review the logged event instances that meet your search criteria. The system displays instances for only the events and event handlers that you have configured in the local Event Registry component to be logged. You set the logging option for an event by selecting the Logging Enabled check box for an event on the Define Events page. Note that the process that raises the event waits for all registered synchronous event handlers to execute.

Node The system diplsays the node from which the event instance was raised.

Event ID The identification code of the event. The combination of this value and the node value uniquely identify the event instance on the originating node.

Event Created The date and time that the event was raised in the source database (node). The system displays the time zone for this field because events could be raised in a node that operates in a time zone that differs from the local node.

Channel The queue on which the system published the message. To view the channel, you must select the Display Event Channel check box. An event channel corresponds to an PeopleTools Integration Broker message queue.

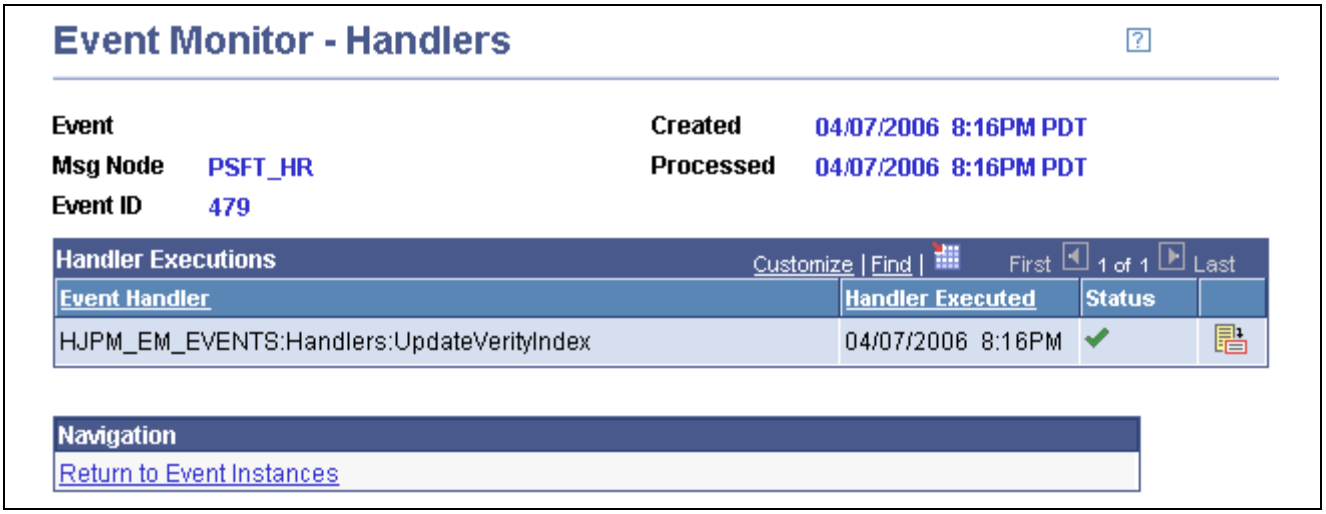
User ID The ID of the user that raised the event. This field is applicable only to event instances that are raised in the local database.

Event Keys The keys for the event instance. To view the keys, you must select the Display Event Keys check box.

Handlers Click this link for a specific event instance to access the Event Monitor - Handlers page, where you can view information about the registered event handlers that were executed on the local node for the selected event instance.

Reviewing Event Handler Executions

Access the Event Monitor - Handlers page.



Event Monitor - Handlers page

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The system displays information for only the event handlers that you have configured to log executions. To log event handler executions, you must set the Logging option for a specific event handler and event combination on the Registered Handlers page.

The upper portion of the page displays information about the selected event instance that caused the event handler execution as well as the date and time that the local node began processing the event. For local events, the Processed date and time is generally the same as the date and time that the event was created. For remote events, the Processed date and time indicates when the local node received notification of the remote event from PeopleTools Integration Broker.

Handler Execution

This grid lists the event handlers that the system executed on the local database in response to the selected event instance.

If no event handler execution information is available, the system displays an informative message that indicates the possible reasons why no information is available. Possible reasons are that no event handlers are registered for the selected event, no event handlers are configured to log execution for the selected event, no synchronous event handlers are registered for the selected event and PeopleTools Integration Broker has not yet executed any asynchronous event handlers, or no event handlers executed for the event.

Event Handler The system displays the full path of the applcation class that implements the event handler.

Handler Executed The system displays the date and time that the system executed the event handler.

Status  Indicates that the the execution of the event handler terminated with a status of *Successful.*

 Indicates that the the execution of the event handler terminated with a status of *Failed.*

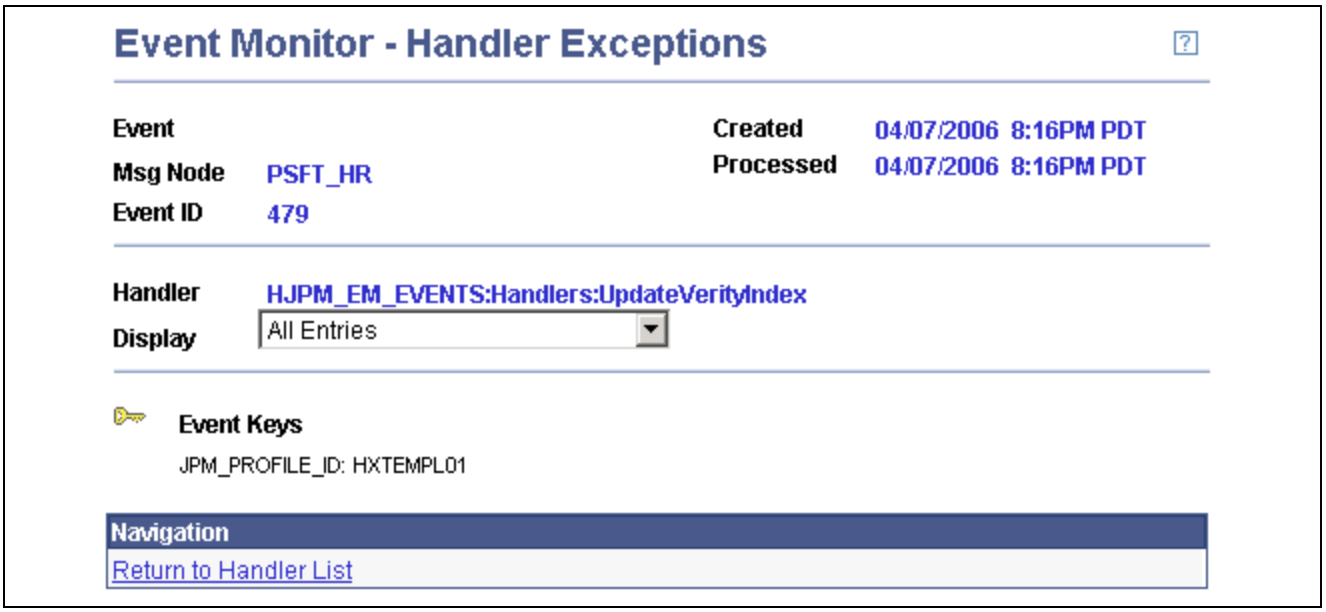
 The system displays this button for event handler executions that terminated with a *Failed* status. Click this button to reexecute the event handler for the selected event instance in real time. After the event handler executes, the system automatically refreshes the page with the new date, time, and status of the event handler's execution.

 The system displays the Display Exceptions button if the event handler passed exception information back to the Event Monitor framework during execution. Click this button to access the Event Monitor - Handler Exceptions page, where you can view the event handler exceptions. If you have selected the Trace check box on the Registered Handlers page for this event handler and event combination, you can also view the trace information.

Reviewing Event Handler Exceptions

Access the Event Monitor - Handler Exceptions page.

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Event Monitor - Handler Exceptions page

The upper portion of the page displays information about the selected event instance that caused the event handler execution as well as the date and time that the local node began processing the event.

Events raised in a remote database are visible in the Event Monitor component only after the local node receives and processes the asynchronous event message, and only if you have enabled logging for the event when registering the event in the local database through the Event Registry component.

Note. If you inactivate the PeopleTools Integration Broker Service Operation for the generic event message, then the local Event Manager framework does not process any remote events and thus no remote events will be visible in the Event Monitor component.

Handler The system displays the full path of the application class that implements the event handler.

Display Select a value to filter the type of information that displays on the page.

Possible values are *All Entries, Exceptions, Keys,* and *Trace Entries.* The system displays the information that is produced by the event handler in the order in which the event handler produced the information.

The system displays the event instance keys.

The system displays information about the event handler exceptions.

The system displays the event handler exception warnings.

The system displays the event handler exception errors.

The system displays event-handler trace information. To view trace information, you must select the Trace check box on the Registered Handlers page for this event handler and event combination.

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Viewing Event Summaries

This section discusses how to:

- View a summary of event instances.
- View failed event handlers.

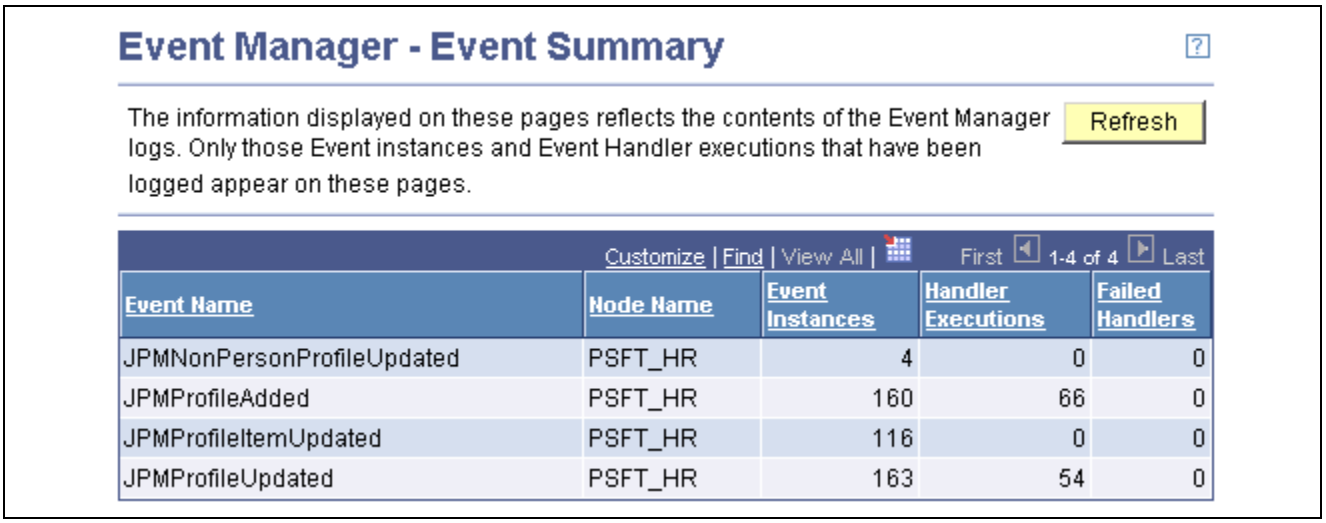
Pages Used View Event Summaries

Page Name	Object Name	Navigation	Usage
Event Manager - Event Summary	HCR_EM_SUMMARY	Set Up HRMS, System Administration, HCM Event Manager, Event Summary, Event Manager - Event Summary	View a summary of all the logged event instances in the local database. This is useful for quickly identifying problems, such as researching the cause of failed event-handler executions to determine a resolution.
Event Manager - Failed Handlers	HCR_EM_SUMMARY2	Click the Failed Handlers link for an event handler on the Event Manager - Event Summary page.	View a list failed event handlers across all instances of a selected event and node combination.
Event Monitor - Handler Exceptions	HCR_EM_MONITOR3	Click the Details button for a failed event handler on the Event Manager - Failed Handlers page.	View the exceptions that failed event handlers produced. See Chapter 25, "Working with HCM Event Manager," Reviewing Event Handler Exceptions, page 586.

Viewing a Summary of Event Instances

Access the Event Manager - Event Summary page.

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Event Manager - Event Summary page

Refresh Click to refresh the statistics that the system displays on this page. The option to refresh is useful in production environments in which the raising and processing of events occurs frequently.

Summary Grid

Use this group box to review statistics for every event that has logged instances in the local database. The system displays event instances for only the events that are configuring for logging through the Event Registry component in the local database. The system groups the logged event instances by event and node combination.

Event Name The system displays the name of the event for which the system logged event instances for the event and node combination.

Node Name The name of the originating node from which the system raised the event instances for the event and node combination.

Event Instances The number of event instances that the system logged for the event and node combination. This equates to the number of times that the system raised the event.

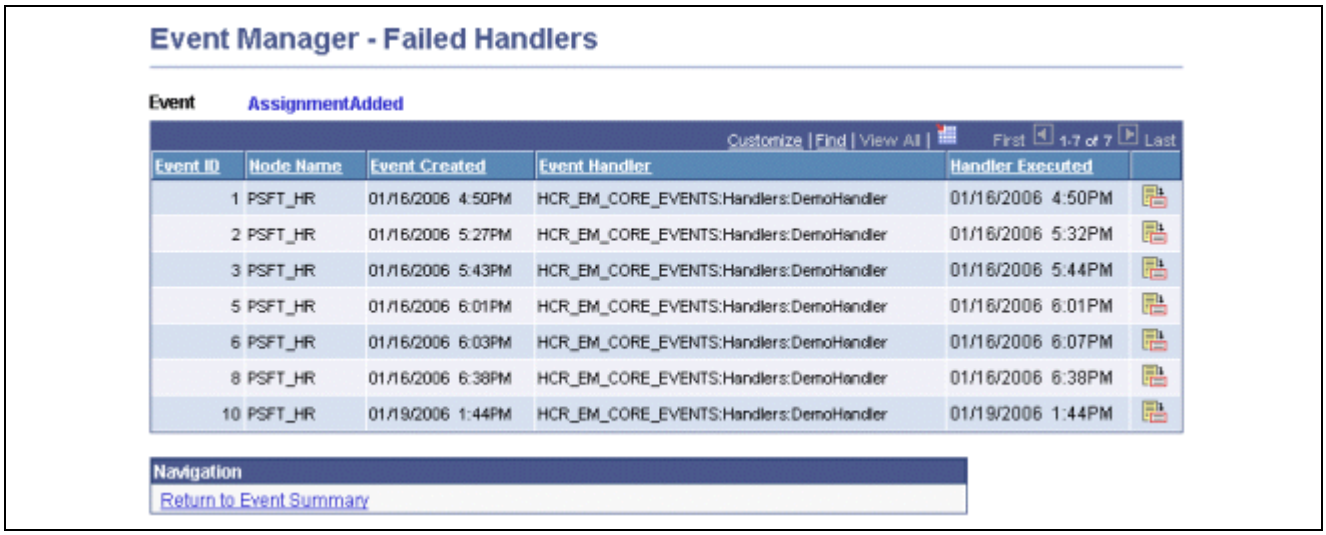
Handler Executions The total number of event handlers that the system has executed for the corrsponding event and node combination.

Failed Handlers The total number of event handlers that the system executed for the corresponding event and node combination that returned a failed status. The system displays this number as a link. Click the link to access the Event Manager - Failed Handlers page, where you can view a list of failed event handlers across all instances of the event and node combination. From that page you can view the exceptions that the failed event handlers produced.

Viewing Failed Event Handlers

Access the Event Manager - Failed Handlers page.

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Event Manager - Failed Handlers page

The system lists information about each failed event handler. Click the Details button to access the Event Monitor - Handler Exceptions page, where you can view the exceptions that the failed event handlers produced.

Viewing Help for HCM Event Manager Pages

This section discusses how to view page help for HCM Event Manager pages.

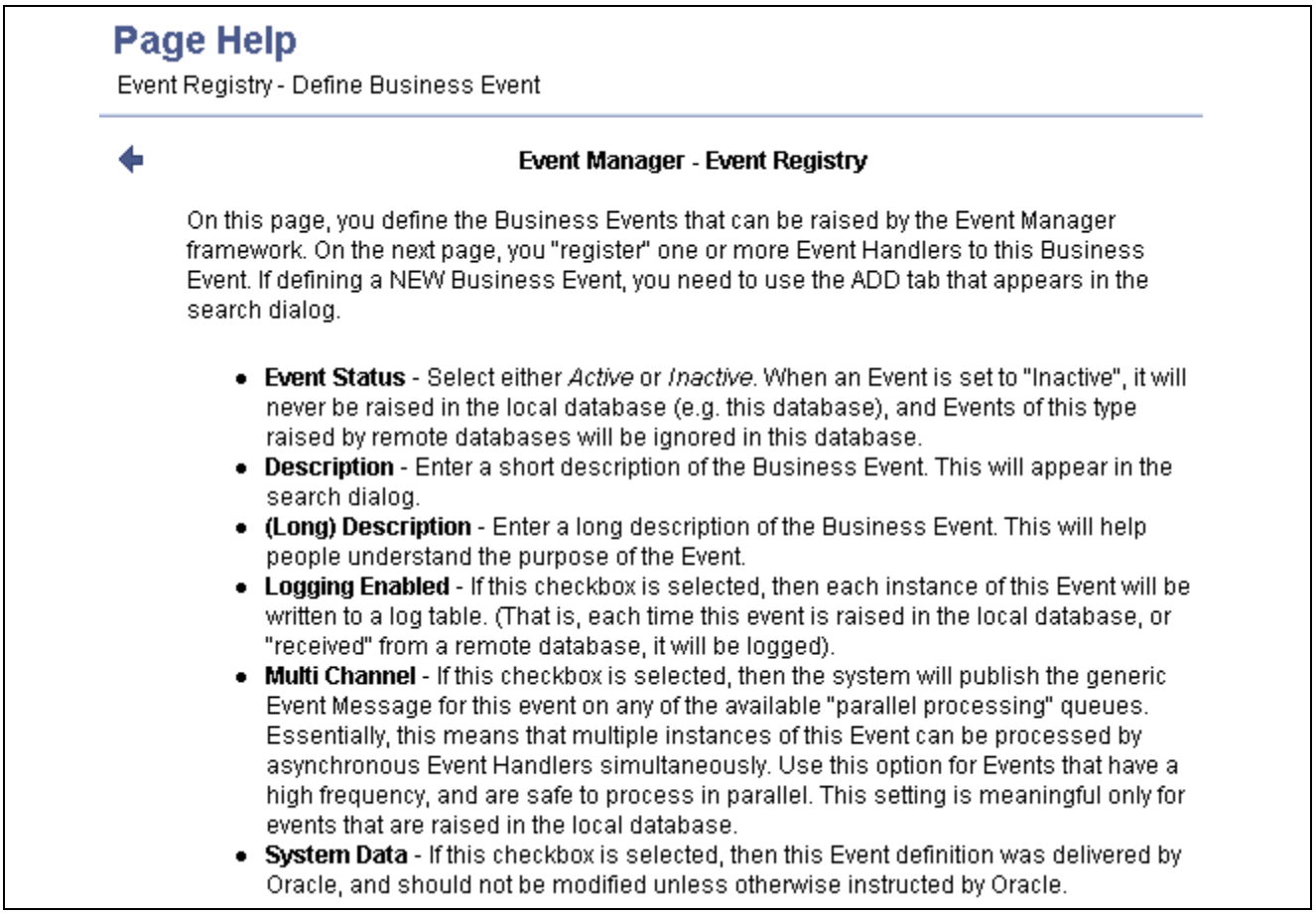
Page Used to View Help for HCM Event Manager Pages

Page Name	Object Name	Navigation	Usage
Page Help	HR_PH_PAGE_HELP	Click the Help button on the current page.	View a detailed description of the current page within the HCM Event Manager framework. The help information includes high-level page information and field-level descriptions.

Viewing Page Help for HCM Event Manager Pages

Access the Page Help page.

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Page Help page

Click the Return arrow at the top or bottom of the help page to return to the original HCM Event Manager page for which you are seeking additional information.

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CHAPTER 26

Setting Up and Building Organization Charts

This chapter provides an overview of organization charts, lists prerequisites, and discusses how to create organization charts.

Understanding Organization Charts

PeopleSoft Enterprise Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. To build organization charts, you decide whether to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees, then run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Formatting options in the Visio Organization Charting Wizard enable you to easily create detailed charts of only one department or your entire organization.

Prerequisites

Before you can create organization charts, you must:

- Make sure that Visio is installed on your client.

  Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio on the client computers separately. For more information about installing Visio, see your Visio documentation.
- Select Visio as your Organization Chart interface on the Third-Party/System page in the Installation Table component (INSTALLATION_TBL).
- Make sure that organization and person data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Creating Organization Charts

This section provides an overview of the process and discusses how to:

- Create an organization chart.
- Copy the organization chart file to the client.
- Review the organization chart.
- Use the Visio Organization Chart Wizard.

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Understanding the Process

To create organization charts that are based on your human resources data:

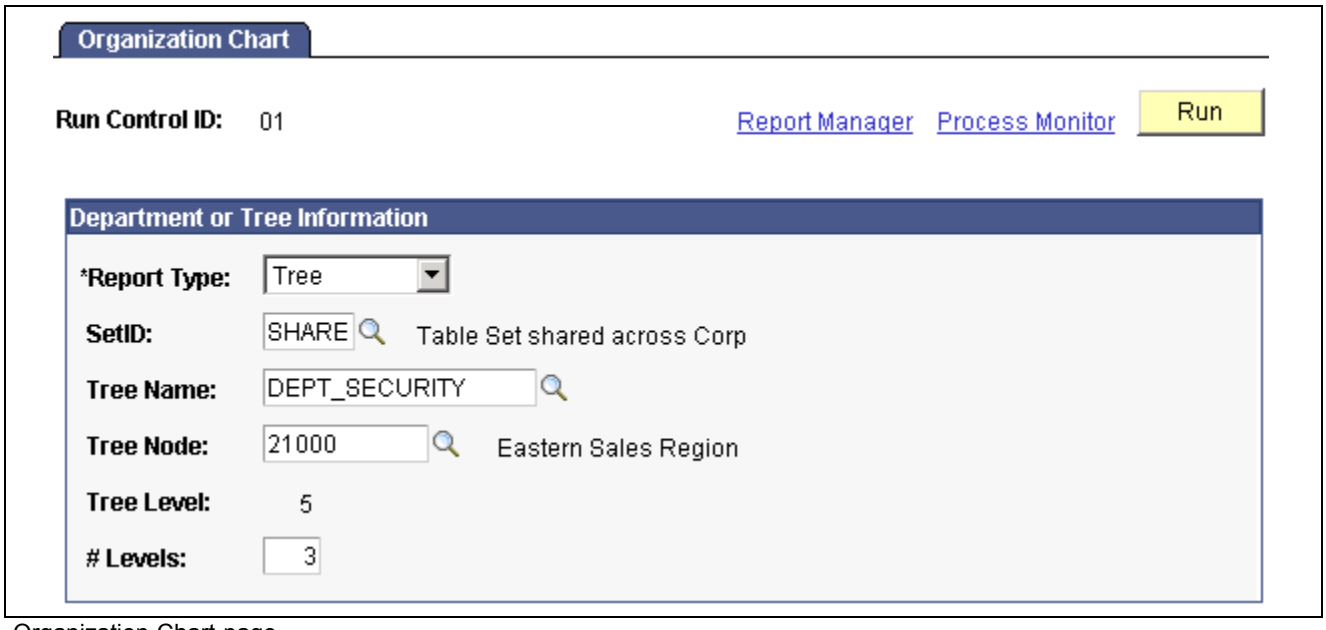
- Run the Organization Chart SQR from the Organization Chart page.
- Copy the resulting file to the client.
- Review the organization chart information gathered by the Organization Chart SQR.
- Start Visio and run the Vision Chart Wizard.

Page Used to Create an Organization Chart

Page Name	Object Name	Navigation	Usage
Organization Chart	ORGCHART_PNL	Organizational Development, Position Management, Create Organization Structure, Build Organization Chart, Organization Chart	Create an organization chart based on PeopleSoft Human Resources system trees.

Creating an Organization Chart

Access the Organization Chart page.



Organization Chart page

Report Type Select a report type. Options are:

- *Department*

  Builds your chart based on a single department that you select.

- *Tree*

  Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

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Note. You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

Building Your Chart Using Departments

If you select Department in the Report Type field, then the SetID and *Department* fields appear.

Department Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)

Run Click Run if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree,* the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.
2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

Tree Node Select the level of the tree on which you want the organization chart to start. For example, if you're using a department tree, select the department.

Tree Level The system enters the tree level of the tree node that you selected.

#Levels (number of levels) Specify the number of levels to include in the tree.

For example, if you begin the chart at tree level*5* and you specify the number of levels as*3,* the organization chart includes levels 5 though 7 of your tree.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 80

Copying the Organization Chart File to the Client

The Organization Chart SQR creates the ORGCHART.TXT file and stores it in the application server. To create an organization chart using Visio, you need to copy the ORGCHART.TXT file to a client computer. You will run Visio and create the organization chart on the client.

To copy the ORGCHART.TXT file:

1. Access the Process Monitor – Process List page (PMN_PRCSLIST) (PeopleTools, Process Scheduler, Process Monitor).
2. Locate the organization chart process and click the associated Details link.
3. Click the View Log/Trace link.
4. Click the ORGCHART.TXT link to open the file.
5. Select File, Save As and save to the client.

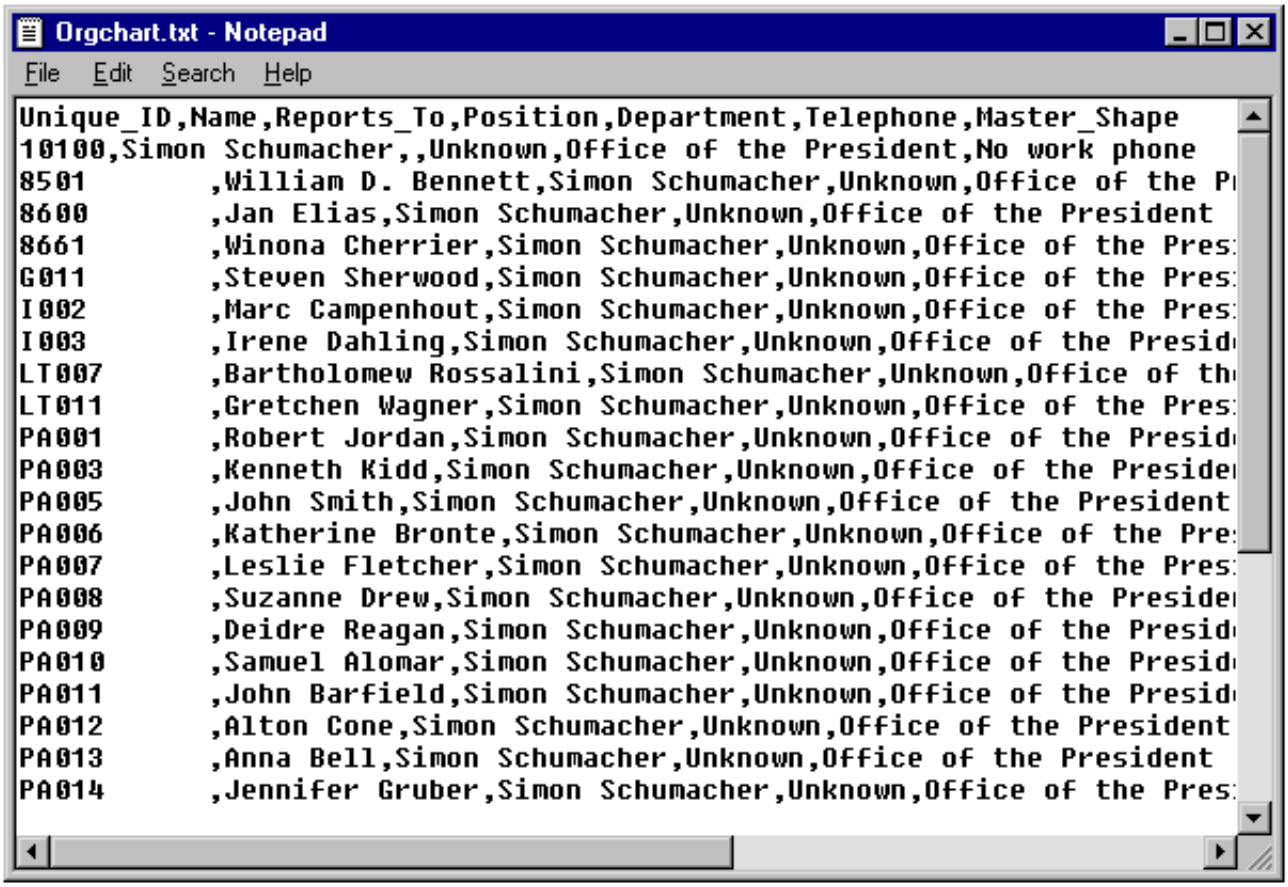
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Reviewing the Organization Chart

To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The file contains the following data:

- Unique ID
- Name
- Reports To
- Position
- Department
- Telephone

Following is an example of the ORCHART.TXT file:



Example of ORGCHART.TXT file

Using the Visio Organization Chart Wizard

Open Visio and use the Organization Chart Wizard to create your organization chart automatically.

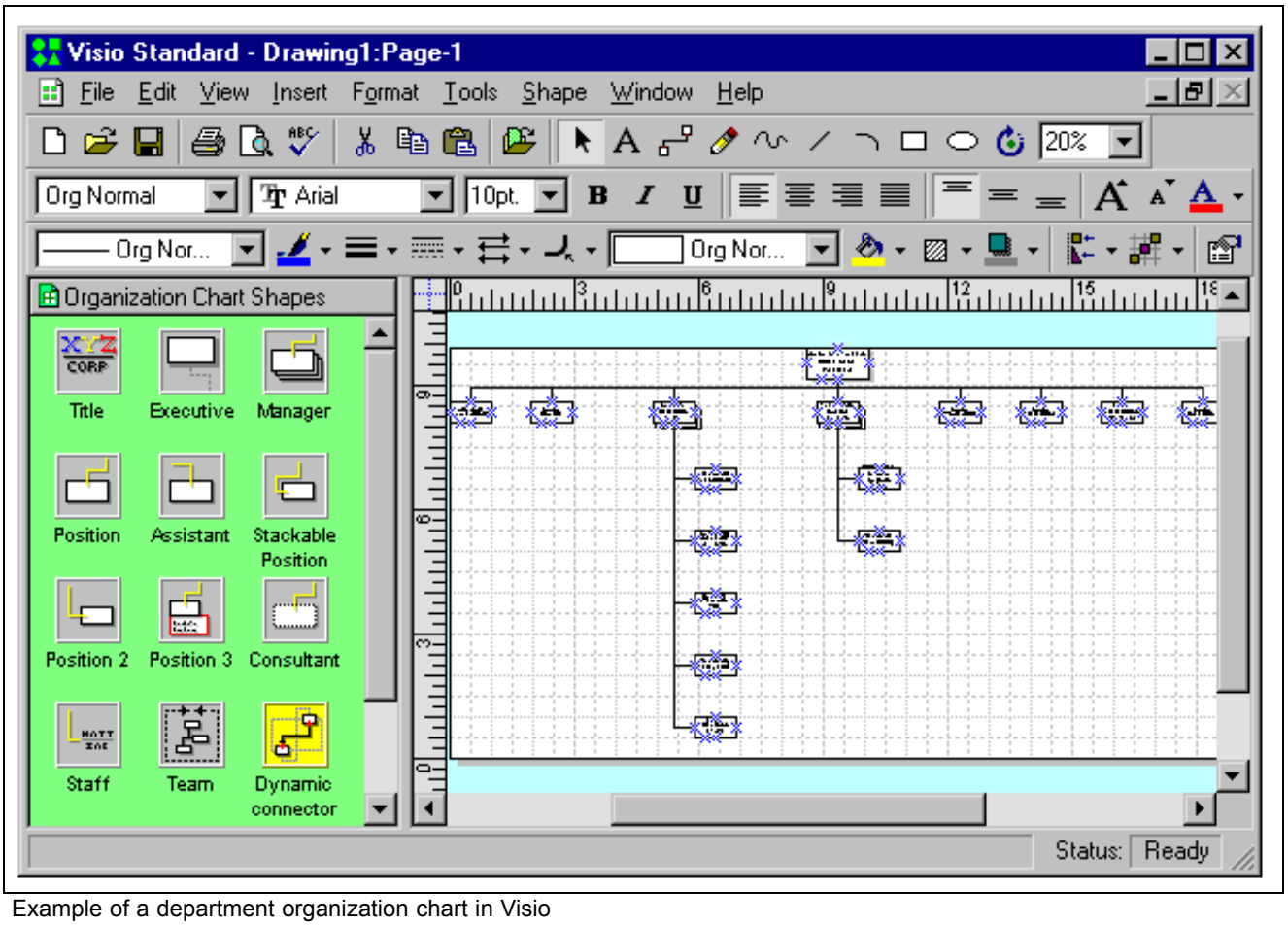
Note. These instructions are for Visio 2000. The Organization Chart Wizard may operate slightly differently for Visio 2002.

To run the Organization Chart Wizard:

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1. In Visio, select File, New, Organization Chart, Organization Chart Wizard.
2. In the window that appears, select the option *Information that's already stored in a file or database* and click Next.
3. On the next window select the option *A text, Org Plus (*.txt), or Microsoft Excel file* and click Next.
4. On the next window enter the location on the client that contains your organization information (where you saved the ORGCHART.TXT file), for example *C:\TEMP\ORGCHART.TXT* and click Next.
5. Select *Name* for the Name field, *Reports_To* for the Reports to field, and <*none*> for the First Name (optional) field and click Next.
6. Select the data that you want displayed in the chart shapes (for example *Name* for the First Line and *Position* for the Second line) and click Next.
7. Add other fields contained in the ORGCHART.TXT file to the Org Chart by selecting them from the Data file columns and adding them to the Custom Property fields column. Click Next.
8. Select *I want the wizard to automatically break my organization chart across pages* and click Finish.

Following is an example of the Visio page that you see when your organization chart is complete:



Example of a department organization chart in Visio

Note. For more information about editing and printing your organization chart in Visio, see your Visio documentation.

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CHAPTER 27

Setting Up and Processing Mass Updates

This chapter provides an overview of mass update processing and discusses how to:

- Configure the Transaction Processor for mass updates.
- Set up mass update definitions.
- Create mass updates.
- Generate the Mass Update report.
- Manage mass updates.
- Perform mass updates.
- Delete pending mass updates.

Note. PeopleSoft no longer supports HRMS-specific Mass Change templates. We have left the templates in the database for your convenience, but recommend that you use the Mass Update feature.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Understanding Mass Update Processing

This section discusses:

- Mass update architecture.
- Mass update process flow.
- Steps for a mass update run.
- Tips for a successful mass update run.

Mass Update Architecture

The Mass Update feature enables you to make changes to the data of large groups of people. For example, you can use the Mass Update feature to perform company-wide compensation increases, department transfers, job code changes, labor agreement changes, and reorganizations.

The Mass Update feature consists of the following modules:

- *Mass Update Manager:* This is the front-end module that provides the user interfaces for the Mass Update feature. It consists of:
  - The Define Mass Update component (MU_SETUP). for setting up mass update definitions.

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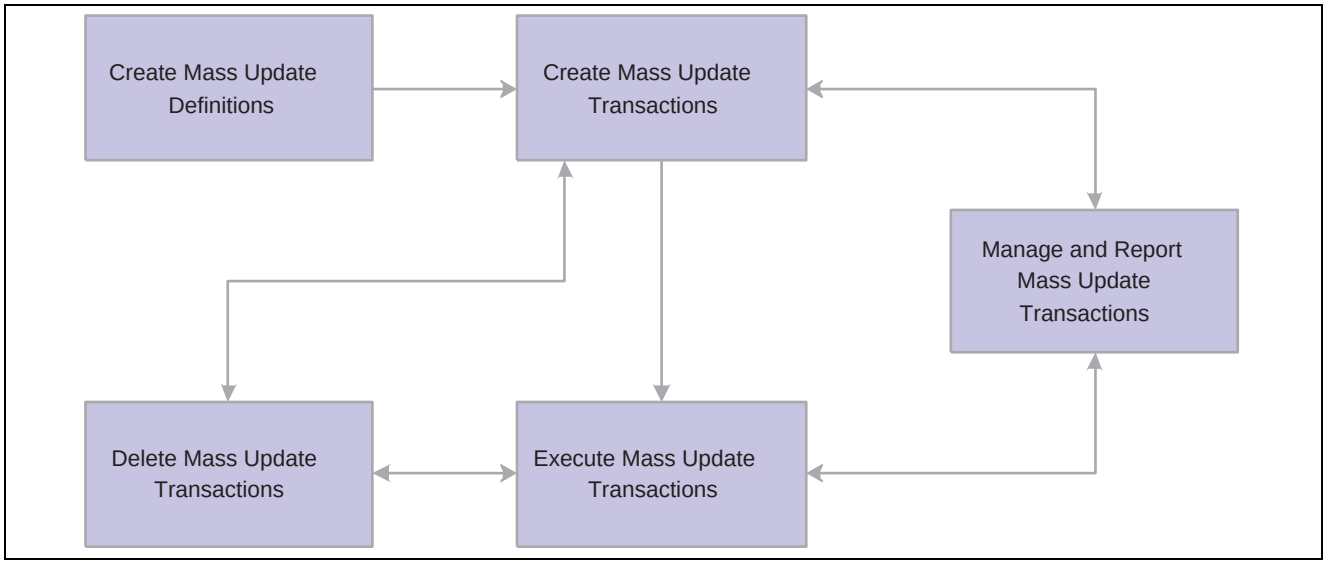
- The Create Mass Updates component (RUNCTL_MU_CREATE) and related Application Engine (AE) process for generating mass update transactions.
- The Report Mass Updates component (RUNCTL_MU_PRINT) and related Structured Query Report (SQR). report for reviewing and printing lists of mass update transactions.
- The Manage Mass Updates component (MU_MANAGE) for reviewing or previewing mass update transactions, managing statuses, and processing mass update transactions individually online.
- The Execute Mass Update component (RUNCTL_MU_EXECUTE) and related AE process for running mass updates in batch.
- The Delete Mass Updates component (RUNCTL_MU_DELETE) and related AE process for deleting pending mass update transactions.

- *Transaction Processor:* This is a back-end module that consists of the Configure Processor component for setting up and managing system data that is available for mass updates and an application class that provides access to transaction processing functionality. The role of the Transaction Processor application class is to provide access to services within the Services Oriented Architecture (SOA) to read (select and write, or update, information. Each transaction is an XML message that contains the list of elements that are involved in the update for a specific employee and employee record combination. The Transaction Processor application class interprets this XML message, provides access to the correct service, and returns acknowledgements and any exceptions to the online or batch process that calls it.
- *Execution Manager:* This is a back-end module that is a mechanism in the batch mass update process to manage and monitor parallel processing through spawning. *Spawning* is a method of simultaneously running multiple instances of a child process by a parent process. The Execution Manager enables you to run multiple instances of the batch mass update process and run these instances in parallel to improve performance.

Note. The Mass Update framework relies on SOA framework.

Mass Update Process Flow

The following diagram illustrates the process flow of mass update processing:



Mass Update Process Flow

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Steps for a Mass Update Run

To process mass updates:

1. Set up a mass update definition through the Define Mass Update component.
2. Run the mass-update selection phase and create transactions for mass update through the Create Mass Updates page (which is part of the Mass Update Manager module.)
3. Review and update transactions.

   You can review and update transactions online through the Manage Mass Updates component.

   You can also generate a report to review transactions from the Report Mass Updates page.

   Both components are part of the Mass Update Manager module.
4. Process transactions using the Transaction Processor.

   You can process transactions one at a time from the Manage Mass Updates component, which is part of the Mass Update manager module.

   Or you can process transactions in batch through the Execute mass Updates page, which is part of the Execution Manager module.
5. (Optional) If necessary, cancel transactions through the Manage Mass Updates component, which is part of the Mass Update Manager.
6. (Optional) If necessary, delete transactions one at a time through the Manage Mass Updates component, or delete transactions in batch through the Delete Mass Updates page.

   Both components are part of the Mass Update Manager module.

Tips for a Successful Mass Update Run

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain that you want to override data.

  If possible, add a new effective-dated row, instead.
- Familiarize yourself with the online transaction to understand the rules governing the component before trying to automate it using the Mass Update process. When you update a component using Mass Update, it is governed by the same rules (such as defaulting and required fields) as when you access the component online.
- Create several simple Mass Update IDs that you can use in combination instead of trying to create a complicated one that changes everything.

  In addition to being more flexible, this approach facilitates identifying the source of errors.

Important! The Mass Update feature uses services to update data. Services run all of the business logic that is associated with a component, which ensures that the components function correctly and that the data is consistent. However, updating the data in this manner, while more complete, is slower than some other methods (such as a SQL update). When you run a mass update, take steps to improve performance, such as limiting the size of the transaction set, performing the update at night when server traffic is low, or both.

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Configuring the Transaction Processor for Mass Updates

Use the Configure Processor component (MU_TP_SETUP) to define the sections and elements that are available for mass updates.

This section provides an overview of Transaction Processor configuration and discusses how to:

- Set up the Transaction Processor for mass updates.
- Define prerequisite elements for mass update definitions.

Understanding Transaction Processor Configuration

The Transaction Processor is an Application Class that can process changes in the application by means of services, based on a transaction that contains the details of the change. The system uses the Transaction Processor to perform mass updates either online through the Manage Mass Updates component or in batch through the Execute Mass Update component.

Mass update processing relies on the configuration of the Transaction Processor. To perform this configuration, you must use the Configure Processor component. This component is intended for technical users with a high level of experience. PeopleSoft provides many predefined sections within the Configure Processor component for performing mass updates.

The Transaction Processor setup defines the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section. You can then use the Define Mass Update component to create mass update definitions. During mass update processing, the Mass Update Manager triggers the Transaction Processor to process mass update transactions using the section, elements, and values that you define on the applicable mass update definition. For each section that the Transaction Processor encounters, it refers to the Transaction Processor setup for the right service, and then triggers the service with the values that are defined in the transaction.

Note. If you add Job Profile Manager (JPM) catalog types to the system, then to perform mass updates to the newly added JPM data, you must replicate those catalog types in the Configure Processor component.

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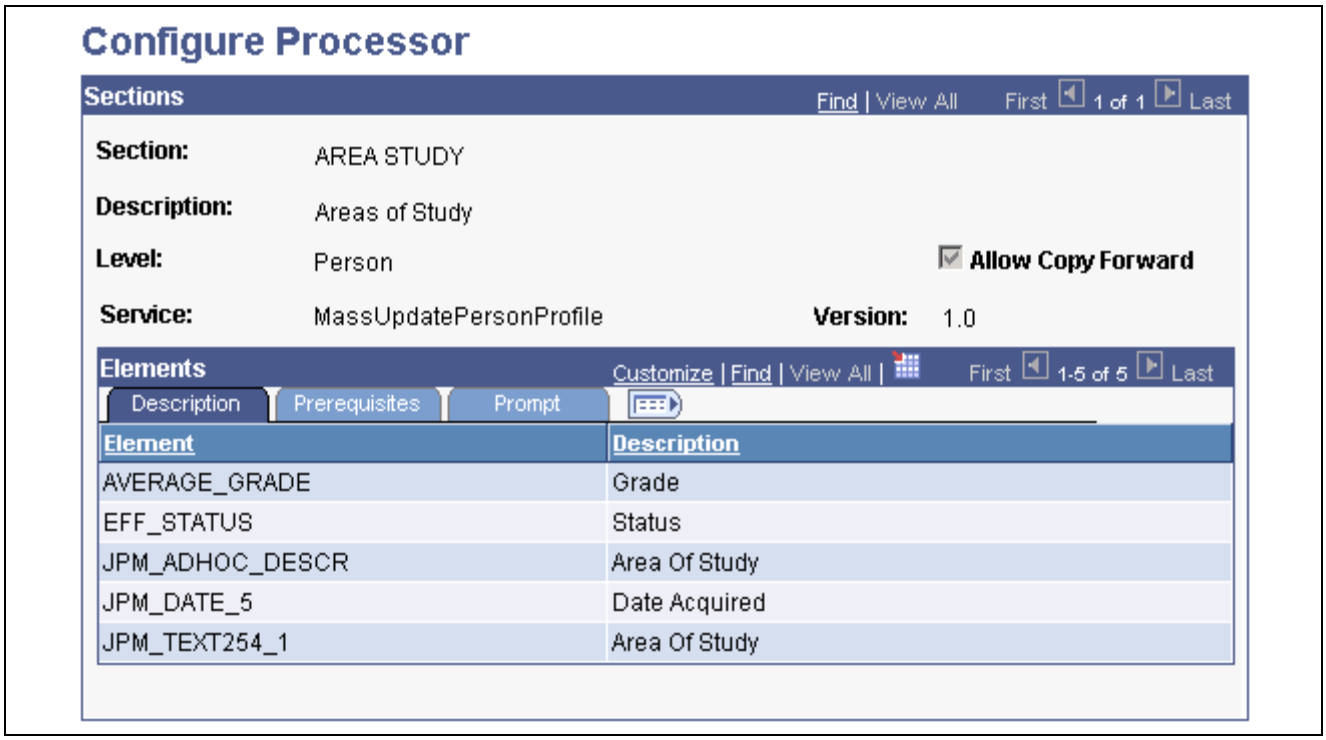
Pages Used to Configure the Transaction Processor for Mass Updates

Page Name	Object Name	Navigation	Usage
Configure Processor	MU_TP_SETUP	Workforce Administration, Collective Processes, Mass Update, Configure Processor	Define the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section. You also define prompt and prerequisite information that the system uses when you create mass update definitions through the Define Mass Updates component.
Configure Processor - Prerequisites	MU_TP_SETUP_PRE	Click the Details button on the Configure Processor page.	Define the prerequisites elements that you must define as part of a mass update definition for the given section. These prerequisites establish the relationships between elements that are available for mass update transactions.

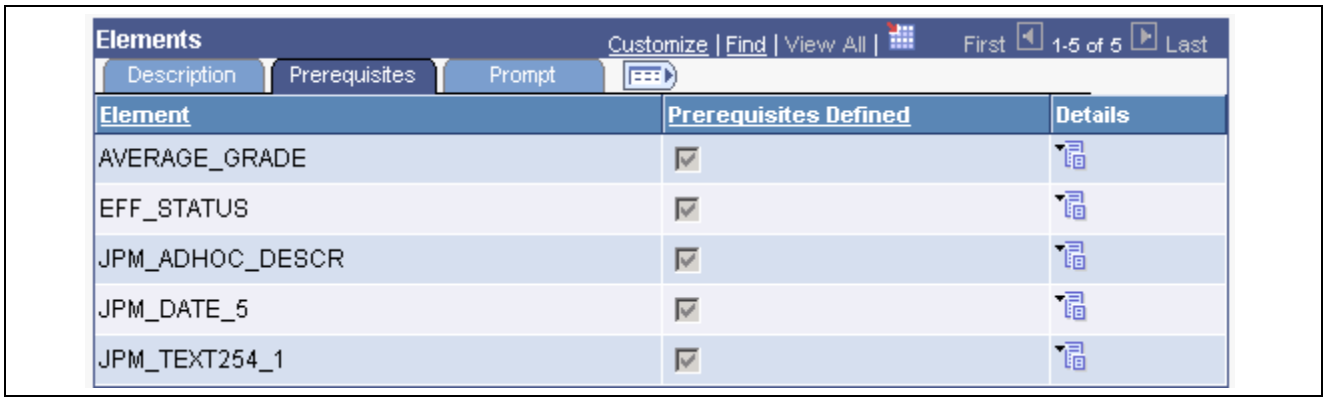
Setting Up the Transaction Processor for Mass Updates

Access the Configure Processor page.

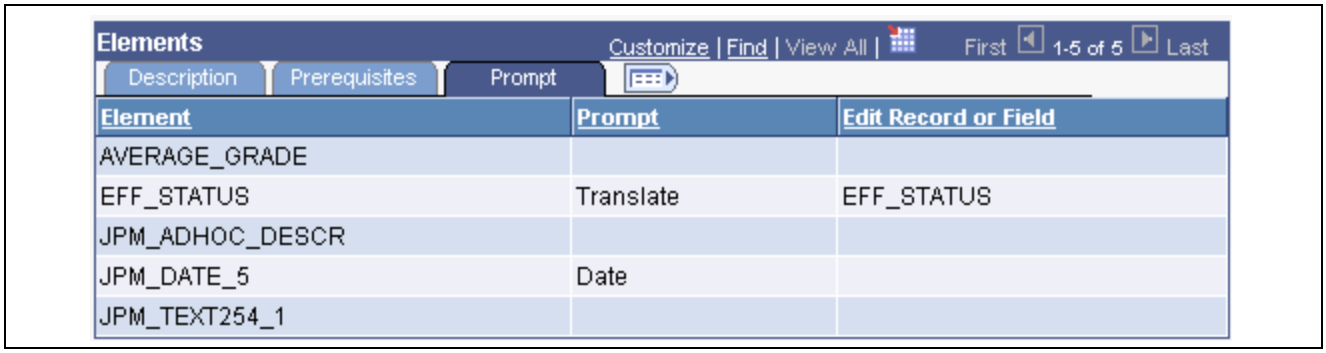
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Configure Processor page (1 of 3)



Configure Processor page (2 of 3)



Configure Processor page (3 of 3)

Sections

Section Enter the name of the section. A section is a functional group of elements and is defined within a service.

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Description Enter the description of the section. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the Section field.

Level Select whether the Component Interface is based on an *Employee Record* number or a *Person.* By default, the system selects the *Person* value.

When the Mass Update Manager module generates mass updates for a person, it uses the selected level to ensure that it generates these update transactions for the same person once only.

The Transaction Processor module uses the selected level to provide access to the service that contains the correct key values.

Allow Copy Forward Select to make the Copy Forward option available for the section or service in the Define Mass Update component.

Service Enter the service that the system uses to manage the update for the corresponding section. The service that you specify provides all the controls and defaults for mass updates that involve the section; no processing logic is within the setup itself.

PeopleSoft Enterprise Human Resources delivers the following services for use with mass update processing: Job Data (which includes specifics for compensations and labor agreements), Person Data, Job Profile Manager, and Military Approval Tracking. Each service is defined using data types and uses the same base class. Each data type defines the elements that are available for the service. To manage services, use the Service Registry component.

Note. You can also build your own services and incorporate them into the Mass Update feature. To have the mass update process access data beyond the delivered services, you must define a service to manage the specific requirements, register the service, and then update the Transaction Processor setup.

Version Enter the version of the specified service.

Elements

Element Enter the object name of the element or data type that you want to make available for a mass update that uses this section. You can enter as a value any simple data type that is defined in the service. The elements that you list provide the information that is available for a mass update.

Description Enter the description of the element. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the Element field.

Prerequisites Defined The system automatically selects this check box whenever you have defined prerequisites for the element.

Details Click this button to access the Prerequisites page, where you can define prerequisites for the corresponding element.

Prompt Select how you want to define the prompt for the element. The prompt that you select determines how you can define the value of the section and element combination on the Define Mass Updates page. Possible values are:

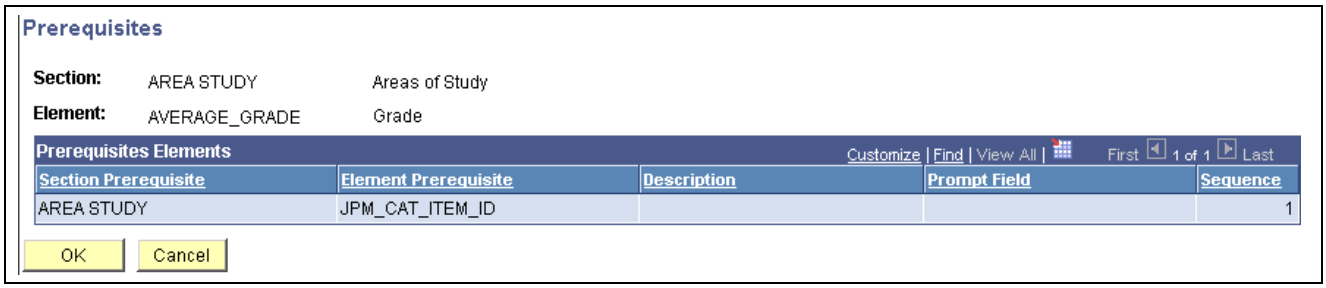
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- *Action:* When processing a mass update for this section and element combination, the system performs the specific action within the application that the element defines. For example, an element might perform the action of pressing a button or setting a default value (in that case, there is no prompt).
- *Checkbox:* When you are defining a mass update for this section / element combination, the system displays a Boolean Value check box.
- *Date:* When you are defining a mass update for this section / element combination, the system displays a date field.
- *Numeric:* When defining a mass update for this section / element combination, the system displays a Numeric Value field.
- *Record:* When defining a mass update for this section / element combination, the system displays a Character Value field that prompts against the record that you specify in the *Edit Record or Field* field.
- *Translate:* When defining a mass update for this section / element combination, the system displays a Character Value field that prompts against the field that you specify in the *Edit Record or Field* field.

Edit Record or Field If you select to prompt for the element with a record, select the record. If you select to prompt for the element with a transalate value, select the field name.

Defining Prerequisite Elements for Mass Update Definitions

Access the Configure Processor - Prerequisites page.



Configure Processor - Prerequisites page

Section Prerequisite, Element Prerequisite, and **Description** Select the section and element that is a prerequisite to this section and element when defining a mass update. The system prompts you to select from the sections that you have defined in this component and the elements that you have defined for the selected section prerequisite. The system displays the name of the element prerequisite that you select.

Prompt Field Select the field that you want to use to prompt for the prerequisite element. This field is used internally in order to identify which field of the prompt record will be populated with the value of the prerequisite field. For instance, the element Work Location / Department has the element Work Location / Business Unit as prerequisite. Then, the field SETID will be populated with the value of Business Unit when used in the prompt record DEPT_TBL.

Sequence Enter the sequence in which you need to enter the prerequisites when defining a mass update.

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Setting Up Mass Update Definitions

To set up the mass update definitions to process mass updates, use the Define Mass Update component (MU_SETUP).

This section provides an overview of mass update definitions and discusses how to:

- Define generic information for mass updates.
- Define common data changes for mass updates.
- Define additional data changes for mass updates.

Understanding Mass Update Definitions

Mass update definitions define the sets of data changes and the selected populations that the Mass Update process uses to run a mass update for a given definition. After you initiate the Mass Update process for a mass update definition, you can no longer modify the definition. Use the Define Mass Update component to define the mass update definitions. The Define Mass Update component is part of the Mass Update Manager module.

You should review mass update definitions carefully to avoid population overlap. The Mass Update process manages additional changes in sequence, processing each employee and record number combination only once. Each change overrides the previous one for the same employee and record number. Therefore, only one combination of change data within a mass update definition applies to an employee and employee record number combination during one mass update.

For example, assume that you want to change the Department value from *D1* to *D2* and also change the Location value to *L3* for all departments with *D2* value. If you define on the Additional Changes page within a single mass update definition to update the department element value to *D2* and the D2 departments to a location value of *L3,* the Mass Update process will first move employees in department D1 to department D2 and then move the employees who are already in department D2 before the update to location L3. The Employees process will not change the location of the employees with the department change. If you want the location change to apply to the whole population, you must define two mass update definitions, one for the department change and one for the location change. You must then apply the second mass update only after the first one finishes.

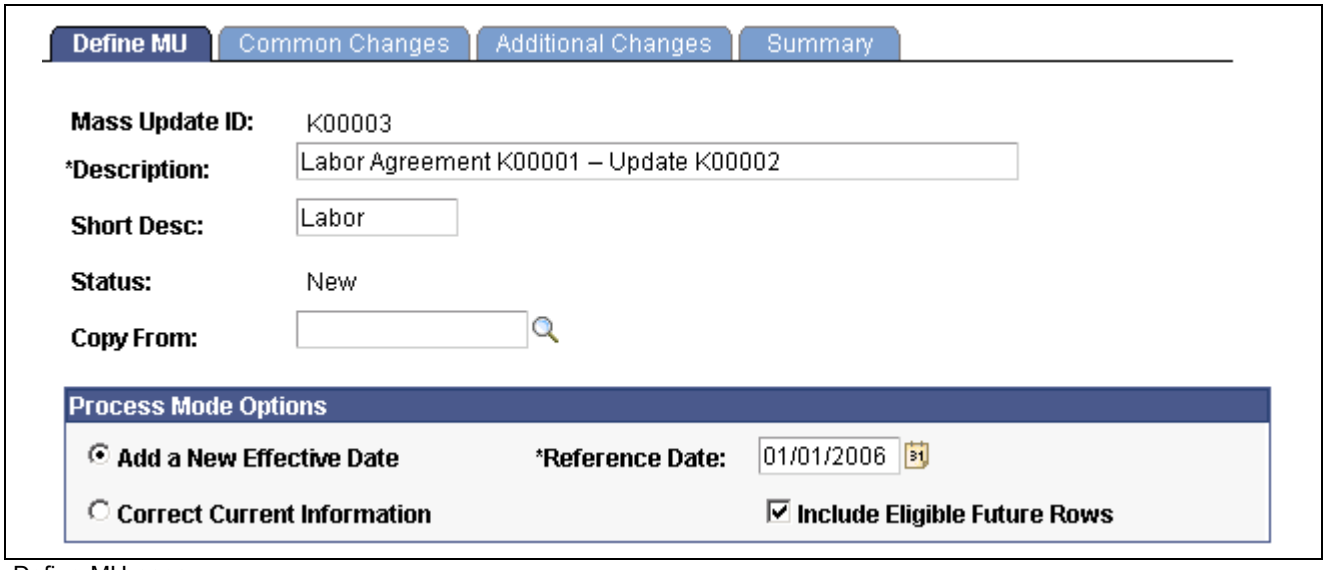
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Pages Used to Set Up Mass Update Definitions

Page Name	Object Name	Navigation	Usage
Define MU	MU_SETUP	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Define MU	Select the generic information for the mass update definition. The options that you select apply to all updates that you process for this definition.
Common Changes	MU_SETUP_CHANGES	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Common Changes	Define the content of the mass update by specifying the population selection criteria and common data changes. To create a valid mass update definition, you must define at least one row of data on either the Common Changes page or the Additional Changes page.
Additional Changes	MU_SETUP_ADD_CHG	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Additional Changes	Define the content of the mass update for each additional population that you include in the mass update definition.
Define Mass Update - Summary	MU_SETUP_SUMMARY	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Summary	Review a detailed summary of all of the data changes that are included in the mass update definition.

Defining Generic Information for Mass Updates

Access the Define MU page.



Define MU page

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Mass Update ID When adding a new mass update definition, enter a unique ID for the definition.

Description and **Short Desc** (short description) Enter a description and short description of the mass update definition.

Status The system displays the status of the mass update definition. Possible values are:

- *New:* The mass update definition has been created and is available for the selection phase.
- *Initiated:* The mass update definition has been included in a run of the selection phase. You can run the selection phases multiple times before running the update phase.
- *In Progress:* The mass update definition has been included in a run of the update process phase. You can run the update phase multiple times before running the completion phase.
- *Closed:* The mass update definition has been included in a completion phase and closed. You cannot run any further mass update processing.

Note. When you initiate the update phase of the mass update processing, the mass update definition becomes display only.

Copy From Select another mass update definition to use as the basis for the definition that you are defining. If you confirm the copy of the mass update definition, the system populates the Define Mass Update component with data from the other definition.

When you copy a mass update definition, the system verifies whether the group builds and employees that are in the original definition are available for you to use. If not, the system issues a warning and removes the unavailable group builds and employees from the new definition.

Note. The system overwrites all existing data that you have already included in the new definition that you are creating.

Process Mode Options

Use this group box to specify the general processing options for the mass update definition. Indicate whether you want the process to correct the current information or add a new effective-dated row. Also indicate how you want the process to handle eligible future-dated rows.

Add a New Effective Date Select to insert a new effective-dated row using the Reference Date value as the new effective date. If a record already exists with this effective date and the record contains a sequence number field, the system inserts a row with the date and a new sequence number, otherwise it overwrites data. If the record is not organized by effective sequence, overwrites data. This option inserts new information and does not override previous data.

Correct Current Information Select to change incorrect data and override information in the person's records. The system corrects the record that is or was effective as of the Reference Date value that you enter.

Reference Date Enter the data that you want the mass update processes to use when inserting a new effective-dated row or correcting an existing row.

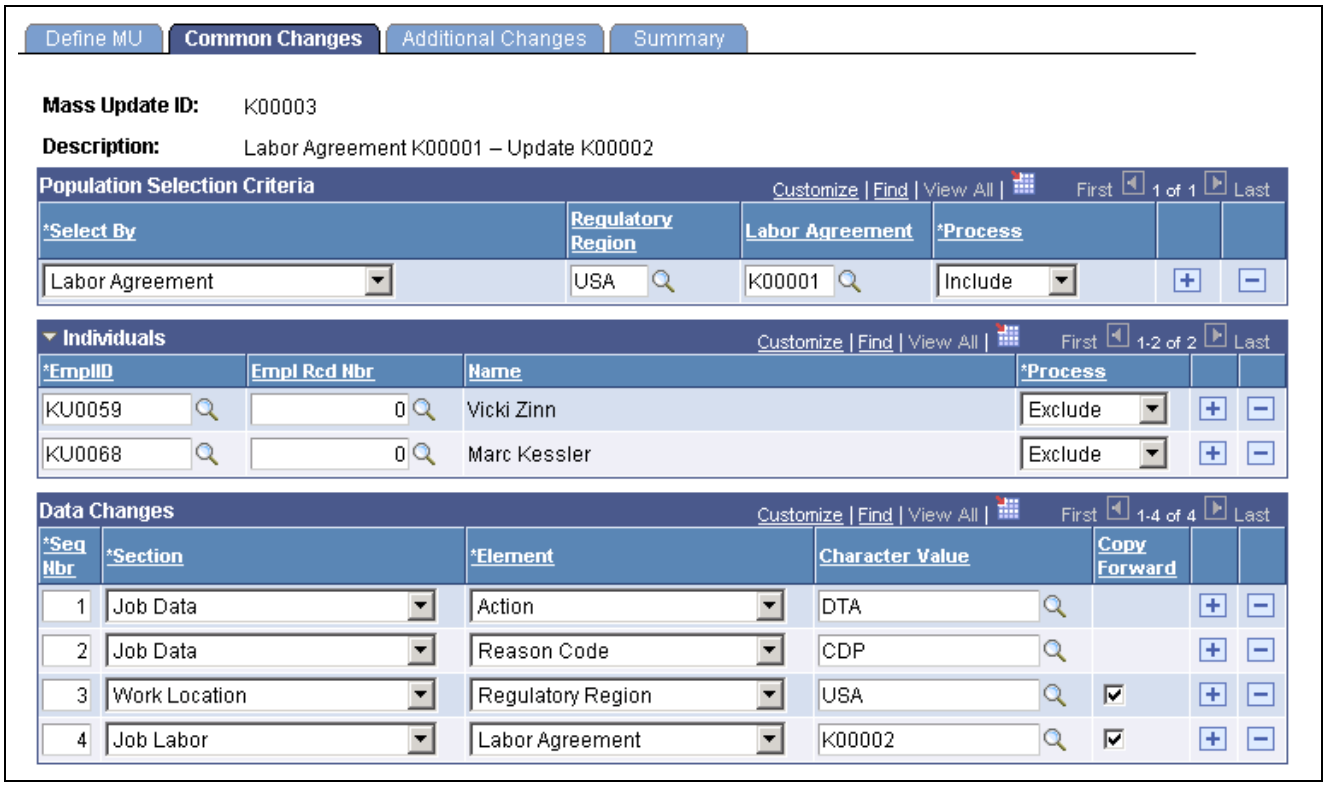
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Include Eligible Future Rows

Use this option when you want to update data of employees that are eligible for the change (as defined in population selection criteria) after the reference date. This option (similar to retroactivity) can be used in conjunction with the carry forward option available at element level.

Defining Common Data Changes for Mass Updates

Access the Common Changes page.



Common Changes page

Population Selection Criteria

Use this group box to define the population selection criteria for the mass update. For each row of criteria that you define, you can select to include or exclude the associated employee population. You can combine multiple rows of criteria to refine the population selection.

Select By

Select how you want the system to select the employee population to include or exclude for the mass update.

When you make a selection here, the system displays related fields for you to specify which value you want the process to update. For example, if you selected *Group ID,* the system displays the Group ID field. The update process will select all people with the group ID that you specify.

Note. To set up mass update definitions by group, you must grant group security to the Define Mass Update component. To set up a mass update definition by department (this is also applicable for other criteria, such as business unit, company, etc... the row-level security defined in the database is applied for any selection), the user must have access to the selected department.

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Boolean Value If applicable, select this check box to indicate the Boolean value for the selected population.

From Date and **To Date** If applicable, enter the date range for the selected population.

Business Unit If applicable, select the business unit to which the employees in the selected population belong.

Character Value If applicable, enter the character value for the selected population.

Regulatory Region If applicable, select the regulatory region for the selected population.

Labor Agreement If applicable, select the labor agreement for the selected population.

Military Service If applicable, select the military service for the selected population.

Process Select whether to include or exclude the selected population from the mass update.

Individuals

Use this group box to include or exclude specific employees from the mass update.

EmplID (employee ID) Select the employee that you want to include or exclude from the mass update.

Empl Rcd Nbr (employee record number) Select the record number of the employee that you want to include or exclude from the mass update.

Name The system displays the name of the selected employee.

Process Select whether to include or exclude the selected employee from the mass update.

Data Changes

Use this group box to define which fields to update and with what values. You must enter at least one row on this page or the Additional Changes page.

You should include an action and reason code value when making changes to job data. If you do not specify an action and action reason for inserting a new effective-dated row in a person's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

Change Type	Action	Action Reason
Job Data Change	Data Change (DTA)	None

Seq Nbr (sequence number) Enter a numeric value to indicate the order in which you want to process the mass updates. By default, the system sets the first row to one and incrementally increases the value by one for each additional row that you insert.

Some elements cannot be updated without your specifying several other related elements in the same mass update ID. For example, to specify a Location on the JOB record, you must first specify the appropriate business unit. The Business Unit element should be processed first and should have an earlier sequence number than Location.

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Elements that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number.

The system warns you if you need to add a related or key field.

Note. Be careful to sequence fields appropriately. Remember that the same constraints (such as defaulting and required fields) that govern a component when you access it online are also active when you update them with Mass Update.

Section Select the section that contains the element for which you want to perform a mass update. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page.

Element Select the element within the selected section for which you want to perform a mass update data change. An element refers to a field on a page. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page.

Some elements require prerequisites as defined on the Configure Processor page. You must select prerequisites elements first. If you select an element that requires a prerequisite element and you have not entered a data change for the prerequisites, the system alerts you to the missing prerequisite.

Character Value Specify the new value to which you want to change the selected element. The system displays different value fields according to the type of field for the selected element.

Copy Forward Select to have the Mass Update process update all existing future effective-dated rows in addition to the effective-dated row that it is adding or correcting. A future effective-dated row is a row that has an effective date that is later than the reference date that you specify on the Define MU page. This option is applicable only to data that is effective-dated.

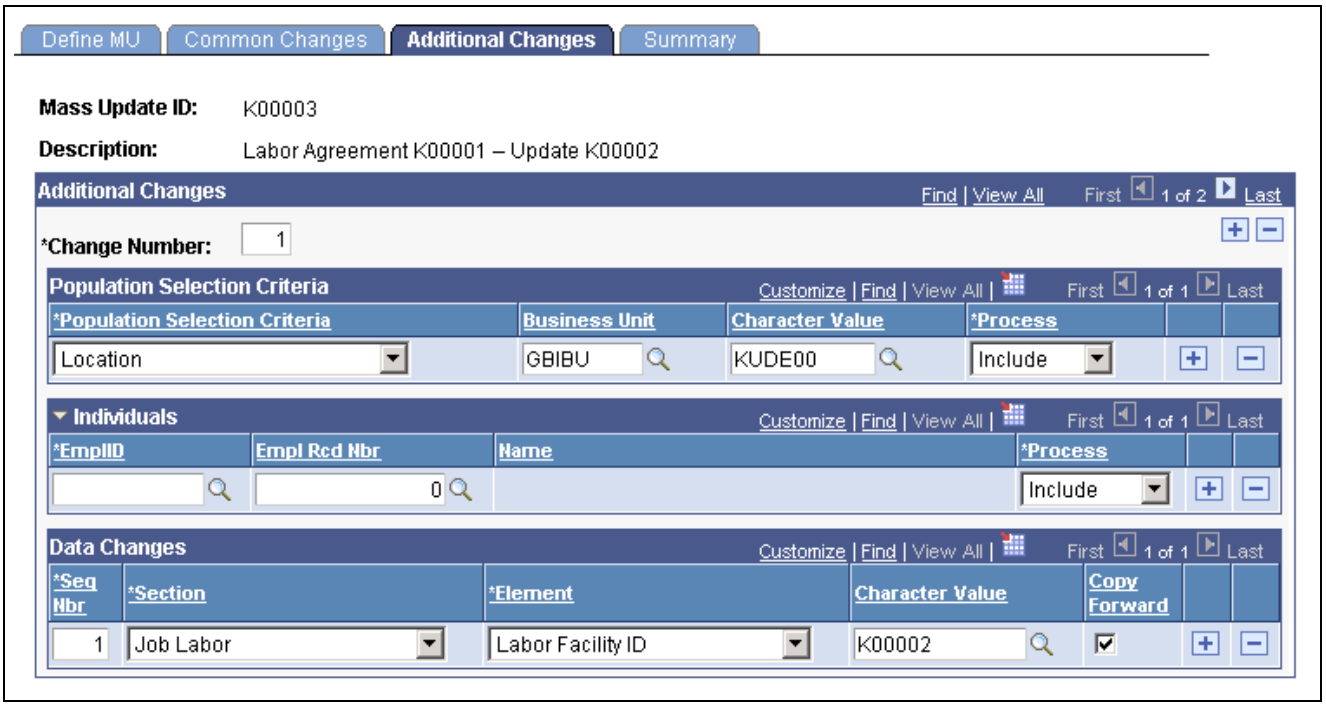
See Also

Chapter 5, “Setting Up and Administering HRMS Security,” page 37

Defining Additional Data Changes for Mass Updates

Access the Additional Changes page.

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Additional Changes page

Additional changes are combined with common Changes and several combinations can be defined. While several additional changes can be entered, none of them is mandatory.

Change Number Enter in the Change Number field the order in which you want to process mass update changes for additional populations within the mass update definition. Click the Add a new row button to insert information for data changes to additional populations. The system automatically sets the first row to *1* and increments the value by 1 for each additional row.

Note. The remaining fields on this page are the same as the fields on the Common Changes page.

Creating Mass Updates

This section provides an overview of mass update transaction creation and discusses how to generate mass update transactions.

Understanding Mass Updates Creation

Use the Create Mass Updates component to perform the selection phase of mass update processing by running the Mass Update Selection Application Engine process (HR_MASS_PREP). The main role of this process is to define populations and generate transactions for each person (emplID and employee record number combination) in the population based on mass update definitions. The process assigns each transaction a unique transaction ID during the generation of transactions. It creates the content of the transactions using XML language and stores the transactions in a table that is keyed by transaction ID. Each transaction contains one set of changes for a single person and employee record number.

Note. The process shares this run control page with other mass update processing components.

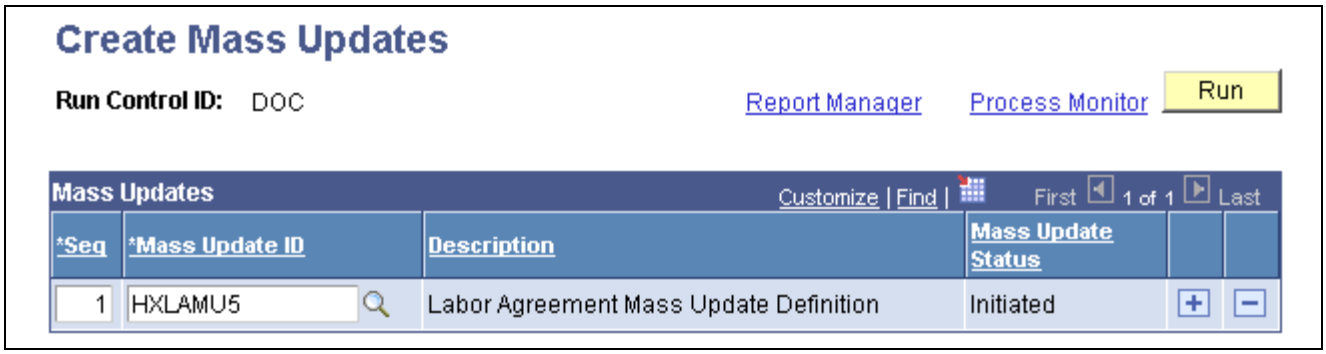
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Page Used to Create Mass Updates

Page Name	Object Name	Navigation	Usage
Create Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Create Mass Updates	Generate mass update transactions for selected mass update definitions.

Generating Mass Updates

Access the Create Mass Updates page.



Create Mass Updates page

Mass Updates

Enter one or more mass update definitions into the grid.

Seq (sequence)

Enter the sequence in which you want the process to generate mass update transactions for the mass update definitions that you specify. By default, the system sets the first row to *1* and increments the sequence by 1 for each additional row that you add.

Important! If you are creating transactions for two or more mass update definitions at the same time, be sure that population overlap occurs between the mass update definitions.

Mass Update ID and **Description**

Select the mass update definition for which you want to generate mass update transactions. The system displays the description of the selected mass update definition.

Mass Update Status

The system displays the processing status of the selected mass update definition.

Possible values are *New, Initiated, In Progress,* and *Closed.*

See Setting Up Mass Update Defintions, Defining Generic Information For Mass Updates

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Generating the Mass Update Report

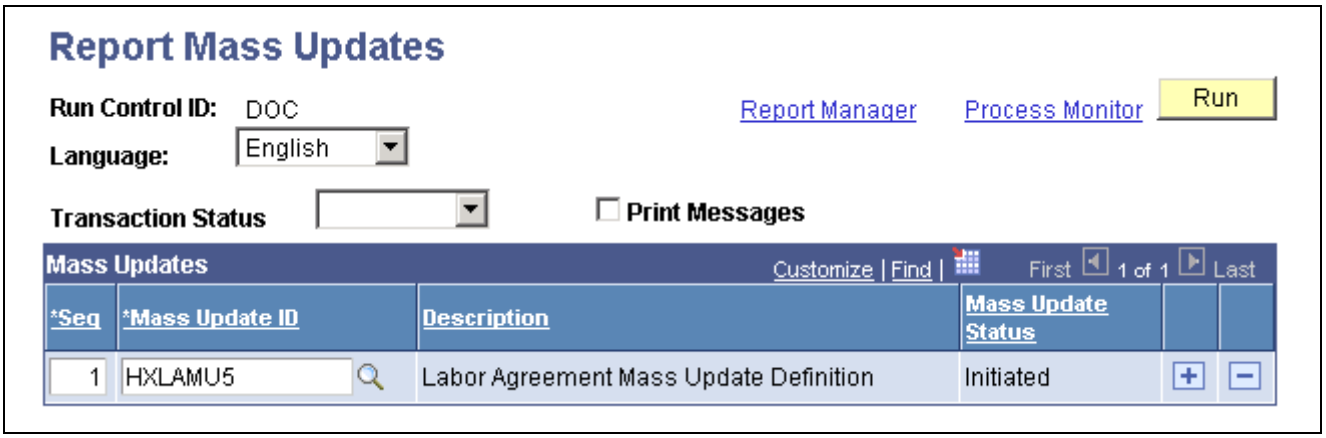
This section discusses how to generate the Mass Update report.

Page Used to Generate the Mass Update Report

Page Name	Object Name	Navigation	Usage
Report Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Report Mass Updates	Generate a report to review or preview transactions that are associated with specific mass update definitions.

Generating the Mass Update Report

Access the Report Mass Updates page.



Report Mass Updates page

The Mass Update SQR report (HRMASS) includes the mass update ID, description, and status. It also includes the total transactions per status and transaction details. This report is part of the Mass Update Manager module. You can run this report anytime before, during, or after the processing of the mass update transactions. When it is run before you process the mass update transactions, you can use this report as a preview.

Language Select the language in which you want to print the report.

Transaction Status Select the status of the mass updatate transactions that you want to include in the report. Possible statuses are *Cancel, Failure, Ready, Success,* and *Warning.*

Print Messages Select to include the details of messages and exceptions in the report.

Mass Updates

Use this group box to enter one or more mass update definitions to include in the report.

Seq (sequence) Indicate the order in which you want the mass update definitions to appear on the report. By default, this sets the value to *1* for the first row and increments the value by 1 for each additional row.

Mass Update ID and **Description** Select the mass update definitions that you want to include in the report. The system displays the description of the selected definitions.

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Mass Update Status The system displays the status of the selected mass update definitions.

Managing Mass Updates

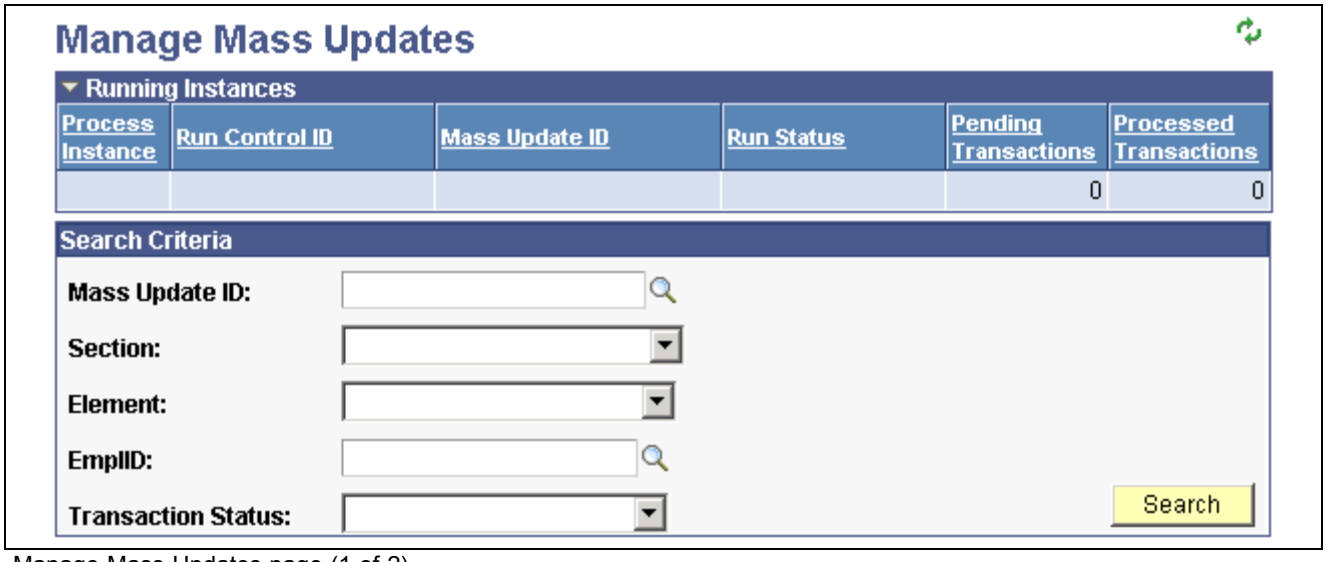
This section discusses how to manage mass updates.

Pages Used to Manage Mass Updates

Page Name	Object Name	Navigation	Usage
Manage Mass Updates	MU_MANAGE	Workforce Administration, Collective Processes, Mass Update, Manage Mass Updates	Monitor the running instances of the Execution Manager module and manage generated mass update transactions. You can view transaction details, change their statuses, and perform the update phase of mass updates by processing transactions individually online.
Transaction Details	MU_MANAGE_DETAIL_S	Click the Details button for a row on the Manage Mass Updates page.	Review details of the mass update transactions. This page includes high-level details of the transaction as well as information about population selection criteria, changes, eligibility, messages, and exceptions.

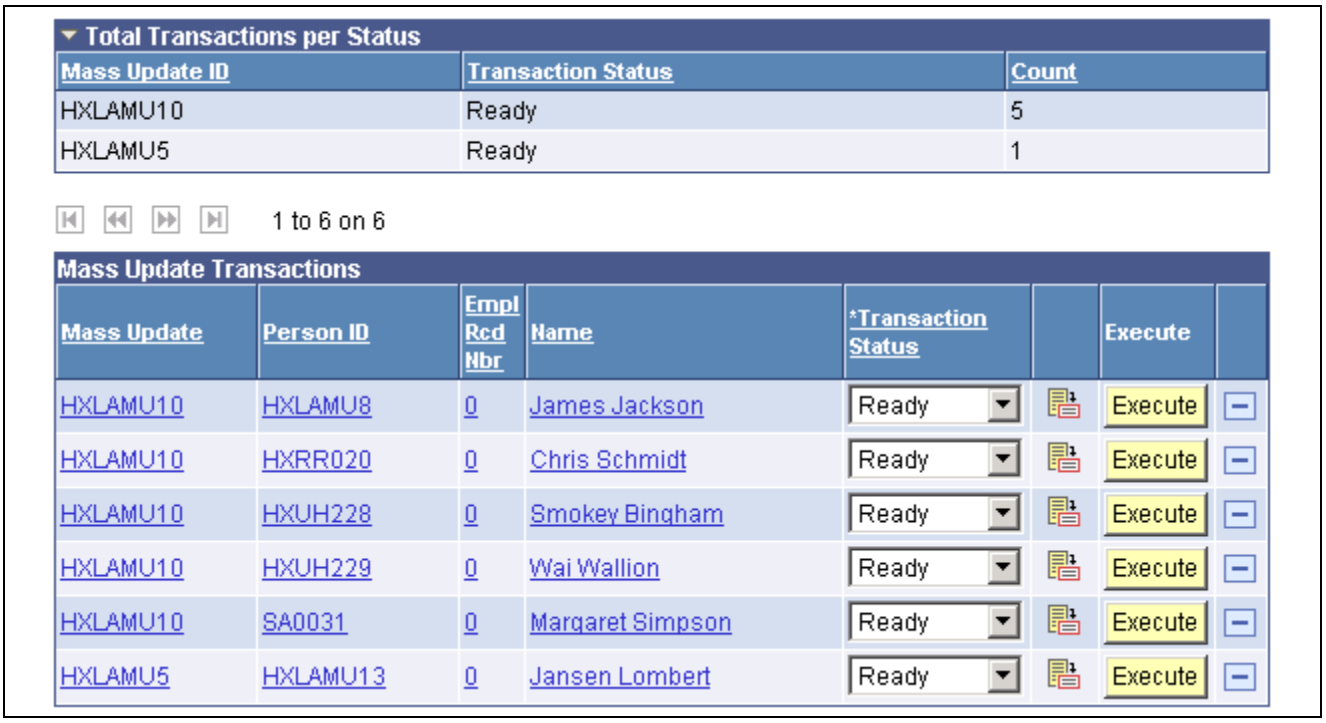
Managing Mass Updates

Access the Manage Mass Updates page.



Manage Mass Updates page (1 of 2)

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Total Transactions per Status

Mass Update ID	Transaction Status	Count
HXLAMU10	Ready	5
HXLAMU5	Ready	1

1 to 6 on 6

Mass Update Transactions

Mass Update	Person ID	Empl Rcd Nbr	Name	*Transaction Status		Execute	
HXLAMU10	HXLAMU8	0	James Jackson	Ready		Execute	
HXLAMU10	HXRR020	0	Chris Schmidt	Ready		Execute	
HXLAMU10	HXUH228	0	Smokey Bingham	Ready		Execute	
HXLAMU10	HXUH229	0	Wai Wallion	Ready		Execute	
HXLAMU10	SA0031	0	Margaret Simpson	Ready		Execute	
HXLAMU5	HXLAMU13	0	Jansen Lombert	Ready		Execute	

Manage Mass Updates page (2 of 2)

Refresh Click to reload the data on the page.

Running Instances

Use this group box to view details of the current running instances for mass update processing.

Process Instance Displays the process instance number for the corresponding instance.

Run Control ID The run control ID that the instance is processing.

Mass Update ID The mass update definition that the instance is processing.

Run Status The run status of the proces sinstnace.

Pending Transactions The number of mass update transactions that are assigned to the process instance but not yet processed.

Processed Transactions The number of mass update transactions that have been processed by the process instances. This includes processed transactions with errors.

Search Criteria

Use this group box to specify search criteria for retrieving mass update transactions.

Mass Update ID Select a mass update definition to narrow your search to only mass upate transactions within that definition.

Section Select a section to narrow your search to only mass update transactions that involve that section.

Element Select an element to narrow your search to only mass update transactions that involve that element.

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EmplID (employee ID) Select an employee to narrow your search to only mass update transactions that involve that employee.

Transaction Status Select a transaction status to narrow your search to only the mass update transactions with that status.

Search Click to retreive a list of the mass update transactions that meet your search criteria. The system displays your search results in the Mass Update Transactions grid.

Total Transactions Per Status

Use this group box to view statistics that are related to the mass update transactions in your search results. The system displays a list of the mass update definitions in your search results, the status of each definition, and the transaction count for each definition.

Mass Update Transactions

Mass Update The system displays the ID for each of the mass update definitions that meet your search criteria with a separate row for each employee who has a transaction based on the definition. Click the ID to access the Define Mass Update component, where you can review the details of the mass update definition.

Person ID The system displays the ID of the person that is involved in each of the mass update transactions that meet your search criteria. Click the Person ID link on a row to access the Personal Data component, where you can review the personal data record for the individual.

Note. This link provides access to personal information, but the mass update transaction itself might not relate to personal data.

Empl Rcd Nbr (employee record number) The system diplays the employee record number of the person that is involved in each of the mass update transactions that meet your search criteria. Click the employee record number link on a row to access the Job Data component, where you can review the person's job data record.

Note. This link provides access to job data, but the mass update transaction itself might not relate to job data.

Name The system displays the name of the person that is involved in each of the mass update transactions that meet your search criteria. Click the name link on a row to access the personal data for the individual.

Transaction Status The system displays the status of each mass update transaction. Possible values are:

- *Cancel:* A user has canceled the mass update transaction.
- *Failure:* The Mass Update process cannot successfully process the transaction. View messages and exceptions to details about the failure.

  You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed.

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- *Ready:* The transaction has been created during the selection phase and is ready to be processed.

  You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed.

- *Success:* The Mass Update process has successfully processed the transaction and performed the update.

- *Warning:* The transaction has been created during the selection phase and is ready to be processed. However, a conflict occurred during transaction creation. For the shown empolyee record number, the employee is eligibile for more than one additional population. The system has assigned the employee to the latest population.

  You can change this status to Cancel to cancel the transaction. Note, however, that this action is irreversible after it has been processed.

When you change transaction statuses and save the page, the system updates the status of the mass update definition accordingly. If all transactions for a mass update definition have a status of *Cancel* or *Success* and no transactions have a status of *Ready, Warning* or *Failure,* then the system changes the status of the mass update definition to Closed. The Mass Update process processes only transactions with a status of *Ready* or *Failure.* It does not process transactions with any other status.

Details Click to access the Transaction Details page, where you can view details of the mass update transaction and its execution log.

Execute Click this button for a row to process the corresponding mass update transaction online individually. You can process only transactions with a status of *Ready* or *Failure.* The system triggers the Transaction Processor to process the transaction. The Transaction Processor then updates the statuses of the transaction and the mass update definition. Note that processing individual transactions online is especially useful for troubleshooting.

Reviewing Mass Update Transaction Details

Access the Transaction Details page.

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Transaction Details page

Population Selection Criteria

Review the population selection criteria that the system used when generating the mass update transaction. This includes criteria for common changes and additional changes.

Eligibility

Review the date range for which the transaction is eligible for the mass update.

Messages and Exceptions

Review the messages and exceptions that the Transaction Processor generated for the mass update transaction during processing. The system displays in sequence the date and time of the last update in which the Transaction Processor generated the message or exception, the severity, and the description.

Performing Mass Updates

This section provides an overview of mass update processing and discusses how to run the Mass Update process.

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Understanding Mass Update Processing

Use the Execute Mass Updates component to run the Mass Update Application engine (AE) process (HR_MASS_UPD), which processes transactions for mass updates in batch. To run this batch means of performing the update phase of mass update processing. You can also perform the batch update phase of mass update processing online through the Manage Mass Updates component.

The Mass Update process (HR_MASS_UPD) uses the services that are related to the data that is slated for update (that is, for job data, it uses the JOB_DATA component) and retrieves the data for each person in the group. It then assigns the new values for the people and saves the change, triggering any business rules that apply to this component. It also creates an execution result record to trace the statuses of all modifications for all people.

To run the Mass Update process, use the Execute Mass Updates run control page to specify one or more Mass Update definitions for which you want to process mass updates in batch and the sequence in which you want the Mass Update process to handle transactions for these definitions. You also can define parallel processing parameters. Parallel processing enables you to run instances of the Mass Update process in parallel to improve performance.

When you run the Mass Update process (which is triggered by the Mass Update Manager), it calls the Transaction Processor for the set of transactions to process (transactions in pending status). The Mass Update process monitors the queue of mass update transactions that are pending processing and a list of running instances until no more transactions are in the queue or until the process reaches the maximum parallel processing values that you define on the run control page.

When you run the process with parallel processing, the Mass Update Manager activates the Execution Manager by means of the Mass Update Execution AE process (HR_MASS_EXE) and uses the parallel processing parameters that you specify on the run control page. The Mass Update Execution process first creates an instance (which is called spawning). The process then assigns a chunk of transactions to that instance based on the value that you specify in the Transactions per Instance field and submits that instance to PeopleTools Process Scheduler for processing. As long as the instance number is less than or equal to the value that you specify in the Maximum of Instances field, the process spawns another instance. The process repeats these steps until it reaches the maximum allowable number of instances. The Mass Update Execution process is a child process of the Mass Update process.

Note. PeopleTools provides load balancing options on the Server Definition page, navigation PeopleTools, Process Scheduler, Servers, Service Definition.

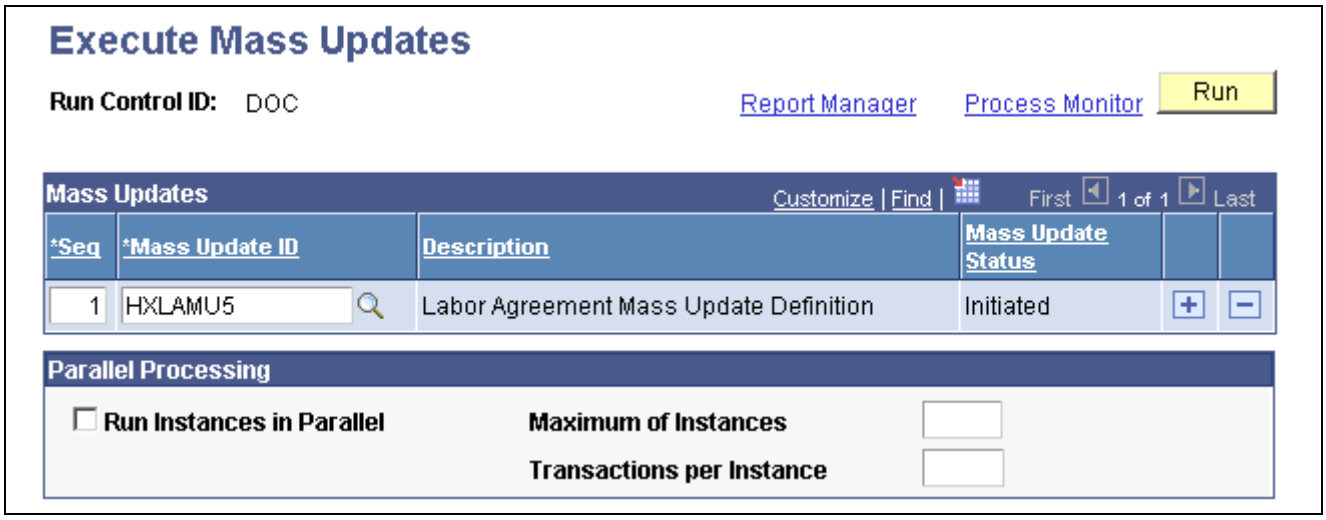
Page Used to Perform Mass Updates

Page Name	Object Name	Navigation	Usage
Execute Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Execute Mass Update	Run the Mass Update process.

Running the Mass Update Process

Access the Execute Mass Updates page.

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Execute Mass Updates page

Mass Updates

Use this group box to select the mass update definitions for which you want to process the mass update transactions.

Seq(sequence) Indicates the order in which the process performs the mass update. By default, the system sets the first row to *1* and automatically increments by 1 for each additional row.

Mass Update ID and **Description** Select the mass update definitions that you want to include in the processing. You can select only from the mass update definitions that are initiated or in progress. The system displays the description of the selected mass update definition.

Mass Update Status The system displays the status of the mass update definition.

Parallel Processing

Use this group box to specify parameters for parallel processing of mass update execution instances. Note that to improve performance, you can run Mass Update processes in parallel on different hardware with no additional configuration required.

Run Instances in Parallel Select to enable the process to run instances in parallel. The process uses the Execution Manager to generate and monitor subprocesses (called process instances) that run in parallel on the PeopleTools Process Scheduler.

Clear this check box to run the process on a single instance on PeopleTools Process Scheduler. The process in this case commits mass updates to the database after each transacion without intervals.

Maximum of Instances Enter the maximum number of instances that the process can generate and run in parallel. This option is available only when you have selected to run instances in parallel.

Transactions per Instance Enter the maximum number of transactions that the process can process per instance before creating a new instance. This option is available only when you have selected to run instances in parallel.

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Deleting Pending Mass Updates

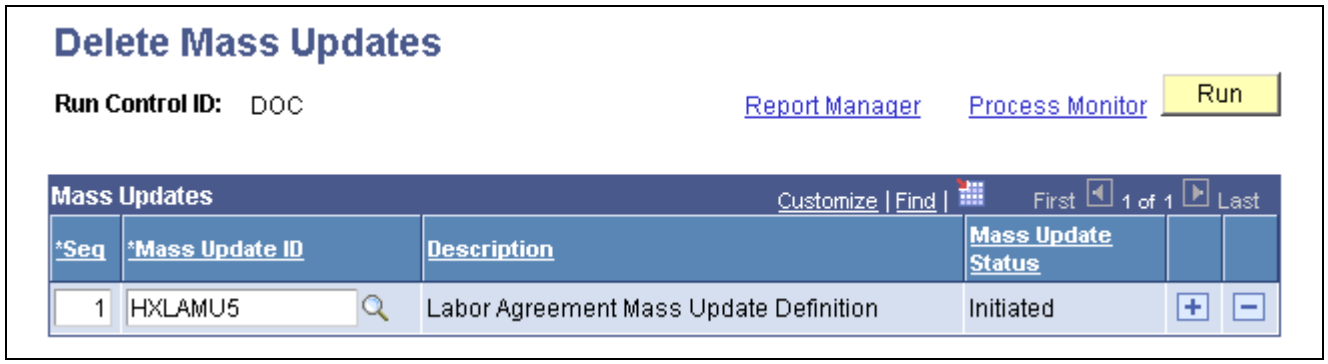
This section discusses how to delete mass updates.

Page Used to Delete Pending Mass Updates

Page Name	Object Name	Navigation	Usage
Delete Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Delete Mass Update	Delete mass update transactions that you have generated and which are pending processing.

Deleting Mass Updates

Access the Delete Mass Updates page.



Delete Mass Updates page

The Mass Update Manager triggers the Mass Update Delete Application Engine (AE) process (HR_MASS_DEL) to perform the transaction deletion. The Mass Update Delete process deletes the pending mass update transactions that you have generated through the Create Mass Updates component for the selected mass update definitions. The process also performs the necessary cleanup of the system tables.

Mass Updates

Use this group box to specify the mass update definitions for which you want to delete mass update transactions.

Seq(sequence) Specify the order in which you want the process to delete mass update transactions. By default, the system sets the first row to *1* and automatically increments by 1 each additional row.

Mass Update ID and **Description** Select the mass update defintion that contains the mass update transactions that you want to delete. The system displays the name of the mass update definition. You can select only from mass update defintions that are initiated or in progress.

Mass Update Status The system displays the status of the mass update definition.

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CHAPTER 28

Setting Up and Working with Approvals

This chapter provides an overview of approvals and discusses how to:

- Navigate approvals components.
- Register approval transactions.
- Link workflow transactions.
- Configure approval transactions.
- Set up approval process definitions.
- Define dynamic approvals.
- Define notification templates for approvals.
- Define users for approvals.
- Set up the notification and escalation manager.
- Set up security for approvals.
- Administer approvals.
- Generate an approvals audit report.
- Work with self-service approval transactions.

Understanding Approvals

Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. The term workflow refers to this process. To facilitate this type of multiuser process, PeopleSoft Enterprise provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.

Approvals Terminology

The following terms are important to the understanding of the approvals functionality and are used throughout the chapter:

Approval Process	A generic term referencing the business process of how a particular transaction is routed for approval within an organization.
Approval Workflow Engine (AWE)	Engine that provides capabilities for the creation, execution, and management of approval processes.

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Approval Process Definition	The definition of an approval process within the Approval Workflow Engine. The definition may contain stages, paths, steps, varying hierarchies, and criteria, among other configurable parameters.
Approval Process Definition ID (Process ID)	The ID associated with a particular approval process definition in the Approval Workflow Engine. Each transaction registered with the Approval Workflow Engine must have at least one Process ID defined.
Request	A transaction that uses the Approval Workflow Engine for approval processing. For example, a promotion, transfer time off request, job requisition, and so on.
Approval Step or **Step**	A step has one or more approvers, whose actions are tracked. A step can be configured to require a set number of approvers to act, and has criteria which govern whether or not the step is to be active for the request under consideration. Steps are sequential.
Approval Path or **Path**	A path is a sequence of steps. For example, step two routes to its approvers only after step one is approved. A given approval could actually go through multiple approval paths based on some decisions. Paths can be mutually exclusive or parallel. They all converge at the final approval.
Approval Stage or **Stage**	A stage is a collection of approval paths. Approval stages come in a single sequence (stage 1, stage 2, and so on). An approval stage runs when it's immediately preceding stage finishes. When an approval stage runs, all the approval paths within it run simultaneously. The approval stage is considered complete when all approval paths within it have finished.
Approver	The person who has been determined to have the authority to approve (deny, pushback, and so on) a request.
Requester and **Originator**	The requester is the person for whom you want the Approval Workflow Engine to treat as the initiator of a request. In most cases the requester and originator are the same person. However, when using the Delegation feature the requester and originator of a request can vary. For example, if a manger delegates a transaction to a direct report and that direct report submits the transaction, the direct report is the originator and the manager is the requester.
Subject	The person for whom a transaction is being processed. For example, Karen submits to her boss, Russell, a promotion request for one of her employees, Robbin. Karen is the requester (originator), Robbin is the subject, and Russell is the approver.
Supervisor or **Manager**	The person who has management responsibilities for the requester or for an approver, as defined in your direct report settings during implementation.
Approvals Administrator or **AWE Administrator**	The system administrator who is responsible for configuring, managing, troubleshooting, and maintaining approvals.
Event or **Approval Event**	The Approval Workflow engine is event driven. Events are typically actions that can be taken by a user in the system, actions such as submit, approve, deny, push back, and so on.
Status or **Approval Status**	Statuses typically represent the overall state a transaction is in, such as pending, on hold, approved, denied, terminated, and so on.
Approval Criteria	Rules used to decide whether or not approval is required. Approval criteria fields and dimensions are data elements and attributes that are used to define the approval criteria.

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Approval Hierarchy	The organizational hierarchy that models the actual approvals required by a transaction type. (for example, approval hierarchy by supervisor or department).
User List	Collection of users (Peoplesoft Operator IDs) expressed as the result of an SQL statement, Peoplesoft role, or Peoplesoft Application Class.
Alternate Approver or **Alternate User ID**	A user can have another user in the system as his or her alternate approver for a specified period of time. This is set on the Workflow page of the User Profile component within PeopleTools security.
Delegation	Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Approval Workflow Engine

The Approval Workflow Engine (AWE) is the engine that provides the framework and capabilities for creating, running, and managing approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

Approval workflows are triggered when requesters submit a transaction, such as a promotion. The application hands the transaction over to the Approval Workflow Engine, which finds the appropriate approval process definition and launches the approval workflow. A set of approvers then carry out tasks related to the transaction.

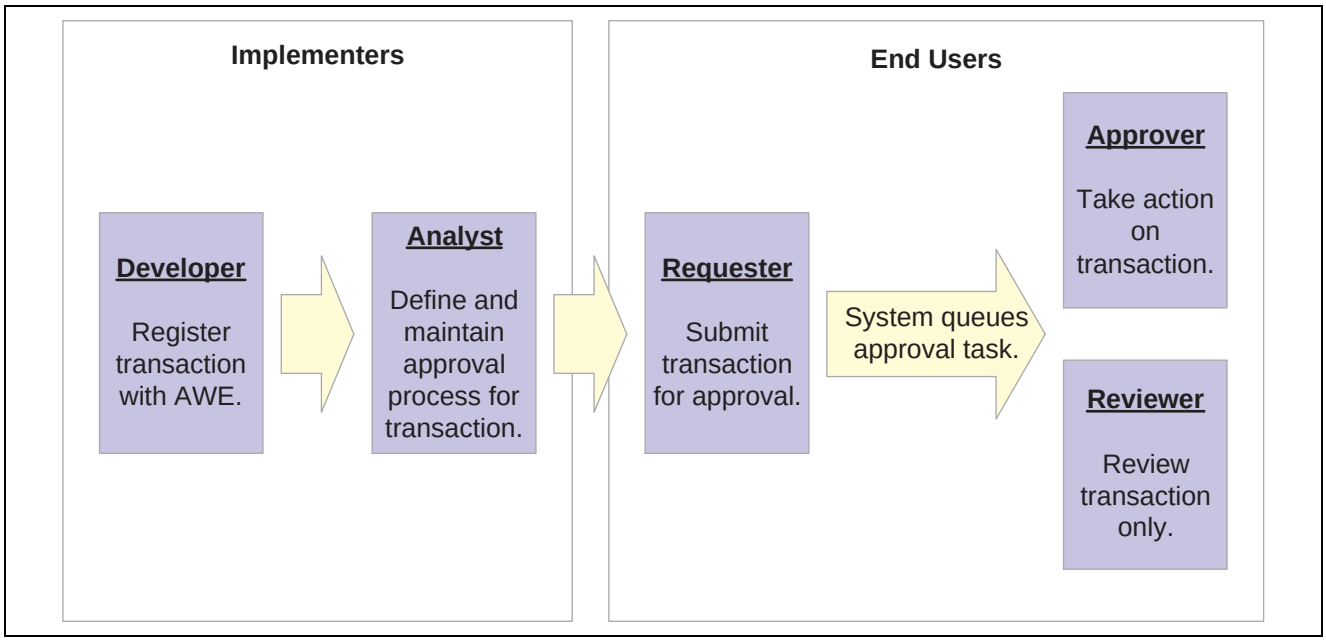
The Approval Workflow Engine enables three levels of users to develop, configure, and use transaction approvals that meet their organizational requirements. For example, the process of submitting a promotion and getting it approved requires defining who will approve the promotion, the order in which they will approve it, and how it will be routed to approvers.

In contrast to the standard PeopleSoft workflow, which requires advanced technical skills in PeopleSoft PeopleTools to create and maintain, approval workflow provides an alternative workflow that is much easier to create, configure, and maintain. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules.

Approvals Business Process Flow

This diagram details the business process flow of implementing and using approvals functionality. It shows tasks that application developers, business analysts, and end users perform in conjunction with approval workflow.

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Approval business process flow

Within the approvals business process flow:

- Application developers register information with the Approval Workflow Engine by using the Register Transactions page, where they register an application with the engine and describe its components, event handler, and records.

  As part of defining the registry, application developers create a record and table in which to store cross-reference information and set up notification templates for events. This definition determines the pending approval workflow process and tells an application which transaction is being approved or denied. Application developers also link the transaction component.

  Note.

  PeopleSoft Enterprise Human Resources delivers many transactions that are registered with the Approval Workflow Engine. *Do not* modify these transaction registry definitions because the system requires their setup to be as delivered. For a complete list of delivered transaction registry definitions, access the Register Transactions component by navigating to Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Register Transactions.

- Functional business analysts define the approval process definition for an application transaction.

  The approval process definition includes setting up approval stages, paths, steps, recipients, and notifications for each approval process ID. Analysts identify the approval transaction registry entry on which to base approval process definitions and then define the details of the process.

  Functional business analysts also define or review user list definitions, email template definitions, and transaction configuration settings.

  After completing the setup, functional business analysts are responsible for maintaining and troubleshooting approval process transactions.

- Requesters submit a transaction for approval.

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This action launches the approval process. The Approval Workflow Engine reads the approval process definition and queues the transaction for approvers.

- The system queues an approval task to an approver or reviewer using email notification, Worklist entry, or both.

  The URL encoded in the Worklist entry points to the corresponding approval component.

- Approvers take actions on transactions.

  They can approve or deny requests, monitor transaction statuses, and audit approvals. When an error or violation of criteria or rules occurs during the approval process, the system notifies the approvals administrator, who interacts to resolve the issue.

- Reviewers view the transaction.

Approvals Design

After an approval process is defined, validated, and made active, the system can process a transaction for approval. Each PeopleSoft application typically has a top-level database record that distinguishes one transaction from the next. For example, the top-level record for eProfile Manager Desktop application's promotion transactions is HR_PROMOTE_DAT. These top-level records are called header records. When a transaction is submitted for approval, the Approval Workflow Engine combines the approval process definition with the header record instance and line records, if line level approval is configured, to create a unique approval process instance.

Approvals use two levels of processing: header and line. Business analysts set up the approval process definition that determines the flow of the approval at both levels. The approval process definition consists of:

- Stages

  A stage is one part of an approval process that can contain multiple parallel paths but must be at the same header or line record level. The system executes stages in sequence where one must complete before the next one begins. A stage can be at either a header level or at a line level. Stages at a line level make it possible for approvers to sign off separately on individual line items for a single transaction. The workflow engine sees each header and each line as individual pieces. A line is a child of the header. A header stage acts on the unique header while a line stage acts on each line. A stage consists of one or more paths.

- Paths

  A path contains a sequence of steps. Within a stage, paths execute in parallel. Path entry criteria determines whether or not a path executes for a given transaction or transaction line.

- Steps

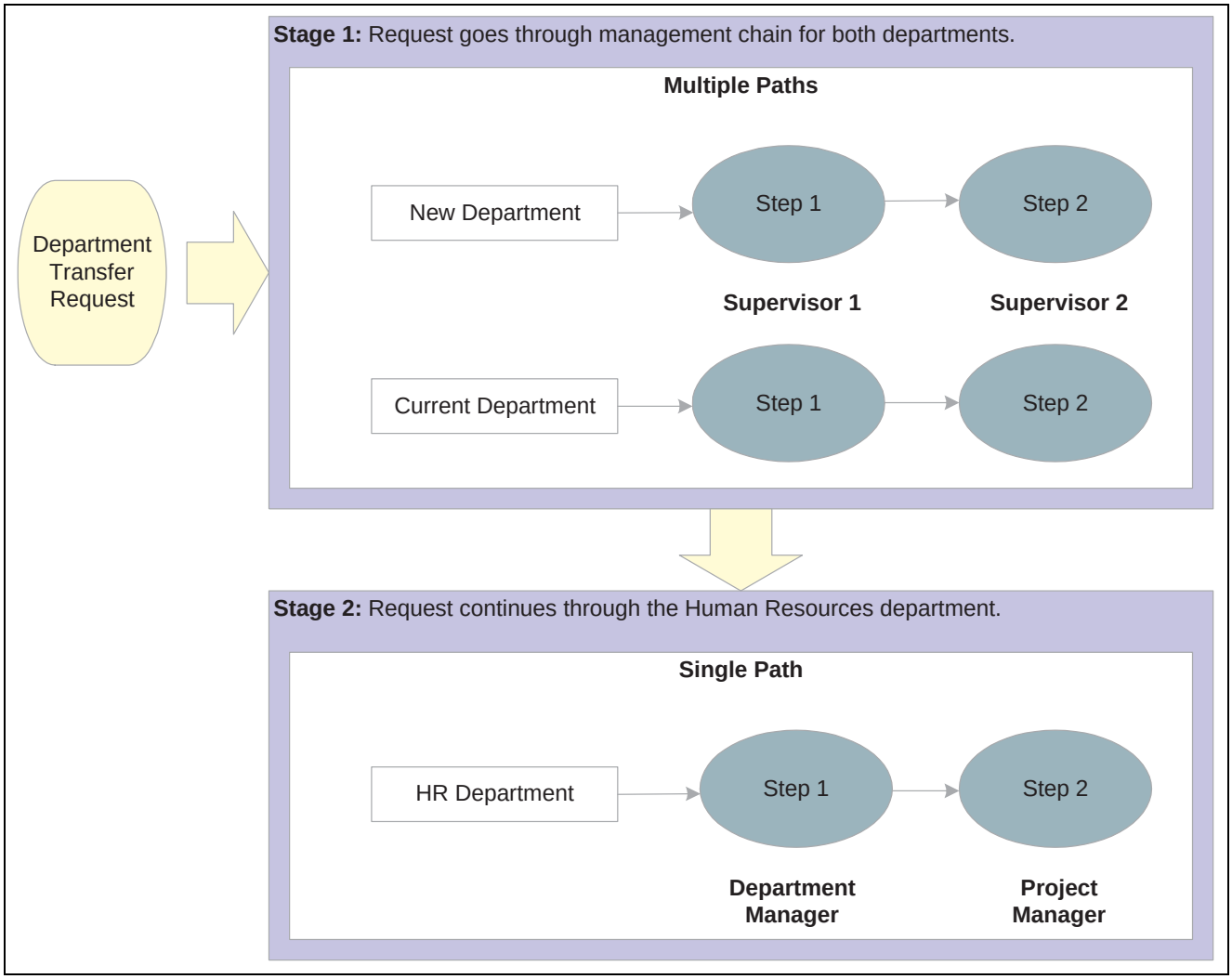
  A step represents one or more approvers or reviewers. Steps within a path execute in sequence. Separate criteria for each step determines whether or not that step executes. Each step can also have a set of reviewers. Reviewers are notified about transactions that are pending approval by email, through the Worklist, or both. However, the workflow proceeds without waiting for reviewers to act.

  The system notifies participants by using email, Worklist, or both, of pending approval steps, which can require one, all, or a fixed number of approvers. You can specify approvers by roles, queries, SQL objects, or by using custom application classes. Once the required number of approvers have approved a step, the approval workflow advances to the next step. If the Approval Workflow Engine has no further steps, it advances to the next stage.

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Note. While the configuration may require multiple approvers to approve a step before it advances, any single approver can deny a step. The moment an approver denies a step, the transaction stops moving forward in the approval process. If the transaction is at a line level, other lines will continue to move forward. If the denial is at a header level, the approval process terminates, and the entire transaction is denied.

This diagram illustrates how the approval process uses stages, paths, and steps for routing approvals:



The approval process

The above diagram is an example of request to transfer an employee from one department to another, illustrating the flow of the request through the various stages, paths, and steps of an approval process definition.

Header and Line-Level Approvals

Many PeopleSoft transactions have a top-level record (known as a header) with keys that uniquely identify a single transaction in an application. Then, these transactions can have children records (line-level records) of this header record. Note that line-level records *do not* exist for all transactions. PeopleSoft Enterprise Human Resources does not deliver any transactions with line-level processing because the transactions require no line-level records.

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The approval process uses an application's header keys to correlate approval processes and application transactions. For example, when you open an application transaction, the Approval Workflow Engine enables you to submit the request for approval only if you haven't already submitted it. This check is possible because the system correlates the application header keys with the approval process instance keys.

When you need to track an approval status at a lower level within a transaction, an analyst can configure the approval process so that different line-items in the same request follow different routes. In such cases, the Approval Workflow Engine splits the workflow into constituent line items, and enables analysts to configure the approval process so that different line items in the same request follow different routes. These lines of the workflow are still part of the same request, however, and should be tracked as such.

You can deny some lines of a transaction and approve others, making line-level approvals independent for each line. For example, a transaction can contain multiple lines, and you might want to use special approvers for certain items. You can add specialized approvers to approve transactions that are in their area of expertise.

An approval process might have mixed header and line-level approval routings. For example, department managers might exercise control over the request as a whole, while other approvers still examine only those line-items which fall within their expertise. Final approval requires both types of approvers to sign off on the transaction.

Additional Approvals Features

Using a combination of features, you can create rules for different types of approvals. This section discusses:

- Ad hoc path approval
- Ad hoc review
- Self-approval
- Route to requester
- Skip prior path
- Auto approval
- Alternate approvers
- Push back
- Approval comments

Ad Hoc Path Approval

During the approval process, approvers can add other approvers or reviewers to the current or a later stage of the approval process.

For example, if a manager wants approval from the requester's previous manager, she can add the manager as an approver. This action is called *ad hoc approval,* and it only applies to the approval instance in which the addition occurs and does not affect the underlying approval process definition used for other requests.

Ad Hoc Review

Ad hoc reviewers are users that an approver or requester would like to review a transaction. Ad hoc reviewers are notified and provided with a link in a Worklist entry or email to the transaction, if the process is so configured. Reviewers do not have authority to take action on a request.

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Self-Approval

In some instances, a requester can also be an approver. If requesters approve their own transactions, it's called self-approval. A check box setting enables self-approval. If enabled, the requester's approval is assumed, and the process continues. However, you can establish criteria that helps control the requester's approval authority.

For example, you can place a limit on the type of transaction that is eligible for self-approval, such as a promotion or pay rate change request.

Route to Requester

Route to requester is a feature that informs the system that an approval should be sent to a requester under certain circumstances.

For example, if a vice president submits a promotion request on behalf of a direct report at the supervisor level, the system will send a notification to the supervisor for whom the request was made. The supervisor remains part of the approval process.

Skip Prior Path

When skip prior to requester is enabled, the system begins the approval flow at whatever step in which the requester is an acknowledged approver.

For example, if a vice president submits a job requisition for her department, the system skips application approval steps leading up to the step for which the vice president is an acknowledged approver.

Auto Approval

When auto approval is enabled, the system remembers an approver's action for that process at the header- or line-level, and applies the same action automatically for any subsequent appearance in the approval workflow routing.

Alternate Approvers

Alternate workflow approvers are users who are assigned to receive emails and Worklist notifications for the primary approver when the primary approver is not available. When you identify an alternate approver, you enter a date range during which you want the alternate to fill in. The system determines if the alternate is in place for the date range. First, the system determines whether the transaction has been delegated. If then system does not encounter delegation, then the system determines whether alternate users are defined in the User Profile. Navigate to PeopleTools, Security, User Profiles, User Profile.

Push Back

Push back takes a currently pending step out of pending status and requeues the previous step to its approvers. The meaning of push back is that the approver is questioning the prior step's approval and is requesting clarification. Push back is only possible within a path, therefore, the first step of a path cannot push back.

Note. The push back feature ignores auto self-approval.

Approval Comments

Requesters can add comments to transactions, and approvers can associate their comments with the approval process rather than the request transaction directly. The Administer Approvals component provides a mechanism for associating comments with a particular approval process instance, which is tied to a particular application transaction. Approvers can view comments added by another approver, but they cannot change previous comments.

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Sources of Information

The Approval Workflow Engine is a common component that is shared across multiple PeopleSoft Enterprise applications both within HRMS and other product families. For the HRMS product family, you'll find documentation pertaining to the Approval Workflow Engine in various locations:

- This present chapter describes the common Approval Workflow Engine functionality that applies to all product families as well as the setup steps and details that are specific to the HRMS product family.
- The *Enterprise HCM 9.0 Approval Workflow Engine* red paper, which is posted on the PeopleSoft Customer Connection website, is a step-by-step guideline for application developers on how to integrate applications with the Approval Workflow Engine. The red paper describes all object construction steps in detail and provides additional information on the setup within the application pages.
- Application-specific HRMS PeopleBooks (such as the *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*) expand on all of the above texts by providing approval workflow details that relate to delivered business processes.

Before implementing, you should read all relevant sources of information to gain a complete understanding of how the pieces fit together.

Implemention of HRMS Transactions for Approval Workflow

PeopleSoft delivers many approval transactions that are already configured to work with the Approval Workflow Engine. For delivered transactions, you should review the delivered transaction data within the application pages to ensure that the data fits your business processes.

To review delivered HRMS transactions for use with the Approval Workflow Engine:

1. Register the approval transaction in the Approval Workflow Engine through the Register Transactions page.

   See Chapter 28, "Setting Up and Working with Approvals," Registering Approval Transactions, page 635.

2. Link Human Resources self-service transactions to the Approval Workflow Engine through the Workflow Transactions page.

   See Chapter 28, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 641.

3. Set up the configuration options for the approval transaction on the Configure Transactions page.

   See Chapter 28, "Setting Up and Working with Approvals," Configuring Approval Transactions, page 645.

4. Set up the approval process definition through the Setup Process Definitions component.

   See Chapter 28, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions, page 650.

   To set up the approval process definition:

   a. Define the stages, paths, and steps of the approval process definitions on the Setup Process Definitions page.

   b. Define criteria for workflow approval processes at the definition, path, and step level on the Criteria Definition page, which is accessed through links on the Setup Process Definitions page.

   c. Set up path details for workflow approval processes on the Approval Path Definition page.

   d. Define step details for approval workflow processes on the Approval Step Definition page.

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e. Define dynamic approvals through various components.

See Chapter 28, "Setting Up and Working with Approvals," Defining Dynamic Approvals, page 667.

5. Create email templates for the approval transaction on the Generic Template Definition page.

See Chapter 28, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals, page 672.

6. Maintain user list definitions for the approval transaction on the User List Definition page.

See Chapter 28, "Setting Up and Working with Approvals," Defining Users for Approvals, page 673.

7. Set up the Notification and Escalation Manager.

See Chapter 28, "Setting Up and Working with Approvals," Setting Up the Notification and Escalation Manager, page 679.

8. Set up the appropriate permission lists, roles, and web libraries through PeopleTools security components.

See Chapter 28, "Setting Up and Working with Approvals," Setting Up Security for Approvals, page 681.

If you need to implement other transactions for use with the Approval Workflow Engine besides the delivered transactions, you must complete additional implementation steps. These steps include those involving object construction within PeopleTools Application Designer and those involving setup within application pages. For technical details on how to implement additional approval transactions, see the *Enterprise HCM 9.0 Approval Workflow Engine* red paper, which is posted to the PeopleSoft Customer Connection website.

See PeopleSoft Customer Connection, *Enterprise HCM 9.0 Approval Workflow Engine*

Navigating Approvals Components

PeopleSoft Enterprise HRMS provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise HRMS custom navigation pages, PeopleSoft provides menu navigation and standard navigation pages.

This section discusses how to use the custom navigation pages to navigate in the components for approvals functionality.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate Approvals Components

This table lists the custom navigation pages that is used to navigate in the setup and administrative components for approvals functionality:

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Page Name	Navigation	Usage
Approvals Setup Center	Set up HRMS, Common Definitions, Approvals, Approvals Setup Center	Approval administrators and implementers can use the links on this page to access the components necessary to register and set up transactions for the Approval Workflow Engine for PeopleSoft Enterprise HRMS.
Approvals and Delegation	Workforce Administration, Self-Service Transactions, Approvals and Delegation	Approval administrators can use the links on this page to access the components necessary to monitor and troubleshoot approval transactions and to maintain delegation and for PeopleSoft Enterprise HRMS.

Registering Approval Transactions

This section provides an overview on the approval transaction registry, lists prerequisites, and discusses how to register approval transactions.

Understanding the Approval Transaction Registry

The approval transaction registry is the interface that developers use to register a PeopleSoft Enterprise application's transaction with the Approval Workflow Engine. Using the Register Transactions page, developers define how the system interacts with portions of the application that have been defined for approvals. Transactions that require approvals are candidates for being linked to the Approval Workflow Engine. Developers can use the Register Transactions page to link the components, event handler, records, and classes that they created through PeopleTools Application Designer for an application transaction (such as a job offer or employee absence request) into the approval process. The transaction definition itself is the metadata which describes the transaction make up to the Approval Workflow Engine. In some cases, you might add a transaction or make changes to a transaction. Application developers can register the main records and components that make up the transaction, then functional business analysts can select the approval transaction on which to base the approval process definition.

Delivered Approval Transaction Process IDs

PeopleSoft Enterprise HRMS delivers several approval transaction process identifiers that are common across applications for use with the Approval Workflow Engine. The system uses these process IDs specifically for registering delegation-related transactions with the Approval Workflow Engine so that the approval framework, which handles the requests, can communicate back and forth with the delegations framework.

When registering approval transactions with the Approval Workflow Engine on the Register Transactions page, you must specify a header record for the approval transaction. As part of their definition, each of these delegation-related Process IDs include the HCDL_DELEGATION header record and select fields. When you are configuring these Process IDs in the Configure Transactions component, you can use this header record and any of the listed fields to define additional criteria for the processing of the approval transaction. You define this additional criteria on the Criteria Definition page, which is accessible through the Configure Transactions component. Fields not listed on the Register Transactions component are not available for the criteria definition.

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This table lists the approval transaction process IDs that PeopleSoft Enterprise HRMS applications deliver:

Process ID	Description
AbsenceManagement	Absence Management
Absence_Mgmt_ByDeptManager	Absence Management By Department Manager
Absence_Mgmt_ByPosMgmt	Absence Management By Position Management
Absence_Mgmt_ByPosnDeptMgr	Absence Management By Position - Department Manager
Absence_Mgmt_ByPosnSupervisor	Absence Management By Position - Supervisor
Absence_Mgmt_BySupervisorId	Absence Management By Supervisor ID
Delegation	Defines delegation transactions for the Approval Workflow Engine.
DelegationBatch	Defines batch delegation transactions for the Approval Workflow Engine.
DelegationNotifyAdmin	Defines delegation transactions for the Approval Workflow Engine where the administrator gets notified.
DelegationRevoke	Defines revoked delegation transactions for the Approval Workflow Engine.
JPMNonpersonProfiles	Non-person Profile
JPMPersonProfiles	Person Profile
JobOffer	Job Offer
JobOpening	Job Opening
PerformanceManagement	Appraisal Transaction Approval
PromoteEmployee	Promotion Transaction Approval
ReportingChgEmployee	Reporting Change Transaction Approval
TransferEmployee	Transfer Transaction Approval

Note. Refer to the corresponding documentation in your application-specific PeopleBooks for information about delivered approval transaction process IDs that are specific to an application.

Note. Any PeopleSoft delivered approvals will already have the Approval Transaction Registry populated. No additional configuration is typically needed.

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Prerequisites

Before registering approval transactions, you must create all of the required objects in PeopleTools Application Designer.

To complete the prerequisites for defining the approval transaction registry:

- Create a Transaction Handler Application class that extends an approved event handler class delivered by approval workflow.
- Create notification templates for the events, which include approval and denial for header and line levels.
- Create transaction data sources, as needed.
- Create views on transaction tables that will serve as criteria sources.
- Create a view to serve as a source for ad hoc users.
- Create a view to serve as a source for approver contact information.

See Also

Chapter 28, "Setting Up and Working with Approvals," Implemention of HRMS Transactions for Approval Workflow, page 633

Page Used to Register Approval Transactions

Page Name	Object Name	Navigation	Usage
Register Transactions	PTAF_TXN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Register Transactions	Register the approval transaction in the Approval Workflow Engine by creating a unique approval process identifier for each approval transaction. The transaction definition is the metadata that describes the transaction setup to the Approval Workflow Engine.

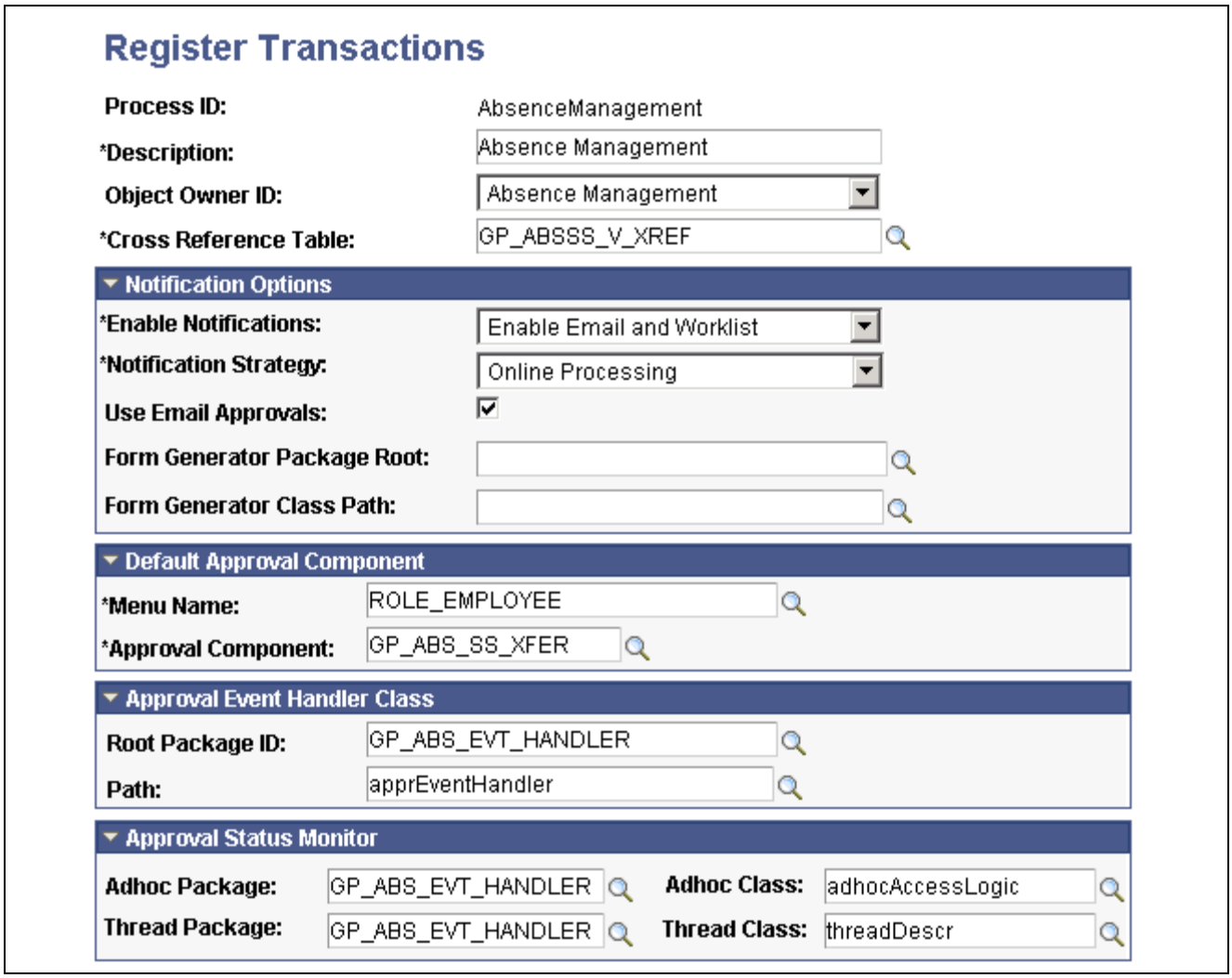
See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

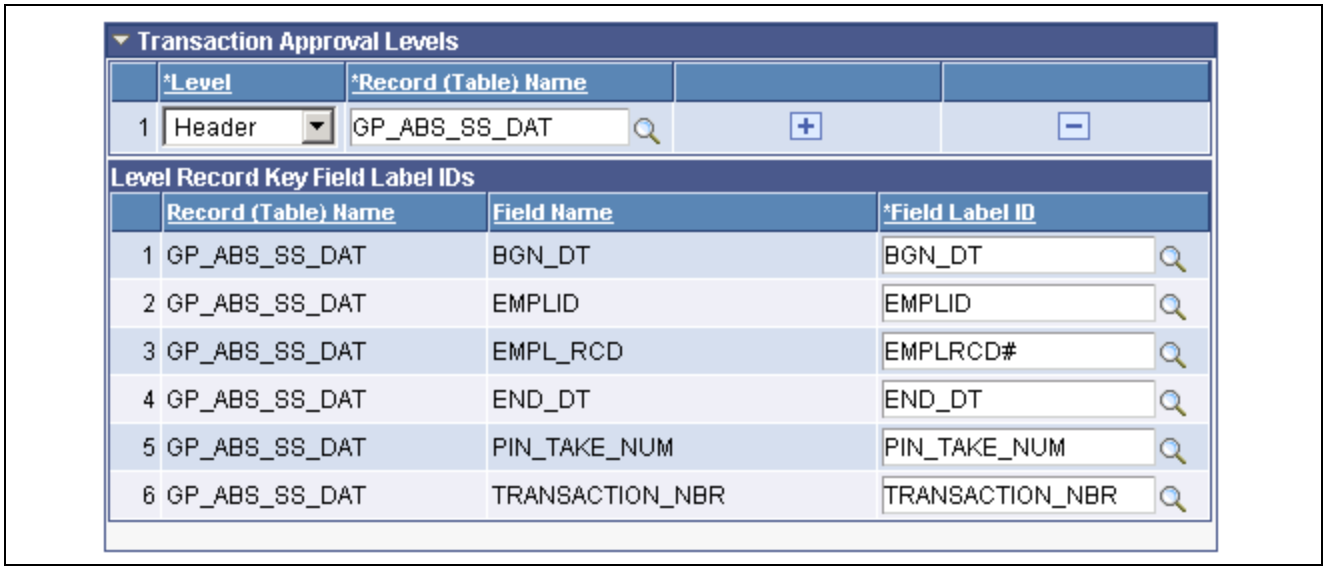
Registering Approval Transactions

Access the Register Transactions page.

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Register Transactions page (1 of 2)



Register Transactions page (2 of 2)

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Process ID Enter a name the system uses to track this approval process for a transaction. You can also enter a description for the approval process.

Object Owner ID Select the PeopleSoft application to which this object belongs.

Cross Reference Table Select the table used to manages application specific transaction records and associate them with the approval process run time instances. Each time a request launches an approval process, the system tracks the process by the header and line-level records of the application. To relate the approval process instance to the transaction instance, the cross-reference table holds the correspondence.

For a given application transaction record, this cross-reference information helps you determine the pending approval process and to define to the application which transaction is being approved or denied.

Application developers must create a record containing the applications keys, and include an Approval Workflow Engine-supplied subrecord. Developers must also build the underlying table.

Notification Options

Identify whether you will be using email or worklist notification, or both.

Enable Notifications Determine what type of notifications you will use. The options include:

- *Disable Email and Worklist*
- *Email Notification Only*
- *Enable Email and Worklist*
- *Worklist Notification Only*

Notification Strategy It allows the email to be processed immediately *(Online Processing)* or offline *(Offline Processing)* through NEM (Notification and Escalation Manager.)

Use Email Approvals Defines that you are going to use email approvals with workflow.

Form Generator Package Root This package root reads the threads provided by the Form Generator Class, and creates a form from an existing email collaboration definition.

Form Generator Class Path Calls the From Generator Class which receives a list of threads to be approved and a language code. This class returns a runtime class, which will add the appropriate recipients and send the emails.

Default Approval Component

Identifies the default component that users should go to when selecting a worklist entry.

Menu Name Select the menu name that contains the component you want to register for the Worklist.

Approval Component Select the component on which the approval is going to be based.

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Approval Event Handler Class

Use this section to define the application class used to monitor events for this transaction. Each time an event occurs, the Approval Workflow Engine notifies the application. For applications to receive the notifications, application developers must extend the event handler class, ApprovalEventHandler.

When a transaction results in an action from the Approval Workflow Engine, the event handler class you specify determines how to proceed with the transaction.

The event handler base class defines the handler methods that you can override by extending classes. The extending class must have a no-argument constructor, since the system instantiates the class with no arguments.

This table explains the various event handler methods for which the system passes arguments to provide the specific context for each event, and gives examples of how an application, in this case PeopleSoft Enterprise HRMS, may act:

Event	Parameters	Possible Application Actions
PROCESS_ LAUNCHED	1. Header record 2. Approval Process Instance	• Disable edits of the application transaction. • Display status information.
HEADER_DENIED	Header record	• Delete transaction. • Disable resubmission. • Log the event on the transaction, possibly highlighting previous denial if the system allows resubmission.
LINE_DENIED	Line-level record	Deduct the line amount from the header, and delete or otherwise deactivate the line item.
HEADER_ APPROVED	Header record	• If job requisition is approved, send offer letter. • If time off request is approved, update an employee's vacation balance. • If the status value in the Approval Workflow Engine is *Pending,* change the status to *Awaiting Approval.*
LINE_APPROVED	Line level record	If the request for an employee is approved and the requests for the rest of the employees are denied in the same time-off request transaction, update the one employee's PTO balance.
PROCESS_ TERMINATED	Header record	Log the event on the application, possibly highlighting changes since the previous submission. This might be useful for approvers who acted on the previous submission of this request.
ALL_LINES_ PROCESSED	Header record	**Note.** The system calls this method only if the last stage is at the line-level, and the analyst has configured the process to trigger LINE_APPROVED end calls as individual lines are approved. The action the system takes depends on how the application developer defines the line sourcing. If the lines are sourced as they are approved, then nothing has to be done when all the lines are processed. This event is distinct from HEADER_APPROVED, and having a distinct notification simplifies the process.

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Root Package ID Select the parent application class through which events are exposed. This defines the action to take based on events.

Path Select a path that uses a specific class within the root package.

See *PeopleSoft Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide*

Approval Status Monitor

Use this section to control how the system processes ad hoc approvers. Any approver can add or remove ad hoc approvers and reviewers.

Adhoc Package Select the ad hoc application class package that you want to use for ad hoc approvals.

Adhoc Class Select the ad hoc application class path. Adding approvers and reviewers is handled by the class you define here. If no class is specified, then the system default class is used. If the transaction has further restrictions an application developer needs to create a class that will be defined here.

Thread Package The package here defines how the transaction details are displayed in the system in the status monitor. Behind the scene approvals are defined with a sequence number. This allows for a user friendly display.

Thread Class Enter the specific class within the thread description package and the worklist description that sets the display details.

Transaction Approval Levels

Use this section to define if the transaction is to be approved at the header or line level and what level the application supports.

Level Select *Header* or *Line*, which determines the levels that are enabled by the application for approvals. The first row will always be the header level. In the majority of cases, you need only define a header level.

Record (Table) Name Select the database table that represents this transaction level.

Level Record Key Field Label IDs

Use this section to define the fields that are used for the transaction. All key Field Names appear for each Record (Table) Name that is listed. You can define criteria against only the fields that are defined here.

Field Label ID Select a Field Label ID to be used for the transaction.

Linking Workflow Transactions

This section discusses how to link workflow transactions.

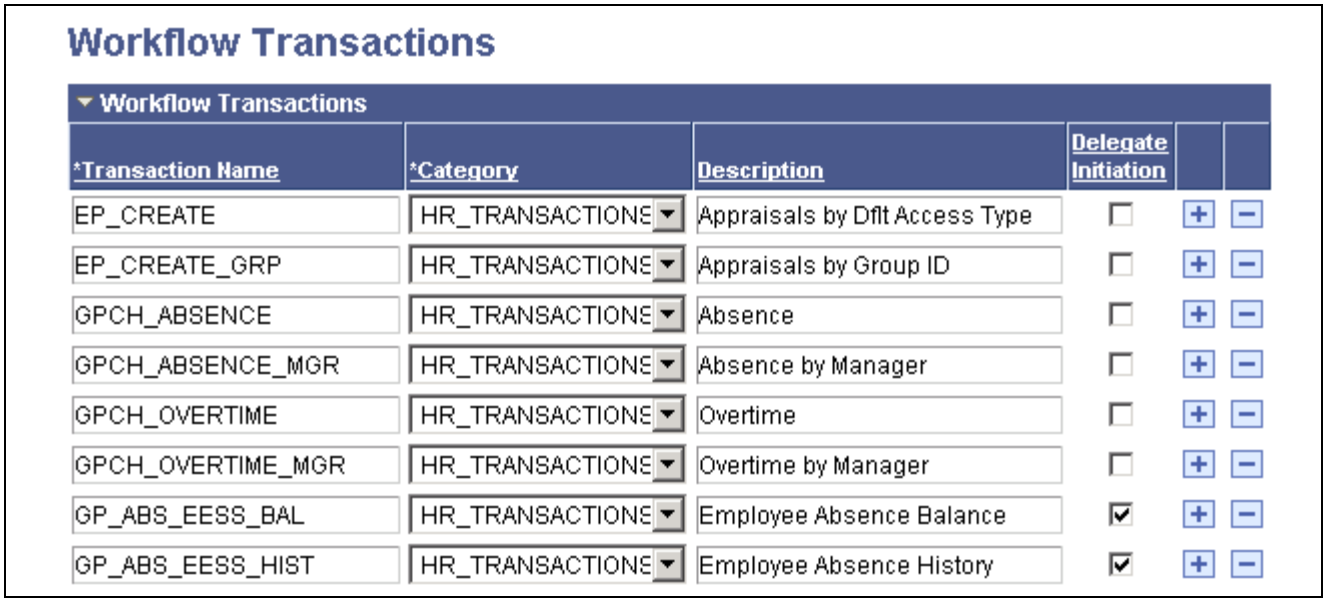
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Page Used to Link Workflow Transactions

Page Name	Object Name	Navigation	Usage
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Workflow Transactions	Link self-service transactions to the appropriate approval functionality, either the Approval Workflow Engine or the existing approval workflow functionality from previous releases. For transactions that use the Approval Workflow Engine, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Linking Workflow Transactions

Access the Workflow Transactions page.



Workflow Transactions page (Workflow Transactions grid)

The Workflow Transactions grid and the Approval Workflow Engine (AWE) and Delegation Transactions grid are mutually exclusive. You cannot register the same transaction in both grids. If attempted, the system displays an error, and you must delete one of your entries before saving the page.

Workflow Transactions

Use the Workflow Transactions grid to register self-service transactions that use existing workflow configuration from a previous release. For example, if the self-service transaction is currently configured to update core records upon final approval via a component interface, you can list the transaction the Workflow Transactions grid so that you can still leverage these configuration values.

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Transaction Name Enter the name of the self-service transaction in either one grid or the other, not both.

Category Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page.

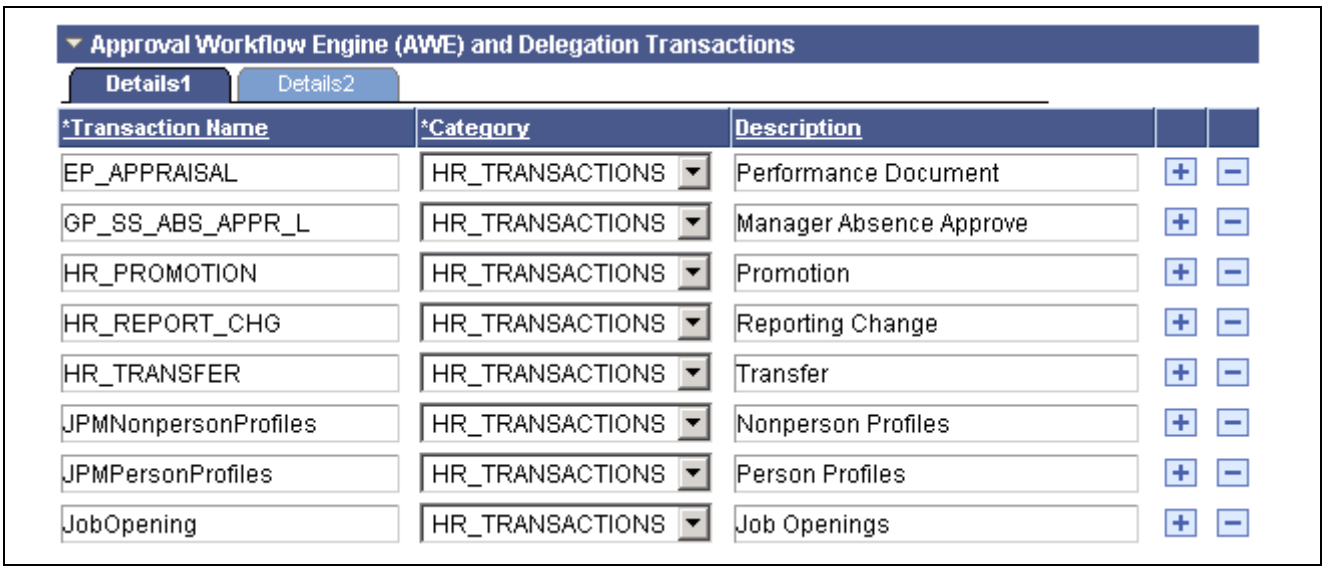
Description Enter a description of the self-service transaction.

Delegation Initiation Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses existing approvals configuration from a previous release. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.

Approval Workflow Engine (AWE) and Delegation Transactions

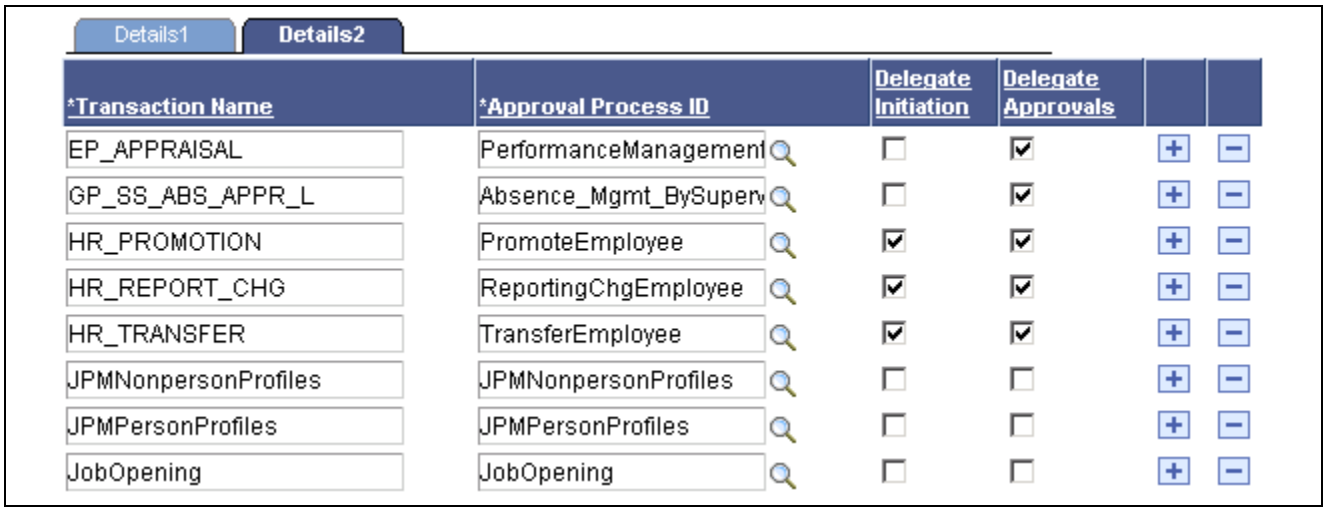
Use the Approval Workflow Engine (AWE) and Delegation Transactions grid to register self-service transactions that use the Approval Workflow Engine framework and Delegation framework. The data that you enter into this grid links the transaction name and accompanying tables for HRMS self-service transactions to the approval process IDs that you create for these transactions on the Register Transactions page as part of the Approval Workflow Engine setup.

Note. You can only list a particular transaction once. You cannot assign the same Approval Workflow Engine transaction to multiple HR_TRANSACTIONS because this violates Delegation processing requirements.



Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions - Details 1)

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Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions - Details 2)

Transaction Name Enter the name of the self-service transaction in either one grid or the other, not both.

Category Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page.

Description Enter a description of the self-service transaction.

Approval Process ID When implementing the Approval Workflow Engine framework, you define a unique transaction registry ID, called a process ID, for each of your HRMS self-service transactions on the Register Transactions page. Select the approval process ID that you have defined for this self-service transaction. By creating this link between the self-service transactions and the Approval Workflow Engine, the self-service transactions can dynamically retrieve this approval process ID by transaction name and thus invoke the Approval Workflow Engine framework. The Approval Workflow Engine framework requires this parameter during processing.

Delegation Initiation Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses the Approval Workflow Engine framework. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.

Delegate Approvals Select to enable delegation of transaction approval for the corresponding self-service transaction. The transaction then becomes available for configuration as an approval-type delegation transaction. This functionality is available only for transactions that you register with the Approval Workflow Engine framework in the lower grid.

If you select both the Delegation Initiation and the Delegate Approvals check boxes, you can configure the transaction for delegation of initiations and approvals. Configure delegation transactions on the Configure Delegation Transaction page.

See Also

Chapter 29, “Setting Up and Working with Delegation,” page 695

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Configuring Approval Transactions

This section discusses how to configure approval transactions.

Understanding Approval Transaction Configuration

Use the Configure Transactions component to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions. The events for which the system sends notifications include:

- Launch of the approval process on a transaction.
- Queue of approval step to an approver.
- Queue of a review step to a reviewer.
- Denial of a line or header.
- Approval of a line or header.
- Completion of the approval process.

Recipients of notifications include requesters, approvers, and reviewers, who can receive their notifications through either Worklist entries or email notification. When using email notifications, you must create email templates.

Page Used to Configure Approval Transactions

Page Name	Object Name	Navigation	Usage
Configure Transactions	PTAF_TXN_NOTIFY	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Configure Transactions	Configure how the system uses the particular implementation of approval triggers by configuring all the events and notifications associated with your approval process IDs.

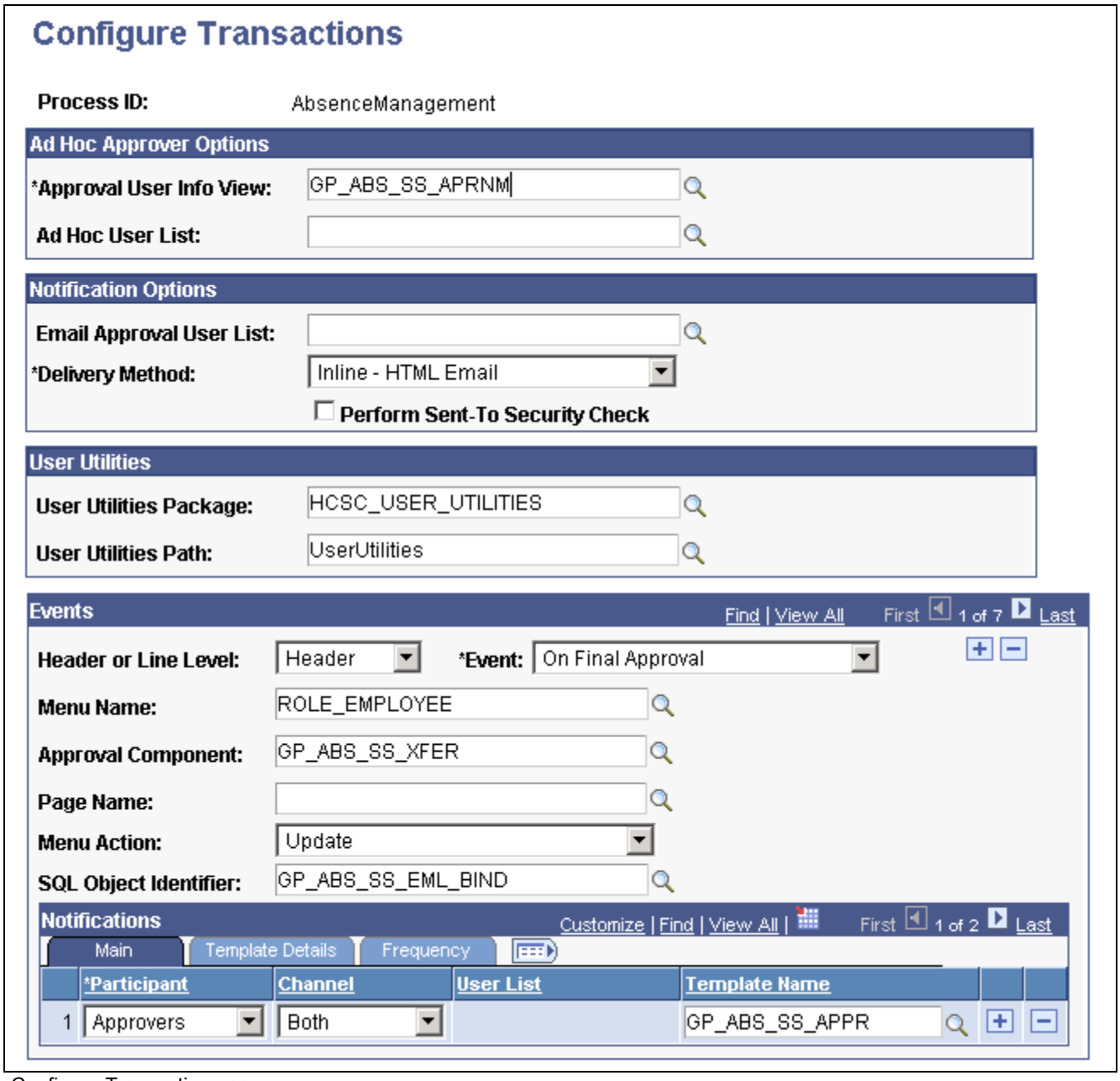
See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Configuring Approval Transactions

Access the Configure Transactions page.

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Configure Transactions page

Ad Hoc Approver Options

Approver User Info View Provides details about which view a user sees when using the Administer Approvals component.

Note. Data in this view dictates what is displayed in the approver links.

Ad Hoc User List This is a filter used to display only a list of users who can be ad hoc approvers.

Notification Options

This section appears only if you select the Use Email Approvals check box on the Register Transactions page for the given process ID.

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Email Approval User List Specify exactly which users should be allowed to do their approval by using email.

Note. If the user receiving the notification also falls into the email approval user list, then they receive an email approval rather than a standard email notification.

Delivery Method Define whether you wish the users to receive their email approvals as text within the email, or as attachments.

Perform Sent-To Security Check Selecting this check box informs the system that you want it to verify the security of the person the notification is sent to.

Note. This security check is only performed on new approvals.

User Utilities

User Utilities are the mechanism that the user changes to modify the behavior of delegation and reassignment.

For HRMS transactions, the workflow engine requires that you enter specific values in the User Utilities section to enable it to interact with the Approval Workflow Engine framework and Delegations framework. In the User Utilities Package field, you must select the value *HCSC_USER_UTILITIES.* In the User Utilities Path field, you must select the value *UserUtilities.* PeopleSoft Enterprise HRMS delivers these values.

Note. The user utilities class checks users against delegation to determine if the users have delegated their authority. If not, then the user utilities class determines whether the users have an alternate user in their user profiles.

User Utilities Package Select the parent application class through which alternate users are selected.

User Utilities Path Select a path that uses a specific class within the root package.

Events

Use the Events section to define event parameters to trigger workflow notification. This section defines the information to build the default URL to include in notification for each of the participants that you specify in the Notifications section.

Level Select *Header* or *Line* to determine the level at which you want a notification sent for an event. For each of these events to be notified, you must select the level of the transaction.

Event Select the event for which you want to send a notification. The approver is always notified of an event. The requester and the system administrator is notified when an error occurs.

Event values include:

Ad Hoc Delete

Ad Hoc Insert

Hold Step

Locked Out

On Error

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On Escalate

On Final Approval

On Final Denial

On Process Launch

On Reactivate

On Reassign

On Step Complete

On Terminate

Processing Complete

Push Back

Request Information

Request Information Added

Route for Approval

Route for Review

Note. *Lock Out, On Error, On Escalate, On Process Launch, On Terminate,* and *Processing Complete* are for header level only.

Menu Name Select the menu name that contains the component you want the notification recipient to link to. This identifies where the person should go upon notification. If you do not enter values, the recipient is sent to the same menu and component that is defined for the Worklist Approval component.

Approval Component Select the component you want to make available to the notification recipient.

Page Name The page defined is the page approvers are redirected to from the URL sent within the email notification.

Menu Action This is the action of the page users see when directed to the page from the URL sent within the email notification.

SQL Object Identifier (structured query language object identifier) Select the SQL definition identifier you want to use to get content for the email. The SQL must accept bind inputs equal to the number of keys at the notification level. For example, header or line keys.

Notifications

Use the Notifications section to define who to notify and how to notify them in addition to the defaults determined in the Events section of this page.

These options enable you to notify participants who have not responded to a particular transaction or request. You can set the set the number of hours and maximum number of times to notify each participant by event. For example, you can have the Approval Workflow Engine notify the requester every two hours on final approval, not to exceed five notifications. The Approval Workflow Engine triggers the notification only if the participant has not acted on the transaction or request.

Participant Define the user who is notified when this event takes place.

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- *A-Delegate:* An approver associated with the particular approval workflow step who has delegated authority to someone else to serve as proxy to *approve* a transaction on his or her behalf.

  Consider defining a template in which the system sends a notification to the delegator informing the delegator that a proxy approved a transaction on his or her behalf.

- *A-Proxy:* An approver associated with the particular approval workflow step who has received delegated authority to serve as proxy to *approve* a transaction on the delegator's behalf.

  Consider defining a template in which the system sends a notification to the proxy stating that the proxy has approved a transaction on behalf of the delegator.

- *Admin:* The approvals administrator.
- *Approver:* The approver associated with the particular approval request.
- *Dynamic:* The user as determined by dynamic approvals setup.
- *R-Delegate:* An approver associated with the particular approval workflow step who has delegated authority to someone else to serve as proxy to *initiate* a transaction on his or her behalf.

  Consider defining a template in which the system sends a notification to the delegator informing the delegator that a proxy initiated a transaction on his or her behalf.

- *R-Proxy:* An approver associated with the particular approval workflow step who has received delegated authority to serve as proxy to *initiate* a transaction on the delegator's behalf.

  Consider defining a template in which the system sends a notification to the proxy stating that the proxy has initiated a transaction on behalf of the delegator.

- *Requester:* The requester associated with the particular approval request.
- *Reviewers:* The reviewers associated with a particular approval request.
- *User List:* The users as determined by the user list with a particular approval request.

Channel

Defines how the participant will be notified.

- *Both*
- *Email*
- *None*
- *User*
- *Worklist*

Note. Routing preferences can also be set up in PeopleTools, Security, User Profiles, Workflow. From there you have two options. You can select *Worklist User* and or *Email User.*

User List

Select either *Dynamic* or *User List* as the Participant. The option becomes active when you select one of these values.

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Template Name	Select the generic template you want to use for the email content of this notification. You define the contents of the email using the Generic Template page. To access the page, select Set Up Financials/Supply Chain, Common Definitions, Approvals, Generic Templates.
Menu Name, Approval Comment, Page Name, Menu Action, SQL Object Identifierand **Priority**	The fields values that you specify fon the Template Details tab build the URL to include in notification for a specific participant. These values relate only to that type of participant, overriding the default URL information that you provide for all participants in the Events section of this page. All of the fields on the Template Details tab have the same definition as the corresponding fields in the Events section.
Number of Hours	Enter a number that determines how many hours between notifications.
Max Notification	Enter a number that determines the maximum number of notifications sent. If the approver does not take action, an escalation is sent to the approvals administrator.

See Also

Chapter 28, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals, page 672

Setting Up Approval Process Definitions

This section discusses how to:

- Set up approval process definitions.
- Define criteria for approval processes.
- Define paths for approval processes.
- Define steps for approval processes.
- Review an example HRMS approval process definition.

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Pages Used to Set Up Approval Process Definitions

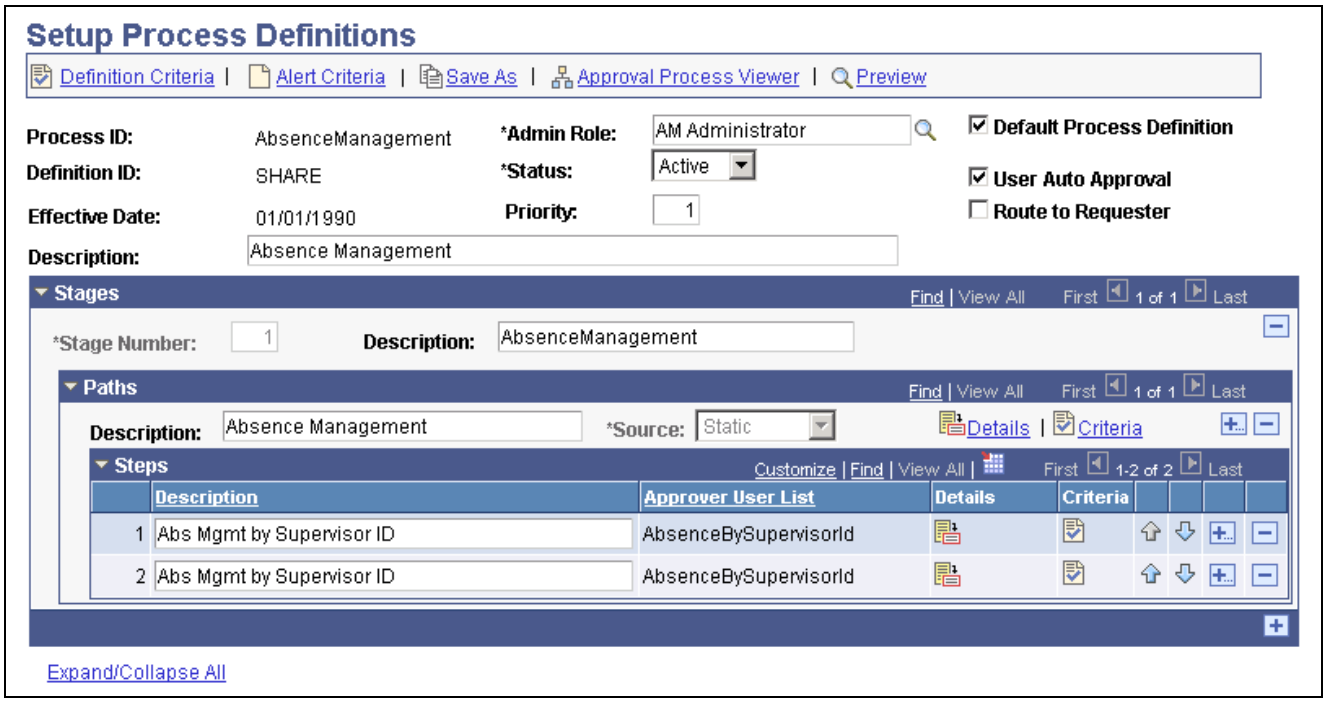
Page Name	Object Name	Navigation	Usage
Setup Process Definitions	PTAF_PRCS_MAIN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions	Define workflow approval process stages.
Criteria Definition	PTAF_CRITERIA	• Click the Definition Criteria link on the Setup Process Definitions page. • Click the Alert Criteria link on the Setup Process Definitions page. • Click the Criteria link from the Setup Process Definitions page in the Path section. • Click the Criteria link from the Setup Process Definitions page in the Steps section.	Define criteria for workflow approval processes. Criteria definitions are used to define bits of logic that, at runtime, the Approval Workflow Engine evaluates for a Boolean result (true or false).
Approval Path Definition	PTAF_PATH_SEC	Click the Details link within the Paths group box on the Setup Process Definitions page.	Set up path details for workflow approval processes.
Approval Step Definition	PTAF_STEP_SEC	Click the Details button within the Steps group box on the Setup Process Definitions page.	Define step details for workflow approval processes.
Copy Approval Process	PTAF_PRCS_COPY	Click the Save As on the Approval Process Definition page.	Create a new approval process definition by copying the existing one. The system requires that you assign a new definition ID and effective date.
Preview Approval	PTAF_PRV_MON_SRC	Click the Preview link on the Approval Process Definition page.	Verify the routing of the approval process definition by previewing.

Setting Up Approval Process Definitions

To set up approval processes, use the Approval Process component.

Access the Setup Process Definitions page.

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Setup Process Definitions page

Business analysts use this page to define an approval process definition. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for a transaction.

You can develop approval processes that:

- Meet organizational or tiered approval limits.
- Use alternate hierarchies, such as supervisor approval and department approval.
- Use multiple parallel tracks, such as division and HR approvals at once.
- Use staged tracks, such as first receiving department approval and afterward receiving HR approval.

Typical approval processes might include:

- Employees or supervisors who can approve certain transactions.
- Two different approvers for each step, where both approvers at a step must approve the request for it to advance to the next step.

Process ID The Process ID created on the Register Transactions page.

See Chapter 28, "Setting Up and Working with Approvals," Understanding the Approval Transaction Registry, page 635.

Definition ID Enter any identification code that provides meaning to you. This identifier is used as a search field throughout the setup pages.

Note. When upgrading from a previous release, the SetID field is used as the default for the Definition ID.

Definition Criteria Click to access the Criteria Definition page, where you can define user and field criteria along with monetary and application class criteria for this process

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definition. This criteria is used to determine which Definition ID is to be used to process the Approval.

See Chapter 28, "Setting Up and Working with Approvals," Defining Criteria for Approval Processes, page 656.

Alert Criteria Click to access the Criteria Definition page, where you can define user and field alert criteria along with monetary and application class criteria for this stage. This criteria can be evaluated by applications to highlight conditions of a transaction to be approved.

See Chapter 28, "Setting Up and Working with Approvals," Defining Criteria for Approval Processes, page 656.

Save As Click to create a new approval process definition by copying the existing one. The system requires that you assign a new definition ID and effective date.

Approval Process Viewer Click to access a graphical tool, which enables you to view each stage, path, and step of the approval process.

Note. You need Adobe SVG Viewer 3.0 - English (U.S.) installed on the client machine in order to render the graphic.

Preview Click to view what a workflow instance would look like if it were running.

Effective Date Indicates the date on which this approval process became effective and ready for system use. This value applies to approval processes for a particular approval process ID and definition ID, and it includes PeopleSoft functionality associated with effective-dated entities. For instance, if multiple approval processes are active with the approval process ID, definition ID, and effective-date specification, then the system uses the latest active effective-dated process.

Admin Role (administrative role) Select the user list role used by workflow to route the transaction to all users filling that role in case of an error during approval processing.

Note. The error conditions are no approvers or not enough approvers.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Status Select the current state of this approval process. The values are:

Active: Indicates the approval process is available for use.

Inactive: Indicates the approval process is not available for use.

A transaction that has started with a specific definition continues using that definition, even if the status is *Inactive.*

Priority Select to sort the definitions in the order that the Definition Criteria should be evaluated. The Definition with the highest priority and that matches the definition criteria is used to process the transaction. Priority 1 is the highest. Multiple Definition ID's can have the same priority.

Note. Multiple Definition ID's with the same priority may result in inconsistent behavior, in the event that multiple definition ID's match.

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Default Process Definition Select to indicate that the system should use this process definition as the default when no other definition ID matches the criteria entered.

Take Action on Line Completion Select to allow each line to continue to the next step of the approval process, with out waiting for other lines within the transaction to complete. This setting applies to approval processes that have a line-level stage at the end of the process.

The system supports line-by-line sourcing only when the last stage is at the line level. This setting assumes that the line-level stage is the last stage of the approval process.

User Auto Approval Select to enable the system to remember an approver's action for this process. The next time this approval process is presented to the approver, the system automatically applies the approver's selections. The automatic application of steps in the process is left in place until you clear the User Auto Approval check box.

This setting applies to the specific line or header the approver had previously approved in this process only. A header approval implies line approvals for all lines.

Route to Requester Route to Requestor works in conjunction with the self-approval flag. If the approver failed to meet the self-approval criteria, the approval could still be routed if this check box is selected. If the check box is not selected and the approver fails to meet the self-approval criteria, then the system routes the approval to the approvals administrator.

If self-approval is set up, the criteria to trigger self-approval is not met, and route to requester is not selected, then the requester can't be included as part of the approval path.

If route to requester is selected and self-approval criteria is not met, then the requester is included as part of the approval path and the system notifies them of the pending approval.

Stages

Stage Number Enter the sequence in which you want this stage of the approval acted upon. You can also enter a description for the stage in the Description field.

A stage is a logical grouping within an approval process. You can define a single stage or use multiple stages, in which case the stages execute in strict sequence. Before the second stage starts, the first stage must end.

Each stage must be either at the header level or at the line level. A header-level stage acts on the single header. A line-level stage acts simultaneously on all the lines under the header.

Level Select the level at which you want approvals to be processed. All paths within the stage are at the same level as the stage itself. Available values are:

Header: At a header-level stage, the system allows the approvals to act on the transaction as a whole.

Line: Line-level stages can have multiple paths with selection criteria that distinguish the line-item's content, such as software line items going to software approvers. Line-level stages allow each line to route differently, if appropriate.

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See Chapter 28, "Setting Up and Working with Approvals," Understanding Approvals, page 625.

Paths

Description Enter a description that identifies this path. A path is a sequence of steps. Examples of paths might include an executive path where approval steps are defined for job requisitions where the salaries that exceed $100,000 USD. Another example could be a job department path where a requisition requires approval up a department hierarchy.

Within a stage, paths execute in parallel with each path at the level from the stage to which it belongs. Path-entry criteria determines whether a path executes for a transaction header or line. For example, for a line-level stage, each line in the transaction is presented to each path; the path criteria decides whether or not that path is triggered for that line. If the system evaluates the criteria you enter for a path to be false for a header or line, then it bypasses the path for that header or line.

When a stage becomes active (approvers in the stage get pending work), all its contained paths become active simultaneously. All the paths of a stage queue work to approvers in parallel. The stage is complete only when all paths in it complete.

Source Select the method by which steps are instantiated during the approval process. Values are:

Static: Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

Note. User lists are associated with roles, queries, and classes using the User List Definition page. To access the page, select Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, User List Definition.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Path Details Click to access the Approval Path Definition page, where you can define path criteria and escalation parameters.

Criteria Click to access the path's Criteria Definition page, where you can define field criteria along with monetary and application class criteria.

Steps

<Sequence Number> and **Description** Enter the description of the step. The system displays the sequence number of the step next to description.

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Approver User List Select the approver list that you want to use for this step. A user list is an entity that groups users in the system or, more simply put, an approval hierarchy. Roles, queries and application classes are examples of user lists. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval steps.

When configuring approval workflows, business analysts use user lists to assign approval tasks to the approvers and reviewers who are to act on the request being considered for approval.

The approval engine has two types of contextual information available to the user list definition: the previous approvers in the path and the transaction (header or line) keys. The previous approver of the first step in a path is always the requester, regardless of which stage the path belongs to. In the case of SQL queries, the context is provided by bind values. The bind values are the prior approver (one per call in case multiple prior approvers exist) and the keys of the header record. The key values are provided in the order in which they are defined in the corresponding record object.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

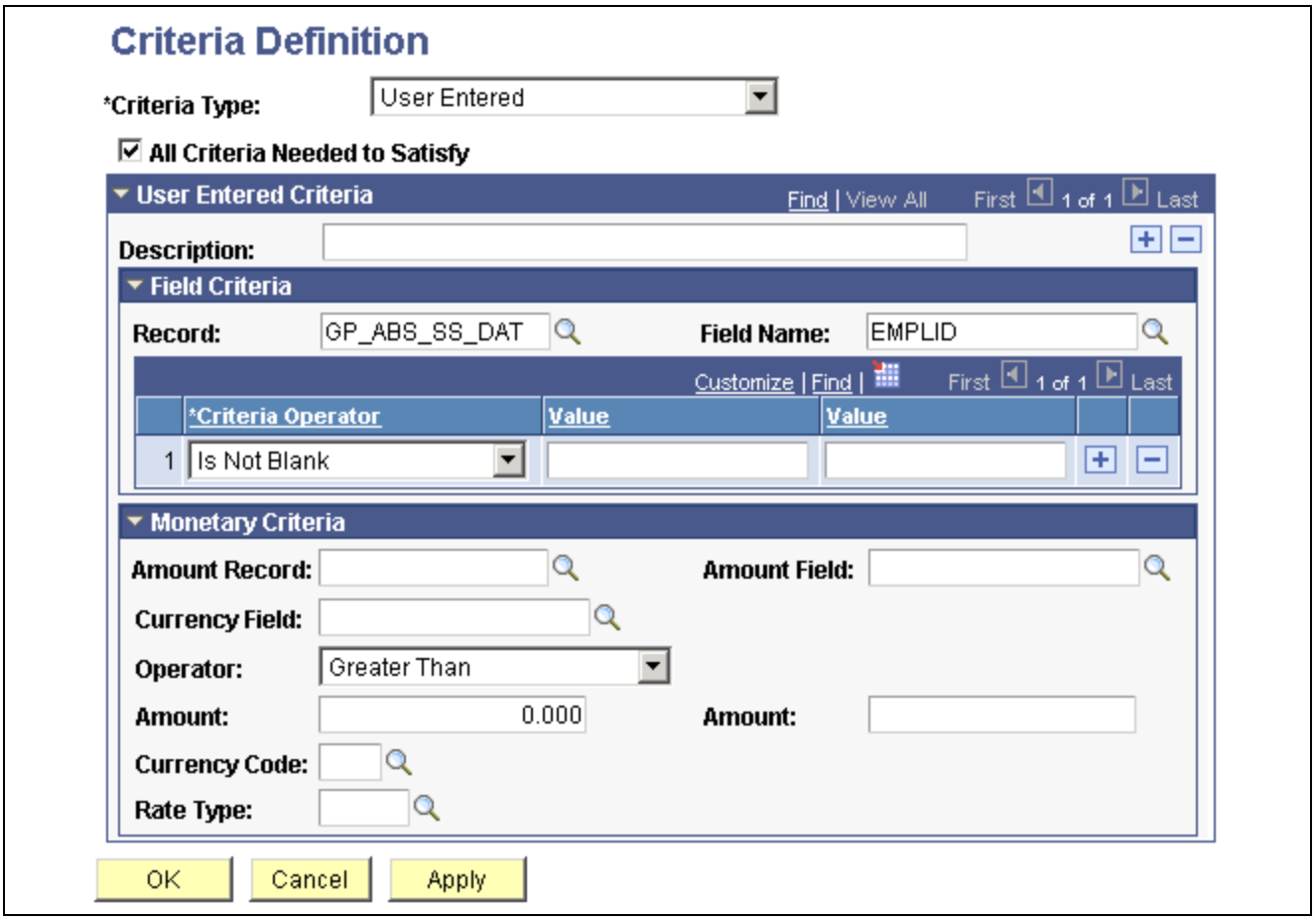
Step Details Click to access the Approval Step Definition page, where you can define approver requirements, self-approval details, and reviewers.

Criteria Click to access the step's Criteria Definition page, where you can define field criteria along with monetary and application class criteria.

Defining Criteria for Approval Processes

Access the Criteria Definition page.

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Criteria Definition page

A criteria definition is a piece of arbitrary logic that, when evaluated, returns true or false. Criteria definitions program the Approval Workflow Engine, using transaction-specific information to change, for example, routing paths. To set the context for the criteria, the engine provides the transaction keys as bind values.

Use this page to define the different types of criteria you want to apply to an approval process at the approval process, stage, path, or step level. The level for which you are defining criteria on this page depends on the link that you click to access the page. You can create definitions consisting of a field with a logical operator and a value of definitions consisting of an application class that takes in transaction data to process the approval. Anytime the Approval Workflow Engine tries to launch an approval process, the engine first evaluates the criteria definition that is tied to the approval process definition. If the criteria definition returns false, the engine does not use the approval process definition. The engine then resolves the path and step criteria definitions in order.

Use this page also to define alert criteria. Alert criteria, although the same in principal as the other criteria types, is different in application. You can use alert criteria to decide when to display an alert. For example, you could decide to display a message to the approver on the Approve Transaction page if the transaction meets the specified criteria. To use this page to define alert criteria, click the Alert Criteria link on the Setup Process Definitions page. Alert criteria has two differences:

- The description field is the actual alert text that appears on the approval page.
- The criteria determines if an alert should appear on the approval page, as opposed to routing a line or header for approval.

Criteria Type Select one of these options:

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- *Always True* informs the system to trigger this approval process. No criteria is needed. The system will only follow paths that evaluate as true.
- *Application Class* requires you to define which specific application class the system uses to determine if the workflow approval task evaluates as true.

Note. Use the *Application Class* criteria type when the user entered criteria does not contain the necessary level of detail.

- *User Entered* requires you to enter on this page all record and field combinations, either value- or monetary-based, that will trigger the workflow to evaluate as true.

All Criteria Needed to Satisfy Select to indicate that all criteria defined on the Criteria Definition page must be met in order to trigger the workflow to evaluate as true.

User Entered Criteria

The system displays this section when you select the Criteria Type value of *User Entered.* Use this section to define additional criteria for the approval.

Description Enter a description for the criteria.

Field Criteria

The system displays this section when you select the Criteria Type value of *User Entered.* Use this section to select a record and field on which to control and filter ranges of data or types of data placed in the file you want to use in the approval process.

Record Name Select a record that you want to use in defining approval criteria.

Field Name Select a field from the header record that you want to use to define approval criteria. The values you define in the remaining field criteria grid are those that are used in determining the approval criteria.

Criteria Operator Determines the action the system applies to the criteria you enter in the Value fields.

These operators are available:

- *Between:* Use only values between the two values you enter as criteria.
- *Equals:* Use only values equal to the entered criteria.
- *Greater Than:* Use values equal to or greater than the entered criteria.

Is Blank

- *Is Not Blank*
- *Less Than:* Use any record value that is less than the value entered in the Operator Criteria field.
- *Not Equal To:* Use any record value that is greater than or less than the entered criteria.

Value Use the two Value fields to define a range upon which you want the operator criteria to evaluate. The second value is only used when the Criteria Operator evaluates using *Between.*

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Monetary Criteria

The system displays this section when you select the Criteria Type value of *User Entered.* Use this section to establish approval criteria based on a value or amount. The system uses the values you define to determine the routing for approving the transaction. When the system evaluates the criteria for an approval process or a step or path within the process, it uses monetary values you define in this section.

The system uses values from fields in this section in conjunction with the Operator field to determine whether to run a step.

Amount Record Select the record name to be used. For example, you might use a salary field to trigger the step.

Amount Field Select the field within the amount record to be used.

Currency Field Select the currency field that corresponds to the currency code you select in the Currency Code field below.

Operator Select a value that determines how the system processes the values in the Amount fields. Values include *Between, Greater Than,* and *Less Than.*

Amount Use the Amount fields to define an amount range for use with the Operator field.

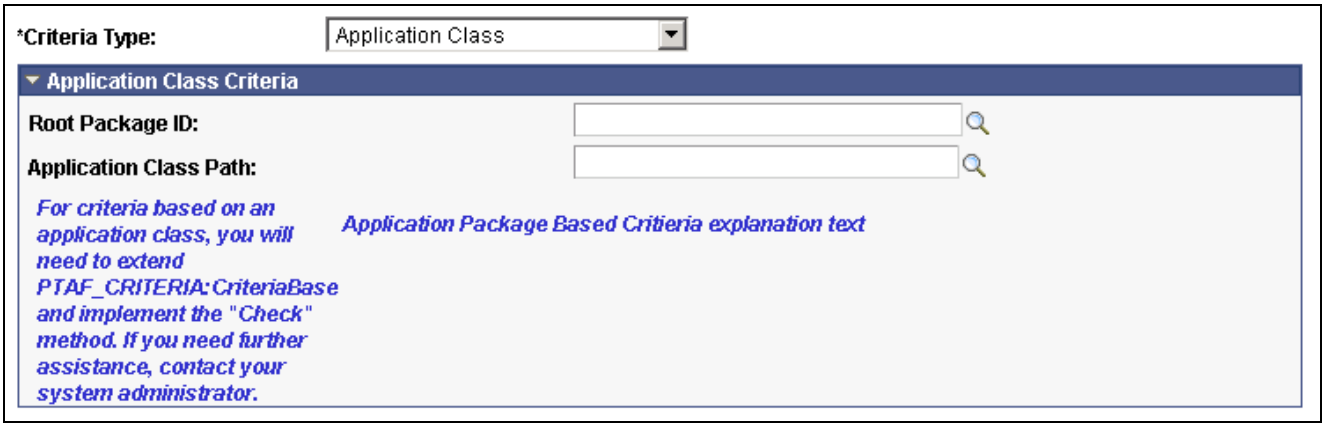
Note. If you use the Criteria Operator with a value of *Between,* a second Amount field becomes active.

Currency Code Select the monetary unit you want to use for the approval.

Rate Type Select how the system arrives at the currency value, such as the current rate or a pay rate.

Application Class Criteria

The system displays this section when you select a Criteria Type value of *Application Class.* Use this section to assign application packages as criteria for the approval process definition. When you define a class, the system uses it along with other criteria you enter to process the approval.



Criteria Definition page (Application Class Criteria section)

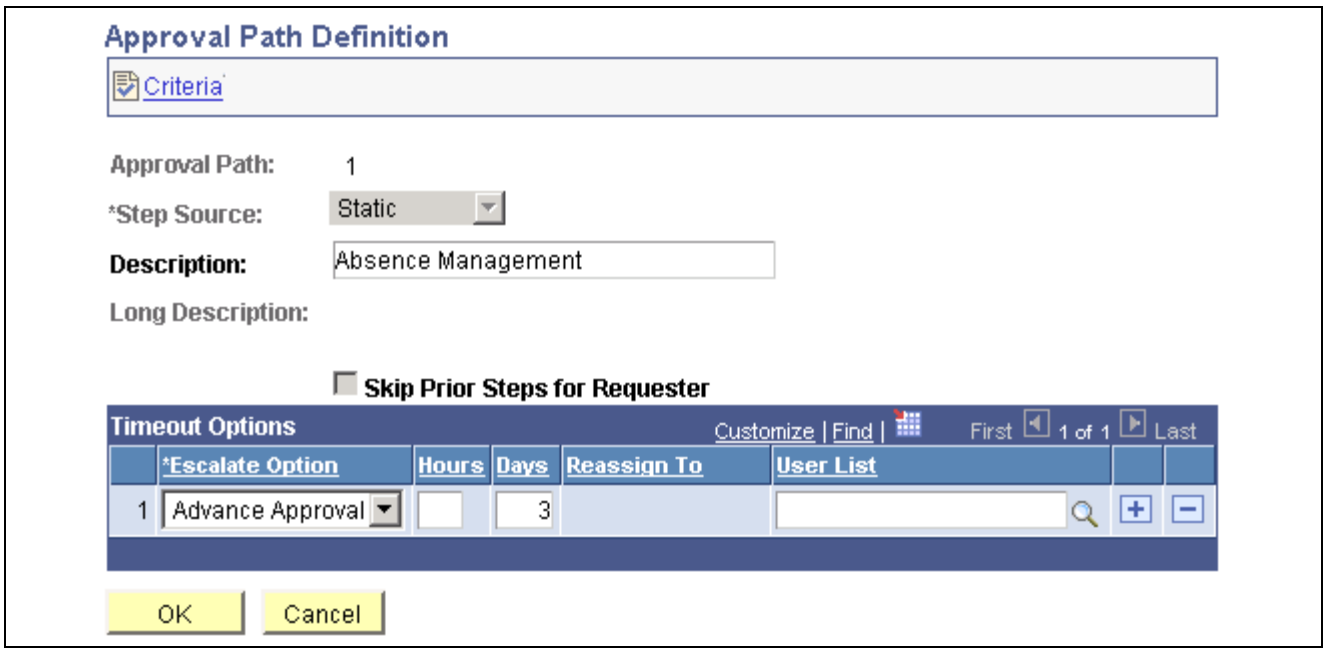
Root Package ID Select the primary application package. This selection is the parent class for other packages or for child application classes.

Application Class Path Select a path that describes a specific class within the root package.

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Defining Paths for Approval Processes

Access the Approval Path Definition page.



Approval Path Definition page

Use this page to set up additional parameters that determine how the system processes an approval path. Use the escalations feature to define time elements for when an approver takes too long to act on pending request.

Criteria Click to access the Criteria Definition page where you can define user and field criteria along with monetary and application class criteria.

Approval Path Displays the path name that you are creating or updating. The path provides the sequence of approvers of a request, usually from a single reporting (or other) hierarchy.

Step Source *Static:* Select this source to indicate that you want the system to use the individual user-defined steps when it processes an approval.

Dynamic: A dynamic path definition contains only one step. When begun, the single step definition could yield any number of instances in sequence.

When using the *Dynamic* source, the system uses the user list on the step definition (Approval Step Definition page) to initialize the steps in the path. The single step definition is repeatedly run, until the step's user list returns no more approvers. All these instances are queued in sequence.

Notify Admin on No Approvers notify administrator on no approvers Select to indicate that the approvals administrator is to be notified if the system does not find an approver for the path. This option is only available when the Step Source is *Dynamic*.

Note. This is the default behavior for static paths.

Skip Prior Steps for Requester Select to indicate that if one of the approvers in this path is also the requester, then the system is to skip all steps in this path prior to that approver's step.

Check Authorization Select to enable the approval authorization.

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Skip Unauthorized Users Select to enable the approval process to skip users within the user list if the system determines that they can't satisfy all of the criteria for approval.

Timeout Options

Escalate Option

Advanced Approval: Skip the current approver.

Notify Participant: Sends an email, or whatever notification is defined in the transaction registry, to the individual.

Reassign Approval: Reassigns to an user ID or a user list.

Note. If you select *Advanced Approval* and define a User List, a notification is sent to the user list members.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Hours Enter the number of hours a transaction can remain at one workflow step before being escalated. This field is combined with number of days to determine the total time an approver has to take action on an approval request.

Days Enter the number of days a transaction can remain at one workflow step before being escalated. This is the length of time an approver has to do something such as approve or deny a transaction.

Reassign To If you have selected *Reassign Approval* as the option, you can enter a user name or a specific user list.

Note. A user list will reassign to the first user in the list that does not match the current user.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

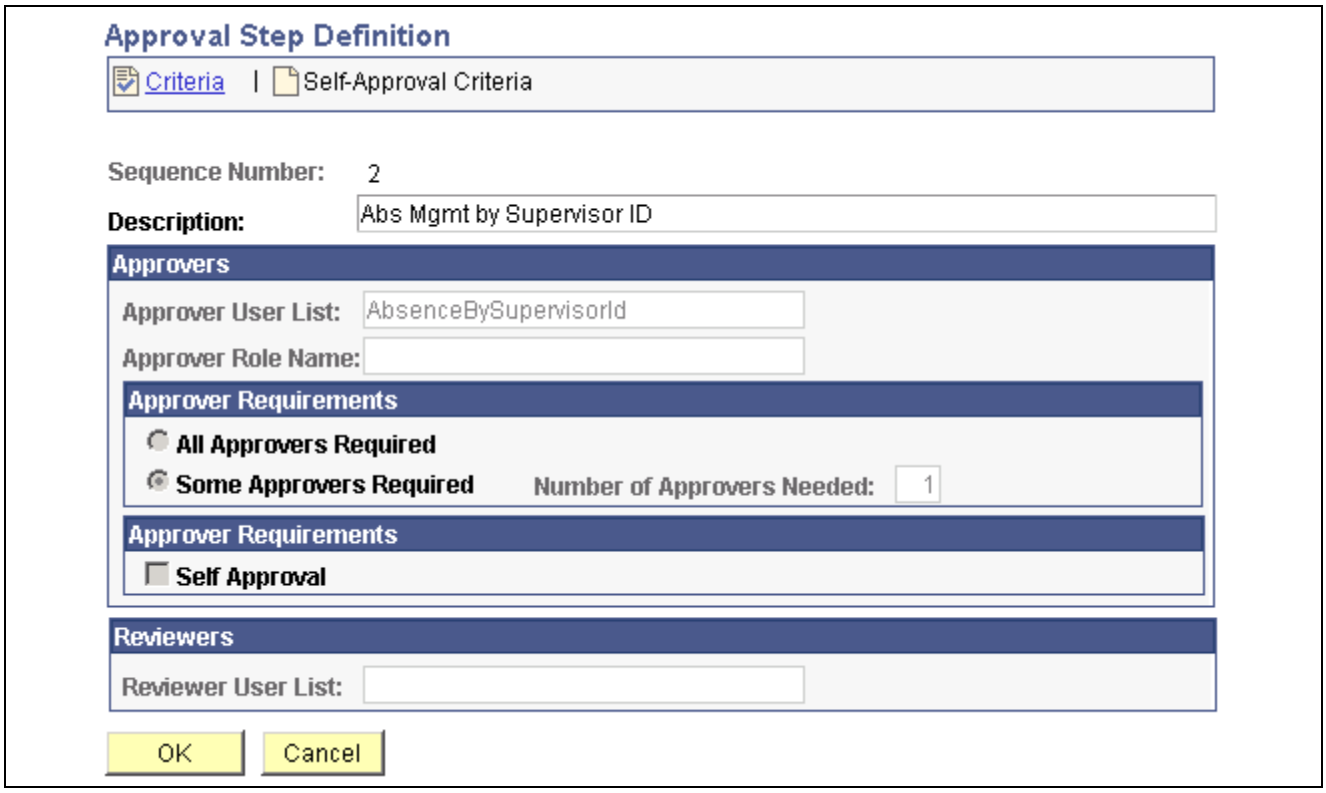
User List Select the list of users the workflow should be routed to.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Defining Steps for Approval Processes

Access the Approval Step Definition page.

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Approval Step Definition page

Use this page to set up additional parameters for the step definition.

Criteria Click to access the Criteria Definition page, where you can define field criteria along with monetary and application class criteria.

Self-Approval Criteria Click to access the Criteria Definition page, where you can set up self-approval criteria for a user, including field criteria and monetary and application class criteria.

Step Number Displays the sequence number in which the approval is routed. Each step typically represents a routing to an approver. However, it is possible to route to multiple approvers or reviewers within a step.

Approver User List Select the type of approver you want to use for this step based on the user list.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Approver Role Name In addition to a User List, a role can be added for additional authorization checking. Select a role that specifies the authority that a user has. The Approval Workflow Engine adds every user in that role to what is returned in the User List.. The engine also enforces the role at the time the approver acts. If the role assignment changes, such as the approver is no longer in the role, the approver is blocked from acting on the transaction.

All Approvers Required Select to indicate that all approvers at this step are required to approve the transaction at this step. You can select to have all approvers or some approvers approve the transaction at this step.

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Some Approvers Required Select to indicate that it is not required for all approvers to sign off on a transaction. If you select this option, you can define the number of approvers required in the Number of Approvers Needed field.

Note. After the number is met, the approval advances to the next step.

Number of Approvers Needed Enter the minimum number of approvers you want to sign off for a transaction at this step. When an approval process is launched and this number can't be met, the system notifies the approval administrator

Self Approval Select to indicate that requesters can also approve their own requests. This setting only applies if the requester also appears as an approver in the step.

You can establish criteria that controls the requester's approval authority by using the Self-Approval Criteria link. If the associated criteria evaluate to true, then self-approval is acceptable. For example, you can place a limit on the dollar amount for the requester so that if the transaction is over that amount, the requester is not used as an approver.

If you select self-approval and the requester appears as an approver, the criteria is evaluated. If the criteria are met, then the requester's approval is assumed and the minimum approvers for that step decrements by one. If the criteria is not met, the Approval Workflow Engine requires that there be at least one more step after this one in the path. This does not apply to ad hoc steps.

Note. If the criteria is not met and no later step exists, the system inserts an additional step. This selection is then routed to the approvals administrator.

Clearing the check box means that self approval is never acceptable. If self-approval is not enabled, then the requester can't serve as an approver. If the requester appears as an approver for any step, they are blocked from acting. If, because of this, the number of approvers that are available to act drops below the minimum, then an error is generated. The process is then routed to the approvals administrator.

When a requester is an approver, you can configure the path to skip the steps in that path prior to the requester's step.

Reviewer User List Select the type of reviewer you want to use for this step. Use a user list to map users to certain functional roles. The system then uses the list and its users to run automated business processes. The list defines the user sources who can be used in approval and review steps.

See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.

Note. The error conditions for static steps are no approvers or not enough approvers at a step.

See Also

Chapter 28, "Setting Up and Working with Approvals," Additional Approvals Features, page 631

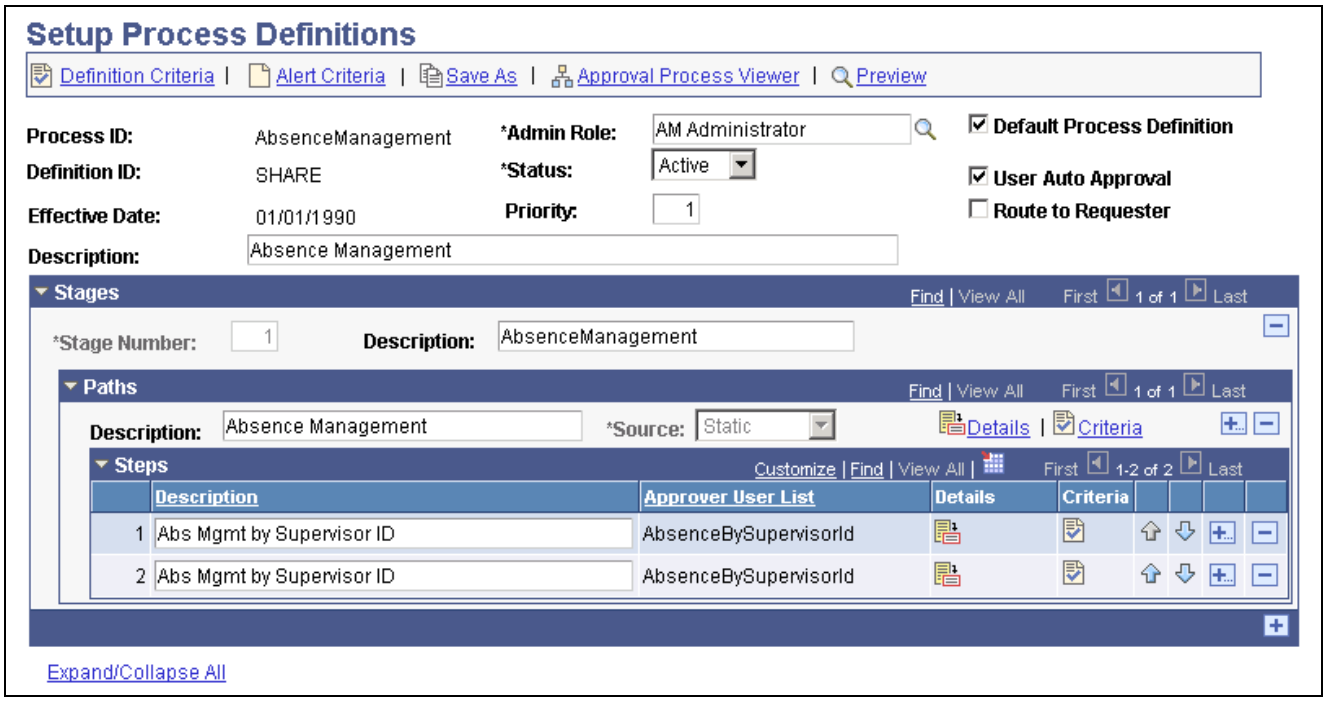
Enterprise PeopleTools PeopleBook: PeopleSoft Workflow Technology, "User List Roles"

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Reviewing an Example HRMS Approval Process Definition

This section provides an example of how set up an approval process definition for a transaction that is specific to PeopleSoft Enterprise HRMS.

In this example, let's suppose that our company wants to create an approval process definition to handle the approval of an employee's request for a day off. First you must define the stages, paths, and steps of your approval process.



Setting up an approval process definition

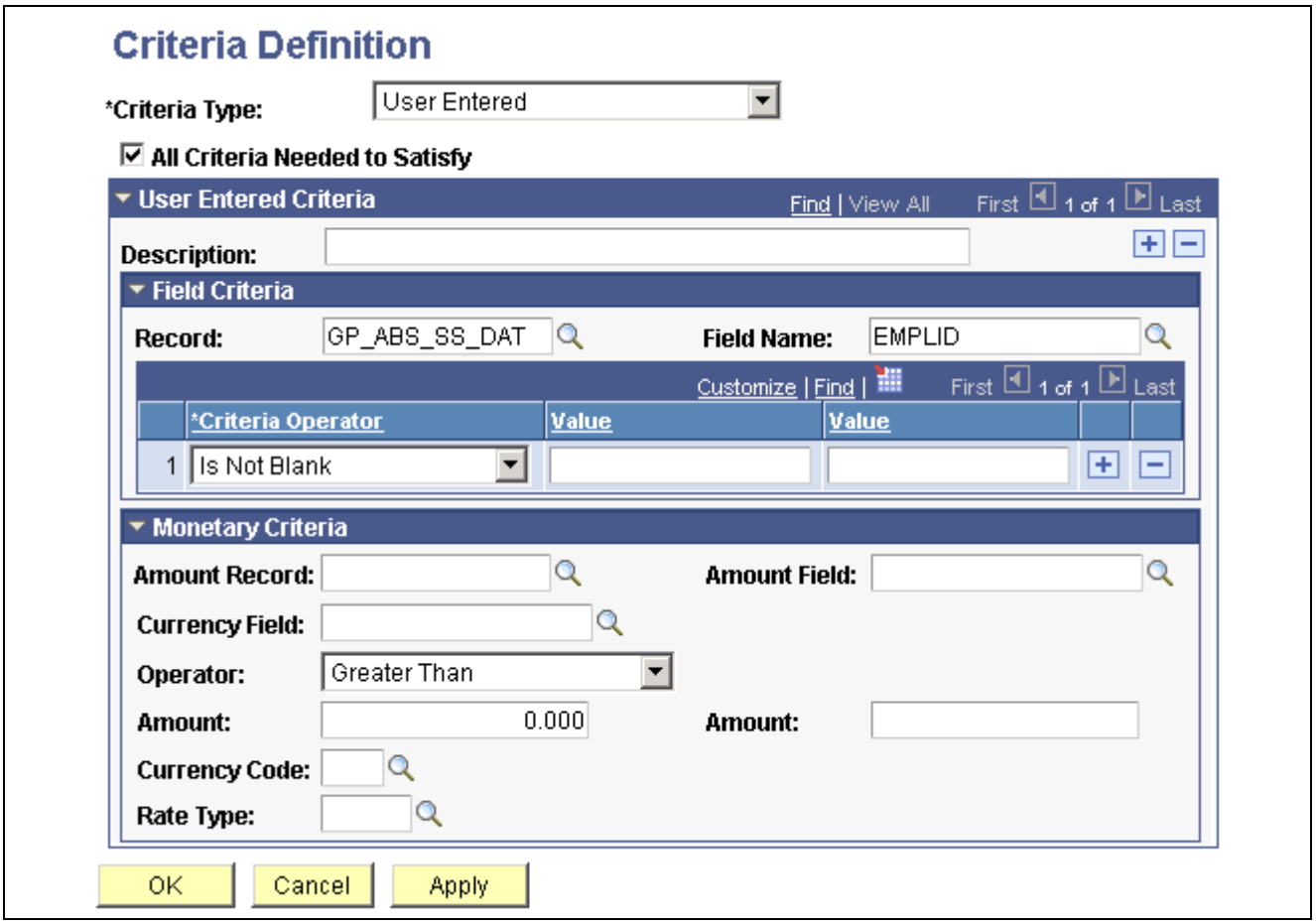
Notice in the example that the approval process contains one stage, one path, and two steps. The stage in this example contains one approval path in the organization that requires two levels of supervisor approval before the employee is granted the day off. First, the employee's supervisor must grant approval, and then that supervisor's manager must approve the request.

You can define multiple stages, paths, and steps for an approval process definition. For example, perhaps you require administrator approval of the employee's day-off request. In this case, you would create an additional path within the existing stage that contains one step requiring administrator approval.

The Approval Workflow Engine processes multiple stages and steps sequentially. The engine cannot advance to the next step until you complete the preceding step in the given path. Likewise, the engine cannot advance to the next stage until you complete all paths within a given stage. For paths, however, you can define them as static (processed sequential) or dynamic (processed in parallel).

Now let's add logic that the Approval Workflow Engine evaluates at runtime for a Boolean result. You can define criteria at the definition, path, or step level. For this example, we want to add logic to the definition level that instructs the Approval Workflow Engine to stop processing if it encounters an absence request that is missing the employee ID value. To set up this criteria, click the Definition Criteria link at the top of the Approval Process Definition page.

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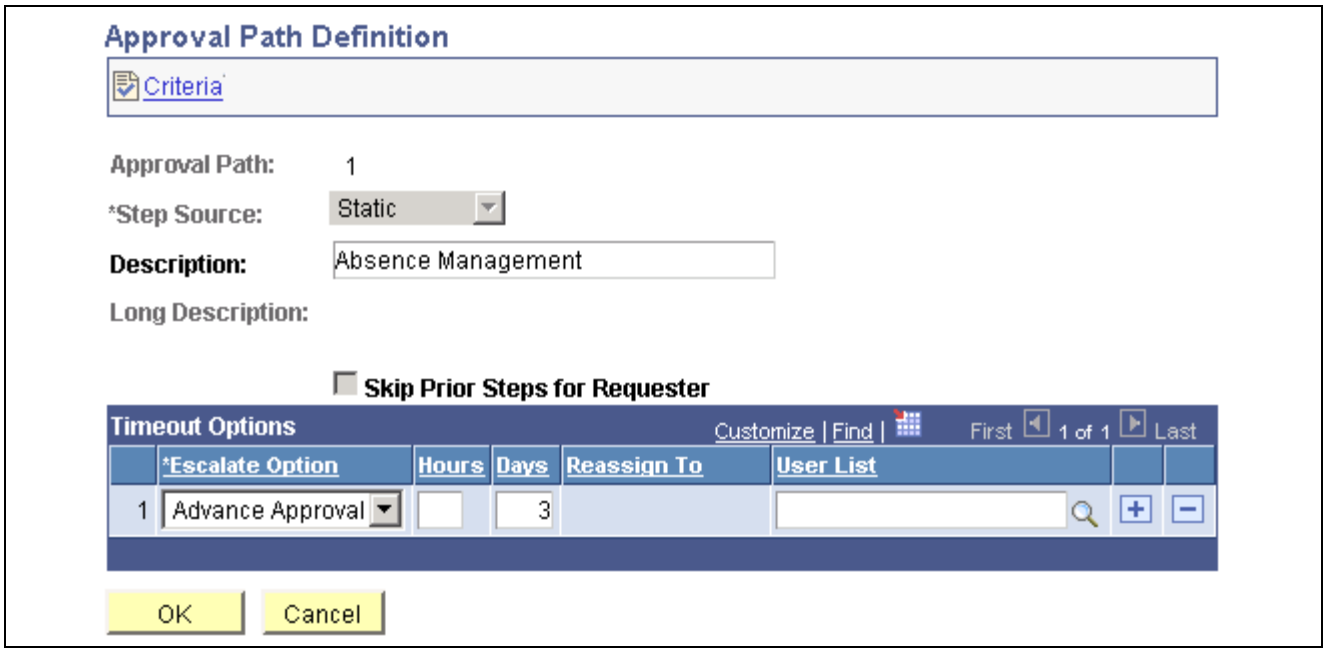
Defining processing criteria

Select the Criteria Type field value *User Entered.* This activates fields on the page that enable you to manually define your criteria. Also select the All Criteria Needed to Satisfy check box. The system selects this check box by default. Next use the Field Criteria group box to specify the necessary logic. In the Record field, select the header record for this transaction. You define header records for transactions on the Register Transactions page. In this instance, the process ID of the transaction is *AbsenceManagement,* which has a defined header record of *GP_ABS_SS_DAT.* Now choose between any of the fields that are defined within that header record for the process ID. In this example, *EMPLID* is selected. To complete the logic, select in the Criteria Operator field, the *Is Not Blank* value. Click Apply and then OK.

The logic in this criteria definition states that when processing a request for time off, the Approval Workflow Engine uses this definition ID to process any transaction related to the AbsenceManagement approval process ID that contains employee ID as part of the transaction. If the transaction does not contain an employee ID value, the Approval Workflow Engine continues to search for another definition ID that matches the required criteria needed to process the transaction for the related approval process ID.

Next we want to require the Approval Workflow Engine to advance the approval to the next approver in the path if the current approver doesn't respond within three days. Click the Details link in the Paths group box to access the Approval Path Definition page.

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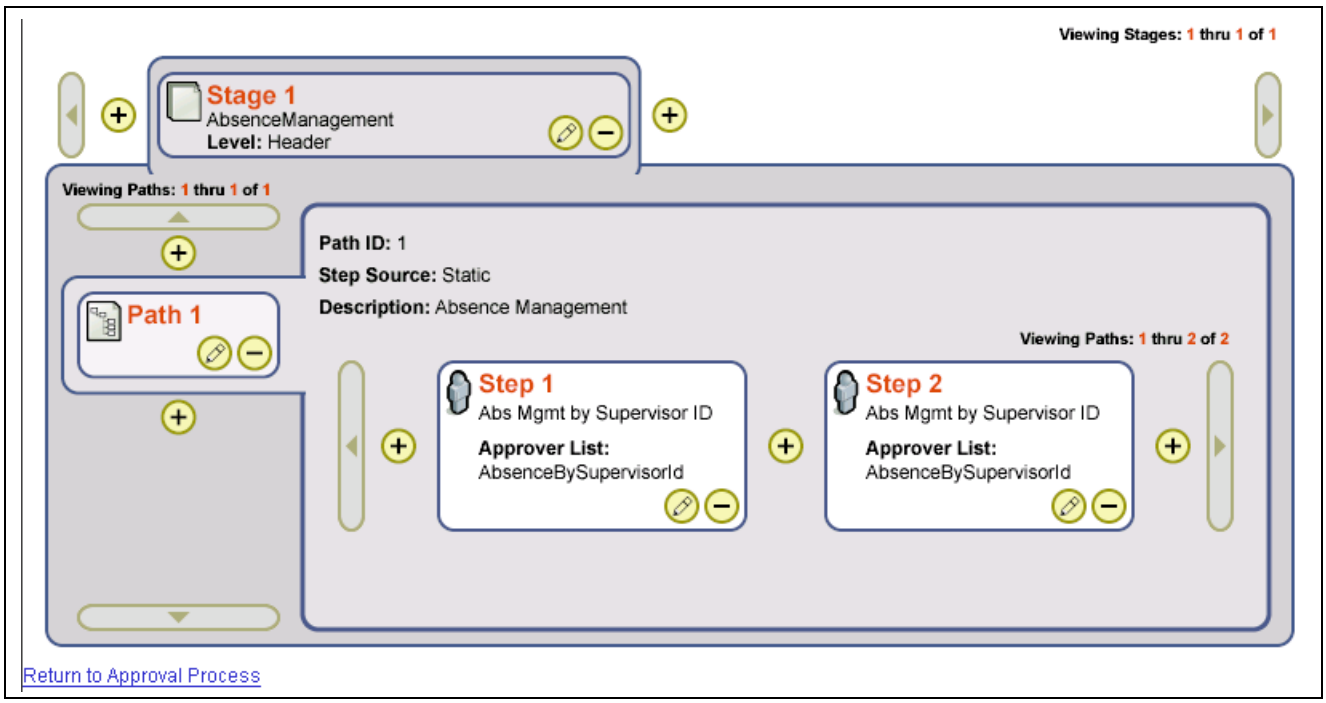


Specifying timeout options

You can use the Timeout Options group box to define what should happen to a particular transaction or request after a certain period of time. For instance, you can notify the participant, advance the approval, or reassign the approval after a certain number of hours or days have passed. You can have the request reassigned to a particular person in the database or to a predefined user list.

To meet the needs of this example, set the Escalate Option field to *Advance Approval* and the Days field to *3*. Click OK.

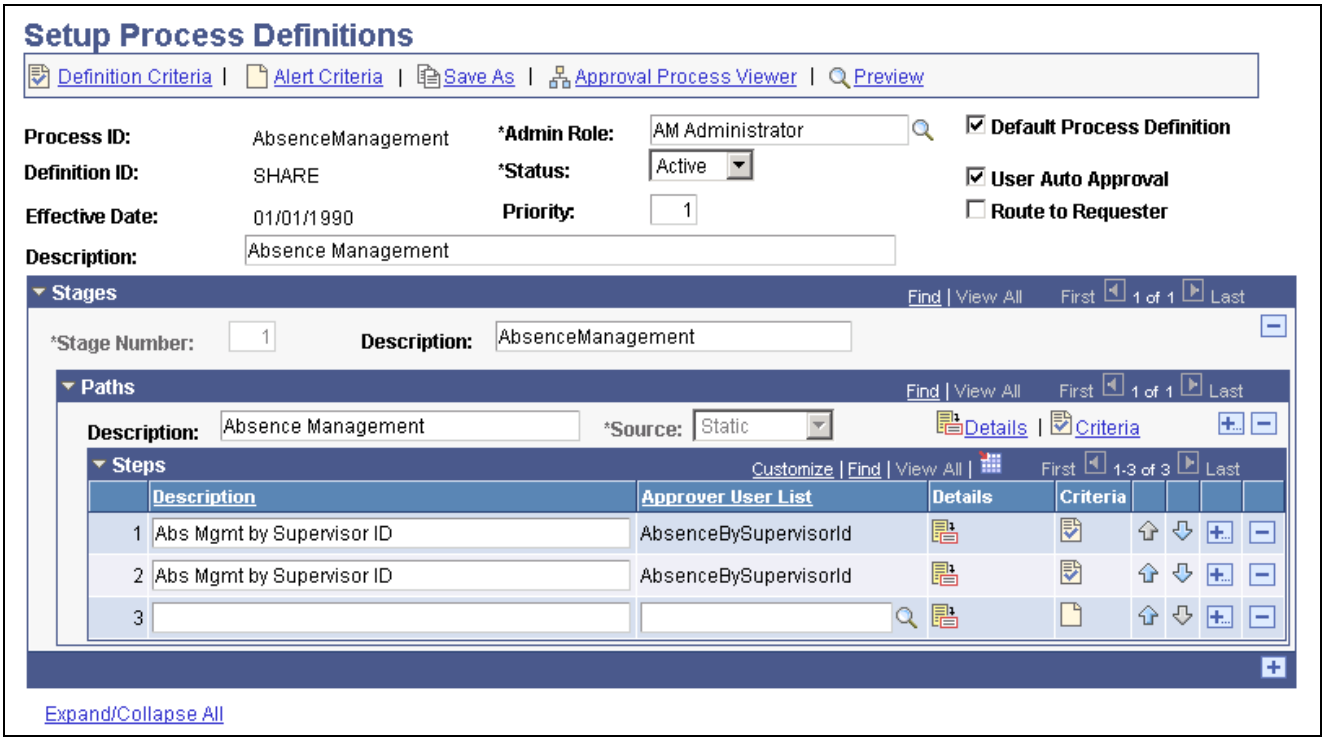
Now that we have defined the approval process definition, let's look at a graphic representation. Click the Approval Process Viewer link at the top of the Approval Process Definition page.



Viewing the approval process definition

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The Approval Process Definition page enables you to view graphically your approval process definition and, if necessary, quickly modify the definition. Click the plus signs, minus signs, or correction buttons. For example, perhaps we have decided that it is best that there is a third approval step for an absence request. Click the plus sign after step 2.



Adding an additional step from the Approval Process Viewer page

The system returns you to the Approval Process Definition page and inserts a new row after step 2 for you to enter the new step. Click Save when you have completed your definition.

Defining Dynamic Approvals

This section provides overviews of dynamic paths and dynamic approval authorizations, and discusses how to define dynamic approvals.

Understanding Dynamic Paths

To use dynamic approvals, create one approval step that determines a list of approvers without setting up every step individually within the path.

Workflow processes are defined in stages, paths, and steps. The system looks at the stage to determine if the trigger for the workflow is recognized at the header or line level. Within each stage, there is a minimum requirement of one path. The path contains steps, which define the workflow triggers and the action to take if the criteria is met. Without dynamic paths, the approvals administrator creates a step for every possible approver. With dynamic workflow, the approvals administrator creates a single path where the system users a user list for the approval hierarchy.

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Note. When self-approval is used and the requester is on the list of authorized approvers, that role is counted as one approval.

See Also

Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676

Understanding Dynamic Approval Authorizations

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. Dynamic approvals enable you to create a single step that systematically identifies every potential approver, searches to find out if that approver has enough authority to complete the approval, and creates a visual path for users to view of all necessary approvers in the process. You can configure a dynamic path allowing supervisor roles to approve or deny a transaction, and stop the approval path when the system has determined that all criteria has been satisfied. The approvals administrator creates a user list that the system uses to select the appropriate supervisory approvers for a transaction and then checks for authorization. The dynamic path takes the prior approver into consideration.

Two keys to creating approval authorizations for dynamic paths are the system's ability to:

- Check authorizations.
- Skip unauthorized users.

The system looks at the user list and the approval authorization to determine which users are required to complete the authorization. The system displays the non-required users as a skipped step instead of a pending step in the event that Skip Unauthorized is selected.

Pages Used to Define Dynamic Approvals

Page Name	Object Name	Navigation	Usage
Approval Authorization	PTAF_AUTH	Set Up HRMS, Common Definitions, Approvals, Authorization Note. This page is available through PeopleTools but must be added to the portal navigation to render it available in the application.	Authorize roles and approvers for dynamic paths.
Setup Process Definitions	PTAF_PRCS_MAIN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions	Define workflow approval process stages. See Chapter 28, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions, page 650.

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Page Name	Object Name	Navigation	Usage
Criteria Definition	PTAF_CRITERIA	• Click the Definition Criteria link on the Setup Process Definitions page. • Click the Alert Criteria link on the Setup Process Definitions page. • Click the Criteria link from the Setup Process Definitions page in the Path section. • Click the Criteria link from the Setup Process Definitions page in the Steps section.	Define criteria for workflow approvals. Criteria definitions are used to define bits of logic that, at runtime, the Approval Workflow Engine evaluates for a Boolean result (true or false). See Chapter 28, "Setting Up and Working with Approvals," Defining Criteria for Approval Processes, page 656.
Approval Path Definition	PTAF_PATH_SEC	Click the Details link within the Paths group box on the Setup Process Definitions page.	Set up workflow approval path details. See Chapter 28, "Setting Up and Working with Approvals," Defining Paths for Approval Processes, page 660.
Roles - General	ROLEDEFN	PeopleTools, Security, Permissions and Roles, Roles	Set up roles for workflow. See *Enterprise PeopleTools PeopleBook: Security Administration*
Approval Step Definition	PTAF_STEP_SEC	Click the Details button within the Steps group box on the Setup Process Definitions page.	Define step details for approval workflow. See Chapter 28, "Setting Up and Working with Approvals," Defining Steps for Approval Processes, page 661.
User List Definition	PTAF_USER_LIST	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Maintain User Lists	Create and maintain user-list definitions used for routing transactions for approval. Also, define user sources for use with steps in the approval process. See Chapter 28, "Setting Up and Working with Approvals," Defining User Lists, page 676.
User Profile	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles	Set up user IDs and assign roles. See *Enterprise PeopleTools PeopleBook: Security Administration*

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Defining Dynamic Approvals

To configure the dynamic approval authorization, the approvals administrator must:

1. Define user lists for dynamic authorizations through the User List Definition page.

   The Approval Workflow Engine delivers user lists that address the most common approval scenario of routing an approval to a supervisor. If the requester is an end user, his immediate supervisor cannot authorize more than 5,000.00 USD, and the job requisition is for 6,000.00 USD, then the requisition moves to the next level supervisor. The user ID for the direct supervisor is listed on the user profile.

   Note. To enable the Supervisor by User ID approval routing, you must have a supervisor assigned to your user ID for the job.

   ---

2. Create an approval authorization by authorizing roles and approvers for dynamic paths through the Approval Authorization page.

   The Approval Authorization page is available through PeopleTools but must be added to the portal navigation to render it available in the application. To add this page to portal navigation, navigate to PeopleTools, Portal, Structure and Content. On the displaying page, click *Set Up HRMS,* then *Common Definitions,* then *Approvals,* and then *Authorization.* Clear the Hide from navigation check box. Click Save. Then navigate to PeopleTools, Portal, Security Sync and run the portal security sync process so that the portal cache recognizes the changes.

   If you don't specify a Definition ID, the authorization is generic. To create an approval authorization for specific definition IDs, you must add a line for each Definition ID.

   Note. If you activate self-approval on the Approval Authorization page, it replaces the self-approval on static path steps.

   ---

3. Define a dynamic approval path through the Approval Path Definition page.

   Note. When creating criteria within the path that will trigger the workflow engine to activate, be certain that you set up the final approver as *Greater Than* so that no gaps occur.

   To define a dynamic approval path:

   a. Select *Dynamic* for a dynamic approval path in the Step Source field.

   b. Select the Notify Admin on No Approvers check box to indicate that the approvals administrator is to be notified if the system does not find an approver for the path. This option is only available when the Step Source is *Dynamic*.

   c. Select the Skip Prior Steps for Requester check box to indicate that if one of the approvers in this path is also the requester, then the system is to skip all steps in the path prior to that approver's step.

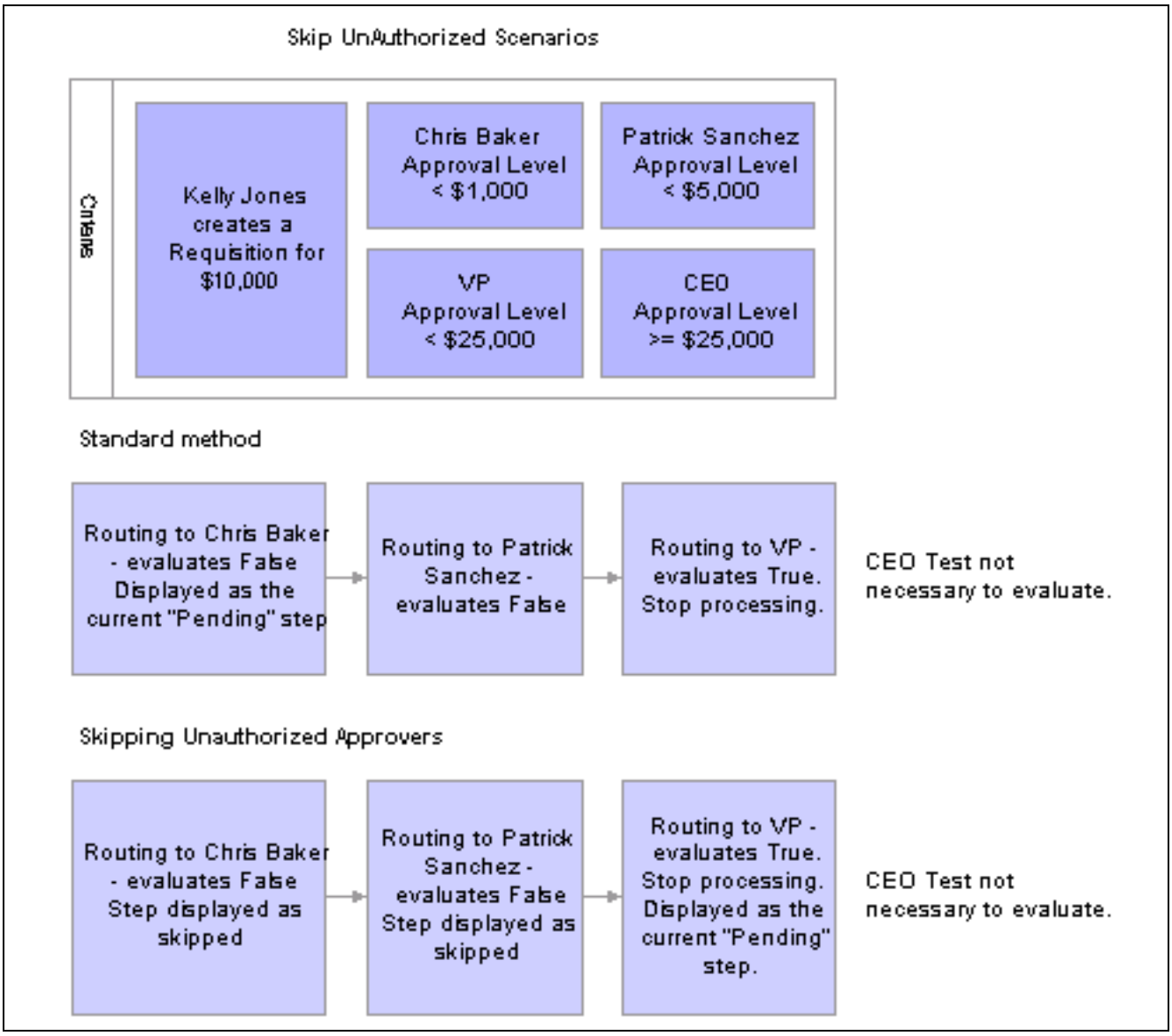
   d. Select the Check Authorization check box to enable the approval authorization.

   e. Select the Skip Unauthorized Users check box to enable the approval process to skip users within the user list if the system determines that they can't satisfy all of the criteria for approval.

Example Dynamic Approvals

This diagram illustrates an example of a workflow routing setup for the standard method and a workflow routing that skips unauthorized users:

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Example of skip approval scenario

In the example, the criteria for the workflow approval path is set up for Chris Baker to have approval authority for less than 1,000.00 USD monthly salary, Patrick Sanchez to have authority for less than 5,000.00 USD, VP to have approval for less than 25,000.00 USD, and CEO to have approval for a job requisition equal to or more than 25,000.00 USD.

Kelly Jones creates a requisition for 10,000.00 USD.

If the system is not set up to skip unauthorized users, the system displays Chris Baker, Patrick Sanchez, and the VP as pending steps in the approval path.

If the system is set up to skip unauthorized users, the system displays the approval path with the VP as the only listed approver, and will display Chris Baker and Patrick Sanchez as skipped.

See Also

Chapter 28, “Setting Up and Working with Approvals,” Defining User Lists, page 676

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Defining Notification Templates for Approvals

This section provides an overview of generic template definitions and discusses how to enter generic template definitions.

Understanding Generic Template Definitions

Anytime that the Approval Workflow Engine triggers an email notification, it constructs the email based on the notification rules that you have set on the Configure Transactions page. The engine bases the email on the template that you specify in the Template Name field in the Notifications group box on that page.

If you are using bind variables (%1, %2, %3 and so on) in your email notification template, you must also create an SQL object through PeopleTools Application Designer. The Approval Workflow Engine uses this SQL object to populate the bind variables that you define in your notification template. You assign an SQL object to an email notification through the SQL Object identifier fields on the Configure Transactions page.

The Approval Workflow Engine reserves the %1 bind variable as a placeholder for an auto-generated link within the email notification to an application component. If you do not want to display the auto-generated link in your email notification, exclude the %1 bind from the template variables that you list on the Generic Template Definition page.

The *Enterprise HCM 9.0 Approval Workflow Engine* red paper, which is posted in PeopleSoft Customer Connection, provides an example of an email template and how to define its associated SQL object.

See PeopleSoft Customer Connection,*Enterprise HCM 9.0 Approval Workflow Engine*

Delivered Notification Template for Approvals

Refer to the corresponding documentation in your application-specific PeopleBooks for information about delivered notification templates that are specific to an application.

See Also

Chapter 29, “Setting Up and Working with Delegation,” Reviewing Delivered Notification Templates for Delegation, page 727

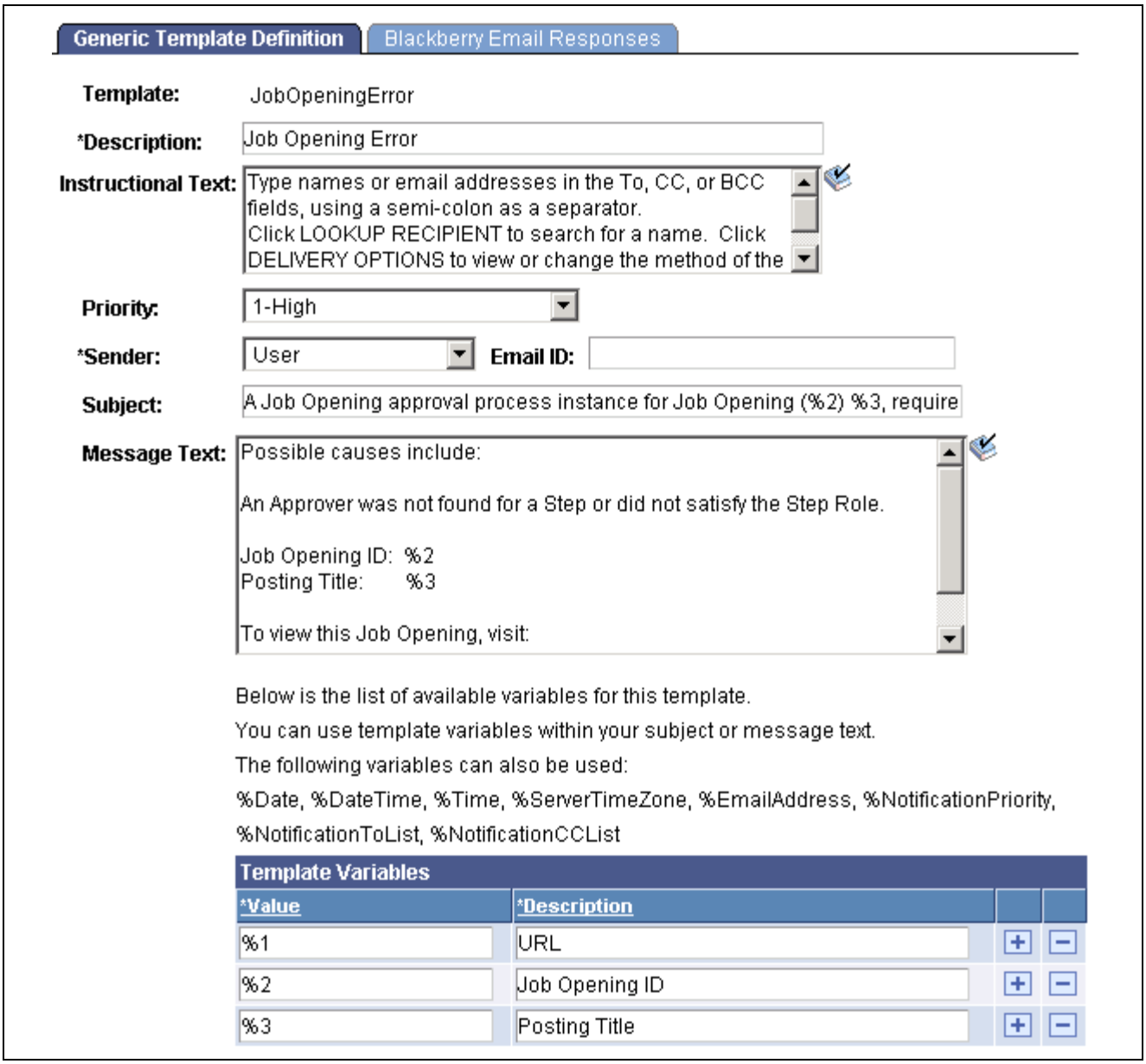
Page Used to Define Notification Templates for Approvals

Page Name	Object Name	Navigation	Usage
Generic Template Definition	WL_TEMPLATE_GEN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Generic Templates	Enter generic template definitions.

Entering Generic Template Definitions

Access the Generic Template Definition page.

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Generic Template Definition page

You use generic templates to establish common formats for ad hoc notifications.

For approvals, the first bind variable is used to store the URL that appears in the email.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology, "Using Notification Templates," Defining Generic Templates

Defining Users for Approvals

This section discusses how to:

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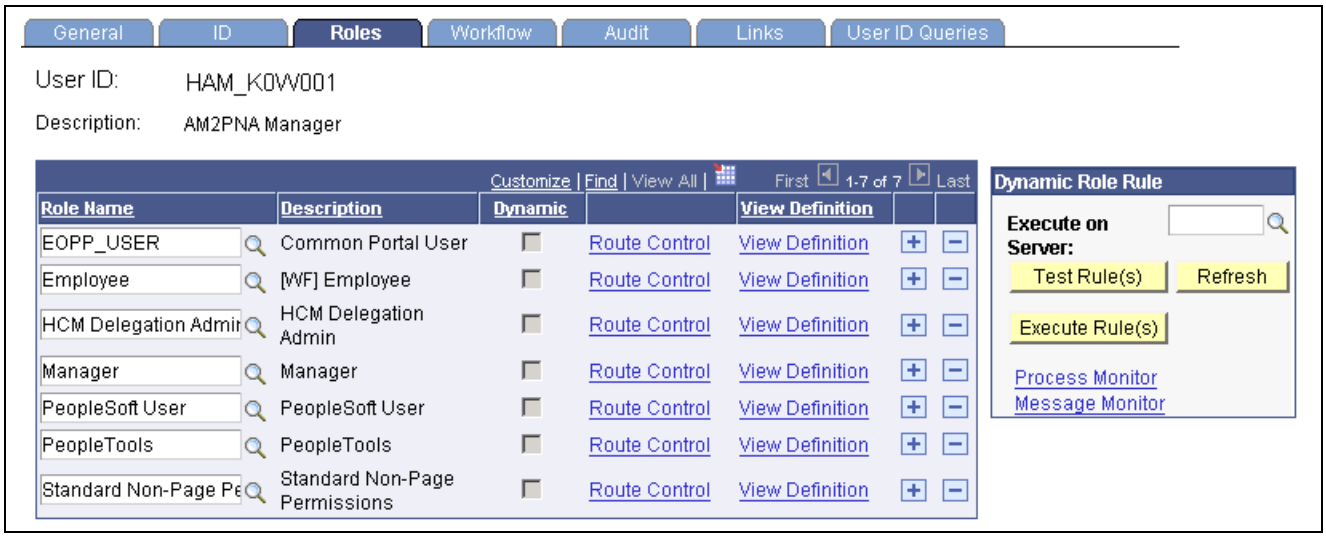
- Attach workflow roles to users.
- Define workflow for user profiles.
- Define user lists.

Pages Used to Define Users for Approvals

Page Name	Object Name	Navigation	Usage
User Profiles - Roles	USER_ROLES	PeopleTools, Security, User Profiles, User Profiles Select the Roles tab.	Attach workflow roles to users.
User Profiles - Workflow	USER_WORKFLOW	PeopleTool, Security, User Profiles, User Profiles Select the Workflow tab.	Define workflow for user profiles.
User List Definition	PTAF_USER_LIST	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Maintain User Lists	Create and maintain user-list definitions used for routing transactions for approval. Also, define user sources for use with steps in the approval process.

Attaching Workflow Roles to Users

Access the User Profiles - Roles page.



User Profiles - Roles page

Use this page to attach workflow roles to users. A role is a class of users who perform the same type of work, such as clerks, buyers, or managers. A role describes how people fit into workflow.

Role user IDs determine how to route Worklist items to users and how to track the roles that users play in the workflow.

Role Name Select a role to assign to this user. Role users are the people who participate in automated business processes.

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Dynamic

Appears if the definition of this role is dynamic. This value is driven by PeopleSoft PeopleCode. Dynamic users can obtain membership in a role programmatically. You can run a batch process that executes predefined role rules and assigns roles to user profiles according to these rules. This approach is called dynamic membership, and users who become role users of a particular role programmatically are dynamic role users.

Static role users, on the other hand, obtain their membership through an administrator adding a role to their user profile manually.

Route Control

Select to access the User Route Control Profiles page, where you can select a route control profile for the workflow.

The PeopleSoft Workflow Administrator enables you to define route controls. For example, suppose you want to route requisitions to different buyers, depending on which vendor supplies the ordered items, which business unit is requesting the items, and which department needs the items. You can define a route control for each factor—vendor ID, business unit, and department—and specify a range of values for each buyer.

View Definition

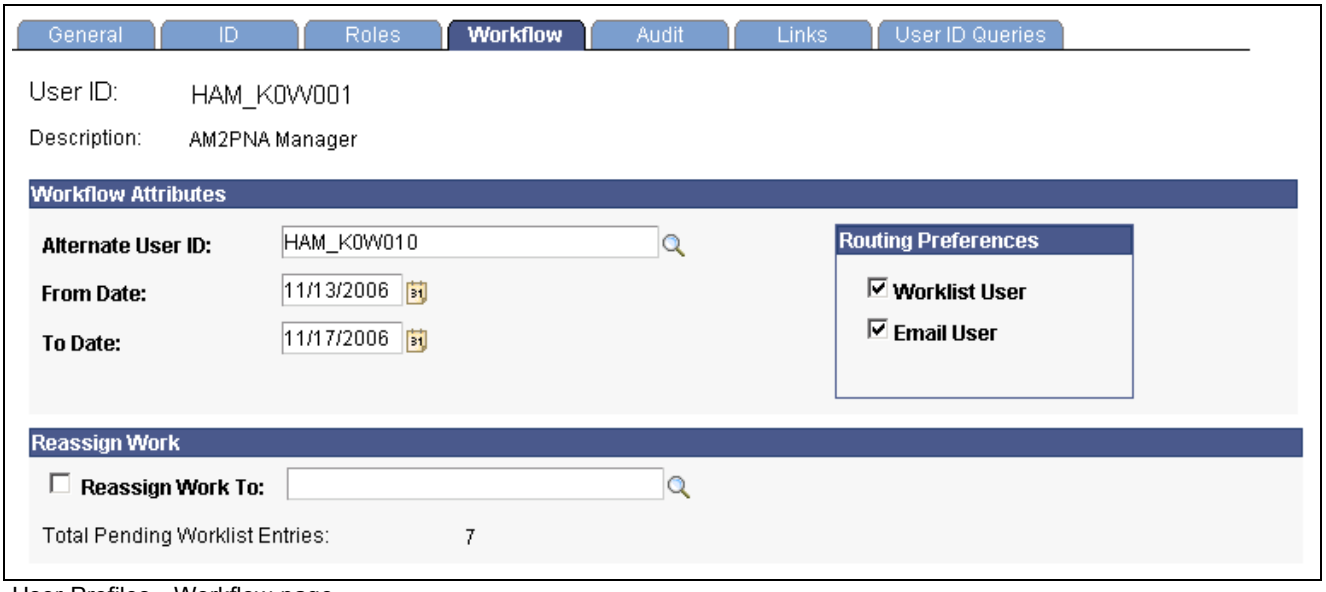
Select to access the Roles - General page, where you can change the role name definition. You can also view the user ID of the role member to ensure that you selected the appropriate definition for inclusion in the role.

See Also

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

Defining Workflow for User Profiles

Access the User Profiles - Workflow page.



User Profiles - Workflow page

Use this page to define alternate users who are part of the workflow process. You can define alternate users to handle approvals during the absence of the primary approver and supervisor.

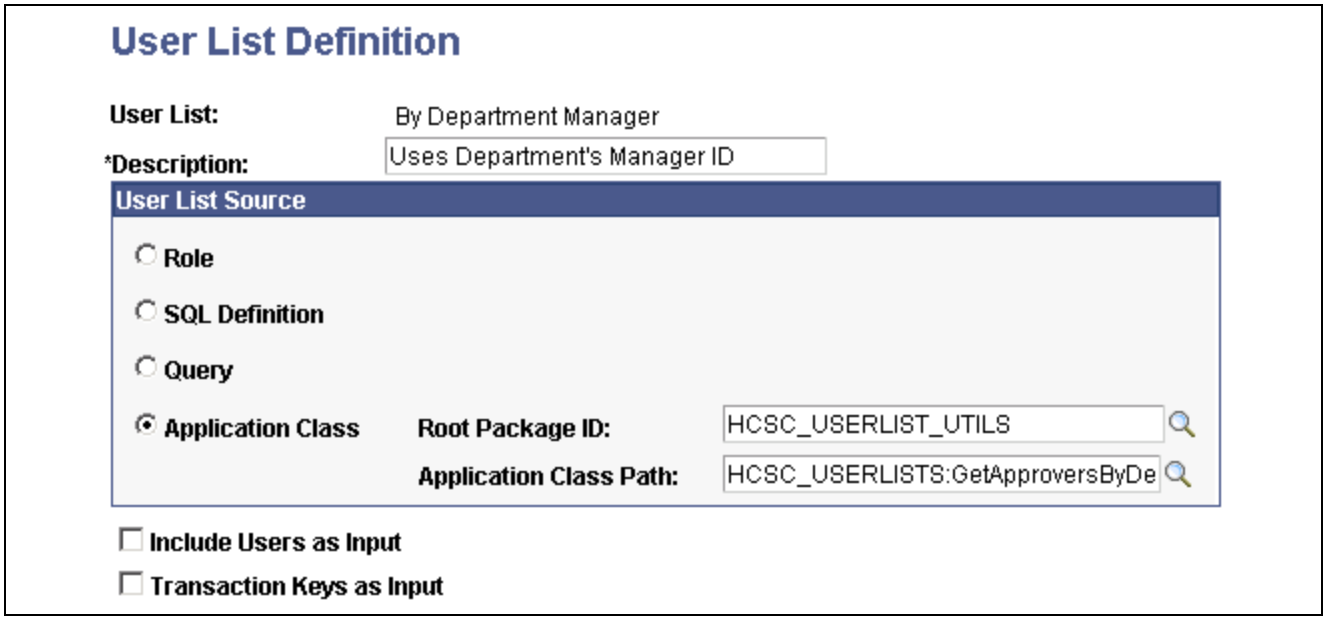
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Alternate User ID	Select a user to receive Worklist items when this user ID is temporarily unavailable. The system automatically forwards new work items for whoever is assigned as the current role user to the alternate role user. The system doesn't reassign items already in the user's Worklist.
From Date and **To Date**	Enter a date range when the current user ID is not going to be available. The system uses these values to forward routings to the alternate user.
Worklist User	Select to indicate that this role user can receive approval routings. Clear the check box if the user is not a PeopleSoft user. You can select Worklist User, Email User, or both.
Email User	Select to specify that this role user can receive email. Clear the check box if email is not available.
Reassign Work To	Select to indicate that you want to send Worklist items to another user. After selecting the check box, select the user ID. When you save the page, the system removes the Worklist items from the current user's list and places them in the new user's list.

Note. Refer to the *Setting Up and Working With Delegation* chapter if you are using the Delegation functionality and want to use the Alternate User ID.

Defining User Lists

Access the User List Definition page.



User List Definition page

A *user list* is a collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class. User lists are used to represent the business process of your approval hierarchy on a transaction-by-transaction basis. PeopleSoft delivers pre-defined user lists. If none of the delivered user lists apply to your organization's hierarchy, then you can define your own using the Maintain User List component.

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When you select a user list source type, you must also select a corresponding value. You can only select one user list source for a user list. The SQL Definition, Query, and Application Class user list sources are dynamic, and can use input values to help identify users.

User List — You can add a new user list or change a current list.

Description — The system uses the value that you enter in this field as part of the graphical representation of the approval process in self-service, displaying the user list description beneath the approver's name. It is important that you provide clear and concise descriptions so that the graphical representation is logical to the self-service user.

Role — Select to use a role as the source for this user list. A role is a list of users who perform the same type of work, such as buyers or managers. Each role has a set of parameters that determine the limits of the role in the organization and in the workflow process.

SQL Definition (structured query language definition) — Select to use an SQL definition as the source for this user list.

Query — Select to use a query as the source for this user list. When a source is defined as a query, the system determines who should receive a work item based on the field values on the page that triggers the routing.

Note. If you are using the Query option to define the user list for approval workflow, then, when you are creating the query in the Query Manager component, you must set the Query Type value of the query to *Process.* Setting the Query Type value to *User* can cause an error.

Application Class — Select to use an application class as the source for this user list.

When you select an application class, the system passes the originator of the transaction and then determines the approver for that originator. For subsequent approval steps, the system passes the approver from the previous step.

Include Users as Input — Select to indicate that the system uses the originator of a transaction as the first step in each path. For subsequent steps in each path, the system uses the approver from the previous step.

Transaction Keys as Input — Select to have the system base the approval routing on transaction keys. Transaction keys are key fields in a database table. System actions depend on the approval level at which a user list is being used. If the approval is at the header level, the system uses transaction record keys from the header record.

Delivered User Lists for HRMS

PeopleSoft Enterprise HRMS delivers the following common user lists for use with the Approval Workflow Engine:

User List	Description
By Department Manager	Uses the Manager ID field from the Department Profile page.

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User List	Description
By Partial Pos Mgmt - Dept Mgr	Uses the Reports To field from the Job Information page and then the Manager ID field for that position and department from the Department Profile page.
By Partial Pos Mgmt - Suprvsor	Uses the Reports To field from the Job Information page and then the Supervisor ID field for that position from the same page.
By Position Management	Uses the Reports To field from the Job Information page.
By Supervisor ID	Uses the Supervisor ID field from the Job Information page.

Note. Refer to the corresponding documentation in your application-specific PeopleBooks for information about delivered user lists that are specific to an application.

Multiple Jobs and User Lists

PeopleSoft Enterprise HRMS delivers a series of user lists, or approval hierarchies, based on application class that is designed specifically for receiving and passing employee job information. These user lists correspond to the roles within an organization and enable you to select which job the Approval Workflow Engine uses to route approvals for employees with multiple jobs.

If an employee with multiple jobs encounters a job-related transaction during self-service approvals processing, the system prompts the employee to select the job for which she or he wants to process the transaction. For multiple job capability, the delivered user lists use an Application Class as the source for the user list, with the value of the Root Package ID field set to *HCSC_USERLIST_UTILS* and one of the following delivered Application Class Path values:

Application Class Path	Related User List Definition
HCSC_USERLISTS:GetApproversByPositionMgmt	By Position Management
HCSC_USERLISTS:GetApproversByDeptManager	By Department Manager
HCSC_USERLISTS:GetApproversByPosnDeptMgr	By Partial Pos Mgmt - Dept Mgr
HCSC_USERLISTS:GetApproversByPosnSupervisor	By Partial Pos Mgmt - Suprvsor
HCSC_USERLISTS:GetApproversBySupervisorId	By Supervisor ID

The delivered user lists correspond with different access types that PeopleSoft Enterprise Human Resources delivers with direct reports functionality. The system uses each of these delivered user lists in correspondence with how you define your direct report structure (by supervisor, by department, and so on).

If you define a custom user list and want multiple job capability, then you must use these same application root package ID and application class path values. PeopleSoft Enterprise HRMS supports multiple job capability *only* in the predefined user lists that we deliver. Note that PeopleSoft Enterprise HRMS *does not* support multiple job capability for these custom user lists.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

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Setting Up the Notification and Escalation Manager

This section provides an overview of notification and escalation and discusses how to:

- Associate events to a server.
- Set up an escalation event.
- View event statuses.
- Set up a notification and escalation manager (NEM).

Understanding Notification and Escalation

NEM is a mechanism used to process notifications and escalations on a specified interval.

For example, escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. You can specify the time period (timeout) and you can specify alternate approvers to whom to notify and escalate the approval for further action. Timeout options are defined on the Approval Path Definition page.

Pages Used to Set Up the Notification and Escalation Manager

Page Name	Object Name	Navigation	Usage
Define Event Types	PTAF_NEM_EVENTS	Set up HRMS, Common Definitions, Approvals, Notification and Escalation, Define Event Types	Associate events to a server.
Define Events	PTAF_NEM_SETUP	Set up HRMS, Common Definitions, Approvals, Notification and Escalation, Define Events	Set up an escalation event and define the evaluation and action details.
Event Status	PTAF_NEM_STATUS	Set up HRMS, Common Definitions, Approvals, Notification and Escalation, Event Status	View the status of an event.
Schedule JobSet Definitions	SCHDLDEFN	PeopleTools, Process Scheduler, Schedule JobSet Definitions	Set up a NEM to define the job to run, and how often you want it to run.

Associating Events to a Server

Access the Define Event Types page.

Event Type Select an event type. The system is delivered with these values: *ESCALATION_EVENT, APPROVAL ACTIVITY EMAIL,* and *RECEIPT_NOTIFICATION_EVENT.*

Server Name Select the server on which to run the escalations.

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Setting Up an Escalation Event

Access the Define Events page.

Event Type The server information that was entered on the Event Type page.

Event Types Description The value entered in the Description field on the Events Type page.

Active Select to enable the escalation process.

Recurrence Enter a time interval at which to run the evaluation process.

Repeat Time Enter a time period to limit the number of times the action step is run.

Evaluation Type Select a method for evaluation. Possible values are:

- *PeopleCode:* Select if you are using a custom application package or class written using PeopleSoft Application Designer.
- *Query Object:* Select if you are using a query set up using the PeopleSoft Query Manager tool.
- *SQL View:* Select if you are using a record object created using the PeopleSoft Application Designer.

Note. For escalations, the evaluation type should be *SQL View*.

Action Type Select an action:

- *PeopleCode:* Select if you are using a custom application package or class written using the PeopleSoft Application Designer.
- *Email:* Enter an email address and notification template.

Note. For escalations, the action type should be *PeopleCode*.

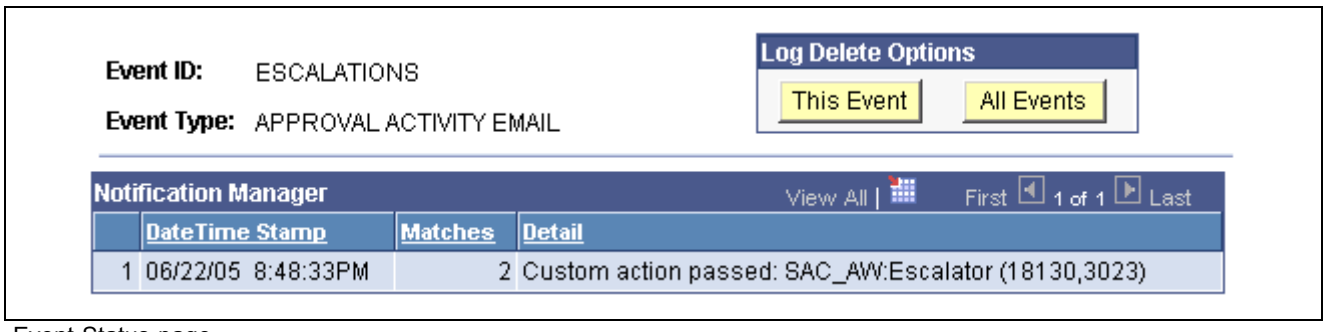
Package Select the application package that contains the escalation utility.

Note. For escalations, the package should be *PTAF_CORE* .

Class For escalations, select *Escalator*.

Viewing Event Statuses

Access the Event Status page.



Event Status page

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Log Delete Options

This Event Click to delete all notification event logs for the event ID that you selected.

All Events Click to delete all notification event logs for all events.

Notification Manager

DateTime Stamp Used in the Status record to track the results of each instance run.

Matches Displays the number of rows that are returned from a row set.

Detail Displays detailed status messages for each notification event.

Setting Up a NEM

Access the Schedule JobSet Definitions page.

Schedule Name Select *SAC_NEM* for the notification and escalation manager.

Job Name Select *NEM_MAIN* for the notification and escalation manager.

Status Select *Active* for the notification and escalation manager.

Run Control ID Enter the run control that has the run configuration desired.

Recurrence Name Enter a value that specifies how often the process runs.

Setting Up Security for Approvals

After you define all necessary objects in PeopleTools Application Designer and complete the required setup in the application components, you must ensure the proper setup of the applicable permissions lists, roles, and web libraries.

This table describes the delivered permission lists for the approval framework:

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Permission List Name	Description	Roles Attached To
HCCPSCAW1010	This is the approvals administrator permissions list. It grants permissions for AWE administration and configuration objects. These objects include all components under the menu path Setup HRMS, Common Definitions, Approvals. PeopleSoft delivers this list already attached to the AWE administrator role. You should also attach this permission list to any existing, application-specific administrator roles in your organization for which you want the administrators to inherit this permission list.	AWE administrator
HCCPSCAW1020	This is the manager permissions list. It grants permissions for AWE manager objects. These objects include several manger-specific self-service pages. PeopleSoft delivers this list already attached to the manager role. Any of your application-specific users who are considered managers and have the manager role assigned to them will automatically inherit this permission list.	Manager
HCCPSCAW1030	This is the employee permissions list. It grants permissions for AWE employee objects. These objects include several employee-specific self-service pages. PeopleSoft delivers this list already attached to the employee role. Any of your application-specific users who are considered employees and have the employee role assigned to them will automatically inherit this permission list.	Employee

PeopleSoft Enterprise HRMS delivers the AWE administrator role. This role already has the HCCPSCAW1010 permission list assigned to it. However, this role is not attached to any users as delivered. If you *do not* have an application-specific administrator role, then you can use this role by attaching it to any application-specific administrator users that you have. If you *do* have an application-specific administrator roles within your organization, then PeopleSoft recommends that you simply attach the HCCPSCAW1010 permission list to that role.

To enable users to view additional information about AWE participants through the approvals status monitor, you must assign users the correct permissions. Because of the manner in which the system displays the approvals status monitor, you must also grant access to the WEBLIB_PTAF web library for the appropriate product permission lists. Also, for users to be able to use the EMC functionality that is part of the Approval Workflow Engine, you must grant permission lists full access to the WEBLIB_PTAFEMC web library. PeopleSoft Enterprise HRMS delivers these two web libraries as part of the delivered Approval Workflow Engine permission lists.

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To grant permission lists access to web libraries:

1. Navigate to PeopleTools, Security, Permissions and Roles. Permission Lists.
2. Select the permission list for which you want to grant access to web libraries.
3. On the Web Libraries page, insert a new row for the web libraries WEBLIB_PTAF and WEBLIB_PTAFEMC.
4. For each web library, click the Edit link.

   The system displays the Web Library Permission page.
5. Click the Full Access button to grant access to all functions, or complete the Access Permissions field to grant access to specific iscript functions.
6. Click OK.
7. Save the permission list.

Note. The AWE framework assumes each person in the system has one valid operator ID. If you are using the approval process and allow your employees to have more than one operator ID, make sure they have the same roles and permission lists.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Administering Approvals

This section provides overviews of approvals administration and discusses how to:

- Administering approvals.
- Administering approvals for a specific approval process.

Understanding Approvals Administration

The Administer Approvals component gives approvals administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

Actions available for the approvals administrator are:

Reassignment Allows the approvals administrator to reassign pending approvals to a new approver based on search criteria.

Approve Allows the approvals administrator to act on behalf of the assigned approver. The approval is initiated for a specific user, wherever that user may be pending within a specific transaction. Once the administrator takes action, the approval resumes the approval process.

Denial Allows the approvals administrator to act on behalf of the assigned approver. The denial is initiated for a specific user, wherever that user may be pending within a specific transaction.

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Ad Hoc

Allows the approvals administrator to add a reviewer or approver to a specific transaction in serial or parallel with existing approvers. For serial approvals, each approval in the process is sequential. Users can add approvers and reviewers only after the current pending step or later. For parallel approvals, the sequence does not matter. Users can insert an ad hoc step in an ad hoc path in any currently pending or subsequent stage.

The approvals administrator can add or remove ad hoc approvers once the transaction is submitted. The Approval Workflow Engine launches the previewed approval process instance if requested by the application developer's code.

If you have an ad hoc approver user list defined on the Configure Transactions page, only the users within that list can be added as an ad hoc approver or reviewer.

Source End Actions

When a request is approved, the engine notifies the application, which then takes source end actions:

- End actions.

  An approval of one transaction often leads to the creation of another transaction, or triggers another business process. The Approval Workflow Engine supports this trigger by providing a call-back mechanism for event notification. For example, when a promotion is approved, it can be sourced—an action follows final approval, which is the end action.

- Line-level versus header-level end actions.

  Use line-level approvals to make it possible for an action to be taken on different line items upon their approval, without waiting for the approval of other line items in the transaction. You can source line items as soon as they are approved.

  This action is possible only if line-level approval routings are at the end of the process and require no further review. In this case, the application can act on the individual lines as they get approved. The Approval Workflow Engine notifies the application of significant approval-related events.

  Header actions allow the transaction lines to be grouped together and processed as one unit.

Approval Reassignment

You can reassign pending tasks to another approver, or an approvals administrator can reassign all tasks that belong to a specific approver to another approver. Use reassignment in the following situations:

- The approver chooses to redirect the task to another approver, thus delegating a specific task (step) to another approver.
- The approvals administrator decides to reassign all pending tasks within a step that belong to an approver to another approver.

  This reassignment usually occurs when an approver is unexpectedly absent and the approvals administrator reassigns all pending tasks to another.

When you redirect a workflow task to another approver, you can modify the approval process map.

Note. The Approval Workflow Engine is set up for administrative reassignment and escalations only.

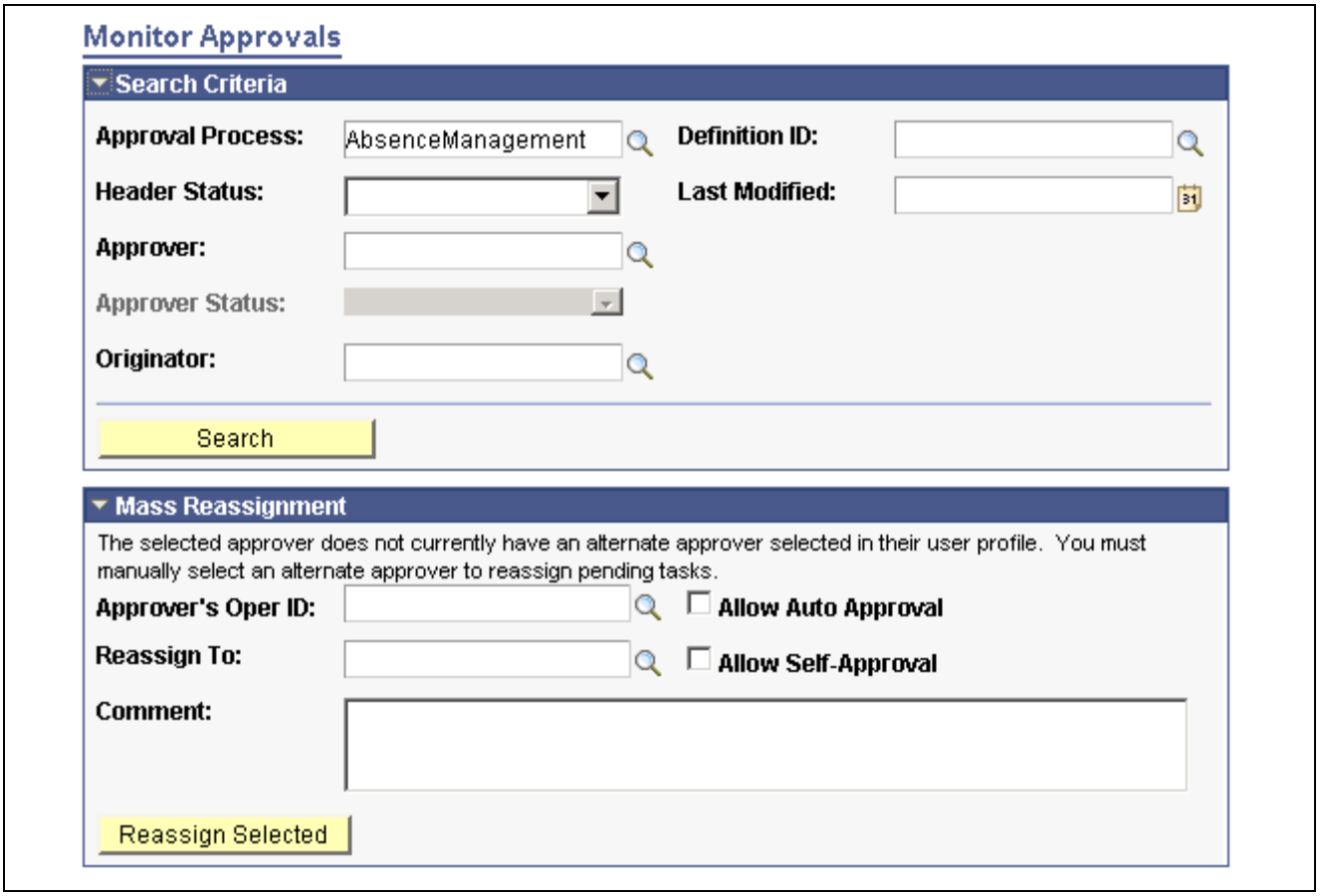
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Pages Used to Administer Approvals

Page Name	Object Name	Navigation	Usage
Monitor Approvals	PTAF_ADM_MON_SRC	Workflorce Administration, Self-Service Transactions, Approvals and Delegation, Administer Approvals, Monitor Approvals	Approvals administrators can search on approval processes and perform mass reassignments.
Monitor Approvals	PTAF_ADM_MON_ACT	Workflorce Administration, Self-Service Transactions, Approvals and Delegation, Administer Approvals, Monitor Approvals Click the link for the approval step you want to modify.	Approvals administrators can perform an action on a specific approval process.

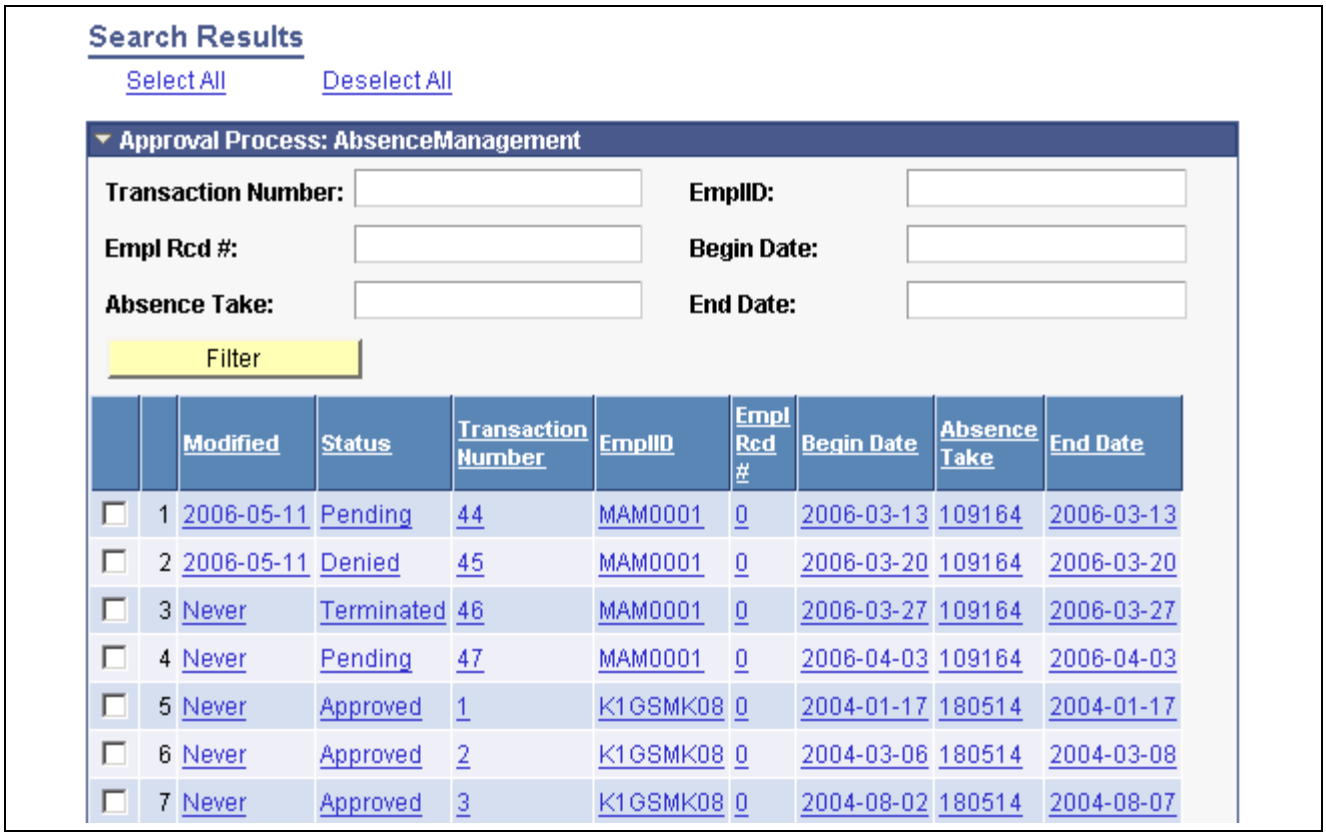
Administering Approvals

Access the Monitor Approvals page for a view of the approval process.



Monitor Approvals page (1 of 2)

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		Modified	Status	Transaction Number	EmplID	Empl Rcd #	Begin Date	Absence Take	End Date
☐	1	2006-05-11	Pending	44	MAM0001	0	2006-03-13	109164	2006-03-13
☐	2	2006-05-11	Denied	45	MAM0001	0	2006-03-20	109164	2006-03-20
☐	3	Never	Terminated	46	MAM0001	0	2006-03-27	109164	2006-03-27
☐	4	Never	Pending	47	MAM0001	0	2006-04-03	109164	2006-04-03
☐	5	Never	Approved	1	K1GSMK08	0	2004-01-17	180514	2004-01-17
☐	6	Never	Approved	2	K1GSMK08	0	2004-03-06	180514	2004-03-08
☐	7	Never	Approved	3	K1GSMK08	0	2004-08-02	180514	2004-08-07

Monitor Approvals page (2 of 2)

Search Criteria

Approval Process Select an approval process. The list of approval processes available is determined by the administrator role associated with the approval process definition. If a user is associated with the role specified in the Admin. Role field on the Setup Process Definitions page, they can view, act on, or both for that process ID within the Administer Approvals component.

Definition ID Select the process definition that is determined on the Setup Process Definition page.

Header Status Select a status in this field to display the selected status. Choices are:

- *Approved*
- *Complete*
- *Denied*
- *Hard Deny*
- *Initial*
- *Not Active*
- *Pending*
- *Pending Denial*
- *Suspended/Pending Denial*
- *Terminated*

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Note. Refer to the *Enterprise HCM 9.0 Approval Workflow Engine* red paper for definitions of each header status value.

See PeopleSoft Customer Connection, *Enterprise HCM 9.0 Approval Workflow Engine*

Approver Select an approver. You can view or take action on approval processes for a specific approver.

Approver Status Select a status from those available. This field is only available when a specific approver is selected in the Approver field. The statuses available for selection are based on the statuses of that specific approver in the cross-reference table associated with the approval process ID.

Originator Select the user who entered the transaction that started the approval process.

Mass Reassignment

Approver's Oper ID (approver's operator ID) Select the operator ID of the approval to whom the approval transaction is assigned.

Reassign To Select the operator ID of the person to whom you want to reassign approval transactions for the specified approver in the Approver's Oper ID field.

Allow Auto Approval Select to allow auto approval of approval transactions that are assigned to the specified approver.

Allow Self-Approval Select to allow the specified approver to approve transactions on their own behalf.

Comment Enter a comment to describe the mass reassigment. The comment becomes part of the transaction itself.

Reasign Selected Click to reassign the approval transactions from approver in the Approver's Oper ID field to the person specified in the Reassign To field. The system reassigns only the approval trasnactions that you have selected in the search results.

Search Results

The system displays a unique section for each approval process that has approval transactions meeting your search criteria. Each section contains key fields that are unique to the specific approval process. You can filter your search results within a section by specifying key values and clicking the Filter button.

Select All Click to select all approval transactions that are listed in your search results.

Deselect All Click to clear the selection of all transactions in your search results.

Filter Specify key values and then click the Filter button to narrow your search results within an approval process section.

Modified The system displays the date when the aproval transaction was last modified. If the approval transaction has never been modied, the system displays *Never.*

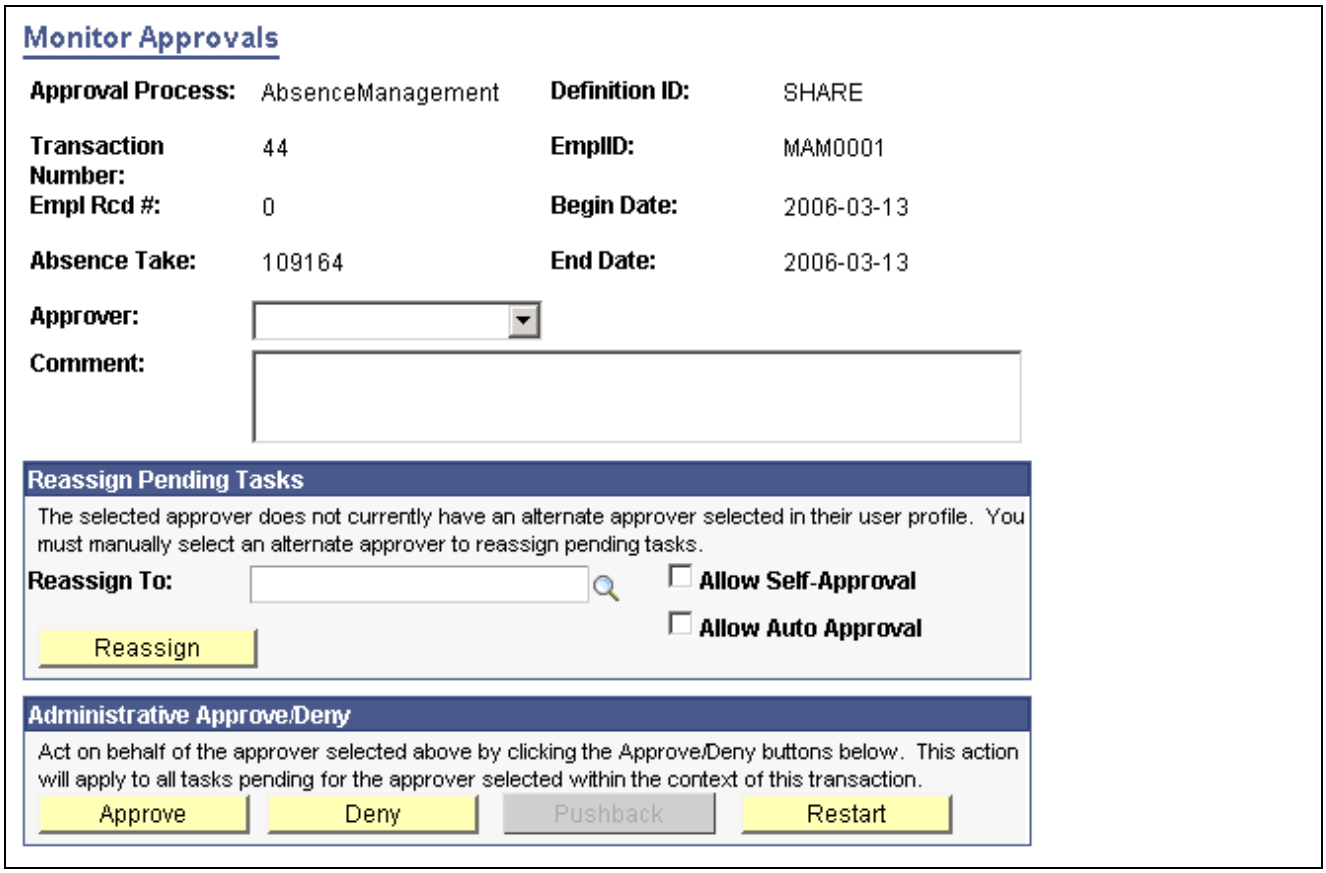
Status The system displays the status of the approval transaction: *Pending, Denied, Terminated,* or *Approved.*

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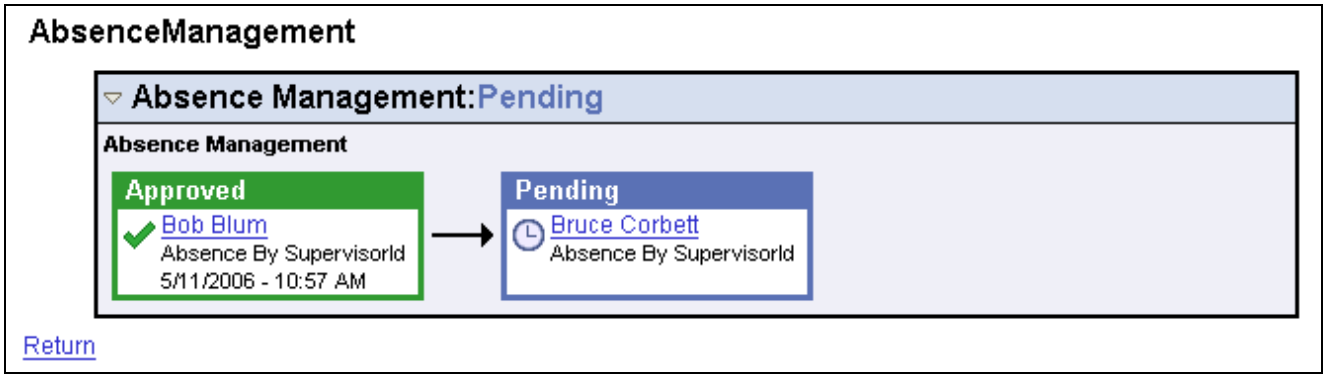
<Key Values> The system displays key values for each of the approval transactions that meet your search criteria. Key values vary dending on the approval process.

Administering Approvals for a Specific Approval Process

Access the Monitor Approvals page to take action on a specific approval process.



Monitor Approvals page (1 of 2)



Monitor Approvals page (2 of 2)

Approver Select an approver. All approvers associated with pending steps within the approval process are listed.

Comment Enter text to appear under the approval graphic in the Approval Comment History section.

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Reassign Pending Tasks

Reassign To Select an approver to whom to reassign all pending steps within the approval process.

Allow Self-Approval Select to enable self-approval. When it is enabled, the approval is assumed and the process continues.

Allow Auto Approval Select to enable auto-approval. When it is enabled, the system remembers an approver's action for that process at the header or line level, and applies the same action automatically for any subsequent appearance in the approval workflow routing.

Reassign Click to reassign all pending steps within the approval process to the person specified on the Reassigned To field.

Administrative Approve/Deny

Approve Click the Approve button to act on behalf of the selected approver. This action applies to all tasks pending for the approver selected within the context of the approval process.

Deny Click the Deny button to act on behalf of the selected approver. This action will apply to all tasks pending for the approver selected within the context of the approval process.

Pushback Click to requeue the previous step to its approver. This button is only available at a step that is greater than one.

For example, a transaction has three approvers. The first approver has approved the transaction, therefore, the transaction is pending at step two. The administrator needs additional information from the requester and, therefore, pushes the transaction back to the requester.

Restart Click to restart a pending transaction to all approvers in the approval path. This button is only available when the transaction is pending.

Resubmit Click to resubmit a completed transaction to all approvers in the approval path. This button is only available when the transaction is complete. The transaction can only be resubmitted in its current state and cannot be modified before resubmitting for approval.

Reassigning Tasks Assigned to You

To reassign your tasks to another approver, select a step assigned to you as an approver and request that the step be reassigned to an alternate. You must have an approvals administrator role to perform this task.

The Approval Workflow Engine reassigns that step to the newly appointed approver, and deletes the original approver's worklist entry. The system creates a new worklist entry for the new approver, and notifies the new approver.

The Approval Workflow Engine adds a comment to the approval thread to log the reassignment.

Reassigning Tasks as an Administrator

To reassign a specific approver's pending tasks to another approver:

1. Filter the display to present pending approval processes for the specific approver.

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2. Indicate the steps to be reassigned and the users affected.

   The system submits a request to the Approval Workflow Engine to reassign all of the pending steps.

Once you have reassigned the pending tasks to a new approver, the approval path is updated and the approval transaction is routed to the new approver.

Note. You can create reassignments through the user profile. However, workflow reassignments through the user profile don't alter the actual approval process. Reassigning using the Monitor Approvals component performs the reassignment and creates the worklist for the new user.

The approvals administrator can also take action instead of reassigning.

Comments

Expand the Comments section or click the View/Hide Comments link to view the previous workflow streams. This section is available when the system has resubmitted the transaction due to a change in the transaction.

Generating a Approvals Audit Report

This section discusses how to generate an approvals audit report.

Understanding the Approvals Audit Report

The Approval Workflow Engine produces an audit trail for each approval transaction as the transaction passes through the approval process. This audit trail includes tracking the distinction between the actions of the original approver and his or her proxy. The Approvals Audit Report Application Engine process (HCSC_AWE_ADT) creates an audit report based on this audit trail and the run criteria that you enter on the Approvals Audit Report page.

The Approvals Audit Report (AWEAUDIT) report includes the following data regarding approval transaction requests as applicable:

- Transaction number, which the Approval Workflow Engine automatically assigns to each approval transaction request.
- Approval process ID, which is defined during setup of the approval process.
- Approval definition ID, which is defined during the setup of the approval process.
- Current approver's name, if the request is still pending.
- Current request status.
- Requestor's or originator's name.
- Proxy and Delegator's names, if applicable.
- Requestor's or originator's employee ID.
- Each approver's name.
- Transaction submit date.
- Transaction completion date.

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Enter data into one or more of the fields to filter your report results. If you leave a field blank, the report process includes results for all possible values pertaining to that criterion. For example, if you specify the range of dates for which requests were submitted as January 1, 2006 to December 31, 2006, and a specific originating requester, then the system generates a report that includes all transactions requested by that person for 2006, regardless of approval process ID and approval definition ID.

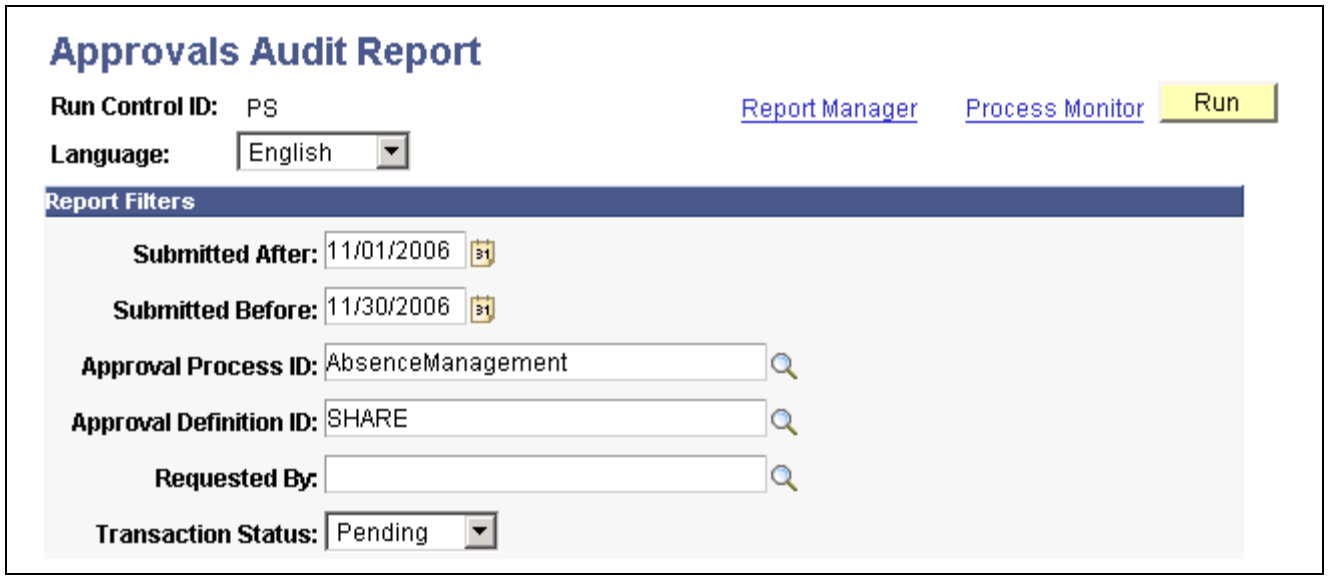
You can view the report online in PDF format, print the report, save it, or rerun the report using different filtering criteria. You can also download the report to your local machine as a TXT, XLS, or CSV file. The top of the report displays the date and time stamp of when it was generated and a summary of the filter data selected. The report sorts the data by request submit date.

Page Used to Run the Approvals Audit Report

Page Name	Object Name	Navigation	Usage
Approvals Audit Report	HCSCAWE_RUN_CNTL	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Approvals Audit Report, Approvals Audit Report	Generate an audit report that provides a complete list of approval transactions that have passed through the Approval Workflow Engine based on your run criteria.

Generating an Approvals Audit Report

Access the Approvals Audit Report page.



Approvals Audit Report page

Submitted After and **Submitted Before** — Enter a date range for which you want to include approval transaction requests in the audit report.

Approval Process ID — Select an approval processes ID to filter your report results to a specific type of appproval transaction.

Approval Definition ID — Select a specific approval process definition for which you want to filter your report results.

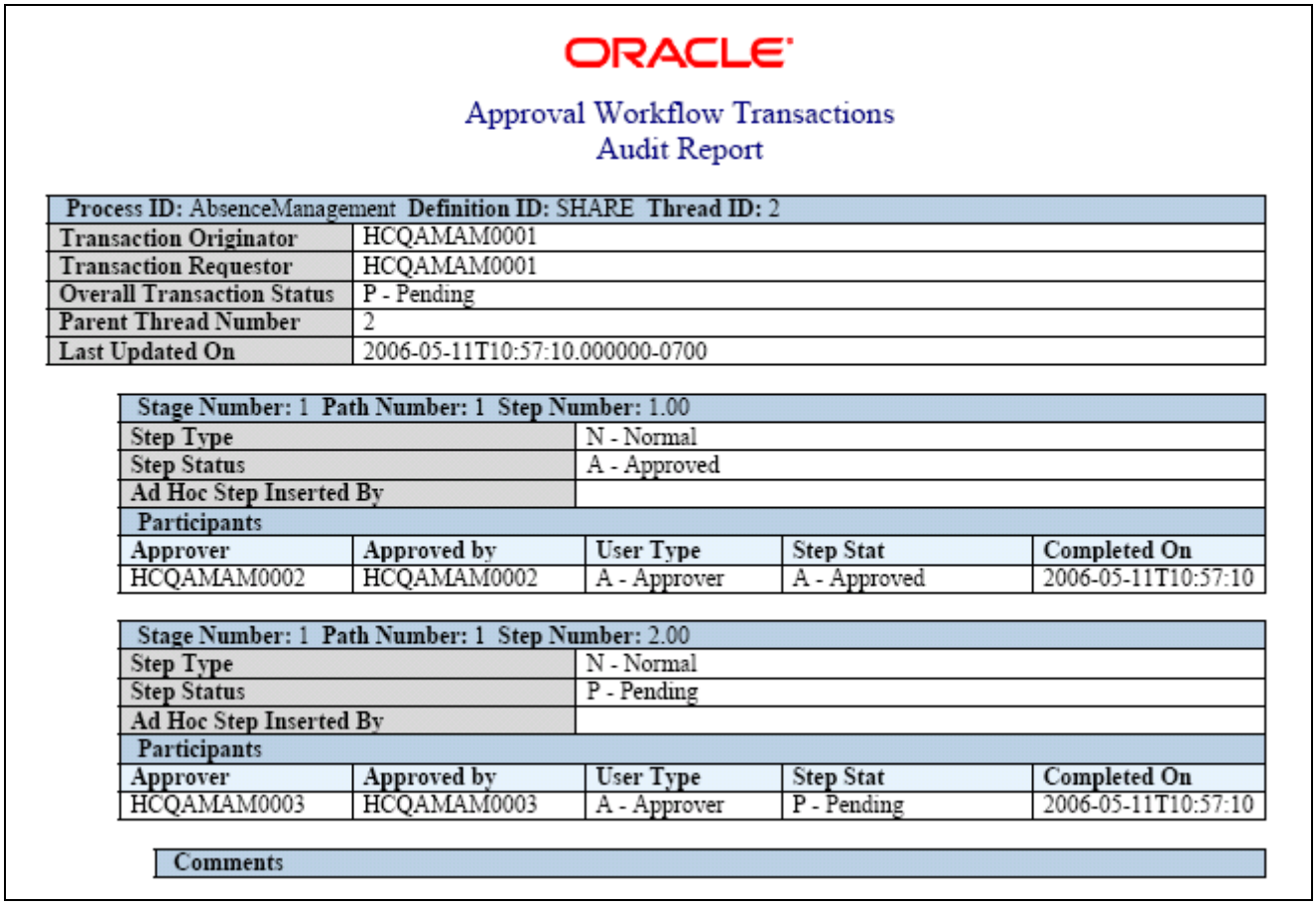
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Requested By Select a requester to filter your report results to approval transaction requests submitted by a specific person.

Transaction Status Select a status to filter your report results to aproval transaction requests that currenty have the selected status.

Sample Approvals Audit Report

The following is a sample of the Approvals Audit Report:



ORACLE

Approval Workflow Transactions
Audit Report

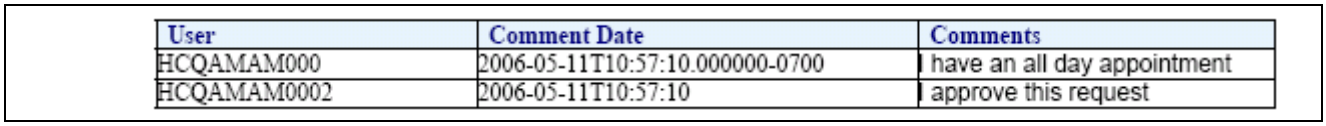
Process ID: AbsenceManagement Definition ID: SHARE Thread ID: 2	
Transaction Originator	HCQAMAM0001
Transaction Requestor	HCQAMAM0001
Overall Transaction Status	P - Pending
Parent Thread Number	2
Last Updated On	2006-05-11T10:57:10.000000-0700

Stage Number: 1 Path Number: 1 Step Number: 1.00				
Step Type	N - Normal			
Step Status	A - Approved			
Ad Hoc Step Inserted By				
Participants				
Approver	Approved by	User Type	Step Stat	Completed On
HCQAMAM0002	HCQAMAM0002	A - Approver	A - Approved	2006-05-11T10:57:10

Stage Number: 1 Path Number: 1 Step Number: 2.00				
Step Type	N - Normal			
Step Status	P - Pending			
Ad Hoc Step Inserted By				
Participants				
Approver	Approved by	User Type	Step Stat	Completed On
HCQAMAM0003	HCQAMAM0003	A - Approver	P - Pending	2006-05-11T10:57:10

Comments

Approvals Audit Report (1 of 2)



User	Comment Date	Comments
HCQAMAM000	2006-05-11T10:57:10.000000-0700	I have an all day appointment
HCQAMAM0002	2006-05-11T10:57:10	I approve this request

Approvals Audit Report (1 of 2)

Note. You can configure this report through the PeopleTools XML Publisher functionality.

Working with Self-Service Approval Transactions

This section discusses how to:

- Review approval transaction requests.
- Select a job for approval transaction requests.

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Important! This section lists only the self-services pages for approval transactions that are common across multiple applications within the HRMS product line. For details about self-service pages that are specific to business processes within an application, refer to application-specific PeopleBooks.

Pages Used to Work with Self-Service Approval Transactions

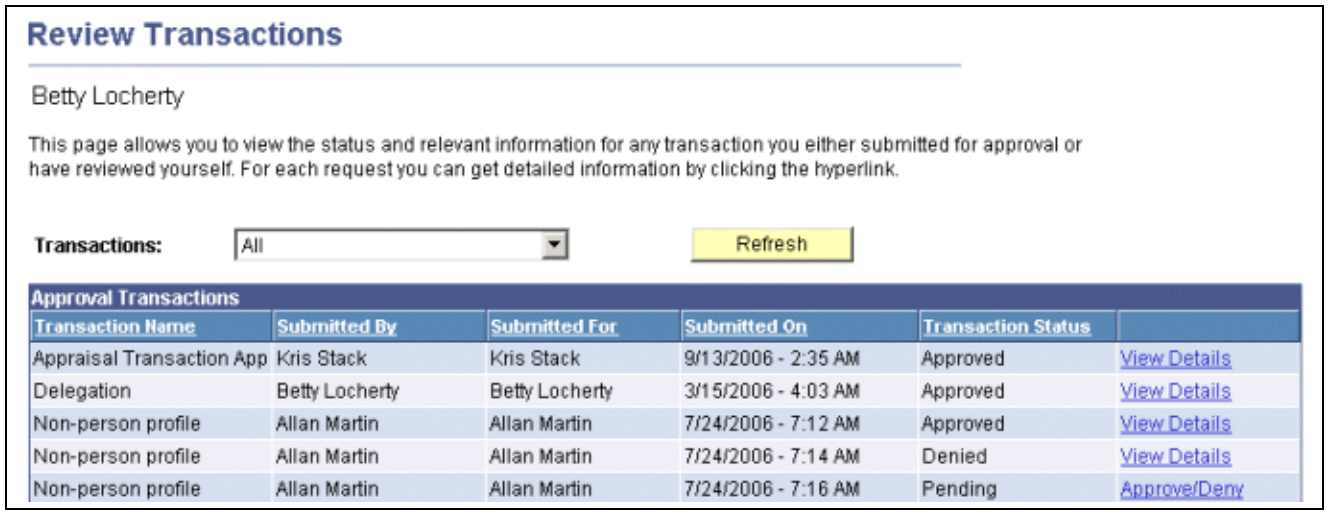
Page Name	Object Name	Navigation	Usage
Approvals Status Page	HCM_APPR_STATUS	• Manager Self Service, Review Transactions, Review Transactions • Employee Self Service, Review Transactions, Review Transactions	Manager and employees can view the status and details of approval transactions requests that are associated with them.
Select Job	HCM_JOB_SELECT	The system displays this page when a user submits or approves an request and the user has multiple jobs.	Users with multiple jobs can select the job for which they want to submit or approve an approval request.s.

See Also

Chapter 29, "Setting Up and Working with Delegation," Working with Self-Service Delegation, page 714

Reviewing Approval Transaction Requests

Access the Review Transactions page.



Review Transactions page

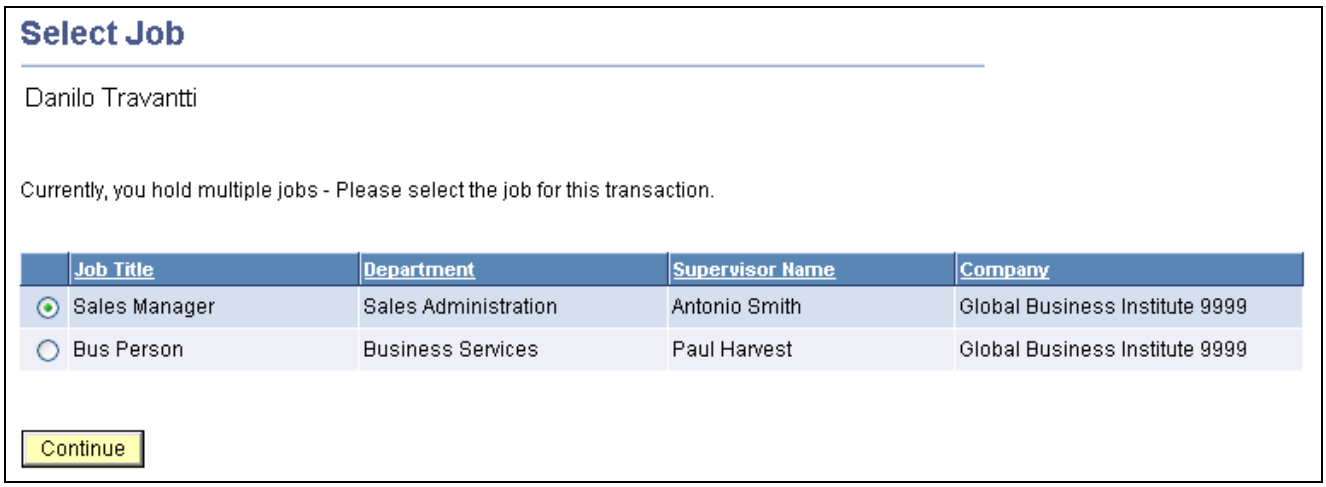
Users can view the status and details of approval transaction requests that are pending their approval, approved, denied, or terminated. The system displays the results in the grid. For each transaction in the grid, users can click the View Details link or the Approve/Deny link to access pages where they can review details of the transactions and take further action in the approval process.

Note. For archiving transactions that are stored in the Approval Workflow Engine, PeopleSoft recommends using the PeopleTools Archive manager component.

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Selecting a Job for Approval Transaction Requests

Access the Select Job page.



Select Job page

If a user submits or approves a transaction and the user has multiple jobs, the user can select the job for which to submit or approve the transaction so that the system can route the request to the appropriate people.

Note. Refer to the *Enterprise HCM 9.0 Approval Workflow Engine* red paper for instructions on how to implement the Select Job page into your application.

See PeopleSoft Customer Connection, *Enterprise HCM 9.0 Approval Workflow Engine*

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CHAPTER 29

Setting Up and Working with Delegation

This chapter provides an overview of delegation and discusses how to:

- Navigate delegation components.
- Register workflow transactions.
- Set up permission lists and roles for delegation.
- Define delegation installation settings.
- Configure delegation transactions.
- Add delegation requests.
- Administer delegations.
- Process batch delegation requests.
- Work with self-service delegation.
- Review delivered notification templates for delegation.

Understanding Delegation

Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority of managerial transactions to another person while away from the office.
- A senior executive does not have the time to process transactions and wants to delegate this authority to another person, such as an assistant.

Delegation Terminology

The following terms are important to the understanding of Delegation feature and are used throughout the chapter:

Delegation	The act a delegating one's authority to another user.
Delegator	A person that delegates authority to another user.
Proxy	A person granted authority to act on behalf of another user.

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Delegate Initiation	The Delegation Framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
Delegate Approvals	The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.
Delegated Authority	The rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	A request from the delegator to the proxy to take on delegated authority.
Delegation Period	The time range in which the delegated authority is in effect.
Delegation Administrator	The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
Revoke	When a delegator or delegation administrator withdraws delegated authority.

Delegation Framework

The core of the Delegation feature is the Delegation framework. The Delegation framework manages a proxy's authority over a delegated transaction. When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy

Integration with the Approval Workflow Engine

The Delegation framework integrates with the Approvals Workflow Engine (AWE). This integration provides several benefits. First, the integration between the Delegation framework and AWE makes the AWE framework aware of delegated authorities in the system. Second, the Delegation framework uses the AWE framework to manage the acceptance and rejection of delegation requests.

Delegation Request Creation Through Self-Service

The Delegation framework is a component of the PeopleSoft Enterprise HRMS self-service solution. Users can create delegation requests for selected transactions through HCM self-services pages.

When creating a delegation request, the delegator can:

- Delegate only the transactions to which they have access.

  For example, an employee who is not a manager does not have access to manager self-service transactions and, therefore, cannot delegate manager-specific transactions.
- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transactions to different proxies.

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Delegation Administration

Delegation administrators can use the administrative components for delegation to perform several useful tasks. They can:

- Create delegation requests on behalf of delegators through the Add Delegation Request component (HCDL_ADMIN_ADD_DLG).
- Review delegation requests and, if necessary, revoke them on behalf of delegators through the Administer Delegation component (HCDL_ADMIN_DLG).
- Process all delegation transactions in batch daily through the Maintain Delegated Authorities component (HCDL_BATCH).

Notifications

The system uses email and worklist notifications to notify managers and proxies of new delegation requests and transactions pending approval. The system creates a worklist item only on the proxy's worklist, not on the delegator's worklist (provided that you have set up worklist items as a preference for receiving notifications). The system sends email notifications for approval to the proxy and, if the delegator selects to be notified, the system also sends the delegator a courtesy email notification. Delegation administrators can use the Generic Templates component to configure different email templates for the proxy and delegator.

See Chapter 29, "Setting Up and Working with Delegation," Reviewing Delivered Notification Templates for Delegation, page 727.

Requests Statuses and Delegation Statuses

The Delegation framework manages delegation requests through request statuses and delegation statuses. A request status defines the status of the delegation request. A delegation status defines whether a proxy's delegation authority is active or inactive. The combination of these two statuses determines how the Delegation framework handles delegations.

This table lists request statuses for delegation and describes how the Delegation framework handles a delegation depending on the delegation status associated with each request status:

Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to *Submitted* and delegation status to *Inactive.*

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Request Status	Delegation Status	Description
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to *Accepted.* The delegation status becomes *Active* only when the following two conditions occur: • The proxy accepts the delegation request. • The system date is greater than or equal to the From Date and less than or equal to the To Date of the delegation period. Once the delegation status becomes *Active,* the system reassigns all pending transactions from the delegator to the proxy. The system also assigns the proxy a temporary permission list and role for the transaction, which grants the proxy navigation access to the online transaction. If the To Date of the delegation request is blank, the request status remains *Active* until revoked by delegator or administrator.
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future-dated, the delegation status remains *Inactive* until the system date is greater than or equal to the From Date.
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to *Rejected.* The delegation status remains *Inactive.*

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Request Status	Delegation Status	Description
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to *Ended* and changes the delegation status to *Inactive.* This change occurs when the system date is greater than the To Date of the delegation authority period. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to *Revoked* and changes the delegation status to *Inactive.* The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.

Implementation Considerations for Delegation

When implementing Delegation functionality, you should consider the following:

The important considerations are:

- Should you enable delegation functionality?
- What transactions should you enable for delegation?
- What hierarchy should you enable for delegation?

You should also analyze the following security needs and create a plan that covers these needs:

- Analyze delivered permission lists and roles for delegation components to decide if the implementation will use the delivered objects or create new objects.
- Decide how to define a standard user profile for the delegation administrator that contains the relevant roles.
- Decide how to define a standard user profile for the delegator that contains the relevant roles.
- Decide how to define a standard user profile for the proxy that contains the relevant roles.
- Decide if the delegator and proxy should have the same or different profiles.

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Steps to Set Up Delegation

To implement transactions in the delegation framework:

1. Register delegation transactions for workflow on the Register Workflow Transactions page.
2. Set up delegation permission lists and roles through PeopleTools Security components.
3. Define installation settings for delegation on the Delegation Installation Settings page.
4. Configure transactions for delegation on the Configure Delegation Transactions page.

Navigating Delegation Components

PeopleSoft Enterprise HRMS provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise HRMS custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

This section lists the pages used to navigate delegation components.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate Delegation Components

This table lists the custom navigation pages that are used to navigate in the setup and administrative components for delegation functionality:

Page Name	Navigation	Usage
Delegation Setup Center	Set up HRMS, Common Definitions, Delegation, Delegation Setup Center	Administrators can use the links on this page to access the components necessary to set up the Delegation framework for PeopleSoft Enterprise HRMS.
Approvals and Delegation	Workforce Administration, Self-Service Transactions, Approvals and Delegation	Administrators can use the links on this page to access the components necessary to maintain delegation and to monitor approval transactions for PeopleSoft Enterprise HRMS.

Registering Workflow Transactions

This section discusses how to register workflow transactions.

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Page Used to Register Workflow Transactions

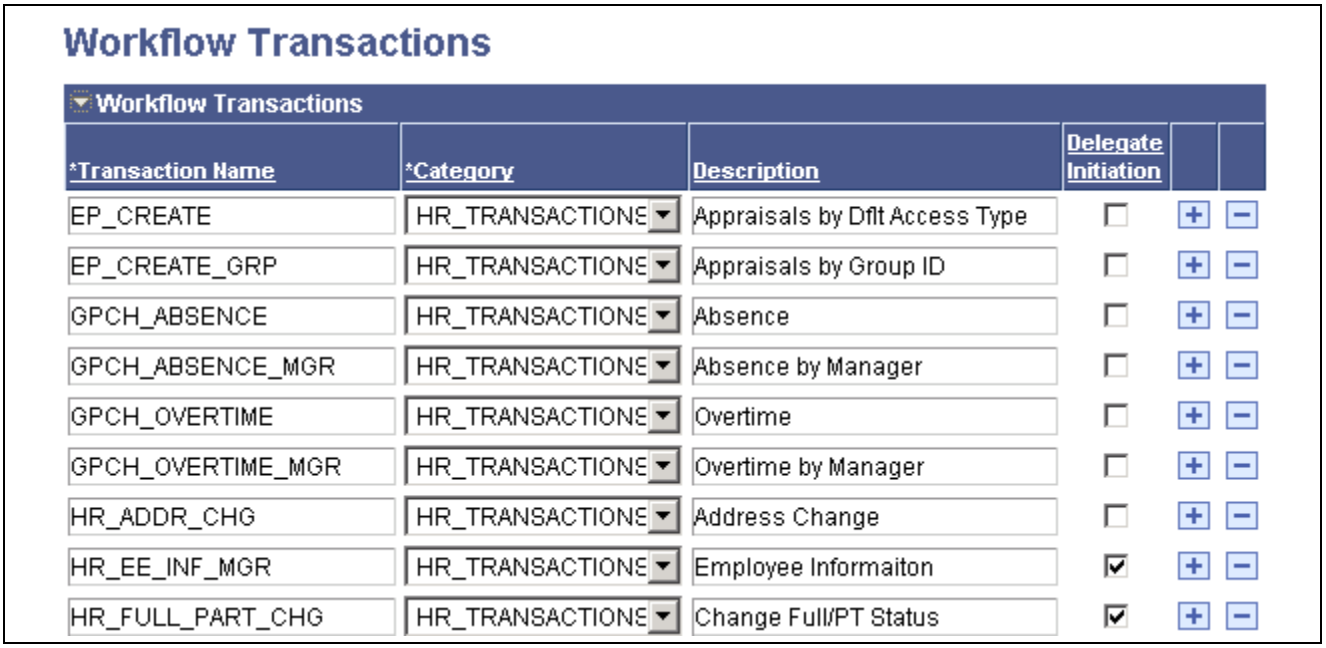
Page Name	Object Name	Navigation	Usage
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Workflow Transactions	Register self-service transactions as workflow transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that use the Approval Workflow Engine, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

See Also

Chapter 28, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 641

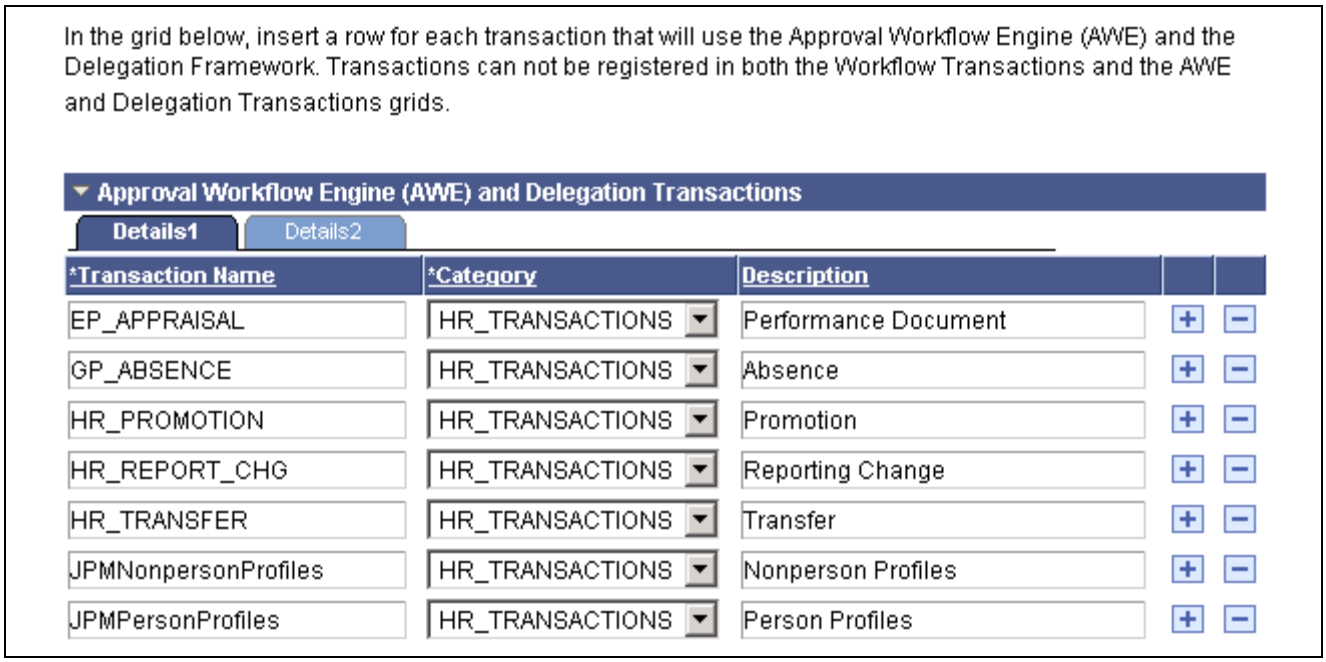
Registering Workflow Transactions

Access the Workflow Transactions page.

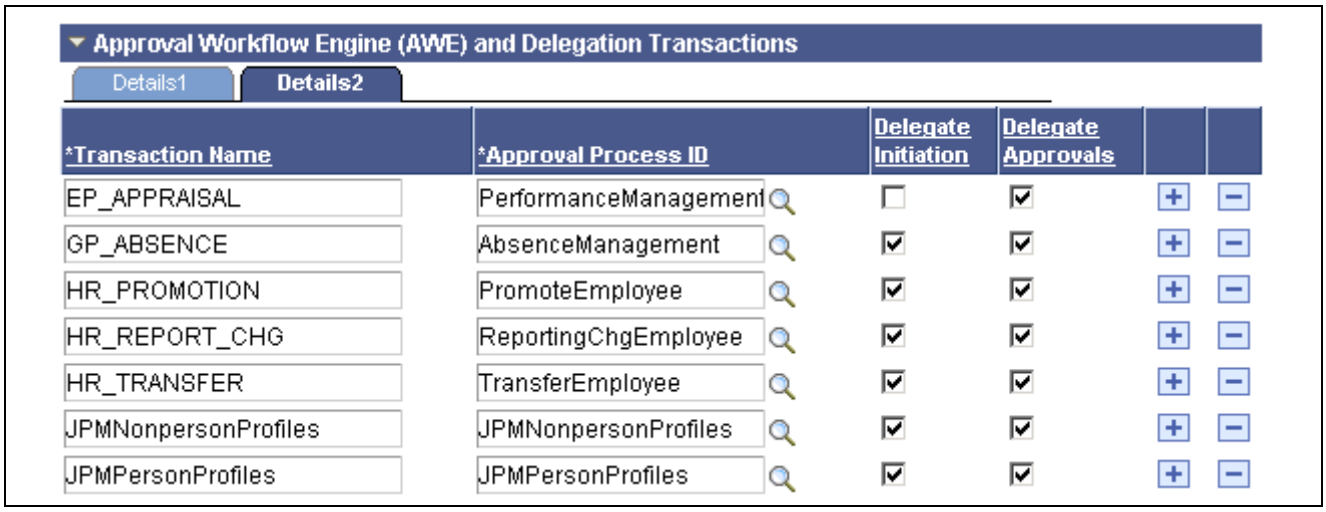


Workflow Transactions page (1 of 3)

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Workflow Transactions page (2 of 3)



Workflow Transactions page (3 of 3)

Note. When implementing the Delegation framework, you must register all self-service transactions. Only the registered workflow transactions that you enable for delegation initiation or approval are available for subsequent delegation transaction setup.

See Chapter 28, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 641.

Setting Up Permission Lists and Roles for Delegation

This section provides an overview of permission lists and roles for delegation and discusses how to set up permission lists and roles.

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Understanding Permission Lists and Roles for Delegation

Before configuring delegation transactions, you must set up permission list and role security for your delegation transactions. PeopleSoft Enterprise HRMS delivers as system data several permission lists that are required for use of the Delegation framework. You can attach these permission lists to roles where needed to enable users access to delegation functionality.

This table describes the delivered permission lists for the Delegation framework:

Permission List Name	Description	Roles Assigned to Permission List
HCCPDL1000	Enables users to access the delegation setup components that are part of the Delegation Setup Center page and the delegation administrative components that are part of the Approvals and Delegation page.	HCM Delegation Admin (administrator)
HCCPDL1100	Enables users to access the Manage Delegation page, which is the home page for self-service transactions.	Manager Employee

In addition to permission lists, you need to define the delegation administrator role and assign the HCCPDL1000 permission list to it. Once assigned to a user, this role enables that designated delegation administrator access to the delegation setup and administrative components. PeopleSoft Enterprise HRMS delivers the HCM Delegation Admin role as system data for this purpose. This role already has the HCCPDL1000 permission list assigned to it.

PeopleSoft Enterprise HRMS applications that use delegation functionality deliver many transactions that are preconfigured for the Delegation framework. These transactions are preconfigured with a unique permission list and role for each component where the proxy can perform the delivered delegated transaction. When a proxy status becomes active, the system inserts the unique role for that delegation transaction into the proxy's user profile. The role contains the permission list that enables the proxy access to the component for performing the delegated transaction. When the proxy status becomes inactive, the system removes that role from the proxy's user profile. To configure delegation transactions, use the Configure Delegation Transaction page to associate to the transaction the unique role and the component where the transaction is performed. The unique permission list is associated with the role in PeopleTools security.

See Chapter 29, "Setting Up and Working with Delegation," Configuring Delegation Transactions, page 706.

When configuring transactions for delegation you must use a unique role and permission list for each component that you associate with a delegated transaction. You must attach the permission list to portal security for the component and associate the unique role with the unique permission list. You might also need to run the Portal Security Sync process (PeopleTools, Portal, Portal Security Sync) to ensure that the permission list is associated with the portal navigation.

Warning! Do not use an existing role to configure a delegation transaction because the delegation framework grants and revokes the role from the proxy's security profile according to the proxy's delegated authority over a transaction. This will cause a proxy who already has access to the specified component to lose access to that component entirely when the delegation framework revokes the delegated authority.

See Also

Chapter 29, "Setting Up and Working with Delegation," Configuring Delegation Transactions, page 706

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Setting Up Permission Lists and Roles

Set up permission list and role security for your delegation transactions.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Defining Delegation Installation Settings

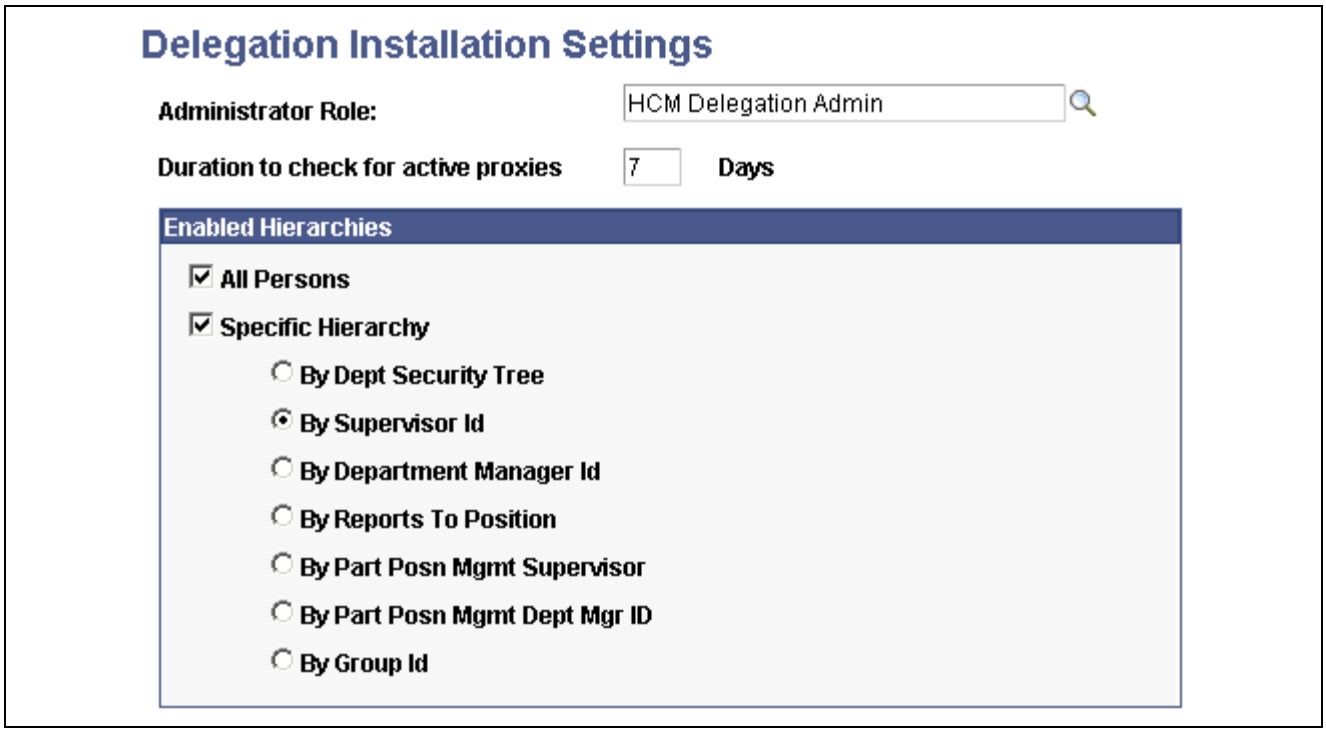
This section discusses how to define delegation installation settings.

Page Used to Define Delegation Installation Settings

Page Name	Object Name	Navigation	Usage
Delegation Installation Settings	HCDL_SYS_SETUP	Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Installation Settings, Delegation Installation Settings	Define the delegation installation settings. This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.

Defining Delegation Installation Settings

Access the Delegation Installation Settings page.



Delegation Installation Settings page

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Administrator Role Select the role that you want to designate as the delegation administrator. The delegation framework routes errors to this role. The PeopleSoft system delivers the HCM Delegation Admin role as system data for this purpose. You can select that role or any other role.

Duration to check for active proxies Days Checking for proxy availability is particularly important when using open-ended delegations. An open-ended delegation is when the delegator leaves the To Date field blank on the Enter Dates page when creating a delegation request through self-service.

By default, the system uses *7* days. If you leave the field blank or enter *0,* then upon saving the component the system automatically sets the value to *7.* In this example, when delegation administrators run the batch job, the process adds seven days to the system data and checks for proxy availability on that date.

Delegation administrators can run a batch job, called the Maintain Delegated Authority (HCDL_BATCH) Application Engine process, to check for proxy availability. Enter the number of days that you want the Maintain Delegated Authority Application Engine process to add to the system date when checking whether a proxy is active in the job data record or equivalent record for persons of interest. Delegation administrators can run this process from the Maintain Delegated Authority page.

Enable Hierarchies

Use this group box to define options for how self-service users can select a proxy when delegating a transaction. Your selections here determine the available proxies that the system displays on the Select Proxy By Hierarchy page when users create delegation requests. These settings apply to all transactions that are using the Delegation framework. For example, you cannot specify that the system display available proxies for time-off requests by supervisor ID and available proxies for promotions by Reports To Position.

All Persons Click this check box to enable open selection of the proxy when users are creating a delegation request. The system displays the Search by Name link on the Select Proxy By Hierarchy page. When users click this link, the system displays the Select Proxy By Name page, where users can search for and select as proxy any active person in the system. By default, the system selects this check box.

Specific Hierarchies Click this check box to require delegators to select a proxy based on a specific hierarchy. You can only select one hierarchy. The hierarchy that you select applies to all delegation requests across the system regardless of the transaction type. When self-service users search for a proxy by hierarchy, they can search up the hierarchy as well as down the hierarchy.

Your choices are:

- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.
- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page

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(DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department.

- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.

  This option is available only if you have enabled the Manage Positions business process on the HRMS Options - Installation page.

- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.

  This option is available only if you have enabled the Manage Positions business process on the HRMS Options - Installation page.

- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.

- *By Group ID:* Determines data access using the Group ID set up in the group build feature.

  If you select this option, you must select a valid group ID in the field that the system displays to the right. You define group IDs on the Group Build - Group Definition page.

These hierarchies relate to direct reports functionality and are the same as those found in the Access Type field on the Target Information page of the Direct Reports Setup component.

If you select the Specific Hierarchies check box and the All Persons check box, then this hierarchical selection of proxy becomes a preference rather than a requirement because the delegator has the option to either select from the list or search for any active proxy in the system.

Configuring Delegation Transactions

This section discusses how to: .

- Configure delegation transactions.
- Review delivered delegation transactions.

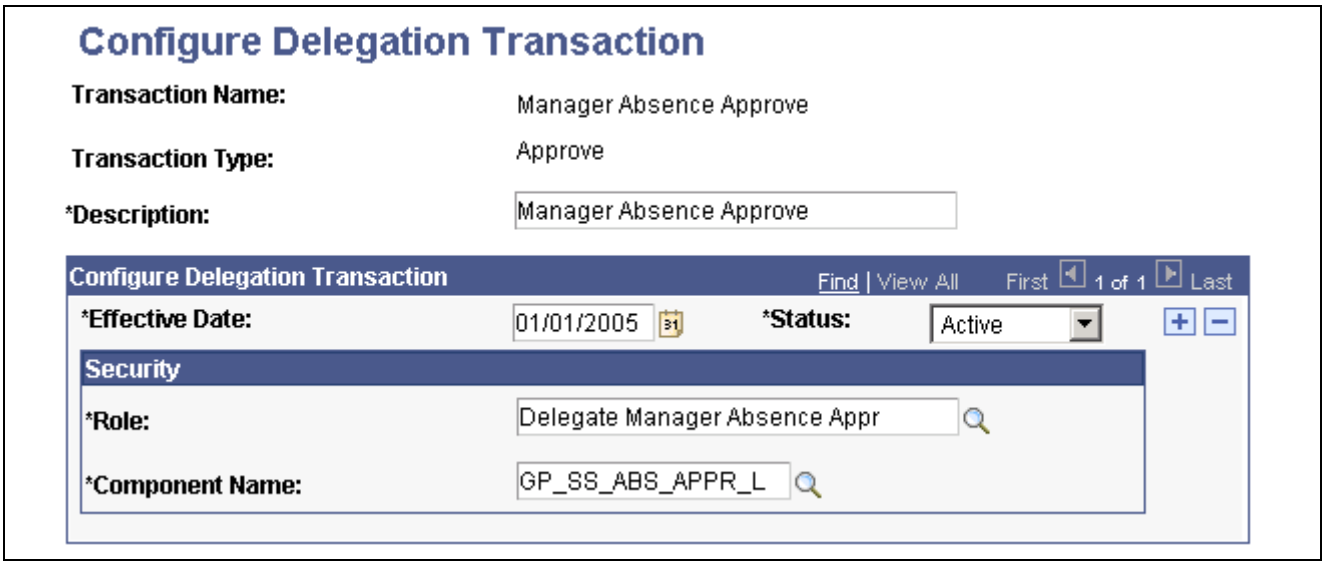
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Page Used To Configure Delegation Transactions

Page Name	Object Name	Navigation	Usage
Configure Delegation Transaction	HCDL_TXN_SETUP	Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Configure Transactions, Configure Delegation Transaction	Configure transactions for delegation. This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Configuring Delegation Transactions

Access the Configure Delegation Transaction page.



Configure Delegation Transaction page

Transaction Name The system displays the name of the transaction. If you are adding a new value, the system prompts you to select a value from the list of transactions that have been configured for workflow *and* selected for delegation initiation or approval on the Workflow Transactions page. Transactions that do not meet these criteria are not available for delegation configuration.

Transaction Type The system displays whether the configuration of the transaction is for delegation initiation or approval. The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. If you are adding a new value, the system prompts you to select either:

- *Initiate:* Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
- *Approve:* Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.

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Although both options are available for the selected transaction, the value that you select is valid only if you have selected the corresponding Delegate Initiation or Delegate Approvals check box on the Workflow Transactions page.

Description Enter the description of the delegation transaction configuration. The system uses this description throughout the delegation pages when displaying related transactions. As a default, the system uses the concatenation of the transaction type and transaction name. We strongly recommend that you always assign a meaningful description.

Effective Date and **Status** Enter the effective date of the transaction and whether it is active or inactive within the Delegation framework. By entering new effective-dated rows, you can enable or disable the transaction, as necessary. When entering a new row, the system uses the system date for the effective date by default.

Security

Use this group box to establish security access for proxies that are delegated authority to the given transaction. While a delegation transaction is active, the Delegation framework temporarily assigns the specified role to the proxy and grants the proxy access to the specified component.

Role Select the role that contains the permission list for the relevant component where one processes the given transaction. Each transaction that you enable for delegation must have a unique role and associated permission list that are solely for delegation purposes.

When a proxy's delegated authority becomes active, the system temporarily assigns this role to the proxy's user profile so that the proxy can access the transaction component while having delegation authority. When the proxy's delegation authority ends, the system deletes this role from the proxy's user profile. Thus, the proxy no longer has access to the transaction component.

If an approval transaction requires that the approver be in a particular role, then the proxy who is delegated authority over that transaction must have the same role to approve the transaction. For example, if promotion approval requires that the approver be a manager, then the proxy who is delegated authority to approve promotions must also be a manager to successfully approve a promotion request.

This field prompts from roles set up in the Roles component.

Warning! You must use a unique role for each component that you associate with a delegated transaction.

See Chapter 29, "Setting Up and Working with Delegation," Understanding Permission Lists and Roles for Delegation, page 703.

Component Name Select the object name of the component where users can process requests for the given transaction. When a user creates a delegation request, the system checks the delegator's user profile to determine if the delegator has the authority to access this component. The system permits the creation of a delegation request for the transaction only if the delegator has security access.

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Reviewing Delivered Delegation Transactions

PeopleSoft delivers many transactions that are preconfigured for the Delegation framework and accessible through the Configure Delegation Transaction component. This table lists the delivered delegation transactions and their configuration:

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
EP_APPRAISAL	Delegate_PerformancDoc_ Approve	EP_APPRAISAL_APPR	Delegate the approval of performance documents.
GP_ABS_EESS_BAL	Delegate Employee Absence Bal	GP_ABS_EESS_BAL	Delegate the initiation of employee absence balance inquiries.
GP_ABS_EESS_HIST	Delegate Employee Absence Hist	GP_ABS_EESS_HIST	Delegate the initiation of employee absence history inquiries.
GP_ABS_EESS_REQ	Delegate Employee Absence Rqst	GP_ABS_EESS_REQ	Delegate the initiation of employee absence requests.
GP_ABS_MGRSS_BAL	Delegate Manager Absence Bal	GP_ABS_MGRSS_BAL	Delegate the initiation of manager absence balance inquiries.
GP_ABS_MGRSS_HIST	Delegate Manager Absence Hist	GP_ABS_MGRSS_HIST	Delegate the initiation of manager absence history inquiries.
GP_ABS_MGRSS_REQ	Delegate Manager Absence Rqst	GP_ABS_MGRSS_REQ	Delegate the initiation of manager absence requests.
GP_SS_ABS_APPR_L	Delegate Manager Absence Appr	GP_SS_ABS_APPR_L	Delegate the approval of absence requests.
HR_EE_INF_MGR	Delegate_View_Employee_ Info	HR_EE_INF_MGR	Delegate the initiation of employee information inquiries.
HR_FULL_PART_CHG	Delegate_FullPartStat_ Initiate	HR_MGR_FULL_PART	Delegate the initiation of changes in full-time and part-time status.
HR_LOCATION_CHG	Delegate_LocChange_ Initiate	HR_MGR_LOCATION	Delegate the initiation of location changes.
HR_PROMOTION (Initiate)	Delegate_Promotion_ Initiate	HR_PROMOTE_MGR	Delegate the initiation of promotions.
HR_PROMOTION (Approve)	Delegate_Promotion_ Approve	HR_PROMOTE_APPR	Delegate the approval of promotions.
HR_REPORT_CHG (Initiate)	Delegate_ReportingChg_ Initiate	HR_MGR_REPORT_ CHNG	Delegate the initiation of reporting changes.

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Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HR_REPORT_CHG (Approve)	Delegate_ReportingChg_ Approve	HR_MGR_REPORT_ APPR	Delegate the approval of reporting changes.
HR_RETIRE	Delegate_Retire_Initiate	HR_RETIRE_EE	Delegate the initiation of employee retirements.
HR_TERM	Delegate_Terminate_ Initiate	HR_EE_TERMINATE	Delegate the initiation of employee terminations.
HR_TRANSFER (Initiate)	Delegate_Transfer_Initiate	HR_TRANSFER_MGR	Delegate the initiation of transfers.
HR_TRANSFER (Approve)	Delegate_Transfer_ Approve	HR_TRANSFER_APPR	Delegate the approval of transfers.

Note. For more information about application-specific delegation transactions, refer to the application-specific PeopleBook.

Adding Delegation Requests by Administrator

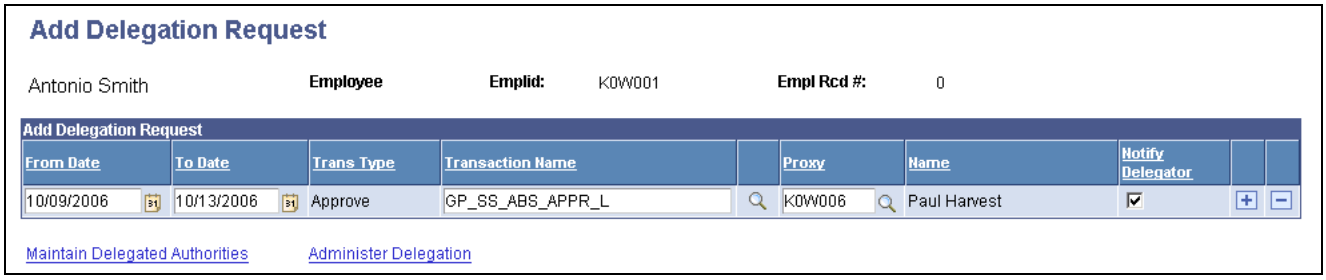
This section discusses how to add delegation requests by administrator.

Page Used to Add Delegation Requests by Administrator

Page Name	Object Name	Navigation	Usage
Add Delegation Request	HCDL_ADMIN_ADD_DLG	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Add Delegation Request	Delegation administrators can create delegation requests on behalf of delegators.

Adding Delegation Requests by Administrator

Access the Add Delegation Request page.



Add Delegation Request page

Note. To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

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Note. When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

From Date and **To Date** — Enter the date range for which you want the delegation to be active. The From Date value must be greater than today's date. The To Date value must be greater than the From Date value. If you want to make the delegation open-ended, leave the To Date field blank.

Trans Type (transaction type) and **Transaction Name** — Select the transaction that is being delegated. The system prompts you to select from only the transactions for which the delegator has access. The transactions must be active for the specified date range of the delegation, as defined on the Configure Delegation Transaction page.

The system displays whether the selected transaction is for delegation initiation or approval.

Proxy and **Name** — Select the proxy to whom the delegator wants to delegate the transaction.

Notify Delegator — Click this check box to have the system send a courtesy email notification to the delegator when the proxy approves or initiates this transaction on the delegator's behalf.

Maintain Delegated Authorities — Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.

Administer Delegation — Click this link to access the Administer Delegation page, where you can search for and manage individual delegation requests in the system.

Administering Delegations

This section discusses how to administer delegations.

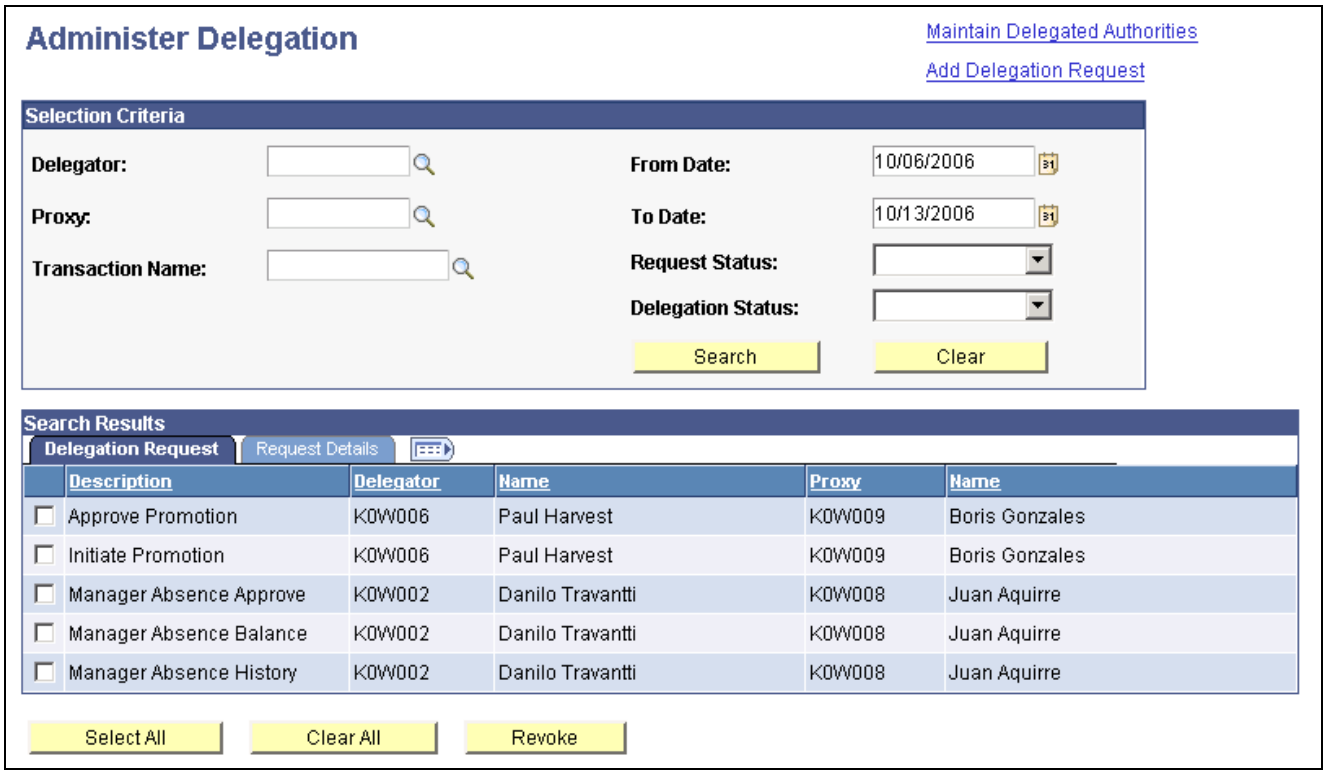
Pages Used to Administer Delegations

Page Name	Object Name	Navigation	Usage
Administer Delegation	HCDL_ADMIN_DLG	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Adminster Delegation	Delegation administrators can review delegation requests and, if necessary, revoke them on behalf of delegators.
Administer Delegation - Request Details	HCDL_ADMIN_RQT_DTL	Click the Request Status link for a delegation request.	Delegation administrators can review details of a selected delegation request.

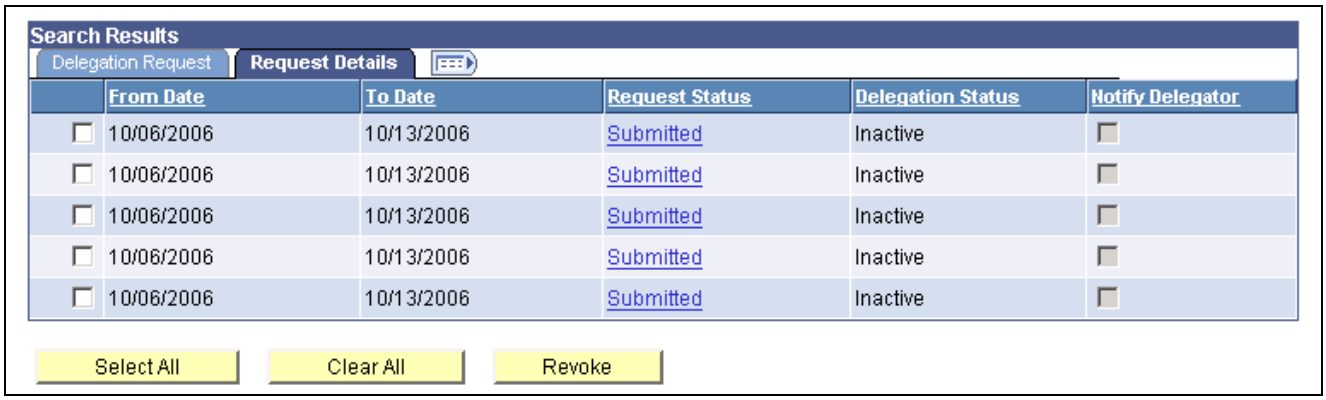
Administering Delegations

Access the Administer Delegation page.

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Administer Delegation page



Administer Delegation page: Request Details tab

Note. If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Maintain Delegated Authorities Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.

Add Delegation Request Click this link to access the Add Delegation Request page, where you can create delegation requests on behalf on delegators.

Selection Criteria

Use this group box to specify criteria for the delegation requests that you want to retrieve. To retrieve all delegation requests, click the Search button without specifying criteria. To narrow your search results, enter one or more criteria.

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Delegator Select the delegator for whom you want to retrieve delegation requests. The system prompts you to select from delegators with existing requests.

Proxy Select the proxy for whom you want to retrieve delegation requests. The system prompts you to select from proxies with existing requests.

Transaction Name Select the transaction for which you want to retrieve delegation requests. The system prompts you to select from transactions that are part of existing requests.

From Date and **To Date** Specify a date range for which you want to review delegation requests.

Request Status Select the status of the requests that you want to retrieve. Request statuses are *Accepted, Ended, Rejected, Revoked,* and *Submitted.*

See Chapter 29, "Setting Up and Working with Delegation," Understanding Delegation, page 695.

Delegation Status Select the delegation status of the requests that you want to retrieve, either *Active* or *Inactive.*

See Chapter 29, "Setting Up and Working with Delegation," Understanding Delegation, page 695.

Search Click this button to retrieve delegation requests based on your selection criteria.

Clear Click this button to clear all selection criteria fields.

Search Results

The system displays delegation requests and details based on your search criteria.

Request Status The system displays the status of the request: *Accepted,Ended, Rejected, Revoked,* and *Submitted.* Click this link to review further details of a delegation request. The system displays the Administer Delegation - Request Details page.

Select All Click this button to select the check boxes for all delegation requests in the search results.

Clear All Click this button to clear all check boxes for the selected delegation requests in the search results.

Revoke Click this button to revoke a delegation request on behalf of the delegator. The system revokes delegations for all requests that are selected in the search results. The system sends a notification to the proxy who is affected by the change and automatically reassigns all pending transactions back to the delegator.

Processing Batch Delegation Requests

This section discusses how to process batch delegation requests.

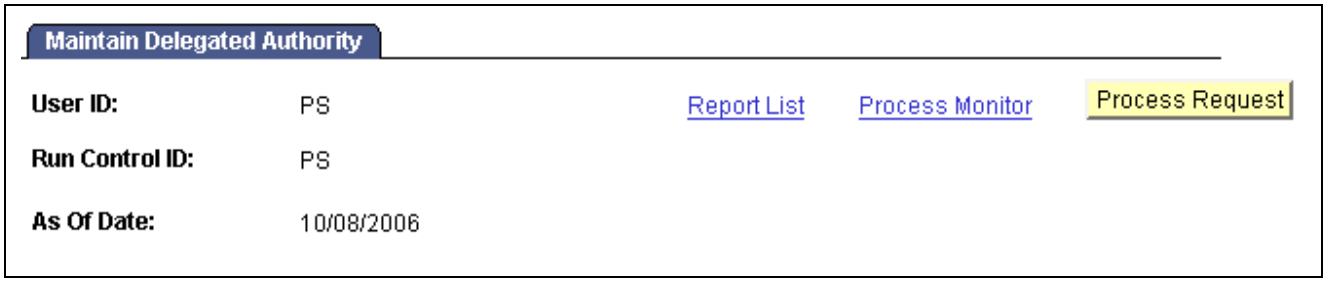
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Page Used to Process Batch Delegation Requests

Page Name	Object Name	Navigation	Usage
Maintain Delegated Authority	HCDL_BATCH	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Maintain Delegated Authorities	Delegation administrators can process all delegation transactions in batch daily.

Processing Batch Delegation Requests

Access the Maintain Delegated Authority page.



Maintain Delegated Authority page

Click the Process Request button to run the Maintain Delegated Authority (HCDL_BATCH) Application Engine process. This batch program processes all delegation transactions as of the system date that appears on the run control page. The process activates all delegation transactions that were future-dated to become active on today's date, revokes all delegation requests that have expired as of today's date, and searches for inactive proxies. For all affected delegation transactions, the process updates the request status and delegation status as appropriate. The process also updates proxy navigation security, as needed.

Important! We recommend that you run this process daily to maintain delegations and update invalid rows.

Working with Self-Service Delegation

This section discuss how to:

- View delegation activity.
- View help for delegation.
- Select the job for a delegation request.
- Select a proxy by reporting hierarchy.
- Select a proxy by name.
- Submit a delegation request.
- View confirmation of delegation request submission.
- Manage proxies for delegation.
- View delegation request details.
- Manage delegated authorities.

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- View confirmation of delegation request acceptance.
- View confirmation of delegation request rejection.
- View details for multiple transactions.

Pages Used to Work with Self-Service Delegation

Page Name	Object Name	Navigation	Usage
Manage Delegation	HCDL_MGR_DLG_HOME	• Self-Service, Manage Delegation • Self-Service, Review Transactions Click the View Details link or the Approve/Deny link for a delegation transaction. • Manager Self-Service, Review Transactions Click the View Details link for a delegation transaction. • Click the Cancel button while creating a delegation request.	Users can view all delegation activity associated with themselves.
Manage Delegation - Learn More about Delegation	HCDL_DLG_INSTR	Click the Learn More About Delegation link on the Manage Delegation page.	Users can view an instructive description of delegation functionality.
Create Delegation Request - Select Job Title	HCDL_JOB_SELECTION	Click the Create Delegation Request link or the Review My Proxies link on the Manage Delegation page.	Users with multiple jobs can select the job for which they want to create the delegation request or review their proxies.
Create Delegation Request - Enter Dates	HCDL_ADD_DLG_DATES	Click the Create Delegation Request link on the Manage Delegation page.	Specify the From Date and To Date, which defines the delegation authority period for a transaction. By not specifying a To Date, users specify an open-ended delegation.
Create Delegation Request - Select Transactions	HCDL_ADD_DLG_TXNS	Click the Next button on the Enter Dates page.	Users can select one or more transactions to delegate.
Create Delegation Request - Select Proxy By Hierarchy	HCDL_ADD_DLG_SRCH	Click the Next button on the Select Transactions page.	Users can select a proxy for the transactions being delegated based on their reporting hierarchy.

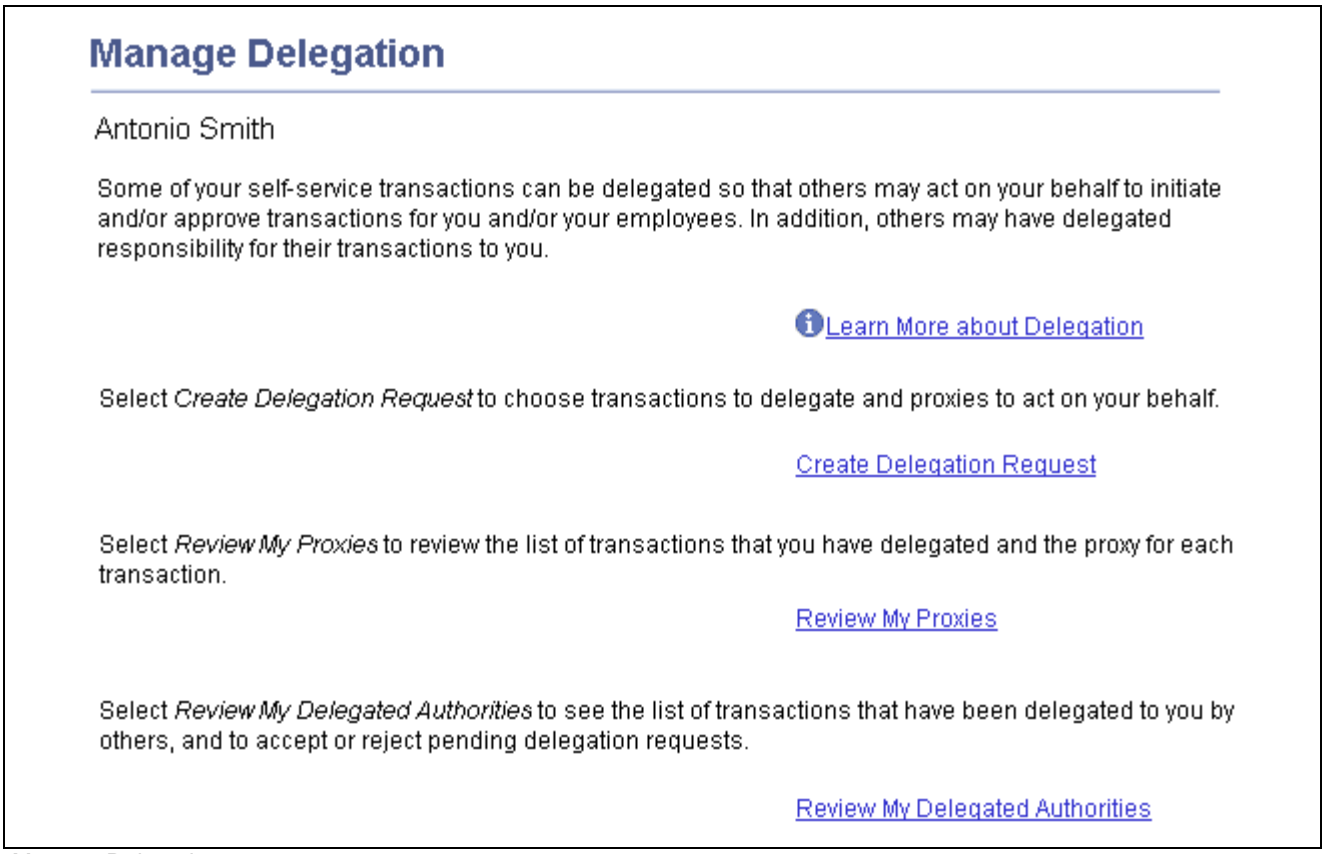
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Page Name	Object Name	Navigation	Usage
Create Delegation Request - Select Proxy By Name	HCDL_ADD_DLG_SRCH	• Click the Search By Name link on the Select Proxy By Hierarchy page. • Click the Search By Hierarchy link on the Select Proxy By Name page.	Users can search for and select a proxy for the transactions being delegated based on name.
Create Delegation Request - Delegation Detail	HCDL_ADD_DLG_DTL	Click the Next button on the Select Proxy by Hierarchy page or the Select Proxy by Name page.	Users can review the details of a delegation request and then submit the delegation request.
Confirmation,, Accept Delegation Request, , Reject Delegation Request	HCDL_DLG_CONFIRM	• Click the Submit button on the Delegation Detail page when adding a delegation request. • Click the Accept button or the Reject button on the My Delegated Authorities page.	Users can view the confirmation of the submission the acceptance of a delegation request, or the rejection of a delegation request.
My Proxies	HCDL_MGR_DLGT	• Click the Review My Proxies link on the Manage Delegation page. • Click the OK button on the Confirmation page after successfully completing a delegation request.	Users can manage their proxies by search for and updating the status of their delegation requests.
My Delegated Authorities	HCDL_MGR_DLGT	Click the Review My Delegated Authorities link on the Manage Delegation page.	Users can accept or reject the delegation requests for which they have been selected to serve as proxy.
Delegation Request Details	HCDL_REQUEST_DTL	Click the Details button for the delegation transaction on the My Proxies page.	Users can review the details of a submitted delegation request.
Multiple Transactions	HCDL_MULTI_TXNS	Click the Multiple Transactions link on the My Delegated Authorities page.	Users can view details of the multiple transactions for which they have delegated authority.

Viewing Delegation Activity

Access the Manage Delegation page.

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Manage Delegation page

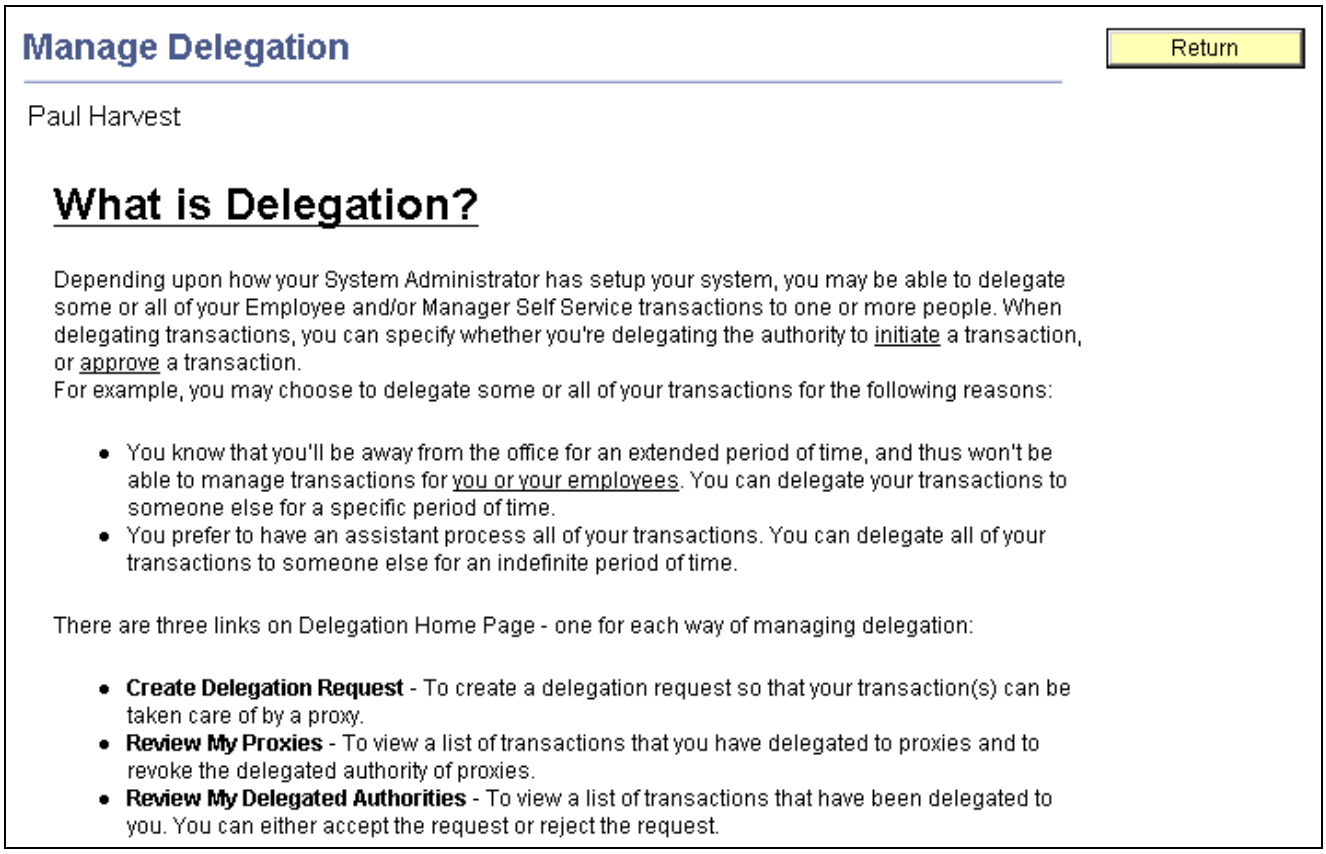
Users can view all delegation activity associated with themselves. They can create a delegation request, revoke delegation requests for which they have delegated transaction initiation or approval to a proxy, and accept or reject the delegation requests for which they are selected to serve as proxy. The system displays only the content and associated links that are applicable to the user at the time that user accesses the page. Specifically, the system displays:

- The Learn More about Delegation link and associated content for learning more about delegation, which is accessible to all users at all times provided that the system is using the Delegation framework.
- The Create Delegation Request link and associated content for creating delegation requests only if the user has navigation security access to transactions that are enabled for delegation through the delegation setup pages.
- The Review My Proxies link and associated content for reviewing proxies only if the user has active or inactive delegation requests.
- The Review My Delegated Authorities link and associated content for reviewing delegated authorities only if the user has been delegated authority to serve as a proxy.

Viewing Help For Delegation

Access the Manage Delegation - Learn More about Delegation page.

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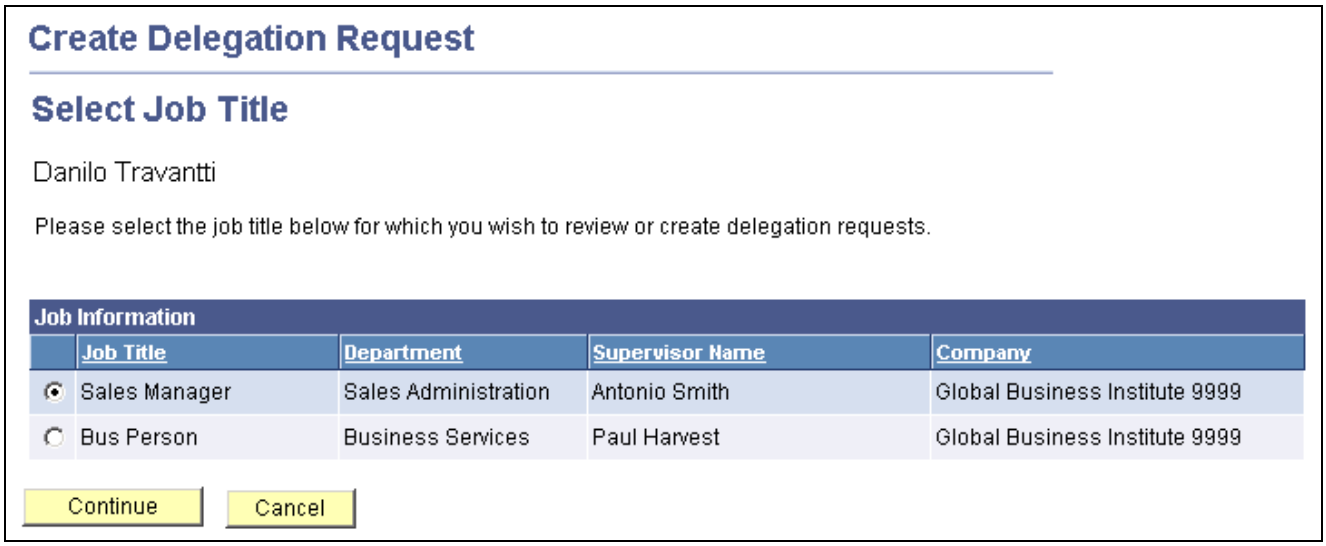


Manage Delegation - Learn More about Delegation page

You can configure this page by accessing it through PeopleTools Application Designer.

Selecting the Job for a Delegation Request

Access the Create Delegation Request - Select Job Title page.



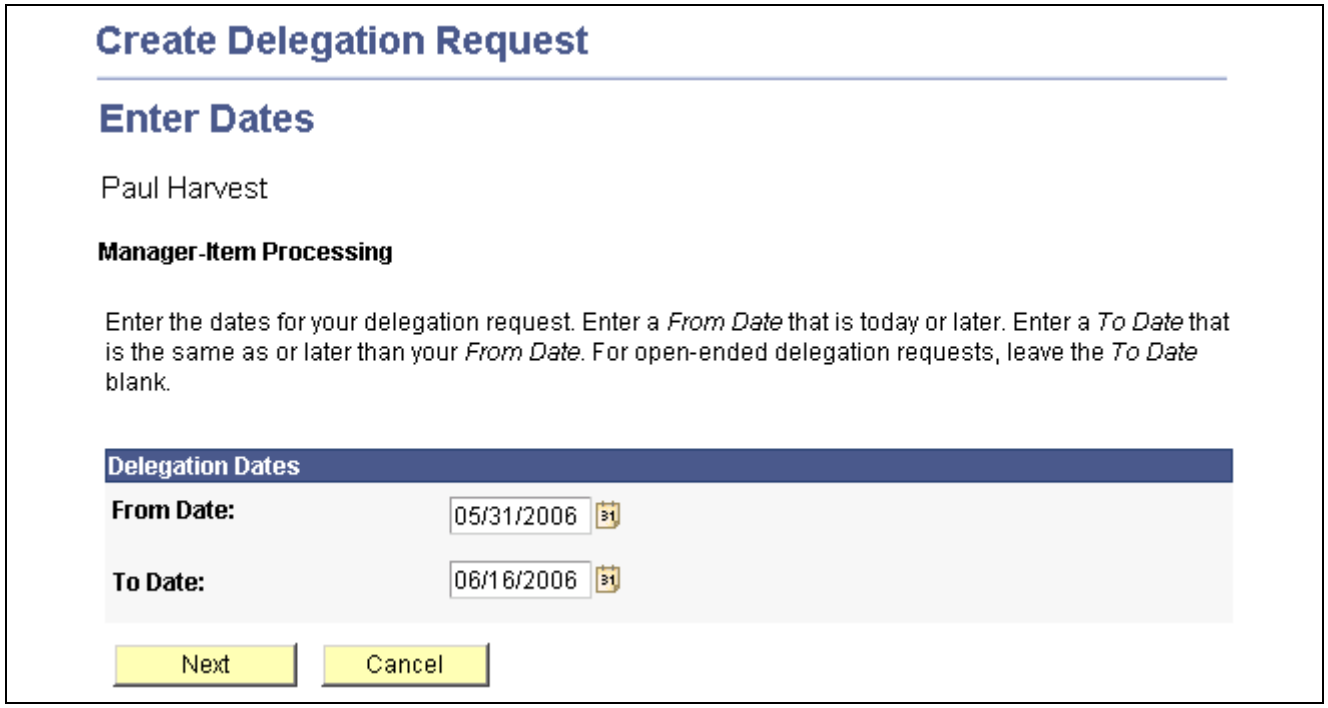
Select Job Title page

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If users creating the delegation request or reviewing their proxies have multiple jobs, the system prompts the user to select the job for which they want to create the delegation request or review proxies. This page displays only when the employee has multiple jobs.

Entering Delegation Dates

Access the Create Delegation Request - Enter Dates page.



Create Delegation Request - Enter Dates page

Selecting Transactions for Delegation

Access the Create Delegation Request - Select Transactions page.

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Create Delegation Request - Select Transactions page

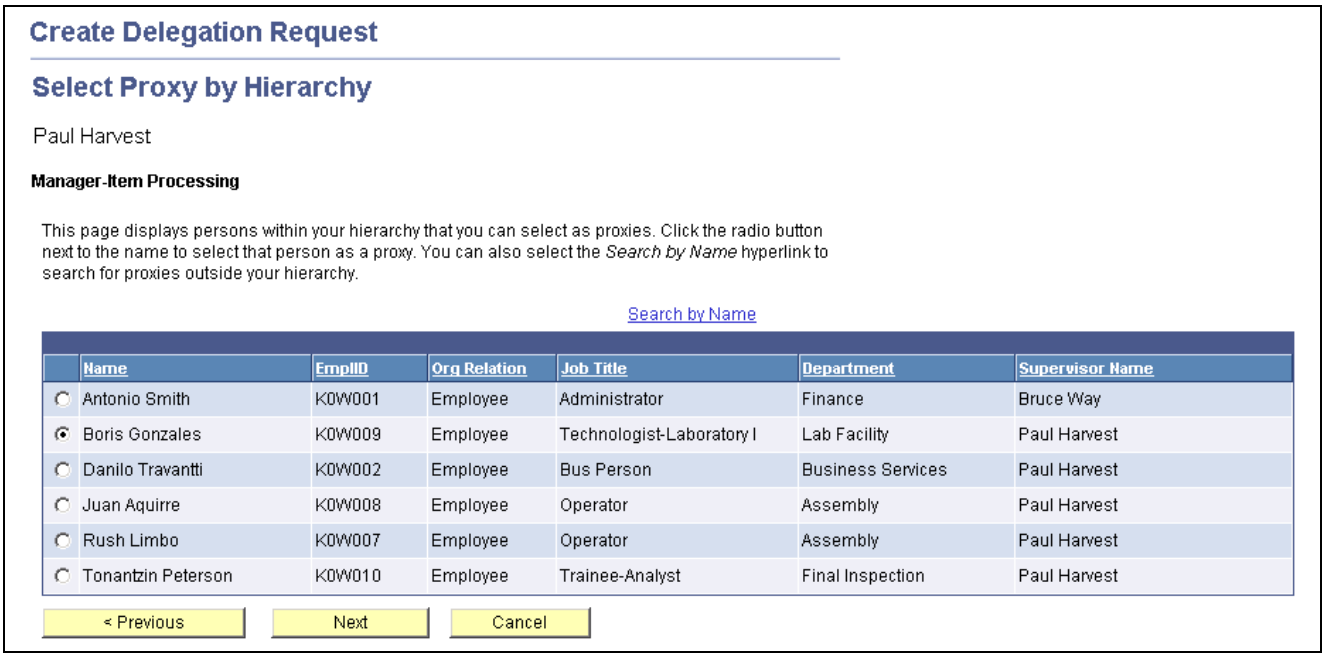
The system displays only the transactions that are configured for delegation initiation or approval on the Configure Delegation Transactions page and for which the delegator has component access.

Users can delegate one or multiple transactions to another person in a single delegation request. When a proxy receives a delegation request for multiple transactions, he or she must accept or reject the entire request. The delegator, however, can revoke single transactions from a multiple transaction request. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Workflow Engine (AWE). The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays an individual rather than multiple delegation request. This functionality preserves the accuracy of the multiple transaction status.

Selecting a Proxy by Reporting Hierarchy

Access the Create Delegation Request - Select Proxy By Hierarchy page.

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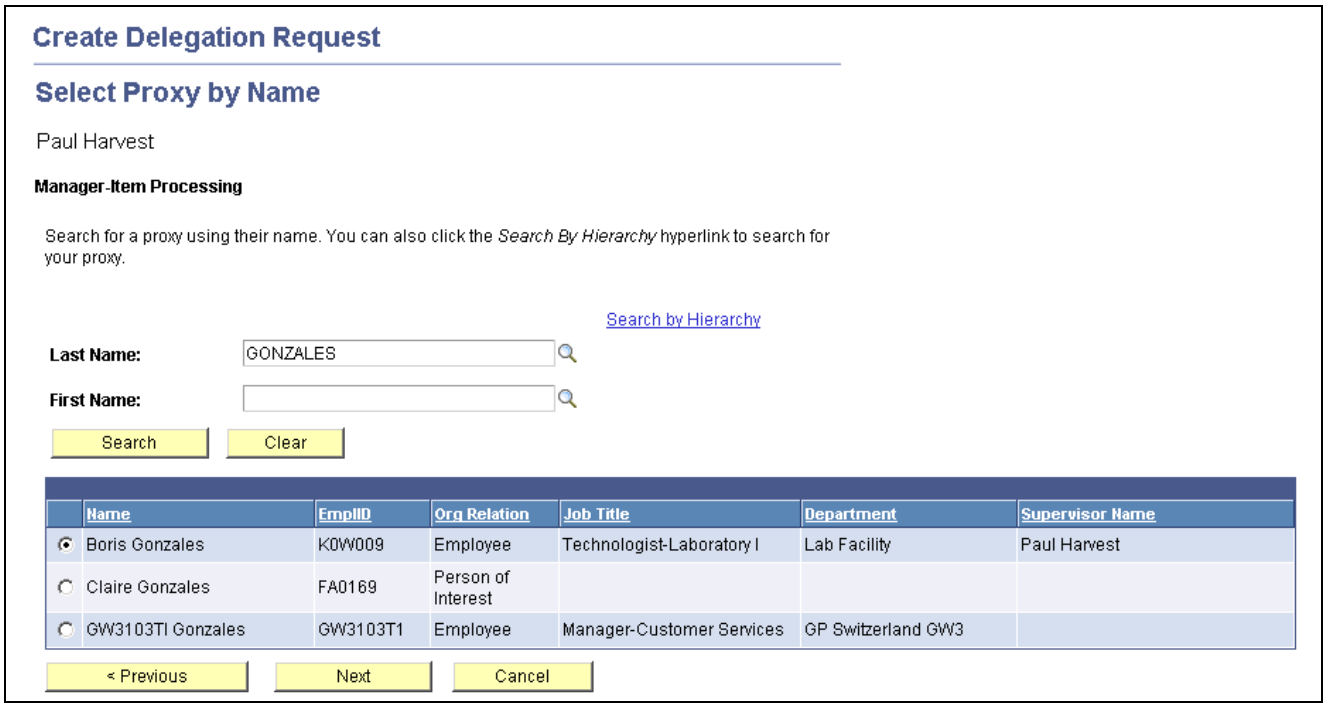
Create Delegation Request - Select Proxy By Hierarchy page

Users can select a proxy for transactions they are delegating. If the delegation administrator selects a specific hierarchy for the transaction on the Delegation Installation Settings page, the system displays valid proxies based on that selection, and users can select from this list. Valid proxies include persons who report directly or indirectly to the delegator, as well as all persons in the upward hierarchy—starting with the delegator's manager. If the delegation administrator selects the All Persons check box on the installation page, then the system displays the Search By Name link so that users can search for and select from any person in the system.

Selecting a Proxy by Name

Access the Create Delegation Request - Select Proxy By Name page.

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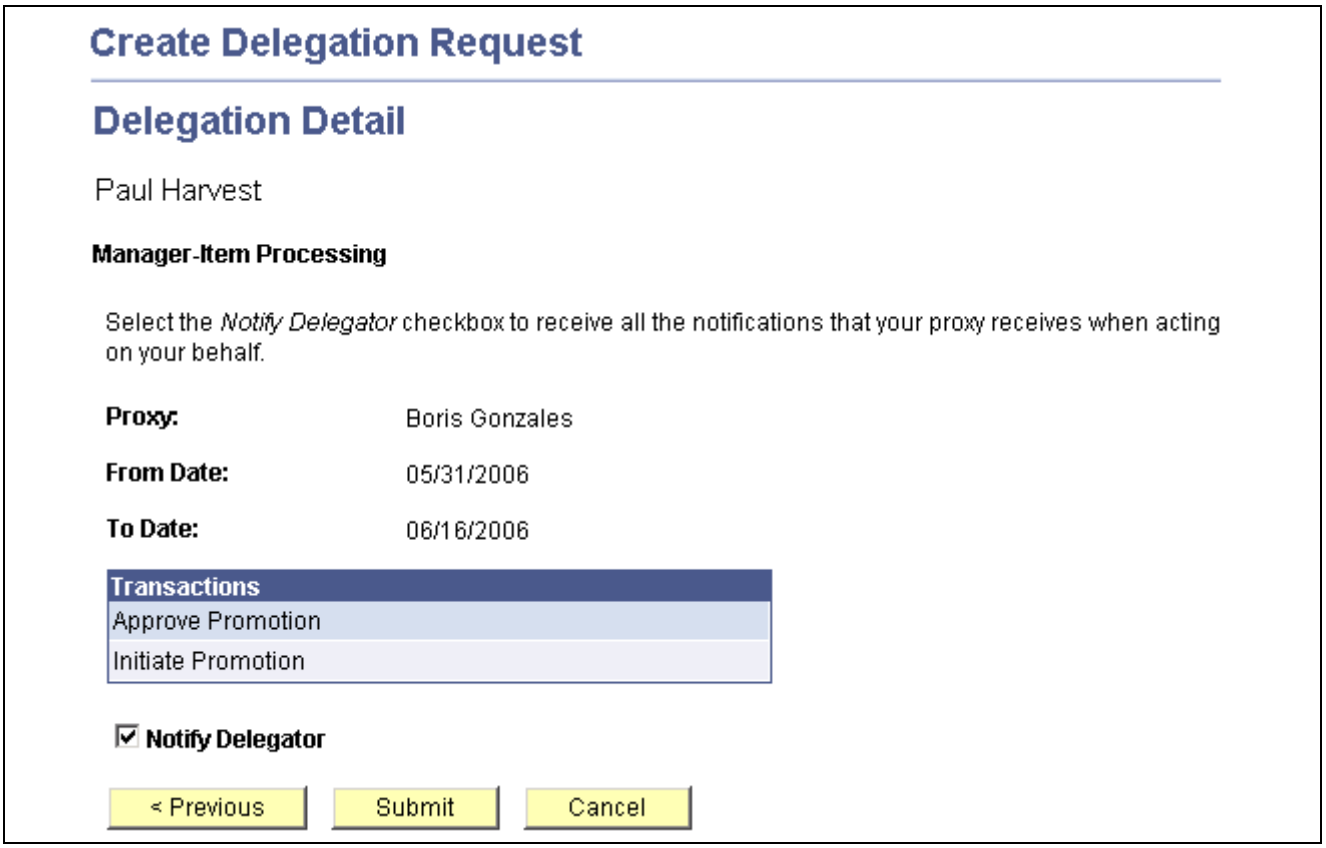
Create Delegation Request - Select Proxy By Name page

Users can search for a proxy by name and select from the list of valid values in the search results. This page is available only if the delegation administrator selects the All Persons check box on the Delegation Installation Settings page.

Submitting a Delegation Request

Access the Create Delegation Request - Delegation Detail page.

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Create Delegation Request - Delegation Detail page

The system displays the delegation period, the selected proxy, and the selected transactions. Users can select the Notify Delegator check box to receive an email notification that the system automatically sends whenever the proxy approves or initiates a transaction. When users click the Submit button, the system automatically sends an email notification to the proxy either accept or reject the delegation request.

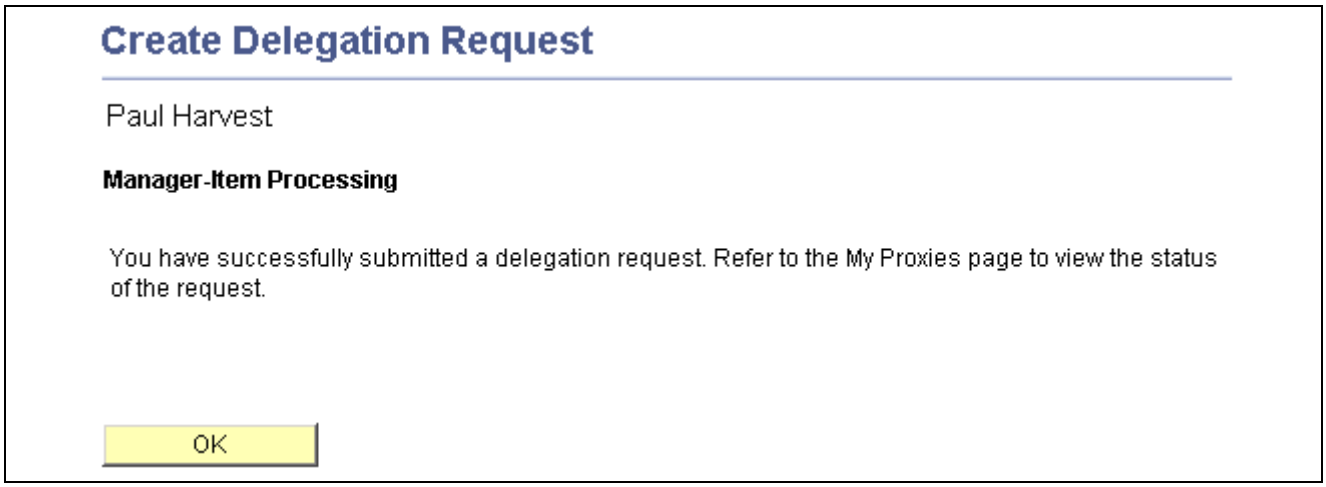
To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

Note. When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

Viewing Confirmation of Delegation Request Submission

Access the Create Delegation Request - Confirmation page.

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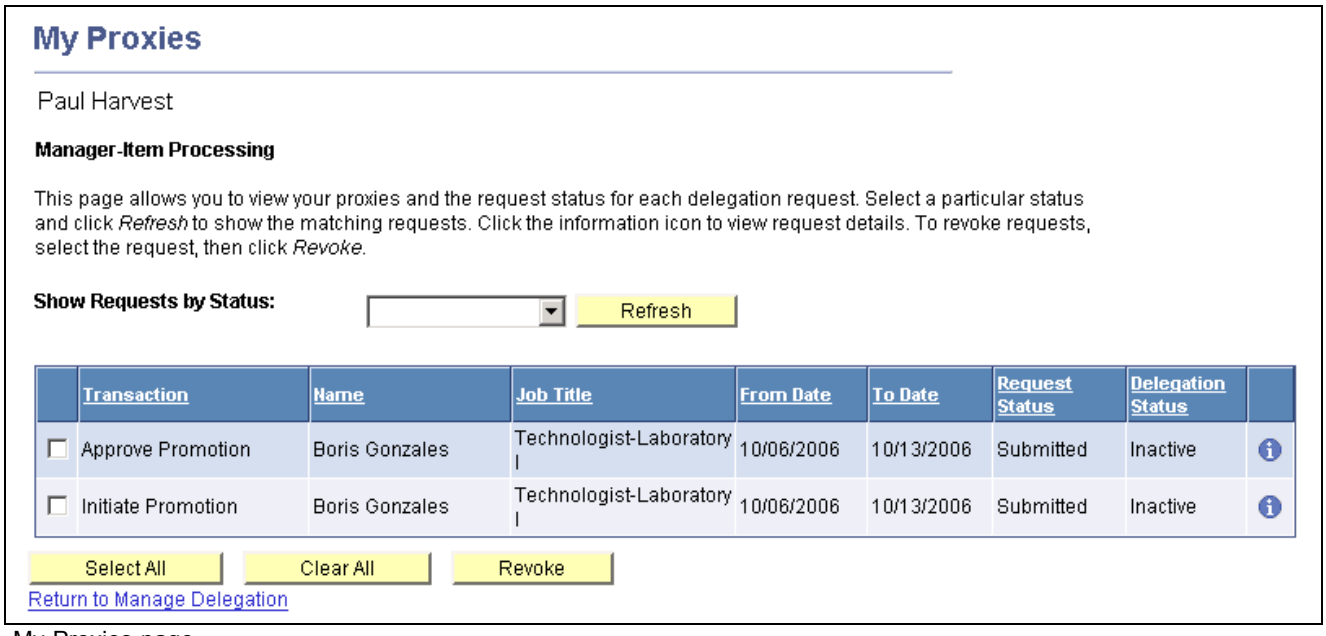


Create Delegation Request - Confirmation page

Note. If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Managing Proxies for Delegation

Access the My Proxies page.



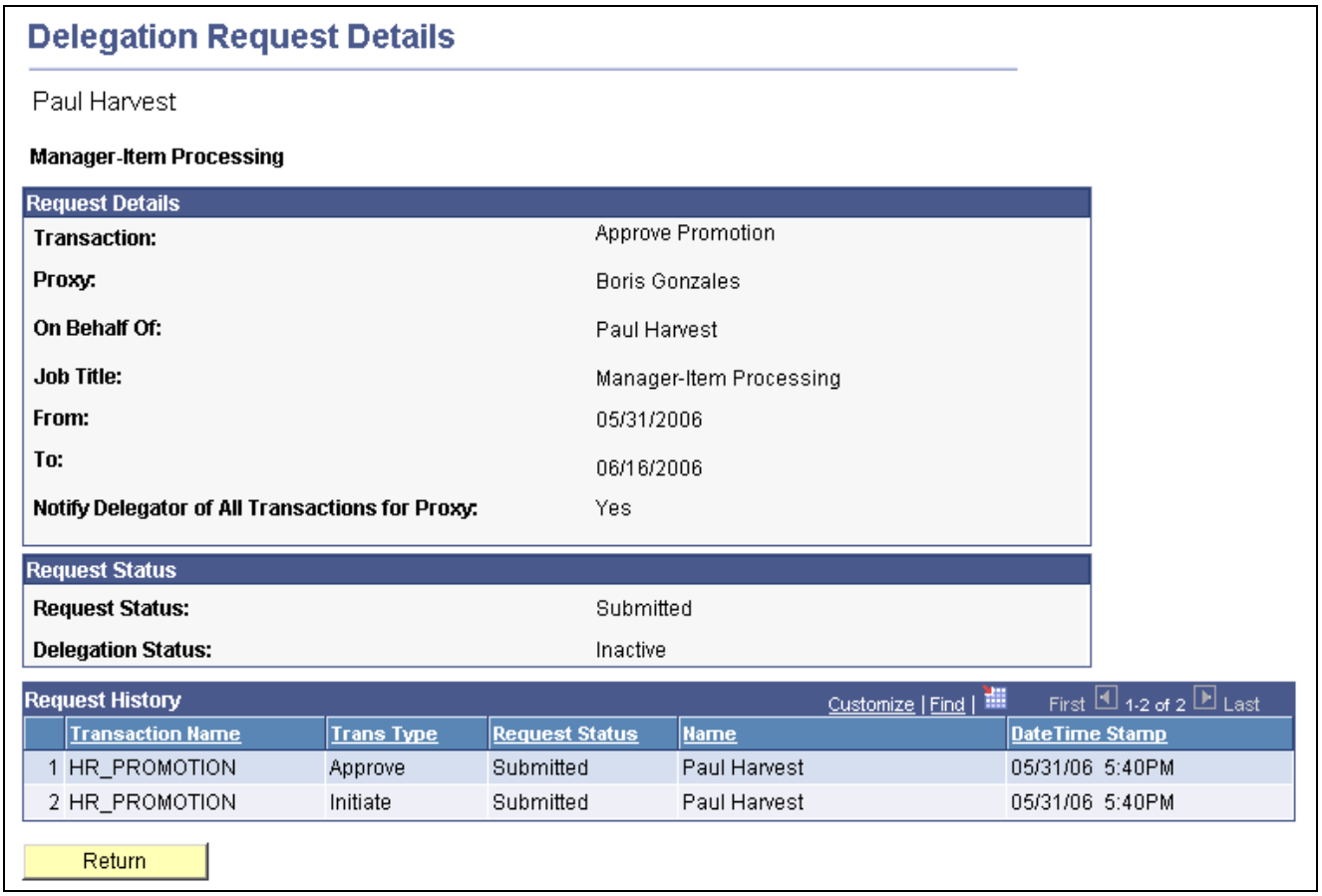
My Proxies page

Users can change their mind by revoking delegation requests for which they have delegated transaction initiation or approval to a proxy. To revoke the delegation request, users must select the check box for the delegation request and then click the Revoke button. The system changes the request status to *Revoked* and automatically sends an email notification to the proxy about the status of the delegation request.

Viewing Delegation Request Details

Access the Delegation Request Details page.

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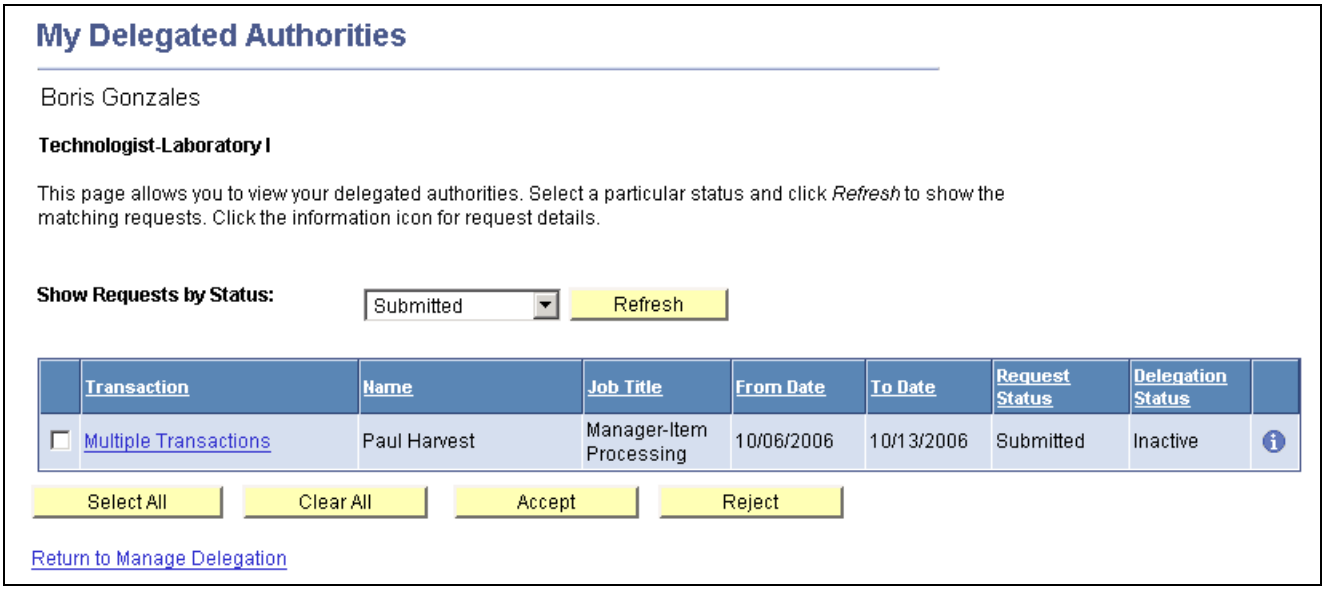


Delegation Request Details page

Users can click the Return button to return to the My Proxies page.

Managing Delegated Authorities

Access the My Delegated Authorities page.



My Delegated Authorities page

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A proxy can hold more than one delegated authority from different delegators. The proxy must select the check box for delegation request and then click either the Accept button or the Reject button. The system automatically sends an email notification to the delegator about the status of the delegation request.

Note. When you are delegating to a proxy who has multiple job records (as defined in the Job Data component), the system uses the proxy's job record number 0 by default.

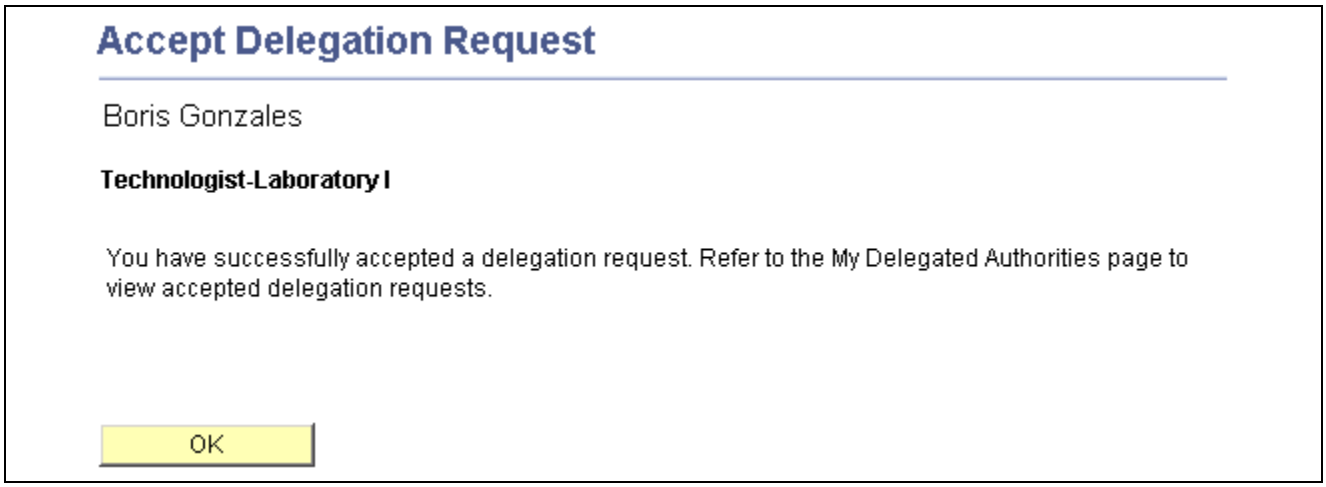
Multiple Transactions

Delegators can delegate one or multiple transactions to another person in a single delegation request on the Create Delegation Request - Select Transactions page. If the delegation request contains multiple transactions, the proxy can click the Multiple Transactions link to access the Multiple Transactions page and view details about each transaction in the delegation request. For a delegation request with multiple transactions, the proxy must accept or reject the entire request.

The delegator can revoke single transactions from a multiple transaction request on the My Proxies page. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Workflow Engine (AWE). The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays the delegation request as an individual transaction rather than a multiple transaction. This functionality preserves the accuracy of the multiple transaction status.

Viewing Confirmation of Delegation Request Acceptance

Access the Accept Delegation Request page.



Accept Delegation Request page

Users can click the OK button to return to the My Delegated Authorities page.

Viewing Confirmation of Delegation Request Rejection

Access the Reject Delegation Request page.

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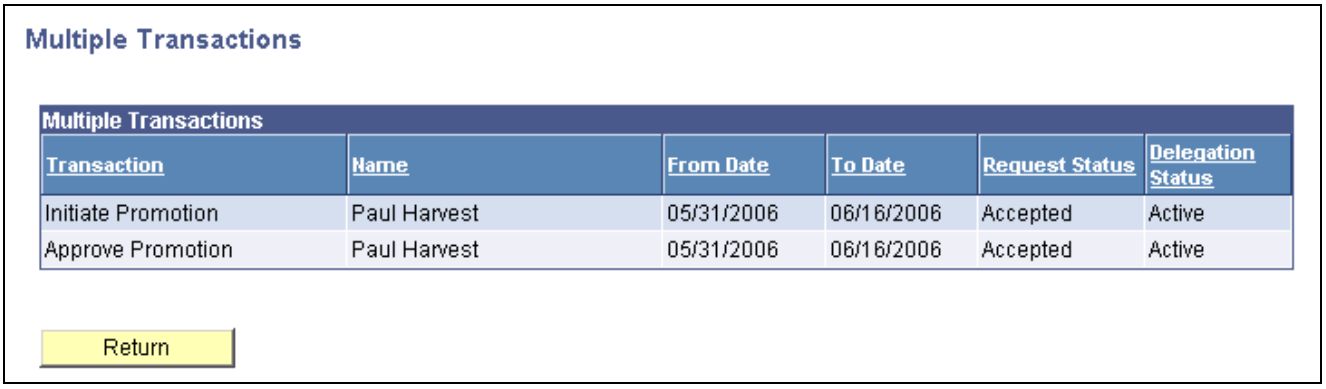


Reject Delegation Request page

Users can click the OK button to return to the My Delegated Authorities page.

Viewing Details for Multiple Transactions

Access the Multiple Transactions page.



Multiple Transactions page

The system provides access to this page only if the delegator selected the user to server as proxy for multiple transactions within the same delegation request.

Reviewing Delivered Notification Templates for Delegation

This table lists the delivered delegation notifications, describes each notification, describes the trigger for each notification, and lists the recipients:

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Template Name	Notification Description	Trigger	Recipients
DelegationAccept	States that the proxy has accepted the delegation request submitted by the delegator.	Proxy accepts delegation request.	To: Delegator CC: Proxy
DelegationAdminAdd	States that the administrator, on behalf of delegator, has submitted a delegation request to the proxy.	Delegation administrator adds and submits delegation request.	To: Proxy CC: Delegator
DelegationAdminRevoke	States that the administrator, on behalf of delegator, has revoked a delegation request that was assigned to the proxy.	Delegation administrator revokes delegation request.	To: Proxy CC: Delegator
DelegationBatch	States that delegation authority has been made active or inactive for the delegator and transactions listed. Also states that security has been updated to allow the proxy access to the transactions.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Proxy CC: Delegator
DelegationError	States that a submitted delegation request has encountered an error.	Delegator submits a delegation request but an error occurs.	To: Delegator
DelegationNotifyAdmin	States that the system has identified that a proxy is inactive for at least one day for a delegation request that has been accepted.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Delegator CC: Delegation Administrator
DelegationReject	States that a proxy has rejected a delegation request submitted by a delegator.	Proxy rejects delegation request.	To: Delegator CC: Proxy
DelegationRequest	States that a delegator or an administrator on behalf of the delegator has submitted a delegation request to the proxy.	Delegator creates and submits a delegation request.	To: Proxy CC: Delegator
DelegationRevoke	States that a delegator or an administrator on behalf of the delegator has revoked a delegation request that was assigned to the proxy.	Delegator revokes a delegation request.	To: Proxy CC: Delegator

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CHAPTER 30

Working with Metadata and Query Builder

This chapter discusses how to:

- Manage the HCM metadata repository.
- Use Query Builder.

Managing the HCM Metadata Repository

To manage the HCM metadata repository, use the Base Catalog component (HCMD_BASE_CATALOG), the Object Catalog component (HCMD_OBJ_CATALOG), the Export component (HCMD_EXPORT_OBJS), and the Import component (HCMD_IMPORT_OBJS).

This section provides an overview of the HCM metadata repository and discusses how to:

- Define base classes.
- Define object classes.
- Enter class attribute details.
- Enter class relationship details.
- Export metadata.
- Import metadata.

Understanding the HCM Metadata Repository

Metadata is data about the data in your system. It defines every object, object attribute, and relationship between objects. Metadata enables you to define and manipulate the records in your PeopleSoft HRMS database as objects.

The HCM metadata object model consists of the following two elements:

- PeopleTools-level metadata

  Provides information about fields, field labels, and database records and views.

- HCM-level metadata

  Establishes relationships between objects at the object level, defines objects's services, and alternative labels.

HCM metadata object definitions are registered in the metadata repository as classes and these classes are grouped in the following two catalogs according to general behavior, processing, and attribute needs:

- Base catalog.

  Object classes:

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- Define the general behavior and attributes for a class.
- Group objects for better processing and querying.
- Provide a single layer of inheritance for derived classes.

• Object catalog.

Object classes:

- Can be the child object of a parent base class, inheriting all of the attributes of the base class.

Note. Object catalogs do not need to have a parent class object.

Note. Any metadata class definitions that are not obviously a parent class object, should be defined in the object catalog.

- Are defined with unique attributes in addition to any inherited attributes.

For example, the base class object, Person Base, is the parent to the derived object class, Person.

Common Elements Used in this Section

Basic Information

Define the class's basic characteristics by entering information into the following fields:

- Class Name
- Display Label
- Object Owner ID
- Active Flag

Class Use

Define how the class object is used by:

- Selecting one of the following options:
  - *Production*: a standard production object.
  - *Staging*: a specialized staging object used to load data into the HCM system.
  - *Reporting*: a specialized reporting object.
  - *System*: an HCM system object not usually visible to users.
  - *Configuration*: a specialized object used in HCM system configuration.
  - *Source View* (object class only)
  - *Attribute Map* (object class only)
  - *Key Map* (object class only)
  - *Temporary* (object class only)
- Selecting Use in UI? to display the class in a dynamic user interface.
- Selecting Use in Queries? to display the class in Query Builder.

The system selects the System Data check box if the class object is delivered as HCM system data.

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Persistence Mapping

Enter the name of the PeopleTools record to which this class maps. The PeopleTools record is the sole source for the class object. Each class definition maps to one PeopleTools record

Class Attributes (Record Field)

Review or enter the class attributes.

Click the View Attribute Details button to review details or enter a details for a new class attribute on the Class Attribute Details page.



Click to populate the Class Attributes grid with all the fields associated with the PeopleTools record you selected in the persistence mapping Record Name field.

The button does not overwrite valid fields.

Note. PeopleSoft recommends that you keep the attributes in sync with the PeopleTools record fields by using this button after you make a modification to the PeopleTools record.

Relationships

Define the relationships this class definition has with other class definitions. For example the Person class that maps to the PeopleTools Person record could be have relationships with the:

- Name class.

  People in the system could have one or more names.

- Address class.

  People in the system could have one or more address.

- Job class.

  People in the system could have zero or more jobs.

Click the View Relationship Details button to review details or enter a details for a new class attribute on the Class Relationship Details page.

Class Extensions

Class extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Name
- Value

Pages Used to Manage the HCM Metadata Repository

Page Name	Object Name	Navigation	Usage
Base Class Definition	HCMD_BASE_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition	Set up and review definitions for base classes.

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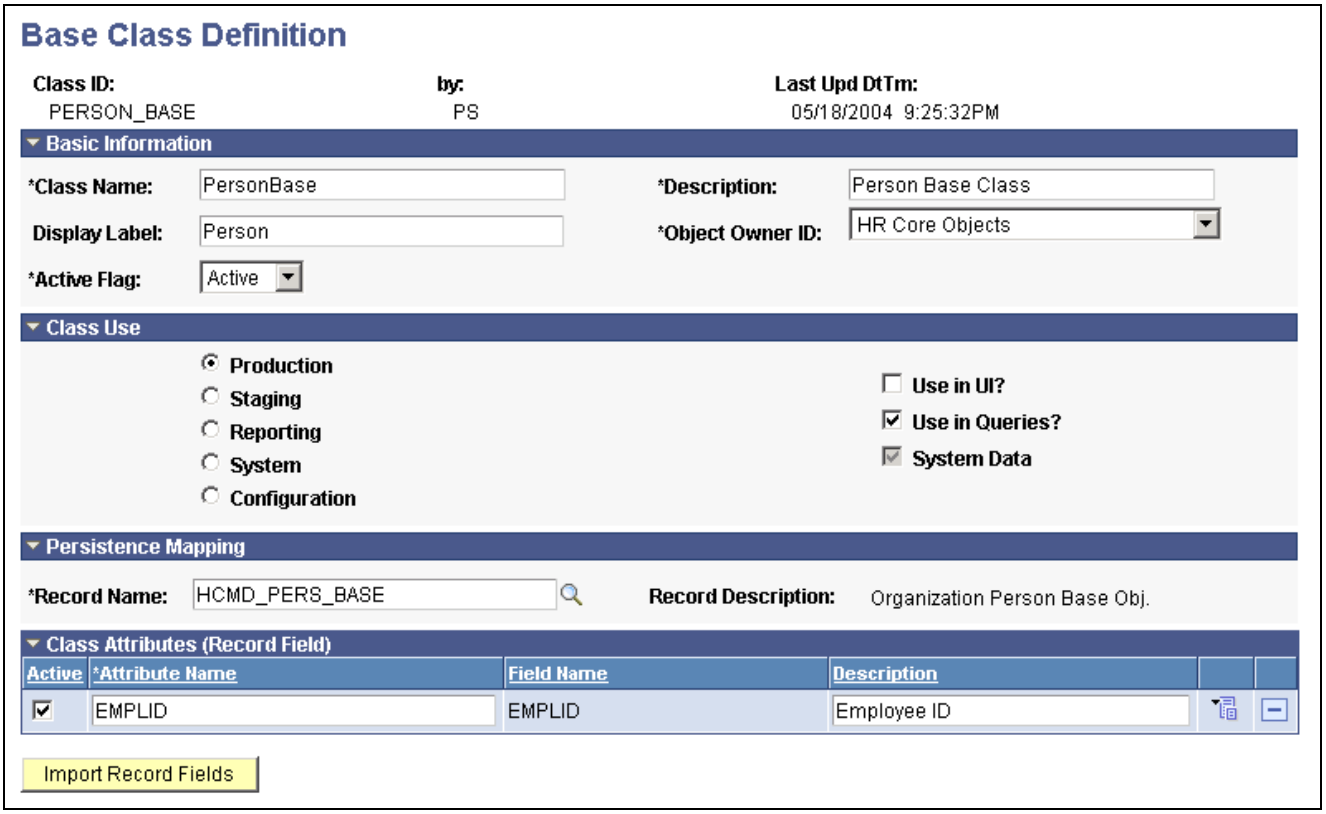
Page Name	Object Name	Navigation	Usage
Object Class Definition	HCMD_OBJS_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition	Set up and review definitions for derived classes.
Class Attribute Details	HCMD_OATT_SPG	• Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition Click the View Attribute Details button on the Base Class Definition page • Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition Click the View Attribute Details button on the Object Class Definition page	Enter or review class attribute details
CLass Relationship Details	HCMD_OREL_SPG	• Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Catalog, Base Class Definition Click the View Relationship Details button on the Base Class Definition page • Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Catalog, Object Class Definition Click the View Relationship Details button on the Object Class Definition page	Enter or review class relationship details.
Export Metadata Definitions	HCMD_EXPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Export, Export Metadata Definitions	Export metadata definitions from the catalog to XML.

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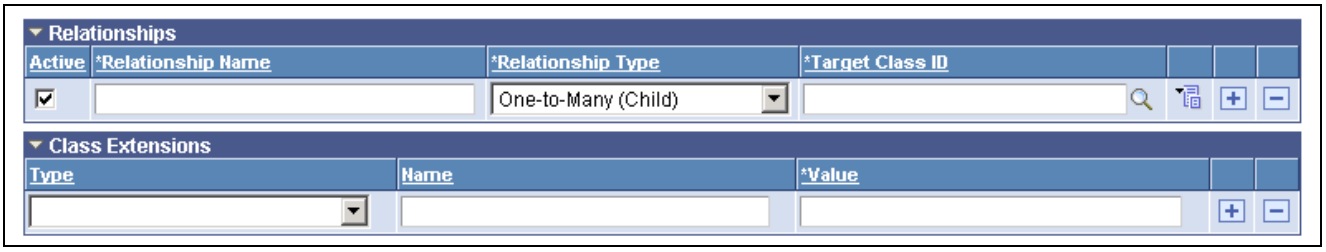
Page Name	Object Name	Navigation	Usage
Import Metadata Defintions	HCMD_IMPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Import, Import Metadata Definitions	Import metadata definitions.

Defining Base Classes

Access the Base Class Definition page.



Base Class Definition page (1 of 2)

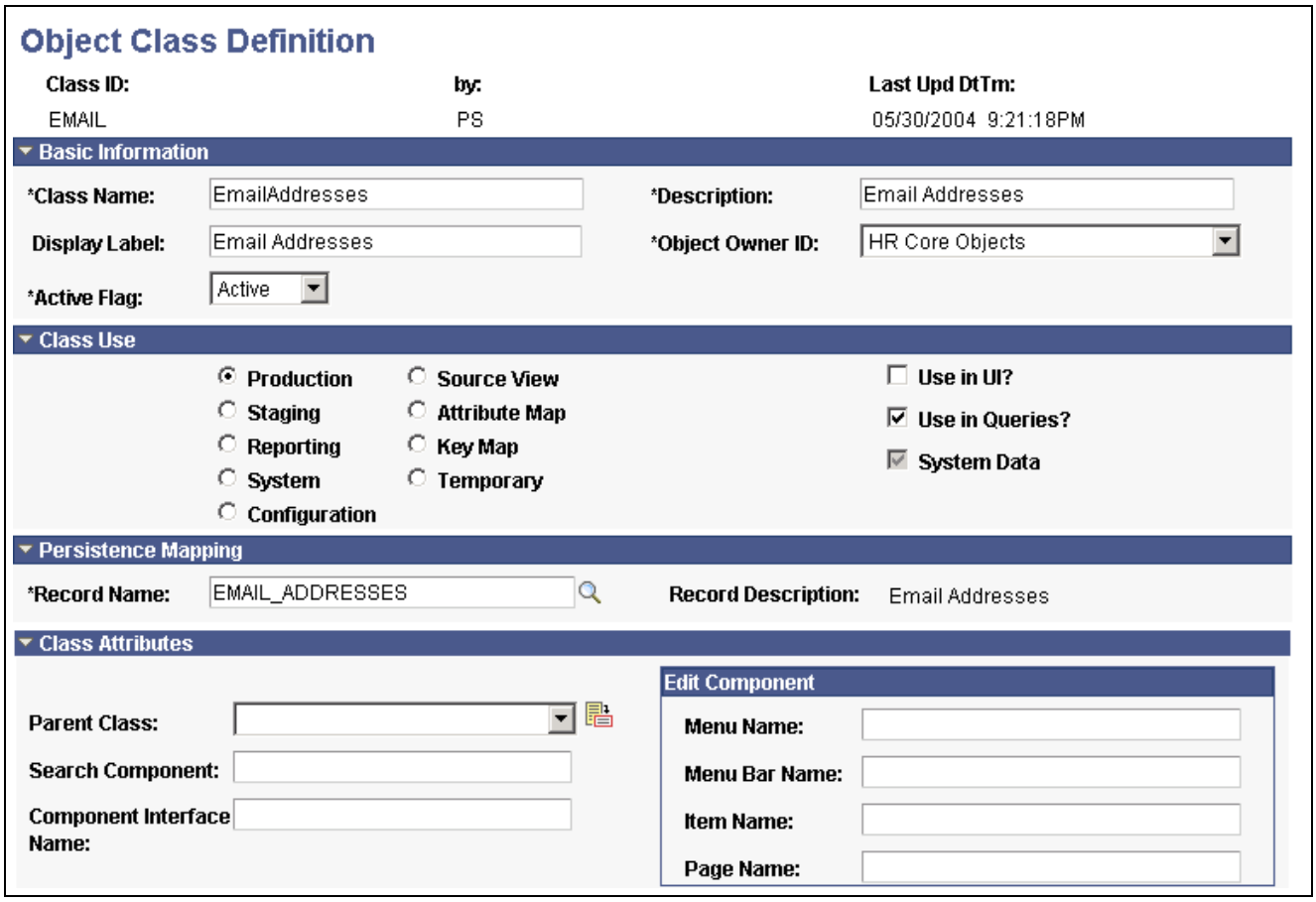


Base Class Definition page (2 of 2)

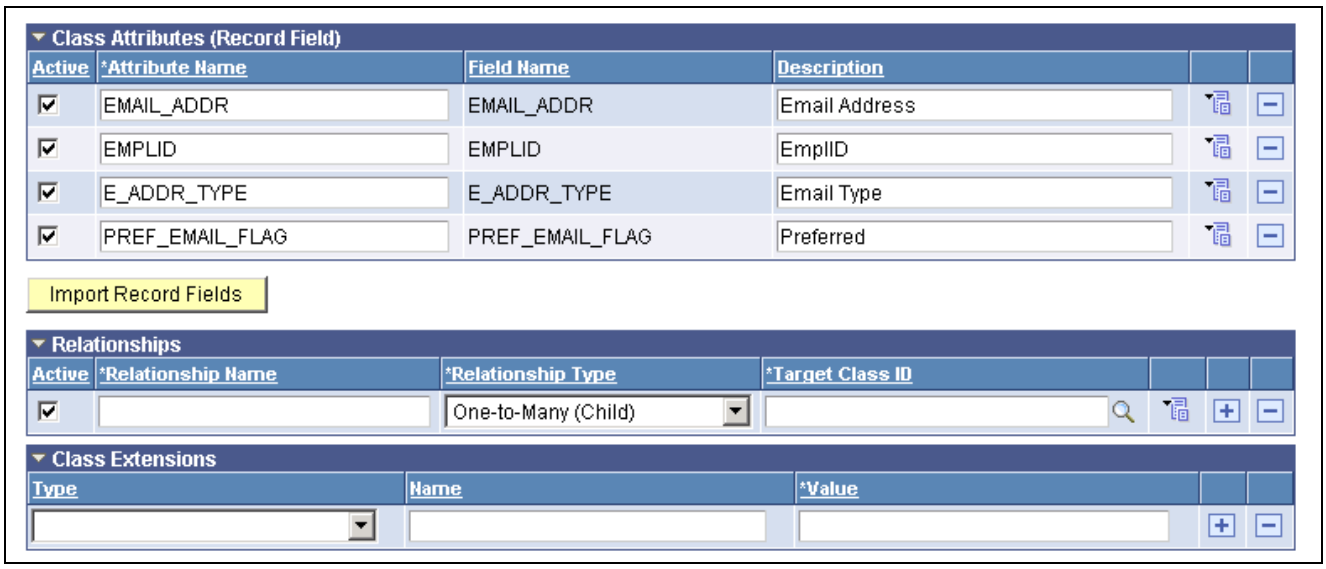
Defining Object Classes

Access the Object Class Definition page.

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Object Class Definition page (1 of 2)



Object Class Definition page (2 of 2)

Class Attributes

Parent Class If this class object is built upon a parent class object, select it here. The class object will inherit all of the parent's attributes.

Leave this field blank if the object class has no parent.

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Component Interface Name Select the PeopleTools component interface used to save data for the class. You can use the component interface in Query Builder to perform bulk updates. For example, you can create a query for all the people at Location A and then update the location information on the Job Data component for that group of people to Location B.

Search Component Select the search component to search for instances for this derived class object. The system uses the Query Builder search component as a default if you do not enter a value here.

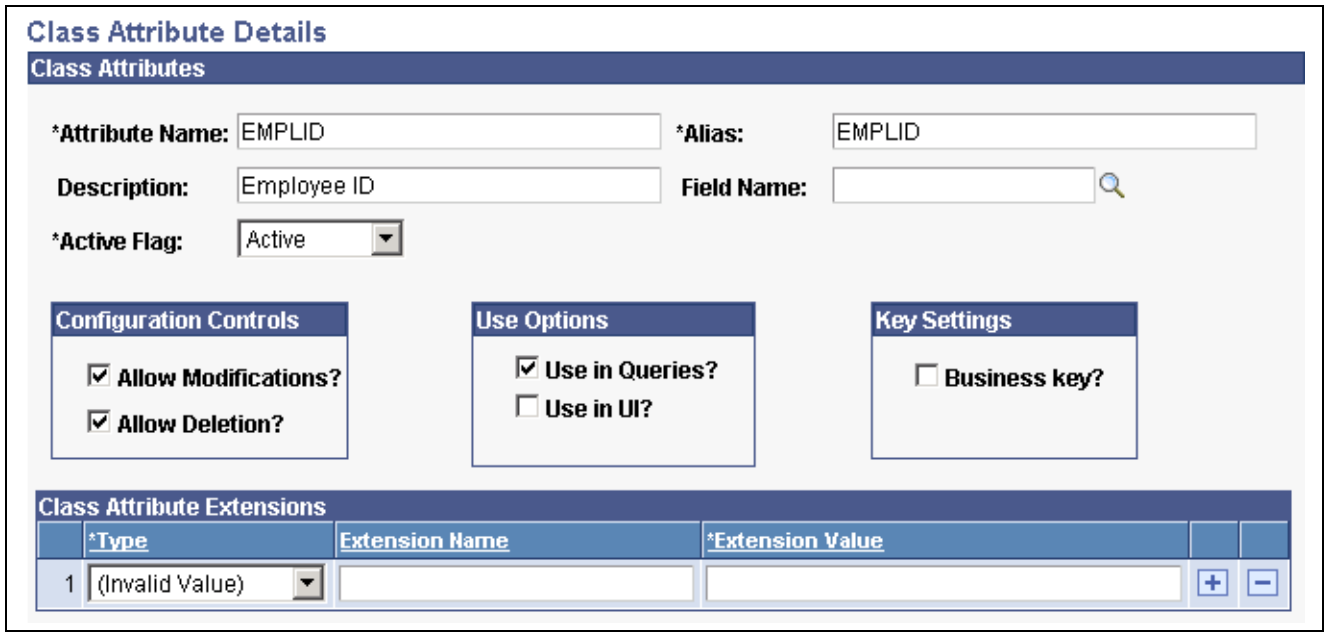
Edit Component

When you enter a component in this group box for a class, the system enables you to link to the component or page from a hyperlink in the query results when you query the class in Query Builder. This enables you to make updates to the component while you are reviewing the query results

Enter the component's Menu Name, Menu Bar Name, Item Name, and Page Name.

Entering Class Attribute Details

Access the Class Attribute Details page.



Class Attribute Details page

Attribute Name Enter the attribute name. It can be different from the corresponding field.

Alias Enter an alias for the attribute.

Field Name Each attribute must have a corresponding field in the PeopleTools record.

Configuration Controls

Allow Modifications? Select if the users can modify the attribute in dynamic user interfaces.

Allow Deletion? Select if the users can delete the attribute in dynamic user interfaces.

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Use Options

Use in Queries? Select to display the class in Query Builder.

Use in UI? Select to display the attribute in a dynamic user interface

Key Settings

Business key? Select if the business logic indicates that this attribute (field) is a key. You do not need to define the attribute as a key field at the record level.

Class Attribute Extensions

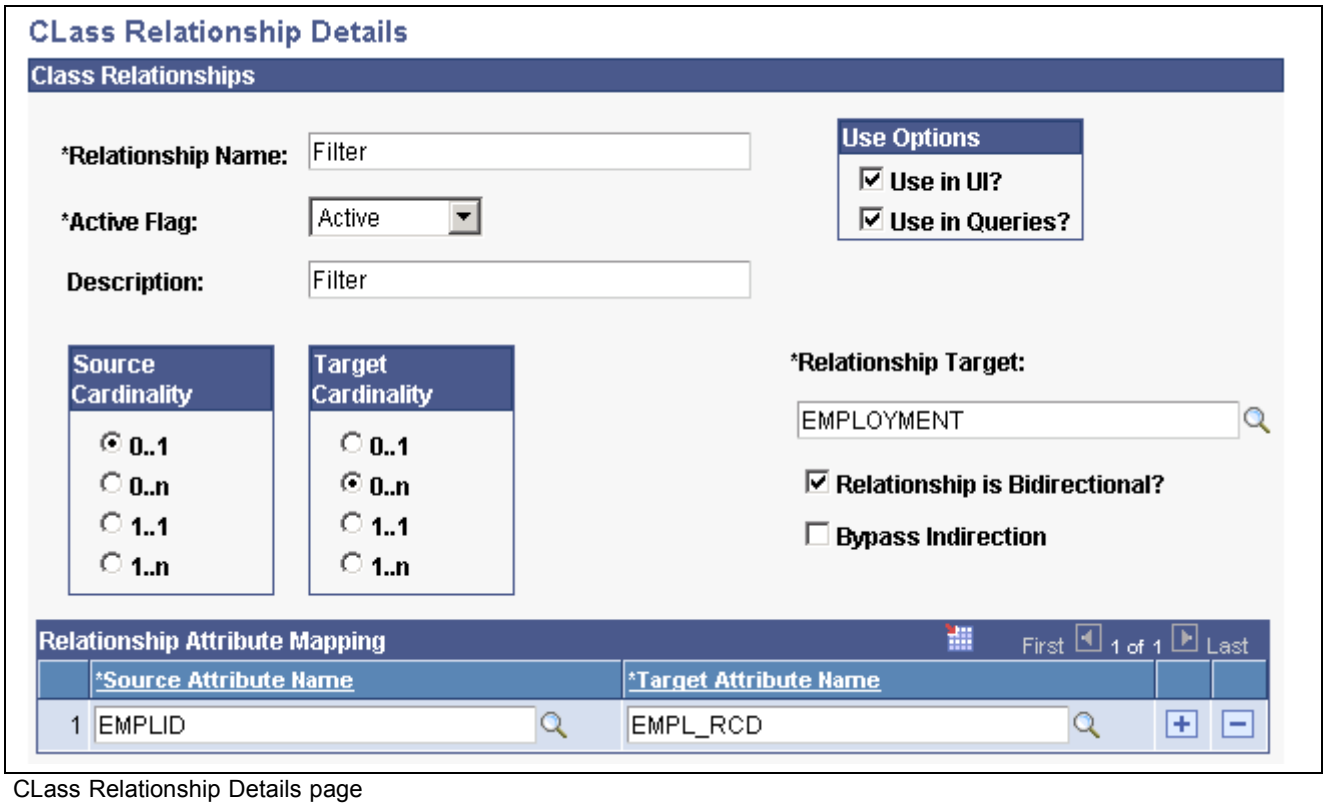
Class attribute extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class attribute extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Name
- Value

Entering Class Relationship Details

Access the CLass Relationship Details page.



CLass Relationship Details page

Relationship Name Enter the name of the relationship.

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Use in Queries? Select to display the relationship in Query Builder.

Use in UI? Select to display the relationship in a dynamic user interface.

Source Cardinality Select the cardinality setting of the source class object from the following options:

- zero to 1 (*0.. 1*)
- zero to many (*0.. n*)
- one to one (*1.. 1*)
- one to many (*1.. n*)

Target Cardinality Select the cardinality setting of the target class object from the following options:

- zero to 1 (*0.. 1*)
- zero to many (*0.. n*)
- one to one (*1.. 1*)
- one to many (*1.. n*)

Relationship Target Select the relationship's target class object.

Relationship is Bidirectional? Select to make the reverse relationship (with the source and target object classes reversed) automatically available.

Bypass Indirection Select to bypass automatic setID indirection for those relationships that include setID indirection fields.

Query Build automatically adds the required SetID logic as required. If you select this option, you must define the logic in the relationship attribute mapping. For example, SETID_Location maps directly to the SetID field on the Locations table (LOCATION_TABLE) to improve performance.

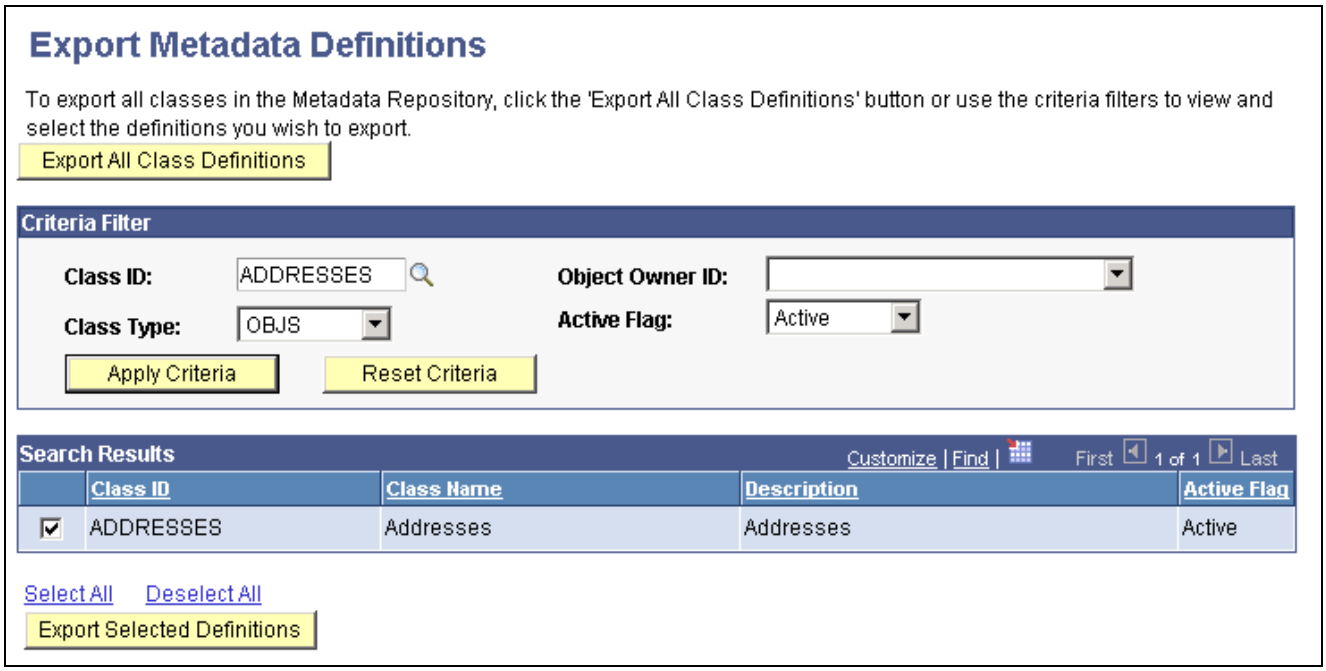
Relationship Attribute Mapping

Enter the names of the attributes that you are mapping. You can map any number of attributes and the attributes do not have to have the same name to be mapped.

Exporting Metadata Definitions

Access the Export Metadata Definitions page.

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Exporting Metadata Definitions page



Click to export all the metadata definitions in the catalog to an XML file. The system will display the Export Metadata Definitions page where you enter the export path and file name to be created.

Criteria Filter

To limit the classes, enter filter criteria in the Class ID, Class Type, Object Owner ID, or Active Flag fields.

Note. You can select more than one class ID in this field by separating the values with commas.



Click to apply the criteria you entered. The system populates the Search Results grid with the class objects that meet the criteria.



Click to clear the search criteria fields.

Search Results

The system populates this grid with the class objects that meet your search criteria and automatically selects all of them. Clear those the check box next to those class objects that you do not want to export.



Click to export the selected class objects to an XML file.

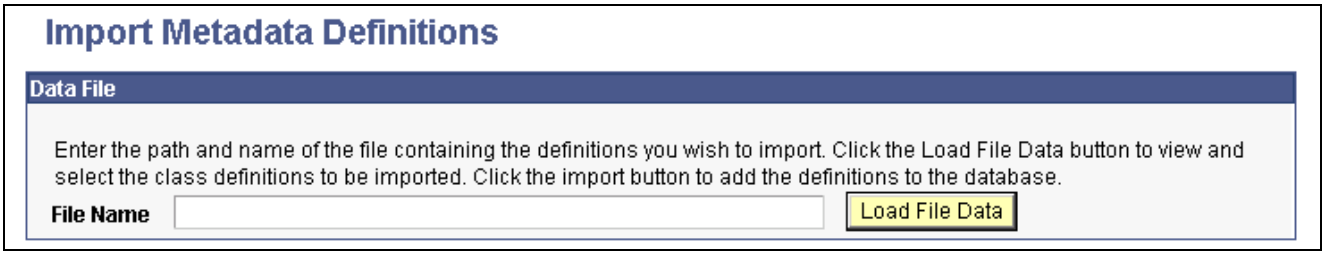
Export Metadata Definitions page

The system displays the Export Metadata Definitions page when you click the Export All Class Definitions button or Export Selected Definitions button. Enter the full path to the application server and the file name. If you do not specify a file name, the process will create the file in the default directory.

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Importing Metadata Definitions

Access the Import Metadata Definitions page.



Import Metadata Definitions page

Enter the file path and name to load the data from the XML file. The system will display a list of classes that exist in the exported file and an icon indicates if the class already exists. Select which classes should be imported and if the system should overwrite existing class definitions.

Building SQL Queries with Query Builder

To build SQL queries with Query Builder, use the Query Builder component (EQRY_SAMP_HTML_CMP) and the Pre-defined Queries component (EQRY_VIEWER_CMP).

This section provides an overview of Query Builder and discusses how to:

- Specify, save, and load result attributes.
- Define query criteria.
- Save query definitions.
- View query results.
- Reuse queries predefined in Query Builder.

Understanding Query Builder

Query Builder is a flexible tool that is used to query class objects that are defined in the PeopleSoft HCM metadata repository.

Query Builder lets you:

- Create queries of unlimited length and complexity without the need to know the underlying database model.

  Query builder automatically generates the most efficient SQL based on the metadata class definitions, generates all SQL joins automatically based on the relationships defined in metadata, and includes SetID and effective-dated logic.
- Select any number of available output fields to display results from both the underlying class and the class relationships.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.

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- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.

  Query Builder automatically generates the appropriate SQL for aggregations.

- Preview the Structured Query Language (SQL) query generated by Query Builder.

Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.
- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

Pages Used to Build Queries

Page Name	Object Name	Navigation	Usage
Result Attributes	EQRY_OUTPUT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Result Attributes	Select the object attributes that you want to use as result attributes in the query results. Select as many attributes as needed.
Save Attributes	EQRY_OUT_S_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Result Attributes Click the Save Attributes button on the Result Attributes page.	Save the result attributes of the query. Enter a name and description for the query. The query is available to all users who have access to Query Builder. If you don't want the query generally available, select Private Query.
Load Attributes	EQRY_OUT_L_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Result Attributes Click the Load Attributes button on the Result Attributes page.	Load or append predefined result attributes selection for use in the current query. The attributes that are available depend on the target object that is selected when Query Builder is invoked.
Criteria	EQRY_ISCRIPT	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria	Specify the attributes for which you want to query, and define expressions by using operators and values.
Criteria Attribute Tree	EQRY_ATT_TREE_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Select Attribute button next to the Attribute Name field on the Criteria page.	Using the object selection tree, navigate to the attribute that you want to use as query criteria and select it.

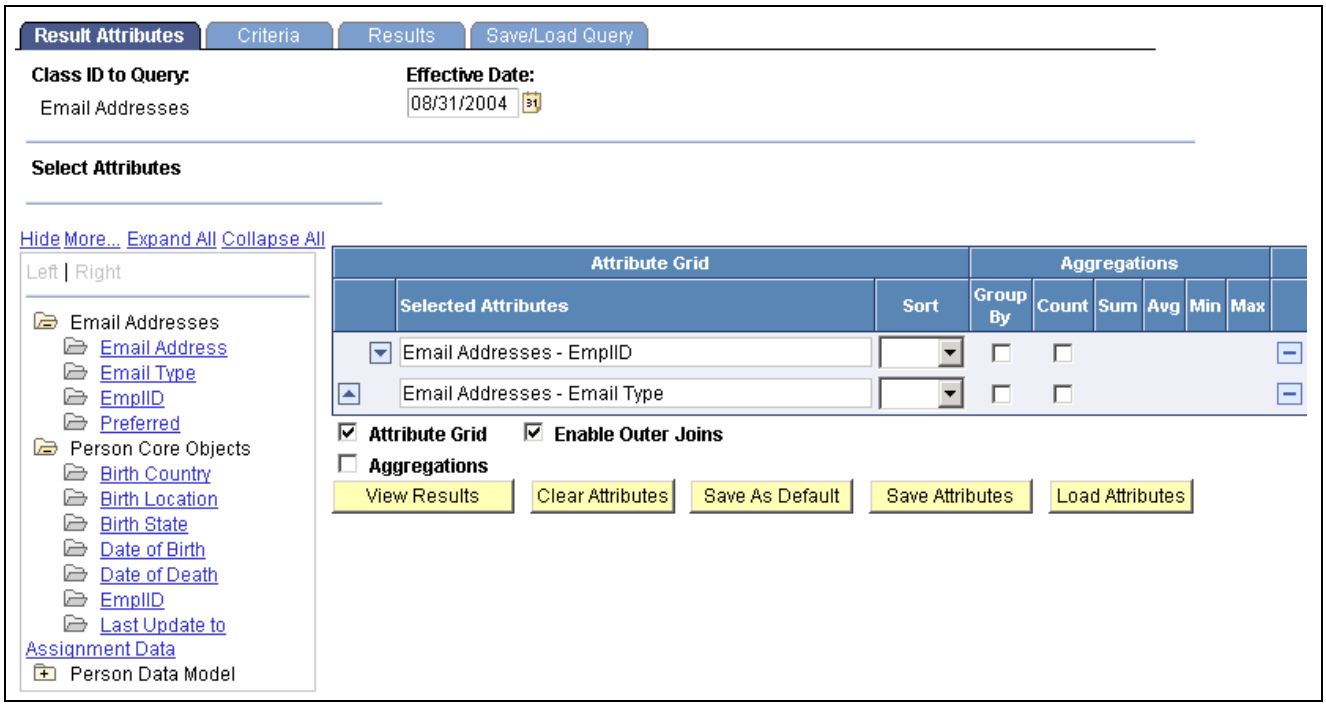
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Page Name	Object Name	Navigation	Usage
Select Value	EQRY_VBUILD_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Value lookup button on the Criteria page.	Select the attribute value to use as query criteria
Save Criteria	EQRY_PROP_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Save Criteria button on the Criteria page.	Save the current criteria selection by name for use in later queries. The system saves the query criteria selection for the target object that is selected when Query Builder is invoked.
Load Criteria	EQRY_LOAD_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria Click the Load Criteria button on the Criteria page.	Load an existing criteria selection.
Results	EQRY_RESULT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results	Review the results of your query.
Save/Load Query	EQRY_COMBO_SAVE_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Save/Load Query	.Save the current query or load a predefined query.
Pre-defined Queries	EQRY_VIEWER_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Pre-defined Queries	Run a query that you've predefined on the Query Builder component. The page looks like the Query Builder - Results page.

Selecting Query Attributes

Access the Result Attributes page.

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Result Attributes page

Use the Result Attributes page to select the object attributes that you want to search against. You can select any combination of the defined attributes for the object.

At any point while defining result attributes, you can run the query and view the results. You can then return to the Result Attributes page to modify the query result attributes, go to the Criteria page to refine the query selection, or save the definitions.

Class ID to Query Displays the class ID you selected for querying on the search page.

Select Attributes

The system displays folders for the target class ID object and any other objects that have a relationship (as entered on the Object Class Definition page) with the selected class ID. In this example, you can see that both the Person Core Objects and Person Data Model objects have a relationship with the Email Addresses object.

Click the folder to view the attributes of each object. Click an attribute to add it to the attribute grid.

Select Attributes You can rearrange the order of the selected attributes to determine the order in which they appear on the Results page. You can also determine the sort order of the data that is in each results column.

Hide Hides the attribute tree.

More When Query Builder first opens, the Select Attributes tree displays the system objects that are closely related to the target object through direct association. These relationships are defined in HCM metadata and represent the objects that you most often use in queries. If you can't find the objects that you want, click the More link to access other objects .

Expand All Click to reveal the contents of all attribute tree folders.

Collapse All Click to collapse all attribute tree folders.

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Attribute Grid Select this check box to display the results columns as defined in the Attribute Grid.

Aggregations Select this check box to display the results based on the groupings that are selected in the Aggregations grid.

Enable Outer Joins Select this check box to enable the query to use outer joins to gather additional data in the query.

View Results Click to run the query. The system opens the Results page, showing the results of the query.

Clear Attributes (Optional) Click to remove the attributes that appear in the Selected Attributes list.

Save As Default (Optional) Click to set the attributes that you select as the default attributes that appear each time that you use the target object.

Save Attributes (Optional) Click to save current attribute selections as a query.

Load Attributes (Optional) Click to load predefined attribute selections.

Attribute Grid

Selected Attributes The system populates the Selected Attributes list with the target object's list box items as they're defined in the Tools Record definition. You can add or delete attributes as necessary for your query.

 and  Use the arrows to rearrange the attributes to determine the column display order in query results. For example, the attribute at the top of the Selected Attributes list appears as the left-most column in the query results.

Sort (Optional) Indicate a sort order for the attribute in the column results: *Blank, Asc*(ascending), and *Desc* (descending). You can sort one or multiple columns. Specifying multiple sorts causes column results to sort from left to right. Column results that are sorted have a link that appears in the column header in the query results.

Group Select this check box to group the results by the attribute.

Count , **Sum** , **Avg** (average), **Min** (minimum), and **Max** (maximum) Select these options to have the system count the different groups. For attributes that are related to transaction amounts, the system can also sum, average, and indicate the minimum or maximum amounts.

Aggregations

Use the check boxes in this grid to indicate how you want the results to appear on the Results page. For example, you can tell the system to group the results by order number, and within each group, sum the order amounts as well as show the minimum and maximum amounts.

Loading Result Attributes

Access the Load Attributes page.

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Load Attributes page

Use the Load Attributes page to add saved results columns to the query. The page displays all of the attribute sets that are saved by all users as well as the attribute sets that you save and mark as private.

Load Replaces the result attributes in the query.

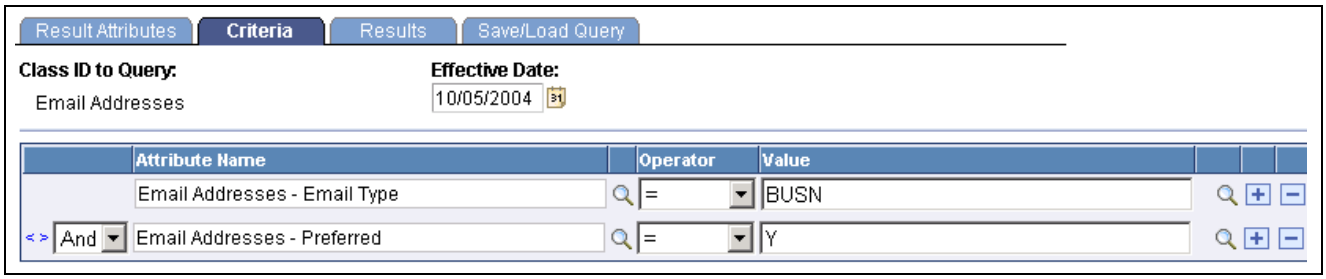
Append Adds the result attributes onto the query.

User ID The user who creates and saves the result attributes.

Private Query Indicates the private queries.

Selecting Query Criteria

Access the Criteria page.



Criteria page

After you load or define the query result attributes, you can optionally add criteria to filter the query results on the Criteria page. You can only select attributes from the objects that are selected on the Results Attribute page. Specify as many criteria rows as needed, or save a criteria selection for later use to use as a predefined query selection in the current query.

By using indentation in expressions, you can create queries that are as complex as you need. Query Builder intelligently parenthesizes the expressions to ensure that the query is evaluated correctly.

Attribute Name Select the attributes from the objects connected to the class ID you're querying.

Click the Select an Attribute button to view a list of all defined attributes for the object on the Select Criteria page. Select an attribute to return to the Criteria page.

Operator Select an operator to define the condition for the criteria.

Value Enter a value for the selected attribute to use as query criteria.

Selecting a Value

Access the Select Value page to select the values that you want to use to filter the query. The fields on the page differ depending on the operator that you select on the Criteria page.

If you use the between or not between operators, you select a From and To value.

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If you used the like, not like, equal to, not equal, greater than, less than or equal to, less than, or greater than or equal to, you select a value for the system to compare the result to.

If you use the in or not in operator, you can select one or more check boxes for the values within which you want the system to return the results.

At any point while defining the criteria, you can click the View Results button to run the query, and then return to the Criteria or Results Columns page to modify or (optionally) save the definitions.

Working with Criteria

View Results — Click to view the results of the query on the Results page.

Clear Criteria — Click to remove all current attribute names and value selections and start over.

Save Criteria — (Optional) Click to save current attribute name and value selections.

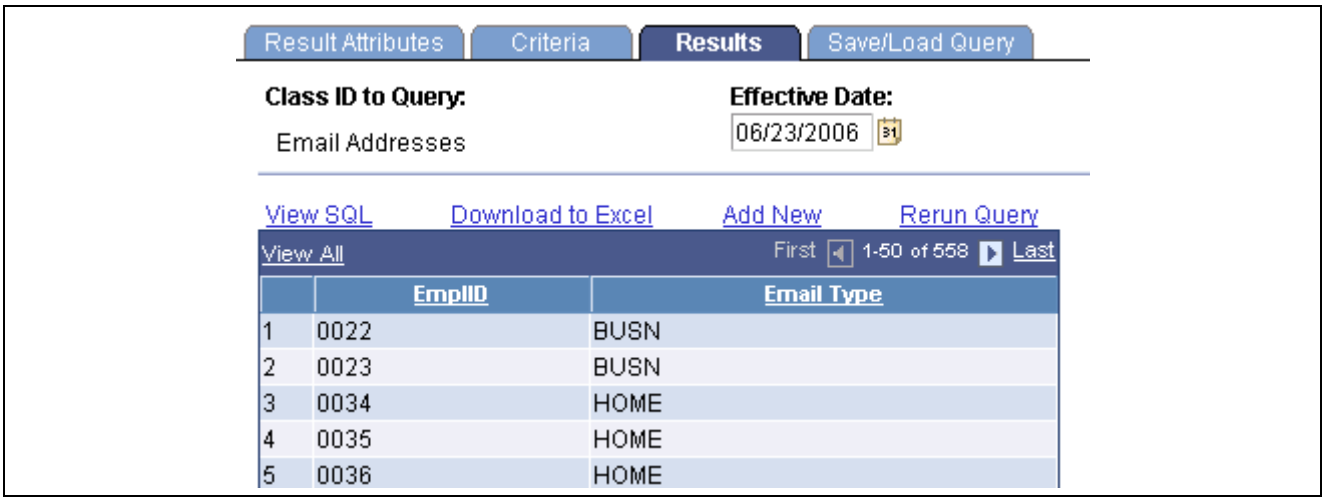
After selecting the criteria, you can save the query definition for future use. On the Save Criteria page, enter a name and description for the query and indicate whether or not you want it to be a private query.

Load Criteria — (Optional) Click to load predefined attribute name and value selection.

This page works just like the Load Columns page, and displays all of the query criteria sets that are saved by all users as well as the sets that you save and mark as private.

Viewing Query Results

Access the Results page.



Results page

Use the Results page to view the results of the query. You can click any of the links that are in the results columns to go to the application page where the attribute is defined.

Select to view the query SQL, download the query results into Excel, add new criteria, or rerun the query.

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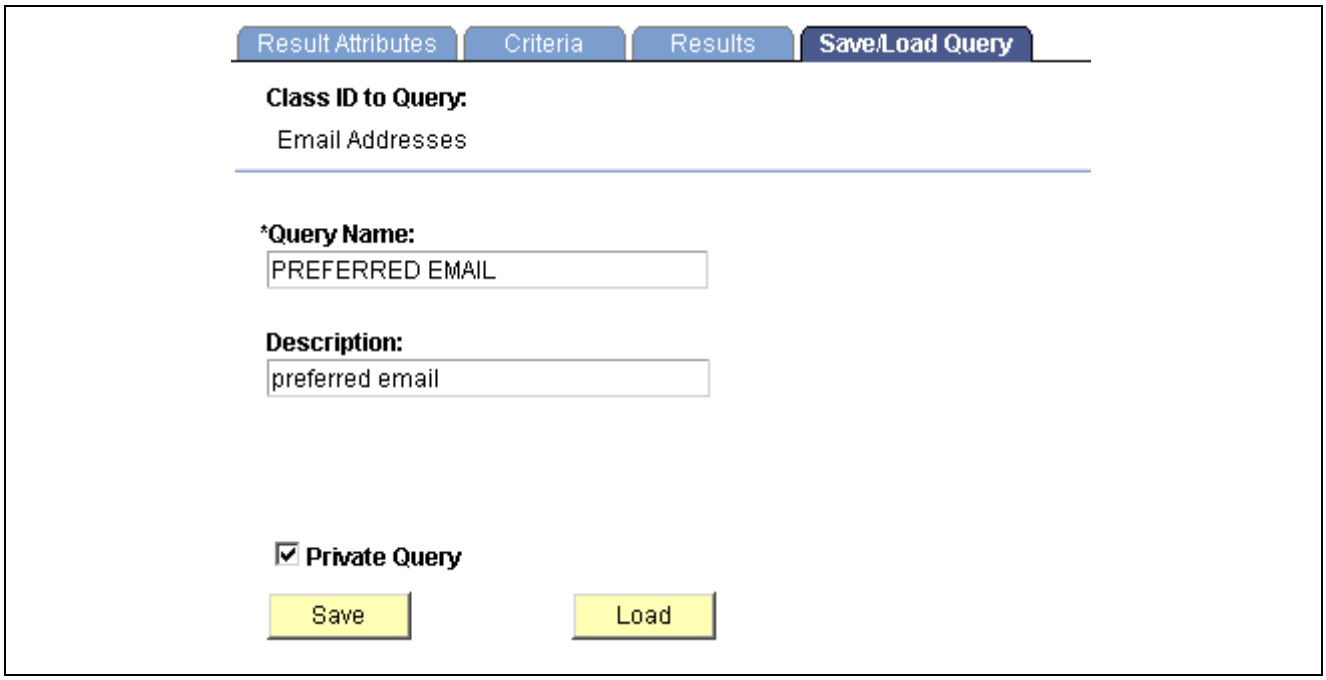
Note. When you select to download the current query results to a Microsoft Excel spreadsheet, only the results currently displayed on the page are downloaded to the spreadsheet. To download all query results, click the View All link, and then click the Download to Excel link.

Aggregations grid

Shows the results sorted and totaled based on the check boxes that you select on the Results Columns page. This grid is only visible if you select the Aggregations check box on the Results Columns page.

Saving and Loading the Query

Access the Save/Load Query page.



Save/Load Query page

While defining a query, you can save the result attributes and criteria as separate definitions. This allows you the flexibility to mix and match various result attributes and criteria. You can also save a query definition, which is a combination of an output (result attributes) selection and a criteria selection.

Query Name Enter a name under which to save the query. When you save a Query Builder query, both the result attributes and the criteria selection are saved.

Private Query Select to make the query private and available only to the user who created it.



Click load to load a predefined query.

Running Predefined Queries

Access the Pre-defined Queries page.

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Select a query by searching on output and criteria combination, description, original class ID, or a combination of these. Then click the query result that you want to run. Click the View Definition link to access the Query Builder component, where you can change the results columns, attributes, or criteria of the query and rerun the query.

Note. Predefined queries are also available by loading existing query definitions from within Query Builder.

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CHAPTER 31

Working with HCM Transformation Framework

This section provides an overview of HCM Transformation Framework and discusses how to set up and manage HCM transformation maps.

Understanding the Transformation Framework

When an application sending a service operation uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. HCM Transformation Framework uses definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

HCM Transformation Framework enables seamless integration among PeopleSoft applications as well as with third-party applications such as Oracle, SAP, and Siebel. Transformation schemas are associated with transformation maps, enabling you to quickly locate and modify a schema to respond to external changes.

The transformation map registry is made up of transformation maps. The transformation map defines the message properties of the message for both the target and source application. For each transformation map, create a transformation schema, an XML document that defines the message structure mapping between two applications.

When a message needs to be transformed in order to be successfully received by an application, you need to assign a transformation program with the message on the Integration Broker Relationships component (IB_RELATIONSHIP).

There are six transformation programs supported by the transformation framework:

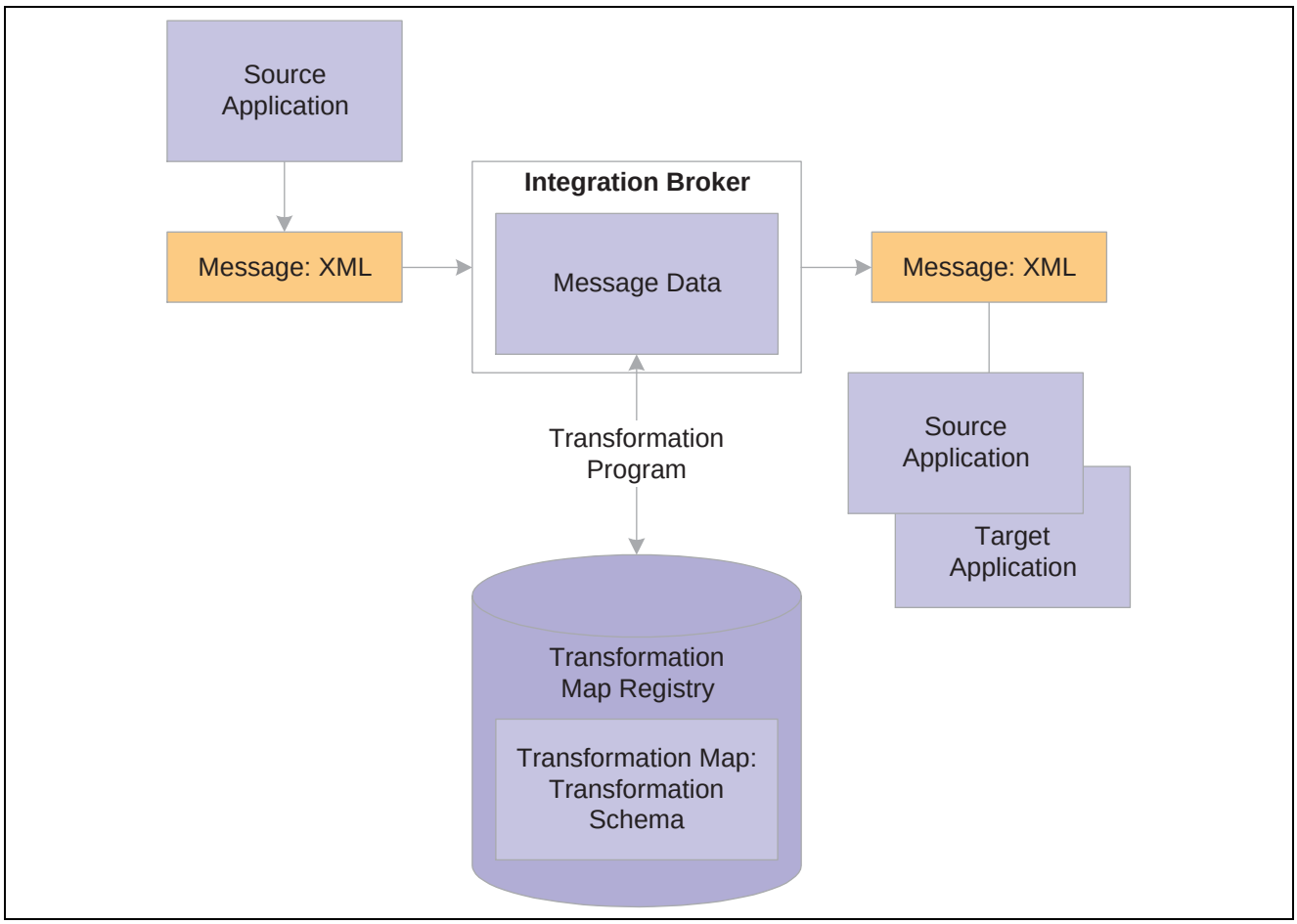
- HTMF_TR_IA, for inbound asynchronous communications.
- HTMF_TR_IS, for inbound synchronous communications.
- HMTF_TR_ISR: for the inbound synchronous response.
- HTMF_TR_OA, for outbound asynchronous communications.
- HTMF_TR_OS, for outbound synchronous communications.
- HMTF_ TR_OSR for outbound synchronous responses.

Based on the type of transaction, choose the appropriate transformation program to associate with your message.

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When an application publishes a message that requires transforming, PeopleSoft Integration Broker invokes the transformation program associated with the message. The transformation program determines which transformation map corresponds to the target message and applies the transformation schema to the message data using XSLT, an XML translation language. The transformation schema can modify the metadata or the message data itself to comply with the target application requirements. PeopleSoft Integration Broker repackages the transformed message data into an XML document that is structurally compliant with the target application. The Integration Broker can then deliver the message to the receiving application.

This diagram illustrates the flow of information from one application to another using HCM Transformation Framework:



Transforming data using the transformation framework

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker, "Applying Filtering, Transformation and Translation"

Base Message Format in PeopleSoft Integration Broker

Before you create a transformation schema, it helps to understand the base XML document format used by PeopleSoft Integration Broker to package application data:

```
<?xml version="1.0"?>
<PeopleSoftMessageName>
 <FieldTypes>
```


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```
 <RecordName1 class="R">
  <fieldname1 type="CHAR"/>
  <fieldname2 type="NUMBER"/>
  ...
 </RecordName1>
 <RecordName2 class="R">
  <fieldname1 type="CHAR"/>
  <fieldname2 type="NUMBER"/>
  ...
 </RecordName2>
 ...
</FieldTypes>
<MsgData>
 <Transaction>
  <RecordName1 class="R">
   <fieldname1>Fieldvalue</<fieldname1>
   <fieldname2>Fieldvalue</<fieldname2>
    ...
  <RecordName1>
  <RecordName2 class="R">
   <fieldname1 type="CHAR"/>
   <fieldname2 type="NUMBER"/>
    ...
  </RecordName2>
 <PSCAMA class="R">
  <AUDIT_ACTN>ActionCode</AUDIT_ACTN>
         </PSCAMA>
    ...
 </Transaction>
 ...
</MsgData>
</PeopleSoftMessageName>
```

This format is then packaged into an XML document for transmission to the target application. If you have attached one of the supported framework transformation programs to the message, the transformation program identifies the appropriate transformation map and applies the transformation schema to the message, modifying its structure. The message is then repackaged into an XML document in its altered form and delivered.

Note. The transformation message must be supported by the transformation framework. Only supported programs can work with the transformation maps. You can also add configured Application Engine or XSLT transformation programs as part of the relationship definition independent of the transformation framework.

The transformation program can modify the following elements of the standard message structure:

PeopleSoftMessageName	The name of the message as it is defined in PeopleSoft using Application Designer. The transformation program can change the message name.
FieldTypes	The metadata for the records and their fields.

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	The transformation program can select the fields required by the target applications and can change their names.
Transaction	Contains the data for the records and their fields and organizes them into a hierarchy. The record tags at each level contain the fields for that record. The transformation program can select one or more record subsets and their fields or just a subset of fields required by the target service operation and can change their names.
PSCAM (PeopleSoft Common Application Message Attributes)	The last record within a transaction that provides information about the entire transaction. The PSCAMA record contains fields that are common to all messages. The <PSCAMA> tag repeats for each row in each level of the transaction section of the message. The sender can set PSCAMA fields to provide basic information about the message, for example, to indicate the message language or the type of transaction a row represents. The transformation program copies this structure to the target message structure.

Setting Up and Managing HCM Transformation Maps

To set up and manage HCM transformation maps, use the Register Transformation Map component (HMTF_WZ_STEP1) and the Transformation Registry component (HMTF_TRF_REGISTRY).

This section discusses how to:

- Set up transformation maps.
- Use the HCM transformation registry.

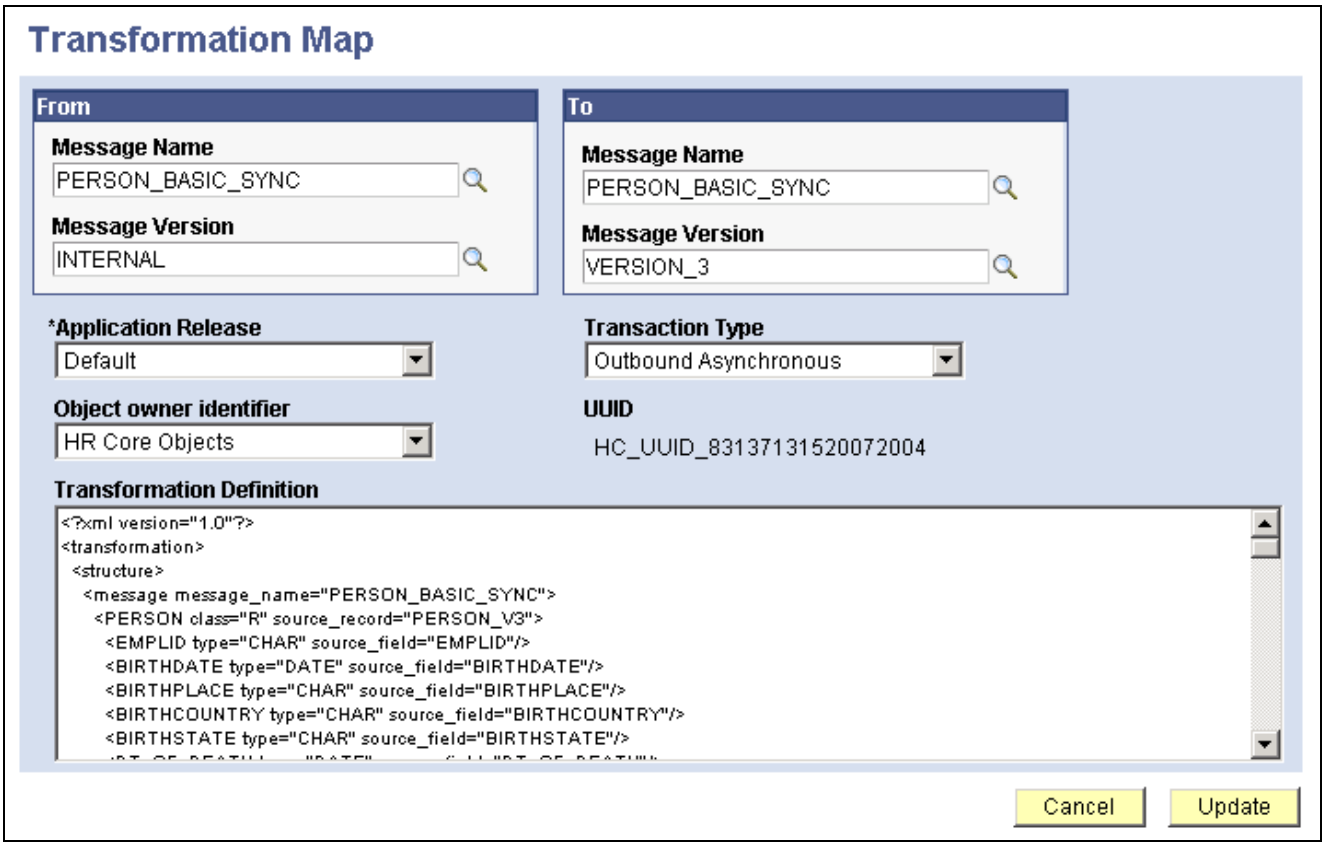
Pages Used to Set Up and Manage HCM Transformation Maps

Page Name	Object Name	Navigation	Usage
Transformation Map	HMTF_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Register Transformation Map, Transformation Map	Define or modify transformation maps (transformation XML schemas).
HCM Transformation Maps	HMTF_TRF_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, HCM Transformation Maps	Organizes the transformation maps by message name, message version, application version, and transaction type. Click a transformation map URL to modify the transformation map

Setting Up HCM Transformation Maps

Access the Transformation Map page.

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Transformation Map page

The system stores the map as an HTML template in the portal registry (HC_REGISTRY) in the HCM Transformation Maps component.

Message Name and **Message Version**	Select the message name and version for both the source (From) and target (To) application.
Application Release	Select the release of the source application.
Transaction Type	Indicate if the type of transaction is *Inbound Synchronous*, *Inbound Asynchronous*, *Outbound Synchronous*, *Outbound Asynchronous*, *Inbound Synchronous Response*, or *Outbound Synchronous Response*.
Object owner identifier	Select the owner of the object.
Transformation Definition	Define the mapping information (schema) to map the source service operation structure to the target service operation structure.

Defining the Transformation Schema

The transformation definition contains the following code:

```
<?xml version="1.0"?>
 <transformation type="IA"application_release="Application Name and?
 Release"default_node="Default Node Name">
  <structure>
   <message message_name="Original Message Name" new_message_name="New Message?
 Name">
```

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```
    <TargetMessageRecord class="R" source_record="SourceMessageRecord ">
     < TargetMessageRecordField1 type="CHAR" value="DefaultValue"/>
     < TargetMessageRecordField2 type="CHAR" source_field="SourceMessageRecord?
Field" [source_record="SourceMessageRecord"/>
     ...
    </TargetMessageRecord>
   </message>
  </structure>
 </transformation>
```

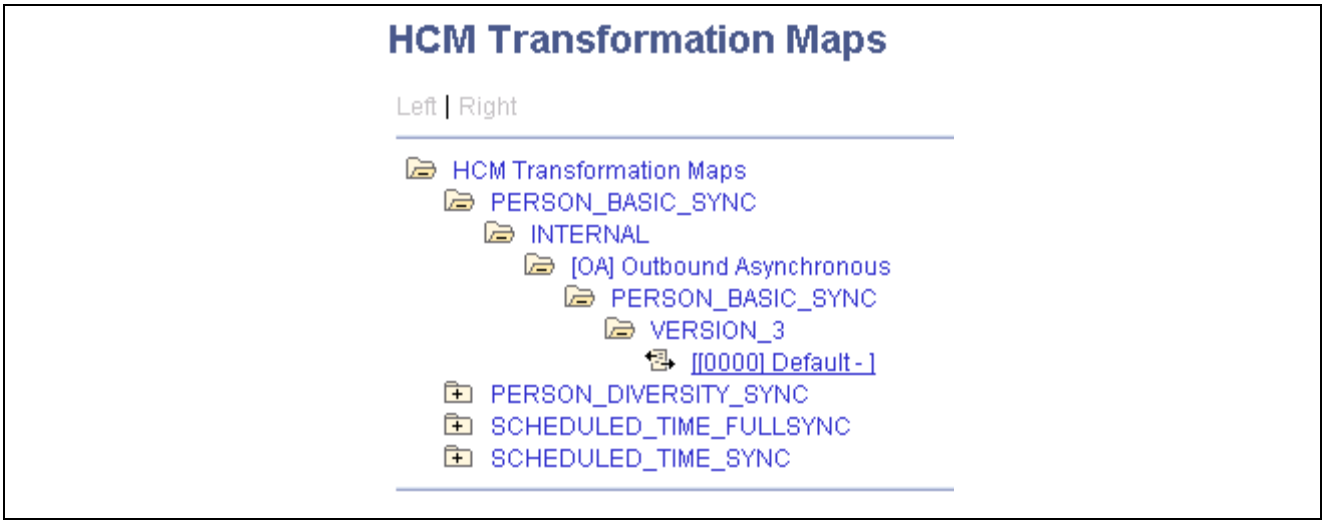
Enter values in the following elements:

XML Tag	Elements	Values
transformation	type	Enter a transformation type. Supported values are: • Inbound Asynchronous. • Inbound Synchronous. • Outbound Asynchronous. • Outbound Synchronous.
	application_release	(Optional) Enter the Category.AppRelease property of the relationship defined in PeopleSoft Integration Broker.
	default_node	(Optional) Enter the default node to be used.
message	message_name	Enter the name of the source service operation.
	new_message_name	(Optional) Enter the name of the message in the transformed structure.
[TargetMessageRecord] **Note.** Edit this tag so that it is the name of the target message record.	class	Enter the element class. The value is *R* for PeopleSoft record based message structure.
	source_record	(Optional) Enter the name of the source record. You should enter a value if the names of the source and target records are different.
[TargetMessageRecordField] **Note.** Edit this tag so that it is the field name in the target message record.	type	Select the data type of the field of the transformed message for the target application. Valid values are: • CHAR • DATE • NUMBER
	source_field or value	Enter the name of the source record field name whose values should be copied in the transformed message structure for the target application *or* enter the default value that should be copied in the transformed message structure for the target application. **Note.** Enter a value in source_field or value, but not both.

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Using the HCM Transformation Registry

Access the HCM Transformation Maps page.



HCM Transformation Maps page

Drill down to the transformation map by message name, message version, application version, and transaction type. Click the template URL to access the Transformation Map page for the transformation map.

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CHAPTER 32

Setting Up and Generating Form Letters

This chapter provides an overview of HRMS form letters and discusses how to:

- Generate form letters for PeopleSoft Enterprise Human Resources.
- Set up standard letter codes.
- Generate form letters for other PeopleSoft HRMS applications.
- Review sample form letters.

Understanding PeopleSoft HRMS Form Letters

This section lists prerequisites and discusses using PeopleSoft HRMS form letters.

Prerequisites

Use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the sample form letters that are delivered with PeopleSoft HRMS. The PeopleSoft Process Scheduler runs a job that:

1. Executes a Structured Query Report (SQR), with SQRibe Technology's Structured Query Report Writer to extract data from the database.
2. Merges the data into a Microsoft Word for Windows document template, with Microsoft Word for Windows as the word processor.
3. Posts the resulting letters on the web server.

If you currently use a report writer other than SQRibe Technology's Structured Query Report Writer or a word processor other than Microsoft Word for Windows, review the information in this chapter to understand the steps that are involved in generating form letters. Then, consult your report writer or word processor documentation to modify the procedures to fit the sample letters.

Once you are familiar with the sample form letters, you can modify the letters or create new ones for other tasks.

Note. To generate letters, you should be familiar with the Microsoft Word for Windows mail merge functions.

See Also

Chapter 32, "Setting Up and Generating Form Letters," Adapting Form Letters, page 766

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Using PeopleSoft HRMS Form Letters

PeopleSoft HRMS delivers a set of sample form letters for use with PeopleSoft HRMS applications. There are two methods for generating form letters; one for PeopleSoft Human Resources and one for applications other than PeopleSoft Human Resources (referred to as other PeopleSoft HRMS applications).

Please follow the appropriate method to create your form letters successfully.

Many human resource management activities involve sending out routine letters and memos on a regular basis. For example:

- (PeopleSoft Human Resources) Letters announcing course session enrollments, cancellations, and rescheduling.
- (PeopleSoft Enterprise Global Payroll, Pension Administration, Benefits Administration) Letters, notification forms, and plan updates.

The wording of such letters doesn't change much from mailing to mailing; what does change is information such as addresses and dates. In PeopleSoft HRMS, you can create form letters in your word processor by accessing the data that you need from your human resources database.

You can generate several types of letters and print them all at the same time, or you can generate letters now and print them later, if you prefer to review them first. Three sample form letters are provided at the end of this chapter.

See Also

Microsoft Word for Windows User's Guide.

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training, "Enrolling and Wait-Listing Students"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, "Setting Up Recruiting Processes"

PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook, "Using Candidate Gateway"

Generating Form Letters for PeopleSoft Human Resources

This section provides an overview of form letters for PeopleSoft Human Resources and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Set up form letters.
- Prepare to print form letters.
- Adapt form letters.
- Troubleshoot form letters.

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Note. These instructions show you how to use templates to create form letters for PeopleSoft Human Resources. To create form letters for other PeopleSoft HRMS applications, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 32, "Setting Up and Generating Form Letters," Generating Form Letters for Other PeopleSoft HRMS Applications, page 772

Understanding Form Letters for PeopleSoft Human Resources

PeopleSoft delivers a set of sample letters for use with the following:

- PeopleSoft Human Resources: Administer Training
- PeopleSoft Human Resources: Manage Labor Administration

The form letter processes search the database for records that have been tagged with specific letter codes. For example, when you enroll an employee in a training course using the Administer Training business process, you can add a letter code to the employee record that identifies the type of letter required. When you later run the training letter report, the system searches for records with the letter codes for training letters.

The form letter processes use Microsoft Word for Windows to generate the letters based on data extracted from the PeopleSoft database.

To generate form letters for PeopleSoft Human Resources:

1. Create letter codes by using the Standard Letter Table page (STANDARD_LTR_TABLE).

   Letter codes represent form letters and are used to link a record to the required letter.

2. Tag people's records with the appropriate letter code in the PeopleSoft Human Resources database.

   Enter a letter code into the records of applicants, employees, contingent workers, or people of interest to flag the record when it's time to generate a form letter.

   For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee, contingent worker, and person of interest records.

3. Generate form letters by running a report that runs the following processes:

   a. An SQR data extract process.

   b. A WinWord WORDINIT process.

   c. The PSMERGE Application Engine process.

   The final step is completed by the Distribution Agent that moves the letter files to the Report Repository.

4. Send training letters by email.

   This step is for the training letters only. The system also emails training letters to students if their email addresses are in their person records.

   Note. You must configure SMTP and activate Workflow to automatically send training letters by email.

   See *Enterprise PeopleTools PeopleBook: System and Server Administration*

5. Print the letters by using Microsoft Word for Windows.

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The system creates the form letters in a temporary directory on the web server, putting all letters of the same type in one file.

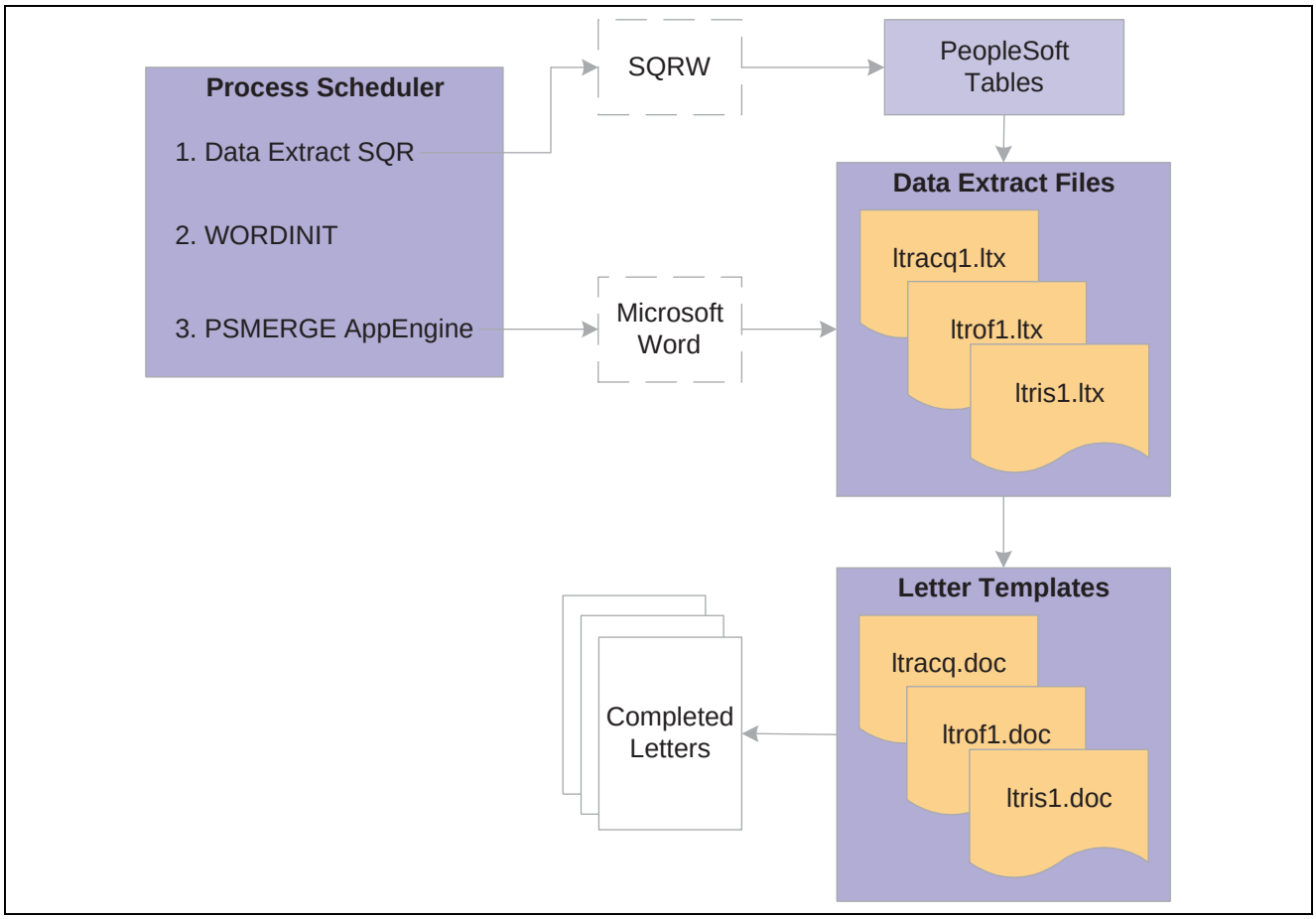
The distributed architecture of the PeopleSoft Human Resources system enables you to access the application server far from local machines therefore the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word for Windows print options.

See Also

Chapter 32, "Setting Up and Generating Form Letters," Setting Up Standard Letter Codes, page 771

Generating Form Letters

This diagram illustrates how PeopleSoft Process Scheduler generates form letters for PeopleSoft Human Resources:



Generating form letters for PeopleSoft Human Resources with PeopleSoft Process Scheduler

Step 1: SQR Data Extract Process

The SQR data extract process:

- Identifies records in the database with the appropriate letter codes (and no print date).
- Extracts data from these tagged records.
- Updates the Print Date field in the tagged records.

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- Creates a data extract file (with an .ltr extension) that contains the data for each letter.

  For example, the file containing data for offer letters is ltrof1.ltr, where of1 represents offer letter, and .ltr represents letter.

The SQR process sends its output to the log/output directory defined for SQR reports. Define the log/output directory in the Process Scheduler configuration file.

Step 2: WORDINIT WinWord Process

The WORDINIT WinWord process is an initialization process. Its purpose is to ensure that the PSMERGE application engine process can retrieve the location of:

- The executable file for Microsoft Word for Windows, winword.exe.
- The PS_HOME directory that contains the letter templates.

The WORDINIT process runs winword.exe and a dummy macro called PSINIT which opens and closes the psmerge.doc file without creating any output. By including the WORDINIT WinWord process in the job definition, the Process Scheduler ensures that it has loaded the location of the winword.exe file into PSPRCSPARMS.

The PSMERGE application engine process uses this information to call Microsoft Word for Windows.

Step 3: PSMERGE Application Engine Process

The PSMERGE Application Engine process completes the merge of the data extract files and the Word templates. It:

- Retrieves the locations of the data extract files, winword.exe and the PS_HOME Winword directory.
- Creates a file called param.txt in the log/output directory.

  This file contains the locations of the files and a list of files to be merged.
- Calls Microsoft Word for Windows to carry out the merge.

  Microsoft Word for Windows:

  - Opens the form letter templates that correspond to the data extract files.
  - Merges the appropriate extract file data into the field codes for each template.

    For example, the offer letters template is ltrof1.doc and it includes field codes for names, addresses, and offer amounts.
  - Inserts the data from the appropriate .ltr file into the template field codes.

    For example, it inserts the data from the ltrof1.ltr extract file into the ltrof1.doc template.
  - Places the resulting letters in the log/output directory.

Using Naming Conventions in Form Letter Files

Before you adapt existing form letters or create new ones, you should be familiar with the naming conventions for each element of the process. Use the same naming conventions for the new form letter components that you create.

This section discusses how to:

- Use letter codes.
- Use data extract files and corresponding Word letter templates.

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Using Letter Codes

You create letter codes in the Standard Letter Table component. Use letter codes to indicate what kind of letter is required for a particular record. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed below.

Using Data Extract Files and Corresponding Word Letter Templates

The extension .ltr represents form letters and the extension .doc is the normal templates extension. Every letter code for which you generate form letters must have a corresponding data extract file and a template with the same name of the data extract file:

Object	Example
New letter code	xyz
Data extract file name	aaaxyz.ltr
Template name	aaaxyz.doc

The letter codes and their associated data extract files and Word templates include:

- Training letters

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of session enrollment	CON	ltrcon.ltr	ltrcon.doc
Rescheduling of course session	RSC	ltrrsc.ltr	ltrrsc.doc
Cancellation of course session	CAN	ltrcan.ltr	ltrcan.doc

Note. The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

- Labor Administration letters

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Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Confirmation of Disciplinary Action Filed	DAF	ltrdaf.ltr	ltrdaf.doc
Confirmation of Disciplinary Action Resolution	DAR	ltrdar.ltr	ltrdar.doc
Confirmation of Grievance Filed	GRF	ltrgrf.ltr	ltrgrf.doc
Confirmation of Grievance Resolution	GRR	ltrgrr.ltr	ltrgrr.doc

Setting Up Form Letters

This section discusses how to:

- Set up the Process Scheduler.
- Set up WinWord security.
- Set up document templates.
- Run the WORDSAMP process.
- Specify the output type and format of the SQR process.

Setting Up the Process Scheduler

To set up your Process Scheduler to generate form letters:

1. Install the Microsoft Word for Windows on the same machine that runs the Process Scheduler.
2. Define the WINWORD parameter in the Process Scheduler configuration file.

   The WINWORD parameter defines the location of the Microsoft Word for Windows executable file, winword.exe on the server. Make sure that there are no spaces in the path and the path does not end with a slash (/).
3. Use the Process Scheduler Manager to define a server specifically for running the form letter processes.

   Select PeopleTools, Process Scheduler Manager, Use, Server Definitions to define the server. On the Distribution page, leave the Transfer Log Files to Report Repository check box clear.

If you run the Process Scheduler as a service, modify the service to interact with the desktop:

1. From the Microsoft Windows Control Panel, open Administrative Tools, Services.
2. Open the Process Scheduler service and access the log on tab.
3. For the Log on as field, select Local System account and select the Allow service to interact with desktop check box.

   This enables Microsoft Word for Windows to run in the foreground of the server. You cannot run Microsoft Word for Windows macros as a background service.

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See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Appendix: Using the PSADMIN Utility"*

Setting Up Winword Security

To run the macro that completes the merge, you must set the macro virus protection to Low. To do this:

1. Run Microsoft Word for Windows and select Tools from the menu bar.
2. Configure security according to the version of Word you are running:
   - Microsoft Word for Windows 97: Select Options and click the General tab. Clear the Macro Virus Protection check box.
   - Microsoft Word for Windows 2000: Select Macro, Security to display the Security window. Select Low.

See *Microsoft Word for Windows User's Guide*

Setting Up Document Templates

To generate form letters, the document templates and the macros must be located in the directory %PSHOME%\winword.

Check that the files psmerge.doc and psmerge.dot, and all the document templates in this directory are read-only.

Running the WORDSAMP Process

Before running any of the form letters processes, test your environment by running the WORDSAMP process. If this process runs successfully, this demonstrates that the environment is correctly configured to run Microsoft Word processes.

Note. To verify that the WORDSAMP process has successfully completed verify that it has created a document called wordsamp.doc.

To run the WORDSAMP process:

1. Select PeopleTools, Process Scheduler, System Process Requests. Select a Run Control ID and click Run.
2. The Process Request Dialog page (PRCSSAMPLEPNL1) appears.
3. Select your server in the Server Name field and select the Win Word Sample Process check box.
4. Click OK.
5. Click the Process Monitor link to check that the process runs successfully (Run Status is *Success*).
6. Check that a document wordsamp.doc is created. This document is posted to the Report Repository as a normal report.

   If the process doesn't run successfully or the process doesn't create wordsamp.doc, then your environment is not set up correctly to run WinWord processes.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Submitting and Scheduling a Process Request"*

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Specifying the Output Type and Format of the SQR Process

When you run the form letter report to generate letters, make sure that the Type and Format fields are set up correctly for the SQR data extract process. The SQR process must be set up with Type set to *File* and Format set to *LP*.

For example, if you are creating a training letter, check the output type and format as follows:

1. Select Enterprise Learning, Student Enrollment, Create Training Letters, Training Letters page (RUNCTL_TRN001).
2. Enter run parameters and click Run.
3. On the Process Scheduler Request page, click *Training Letters* to access the Job Detail page.
4. In the Process List group box, which lists the three processes run to generate letters, locate the SQR process TRN001 and select *File* in the Type field and *LP* in the Format field.

For information about running the form letter reports, refer to the appropriate PeopleSoft Human Resources PeopleBook.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Tracking Disciplinary Actions and Grievances".

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training*, "Enrolling and Wait-Listing Students," Generating Student Form Letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word for Windows macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

  The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word for Windows, you print them to your local printers.

To set up the system to print form letters:

1. On the Servers - Distribution page, create a new dedicated Process Scheduler leaving the Transfer System Files to Report Repository check box clear to run form letters.
2. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

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Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the Letter Code field to other pages in PeopleSoft Human Resources.

This section discusses how to:

- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.
- Add letter code fields to pages.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks that you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are located in the directory \PS\WINWORD.

2. In Microsoft Word for Windows, open the document that you want to modify.

   If you see " " in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft Human Resources.

Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include title in the Training Enrollment Confirmation letter ltrcon.doc, add a title field code to the form letter template. Also add a variable for title in TRN001.sqr so that the SQR retrieves the title value and writes it to the data extract file.

   Here's what the data extract file looks like before the change:

```
systemdate, Name, . . .,
```

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```
"August 10, 2001", "Barry Robert Campbell"
```

Here's what it looks like after the change:

```
systemdate, Name, Title....
"August 10, 2001", "Barry Robert Campbell", "Director". . .
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to create a form letter notifying students they are on the waiting list for a course session.

To create a new form letter:

1. Create a new letter code in the Standard Letter table.
2. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   The file name of the template must match the data extract (.ltr) file name. For example, if the data extract file is app004.ltr, the Word template file must be called app004.doc.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

   For example, create a form letter for interview schedules (INT) by adapting the offer letter template. In the directory \PS\WINWORD, open ltrof1.doc. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, ltrint.doc.
3. Edit the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.

   Insert the MERGEFIELD field code where you want the merge process to insert data from the data extract file into the letter. Press ALT + F9 to insert the MERGEFIELD field code.

   For example, to create a new form letter for interview schedules, you create new procedures in app007.sqr to extract values from all the fields and create a separate data extract file to store interview schedule letter information.

   The SQR process must include the name and extension (.ltr) of the data extract file that is created. An example is:

```
begin-procedure Write-Heading
move '{IMPORTPREFIX}' to $FileName !start a new report file
do Get-prcsoutputdir
if (rtrim($prcsoutputdir,' ') <> '')
move $prcsoutputdir to $Filename
concat 'APP004.LTR' with $Filename
end-if
NEW-REPORT $Filename
Let $InputField1 = 'LANG,Audience,Job_Requisition,JobTitle,DeptID,DeptName,Min_Rt_⇒
Annual,Max_Rt_Annual,Name1,Value1,Name2,Value2,Name3,Value3,Name4,Value4,Name5,Val⇒
ue5,Name6,Value6,Name7,Value7,Name8,Value8,'
Let $InputField2 = 'Name9,Value9,Name10,Value10,Name11,Value11,Name12,Value12,Name1⇒
⇒
⇒
⇒
⇒
⇒
```

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```
⇒
⇒
⇒
3,Value13,Name14,Value14,Name15,Value15,Name16,Value16,Name17,Value17,Name18,Value1⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
⇒
8,Name19,Value19,Name20,Value20,AsOfToday'
Let $InputFieldTot = $InputField1 || $InputField2
move
$InputFieldTot
to $ioarea
print $ioarea (1,1)
next-listing
end-procedure
```

If you create an Application Engine process, the file created by the process must have an .ltr extension.

See *Enterprise PeopleTools PeopleBook: SQR for PeopleSoft Developers*

4. Copy the new letter template to the Process Scheduler %PS_HOME%\winword directory.
5. Create a PSJOB to ensure that the SQR, WORDINIT, and PSMERGE processes are run in the correct order.

   Define the job to include these steps in the following order:

   a. SQR process or Application Engine data extract process.
   b. WORDINIT Winword process.
   c. PSMERGE application engine.

Note. PeopleSoft recommends that you do not modify any of the delivered Winword macros or templates.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See *Microsoft Word for Windows User's Guide*

Adding Letter Code Fields to Pages

We deliver PeopleSoft Human Resources with Letter Code fields in several pages in Administer Training, Administer Workforce, and Manage Labor Relations.

You can add the Letter Code field to any other pages (and their underlying tables) in PeopleSoft Human Resources. For example, if you routinely send letters to employees, notifying them of career planning sessions, you can add the Letter Code field to one of the pages from the Plan Careers menu.

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Note. To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word for Windows field codes, macros, and data statements; and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular application.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- A job containing the SQR, WinWord process WORDINIT, and the Application Engine PSMERGE.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, "Working With Processes and Reports"

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word for Windows User's Guide

Troubleshooting Form Letters

This section discusses:

- Troubleshooting the SQR process.
- Troubleshooting the WORDINIT process.
- Troubleshooting the PSMERGE Application Engine process.
- Troubleshooting the Process Scheduler.
- Troubleshooting the Winword Directory.
- Troubleshooting Winword processes.
- Troubleshooting the PSMERGE process.

Troubleshooting the SQR Process

For the SQR data extract process check that:

- The process is run with the output Type set to *File* and Format set to *LP*. If you have run the SQR with any other output type or format, make sure that you delete these data extract files.
- The data extract file has been produced in the format xxx.ltr in the Process Scheduler log/output directory.
- Use the Process Monitor to delete all failed Process Requests.

Troubleshooting the WORDINIT Process

If the WORDINIT process fails and the environment is correctly configured, the most likely cause is macro security. Switching off the macro security works for some Microsoft NT networks. You may also need to consult your Systems Administrator.

In some networks, Microsoft Word automatically switches the security level back to "high" when running the process. For example, if Winword macro security is defined at the NT User Profile level then you need to set macro security to "low" for the NT ID that starts the Peoplesoft Process Scheduler service.

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Note. Windows NT/XP locks and caches the macro virus protection settings for Winword and this may cause difficulties when turning off the macro virus protection.

Try hard-coding the path to PS_HOME in the Process Definition for WORDINIT:

1. Navigate to PeopleTools, Process Scheduler, Processes.
2. Select Process Name in the Search By field and enter WORDINIT.
3. Select the Override Options page.
4. In the Parameters field replace %%PS_HOME%% with the hard-coded path to the directory.

Troubleshooting the PSMERGE Application Engine Process

If the PSMERGE Application Engine process does not complete and you have added extra fields to the SQR data extract process, check that the fields have also been included in the document template and that the fields occur in the same order.

Troubleshooting the Process Scheduler

Check that the Process Scheduler is configured correctly:

- You must define a separate Process Scheduler server at Process Scheduler Definition level with the Transfer Log Files to Report Repository check box cleared.
- Confirm that the WINWORD parameter is correctly specified in the prcs.cfg file.

Check that all failed attempts at running the form letters have been deleted using the Process Monitor. Delete any Process Requests that have failed.

Use the Windows Task Manager to check that there are no Winword processes still running. Delete these before rerunning the form letter report.

Once Microsoft Word is interacting with the desktop it may try to reinstall itself. To avoid this, disable the Windows Installer.

Troubleshooting the Winword Directory

Check that the template files are in the correct directory with the correct access:

- The Winword templates and the macros must be located in the %PS_HOME%\winword directory.
- The files psmerge.doc and psmerge.dot and the document templates in the %PSHOME%\winword directory must be read-only.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

Troubleshooting Winword Processes

To display errors and debug the Winword Processes, modify your Process Scheduler configuration file, psprcs.cfg, by adding the following line to the Process Scheduler section of the file (after the line for the Allow Dynamic Changes parameter):

```
Allow To Interact With Desktop=1
```

Save the changes, clear the cache and re-start the application server.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Using the PSADMIN Utility"*

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Troubleshooting the PSMERGE Process

If the PSMERGE Application Engine process is failing or the status remains as *Processing*, take the trace file, AE_PSMERGE_<PI>.trc (where <PI> is the process instance number), and extract the arguments from the file, combine them and run them from a command line. This tests the process outside the Process Scheduler.

For example if AE_PSMERGE_<Pl>.trc is set up as follows:

```
cmd = D:\PSHR88\WINWORD\run.bat
 cwd = (null)
 argc = 5
 argv[0] = D:\PSHR88\WINWORD\run.bat
 argv[1] = C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
 argv[2] = D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
 argv[3] = D:\PSHR88\WINWORD\PSMERGE.DOC
 argv[4] = /mPSMERGE
```

You run them from the DOS command line as follows:

```
D:\PSHR88\WINWORD\run.bat  C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
D:\PSHR88\WINWORD\PSMERGE.DOC  /mPSMERGE
```

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine, "Tracing Application Engine Programs"*

Setting Up Standard Letter Codes

To set up standard letter codes, use the Standard Letter Table component (STANDARD_LTR_TABLE).

This section discusses how to set up standard letter codes.

Note. You set up letter codes only for PeopleSoft HRMS form letters used with PeopleSoft Human Resources. You do not set up letter codes for PeopleSoft HRMS form letters used with other PeopleSoft HRMS applications.

Pages Used to Set Up and List Standard Letter Codes

Page Name	Object Name	Navigation	Usage
Standard Letter Table page	STANDARD_LTR_TABLE	Set Up HRMS, Common Definitions, Standard Letter Table, Standard Letter Table	Define your letter codes.
Standard Letter Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Letters and Documents, Standard Letter Report	Run the Standard Letter Table report (PER711) that lists the codes in your Standard Letter table.

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Setting Up Standard Letter Codes

Access the Standard Letter Table page.



Standard Letter Table page

PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

Note. PeopleSoft delivers a letter code for each template, but not all letter codes have a template. Before you use a letter code, confirm that there is a corresponding template.

Set Letter Code Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are:

- *Customer Letters:* Select if you have created letters for your organization that don't fit into any other category.
- *Employee Review Letters:* Select for employee review letters.
- *Manage Labor Relations:* Select for labor relations letters. Standard disciplinary and grievance letters.
- *Training Letters:* Select for training letters.

The system uses the Set Letter Code field to determine which letter codes to list for the Letter Code fields.

Generating Form Letters for Other PeopleSoft HRMS Applications

This section provides an overview of form letters for other PeopleSoft HRMS applications and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Prepare to print form letters.
- Adapt form letters.

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Note. These instructions show you how to use templates to create form letters for other PeopleSoft HRMS applications. To create form letters for PeopleSoft Human Resources, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 32, "Setting Up and Generating Form Letters," Generating Form Letters for PeopleSoft Human Resources, page 758

Understanding Form Letters for Other PeopleSoft HRMS Applications

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft HRMS, you need to understand how the process works for PeopleSoft HRMS applications other than PeopleSoft Human Resources.

To generate form letters for other PeopleSoft HRMS applications:

1. Use the report writer to run SQRs.

   The SQRs search your PeopleSoft HRMS database, retrieve data, and create data extract files containing one line of data for each letter.

2. Use Microsoft Word for Windows to run the macros that merge the data extract files into form letter templates, one for each type of letter.

   To generate form letters by using PeopleSoft Process Scheduler, PeopleSoft delivers two files (stdltr.dot and stdltr.95 located in the \PS\WINWORD directory on your application CD) containing the Word macros. You must use the file that is appropriate for your system.

   - The macros in stdltr.dot are for use with Word 97 (in Microsoft Office 97) and are written in Visual Basic.
   - The macros in stdltr.p5 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

     If you need to use stdltr.95, copy it to your system and rename it stdltr.dot.

3. Print the letters by using Microsoft Word for Windows.

   The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

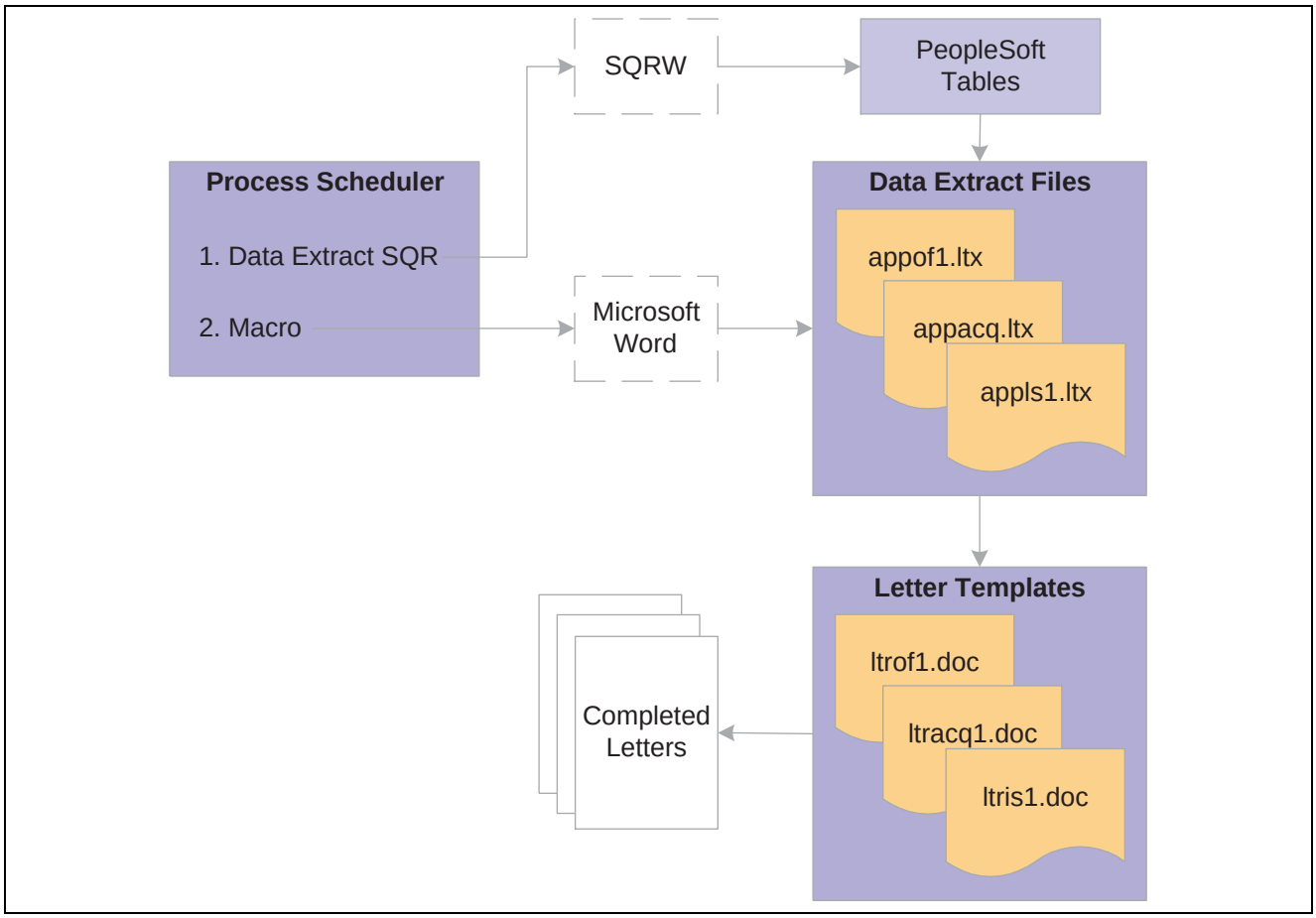
   The distributed architecture of your PeopleSoft HRMS system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word for Windows print options.

Generating Form Letters with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler uses Microsoft Word for Windows to run the macros that merge the data extract files into form letter templates and prints the letters. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

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This diagram illustrates how PeopleSoft Process Scheduler generates form letters for other PeopleSoft HRMS applications:



Generating form letters for other PeopleSoft HRMS applications with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler follows these steps to generate form letters for other PeopleSoft HRMS applications:

1. SQR PAWRL01:
    a. Scans the personal data record of each employee.
    b. Retrieves the information from the record.
    c. Creates data extract files pastdext.dat in the TEMP directory that is defined in the macro.
2. The macro PAWRL01:
    a. Opens the form letter templates that correspond to the data extract files.
    b. Merges the appropriate extract file data into the template rollover.doc.
    c. Inserts the data from pastdext.dat into the template field codes.

Using Naming Conventions in Form Letter Files

Microsoft Word for Windows assigns the extension .doc to all documents. No other naming convention is required for these types of letters.

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Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word for Windows macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

  The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word for Windows, you print them to your local printers.

To set up the system to print form letters:

1. Set up a shared directory on your machine for the letters.

   This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the C:\TEMP directory on your machine as TRNTEMP.

   For the multilingual letters, set up subdirectories for each language in which you run the letters. For example, if you run letters with the Language field set to *English*, you create the directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your empty.doc file and the location of your shared directory.

   In that macro, you replace this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT", "C:\HR800⇒
   \WINWORD", "ROLLOVER.DOC", ""
   ```

   With this line:

   ```
   WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDEXT.DAT", "C:\<path>⇒
   \WINWORD", "ROLLOVER.DOC", "\\<machine_name>\TRNTEMP"
   ```

   Where:

   <path> is the path to the directory that contains empty.doc.

   <machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in the process scheduler configuration file.

   WINWORD defines the location of the Microsoft Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

   ```
   WINWORD=C:\APPS\OFFICE97\OFFICE
   ```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

This section discusses how to:

- Modify the Word macros for the sample letters.

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- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.

Modifying the Word Macros for the Sample Letters

You specify several environment variables in each Microsoft Word for Windows macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you need to modify the PATH to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Microsoft Word for Windows documents and macros and the report writer SQRs and study them carefully.

Note. To make this change, you should be familiar with Microsoft Word for Windows templates and macros and with your report writer.

All of the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Microsoft Word for Windows file called empty.doc.

To modify a macro:

1. In Microsoft Word, open the empty.doc file.
2. Select Tools, Macro.
3. In the Macros in field, select *Stdltr* (template).
4. Highlight the macro that you want to modify and click Edit.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft HRMS contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are located in the directory \PS\WINWORD.
2. In Microsoft Word for Windows, open the document that you want to modify.

   If you see " "in the document, select Tools, Options; then select the Field codes check box.
3. Make changes to the text as you would in any other document, and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft HRMS.

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Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include currencies in the notification letter rollover.doc, add a Currency field code to the form letter template. Also add a variable for currency in pastdext.sqr so that the SQR retrieves the currency value and writes it to the data extract file.

   Here's what the data extract file looks like before the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE
USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993"
```

   Here's what it looks like after the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE,Currency
USA", "Mr. John Matson","BEN01", . . . , "May 15,  1993","US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters about their benefit plans to be signed by employees.

To create a new form letter:

1. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.
2. Create the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.
3. Create a new macro that is able to read the extracted data and merge it with the Word letter template.

   You might find it easier to copy an existing macro and adapt it.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word for Windows User's Guide

Reviewing Sample Form Letters

This section presents three PeopleSoft HRMS sample form letters:

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- Training Letter Sample — A confirmation of enrollment letter that is used in training (PeopleSoft Human Resources Administer Training business process).
- Pension Form Sample — A Direct Rollover Election Form that the employee must complete for pension (PeopleSoft Enterprise Pension Administration).

Training Letter Sample

August 10, 2001

Barry Robert Campbell 4928 Wildwood Place Toronto, ON

Dear Barry:

I am pleased to confirm your enrollment in training course K018 titled PeopleTools 1 beginning 09/11/2000 and ending 09/15/2000. Course hours are 9:00 AM to 6:00 PM daily, unless otherwise advised. The course will commence at: Corporation Headquarters Bldg 2000 Floor 2 Room Training Room 2

500 George Washington Pkway

New York, NY

Directions:

From the Airport, take the shuttle bus to George Washington Parkway.

Sincerely,

Barbara Smith Training Coordinator

Pension Form Sample

DIRECT ROLLOVER ELECTION FORM «PLAN» (Sample Form)

«NAME»

Date: «CURDATE»

«ADDR1»

«ADDR2»

Social Security No: «NATIONAL_ID»

«ADDR3»

I. Distribution Information:

Amount of distribution: _____ (If distribution is for the entire account balance enter "account balance")

II. Information About Plan or IRA to Receive Direct Rollover:

Name of Plan:_____

Name of Plan Administrator:_____

Address of Plan:_____

_____

OR

Name of Plan Trustee or Custodian of IRA :_____

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Address of Plan Trustee or Custodian:_____

Account Number of IRA: _____

Check which Applies to the Plan to Receive Your Rollover:

___ The plan is a qualified plan under Internal Revenue Code Section 401(a).

___ The plan accepts direct rollover contributions.

___ The plan accepts noncash contributions (optional).

I hereby certify that the information I have entered on this form is true, correct, and complete.
_____ Date_____

Signature of Participant

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CHAPTER 33

(USF) Setting Up the Work-in-Progress Management System

PeopleSoft Enterprise Human Resources provides a work-in-progress (WIP) management system that works together with Workflow to automate the tracking and processing of personnel action requests (PAR) and Federal eApps for Self Service.

This chapter provides an overview of the work-in-progress (WIP) management system setup and discusses how to:

- Set up WIP status.
- Define WIP activity processing.

Understanding WIP Management System Setup

This section discusses:

- Delivered setup.
- Configuration steps.

Delivered Setup

Human Resources delivers definitions for the *USFED* WIP management transaction for personnel action requests (PAR) and definitions for these self service transactions:

- Employee self-service transactions:
  - Address Change (FE_ADDRESS)
  - Marital Status Change (FE_MARITAL
  - Name Change (FE_NAME)
- Manager Self Service transactions:
  - Full-Time / Part-time Status (FE_FTPT)
  - Location Change (FE_LOCATION)
  - Reporting Change (FE_REPORTING)
  - Promotion (FE_PROMOTION)
  - Reassignment (FE_REASSIGN)
  - Retirement (FE_RETIRE)
  - Separation (FE_SEPARATE)

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WIP set up tables are delivered as system data. You can modify the delivered setup to suit your agency's WIP processing needs. Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in this chapter is for your agency's system administrator who will perform the setup and is not for managers or system users.

Note. All discussions assume that you understand the processes that are being described.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(USF) Processing Personnel Action Requests"

PeopleSoft Enterprise eProfile 9.0 PeopleBook, "(USF) Setting Up Approvals"

PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook, "(USF) Managing Direct Reports"

Configuration Steps

These are the WIP system configuration steps:

1. Plan and design your WIP process.
2. Set up WIP status codes and associate them with status types and batch processes for reporting.
3. Set up WIP activities and component processing.

Designing Your Agency's WIP Process

Follow these steps to plan your WIP process setup:

1. Review the delivered sample USFED WIP system parameters as an example of WIP setup.

   See Chapter 33, "(USF) Setting Up the Work-in-Progress Management System," Understanding Delivered Sample WIP System Parameters, page 783.
2. Analyze your agency's review process and determine the levels of review that you need for PARs and recruiting processes.
3. Design your system based on your agency's requirements for routing requests and other data through approval processes.

   Use the charts of sample parameters presented in this chapter as a starting point. You can use the charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes and Associating Status Types

To configure your WIP status controls:

- On the Transaction Setup page, define the WIP status codes that you want to use.

  Defining WIP status codes classifies the WIP process into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

  The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. When reviewers change the WIP status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency's review levels and keeps it going until it is completed as an actual event.

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- Associate a status type with the status code.

  The status type tracks the requests and tells related processes when to add data rows.

- On the Batch Programs page, specify the WIP status and type for related processes.

  During processing, the identified process creates a new database row for the specified status type and enters the associated WIP status.

Setting Up Activities and Component Processing

In the Approval Flow component, associate components with WIP activities and further specify the WIP status processing, workflow routing, and other component-level processing controls for each WIP activity.

See Also

Appendix C, "Delivered Workflows for PeopleSoft HRMS," page 901

Understanding Delivered Sample WIP System Parameters

The tables in this section contain the delivered USFED sample system WIP parameters for the PeopleSoft Human Resources Administer Workforce business process.

This section discusses:

- Sample WIP status codes.
- Sample WIP status types and related status codes.
- Sample WIP parameters setup.

Sample WIP Status Codes

The USFED sample system is set up to display the WIP status code as the PAR status when entered on system pages.

This table lists and describes the WIP status codes and the users who assign them in the sample system.

WIP/PAR Status Code	WIP/PAR Status Description	Who Can Assign This Status
INI	Initiated	Employee, Supervisor, Human Resources
REQ	Requested	Employee, Supervisor, Human Resources
1ST	1st Authorized	1st Level Reviewer: Supervisor or Manager
2ND	2nd Authorized	1st Level Reviewer: Supervisor or Manager

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WIP/PAR Status Code	WIP/PAR Status Description	Who Can Assign This Status
SIG	Approved/Signed	2nd Level Reviewer: Supervisor or Manager
APP	Approved	Human Resources
AUT	Authorized	1st Level Reviewer: Supervisor or Manager
REV	Reviewed	2nd Level Reviewer: Supervisor or Manager
PRO	Processed by Human Resources	Human Resources
RET	Return for More Information	Supervisor, Manager, Human Resources
WTH	Withdrawn	Employee or Supervisor requesting the action
DIS	Disapproved	Supervisor, Manager, Human Resources
COR	Corrected	Human Resources
CAN	Canceled	Human Resources
IRR	IRR Reported (individual retirement record reported)	Human Resources

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests," Adding and Updating Data

Sample WIP Status Types and Related Status Codes

This table describes how the WIP status types are linked to the various WIP statuses in the sample USFED system:

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Status Type	WIP Status Code
Work-in-progress	INI (initiated)
Work-in-progress	REQ (requested)
Work-in-progress	1ST (first authorization)
Work-in-progress	2ND (second authorization)
Work-in-progress	APP (approved)
Work-in-progress	AUT (authorized)
Work-in-progress	REV (reviewed)
Work-in-progress	SIG (approved/signed)
Work-in-progress	RET (returned for more information)
Work-in-progress	WTH (withdrawn)
Work-in-progress	DIS (disapproved)
Corrected	COR (corrected)
Canceled	CAN (canceled)
Completed	PRO (processed by Human Resources)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Sample WIP Parameters Setup

This table describes how the sample WIP parameters are set up in the Approval Flow component for USFED to drive Federal PAR component processing:

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WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
1st AUTH	1st Authorization		1ST	EE_1ST_AUTH	1ST, REQ	1ST, Request - Both Status Field Only
2nd AUTH	2nd Authorization		2ND	EE_2ND_AUTH	1ST, 2ND	1ST, 2ND - Both Status Field Only
APP/SGN	Approval /Signature			EE_APPROVAL	2ND, SIG	2ND - Status Field Only; SIG
APPL HIRE	Applicant Hire		PRO	EE_APPLICANT_ HIRE	PRO	PRO, INI
CANCEL	Cancellation			EE_ CANCELLATION	CAN,PRO	COR,PRO - Both Status Field Only
CONC_HIR	Concurrent Hire		PRO	EE_CONC_HIRE		PRO, INI
CORRECTION	Correction	Insert, Delete	COR	EE_ CORRECTION	COR, PRO	COR, PRO
EMPL REQST	Employee Request	Insert	REQ	EE_EMPL_REQ	1ST, 2ND, COR, DIS, PRO, INI, REQ, RET, SIG	INI, REQ
HIRE	Hire		PRO	EE_HIRE		PRO, INI, REQ
HR PROC	Process by HR	Insert, Delete	PRO	EE_HR_PROC	1ST, 2ND, CAN, COR, DIS, PRO, REQ, RET, SIG, WTH	1ST, 2ND, CAN, COR, DIS, PRO, INI, REQ, RET, SIG, WTH

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WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
IRR CORR	Correction IRR	Insert	PRO	EE_IRR_CORR	IRR	PRO
IRR SUPP	Supplemental IRR	Insert	PRO	EE_IRR_SUPP	IRR	PRO
LEAVE REQ	Request Leave Without Pay		REQ	FG_EE_LEAVE_ REQ		REQ
SUP REQST	Supervisor Request	Insert	REQ	EE_SUP_REQ	PRO, INI, REQ	INI, REQ
TERMINATN	Termination Request	Insert	REQ	FG_EE_ TERMINATION		REQ
W3_PERS_DT	Web Personal Data		PRO	W3_GVT_PERS_ DATA	PRO	PRO, REQ

Setting Up WIP Status

To set up WIP status, use the Approval Transactions component (GVT_WIP_RECORD).

This section discusses how to:

- Define WIP statuses and associate status types.
- Specify WIP status and type for related batch processes.

Understanding WIP Status Codes and Status Types

After you review the sample setup, analyze the request process, and determine the process that your agency will use, define your WIP statuses and link each one to a status type.

You can use all or some of the statuses that are delivered with the system, and you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval.

Assign the appropriate WIP status type to each status. As a PAR travels along the path of approvals, it retains the status type *Work-in-progress* until it is approved, at which time the status type would be *Completed.*

This table lists the available WIP status types with definitions indicating when you would use each:

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WIP Status Type	Definition
Work-in-progress	The request hasn't reached the final level of approval. The personnel action information resides only in the Federal PAR component and is not applied (pushed) to core records and components.
Completed	A request has successfully completed all review levels and is approved by HR. The personnel action will be applied (pushed) to core records and components.
Canceled	A completed request is canceled by HR. The personnel action will be retained on the Federal PAR components, but is deleted from core records and components.
Corrected	A completed request is corrected by HR. The personnel action will be retained on the Federal PAR components, but is updated on core records and components.
IRR Reported	The request will be reported on an Individual Retirement Record (IRR).

See Also

Chapter 33, "(USF) Setting Up the Work-in-Progress Management System," Sample WIP Status Codes, page 783

Chapter 33, "(USF) Setting Up the Work-in-Progress Management System," Sample WIP Status Types and Related Status Codes, page 784

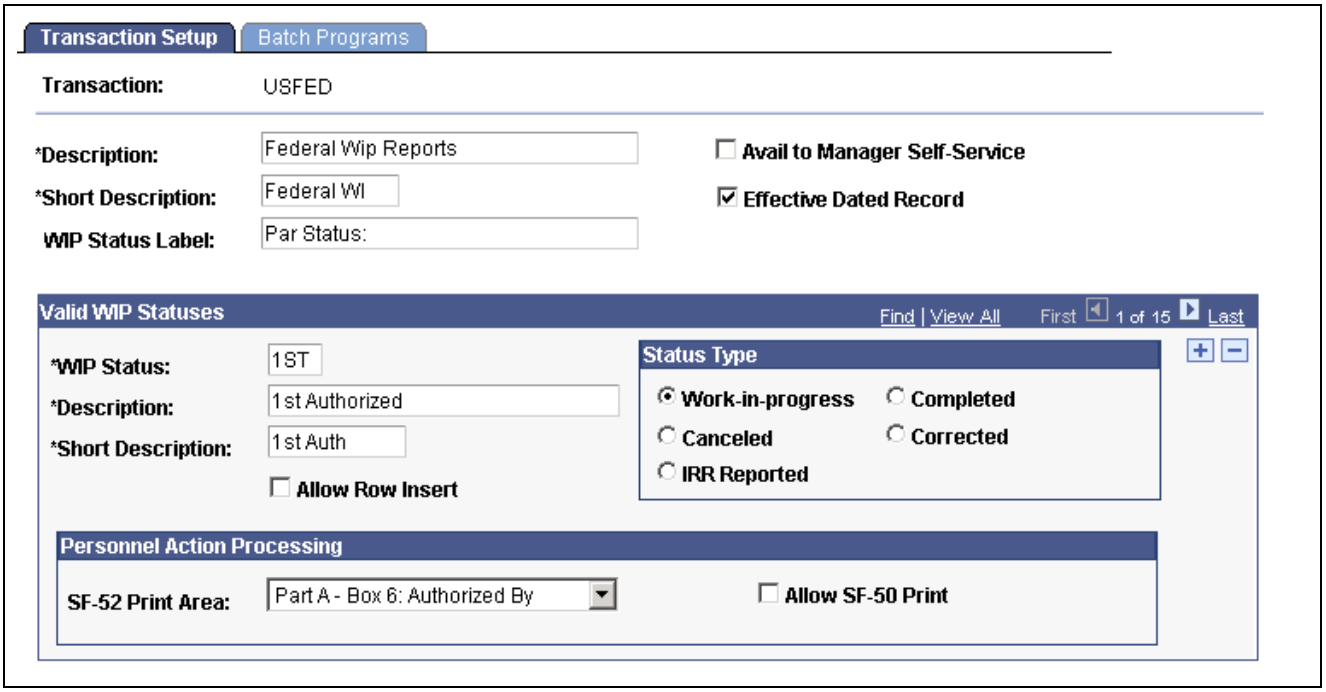
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Pages Used to Set Up WIP Status

Page Name	Object Name	Navigation	Usage
Transaction Setup	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup Select *USFED* as the Transaction value in the search page. Select any other value starting with *FE_* for Federal eApps for Self Service transactions.	Define WIP statuses and associate status types for the USFED or Federal eApps transactions.
Batch Programs	GVT_WIP_RECORD2	Set Up HRMS, Product Related, Workforce Data USF, Approval Transactions, Batch Programs Select *USFED* as the Transaction value in the search page.	Specify WIP status and type for related batch processes. **Note.** This page appears only for the USFED transaction.

Defining WIP Statuses and Associating Status Types

Access the Transaction Setup page.



Transaction Setup page

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Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values in the USFED transaction to correspond to the setup that you require for your agency.

WIP Status Label Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is *Par Status* (personnel action request status).

Avail to Manager Self-Service (available to manager self-service) Select this option only when setting up approvals for self-service transactions.

Effective Dated Record? Select if the record is to be effective-dated. This must be selected for the USFED transaction.

Valid WIP Statuses

WIP Status (work-in-progress status) Add or modify the three-character status codes as necessary. Each WIP status represents a step in the approval process.

Description and **Short Description** The system displays the description or short description on HRMS pages when you select the three-character PAR Status that corresponds to the WIP status.

Allow Row Insert? Select this option if you want users to be allowed to insert a new row from a personnel transaction with the selected status.

For example, the Data Control page in Administer Workforce enables users to enter new effective-dated rows and add new data, creating a history of the changes. These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row.

Status Type Select the status type to be linked to the WIP status. Valid status types are:

- Work-in-progress.
- Completed.
- Canceled.
- Corrected.
- IRR Reported (individual retirement record reported).

These status codes are defined in the overview to this section.

See Chapter 33, "(USF) Setting Up the Work-in-Progress Management System," Understanding WIP Status Codes and Status Types, page 787.

Personnel Action Processing

In this group box, enter details related to printing forms from a page with the selected status.

SF-52 Print Area Select the area where the name is to appear on the actual form; for example, *Part A - Box 6: Authorized By.*

Allow SF-50 Print? Select if you want the SF-50 button to be enabled. This allows the SF50 form to be printed for a personnel transaction with this status.

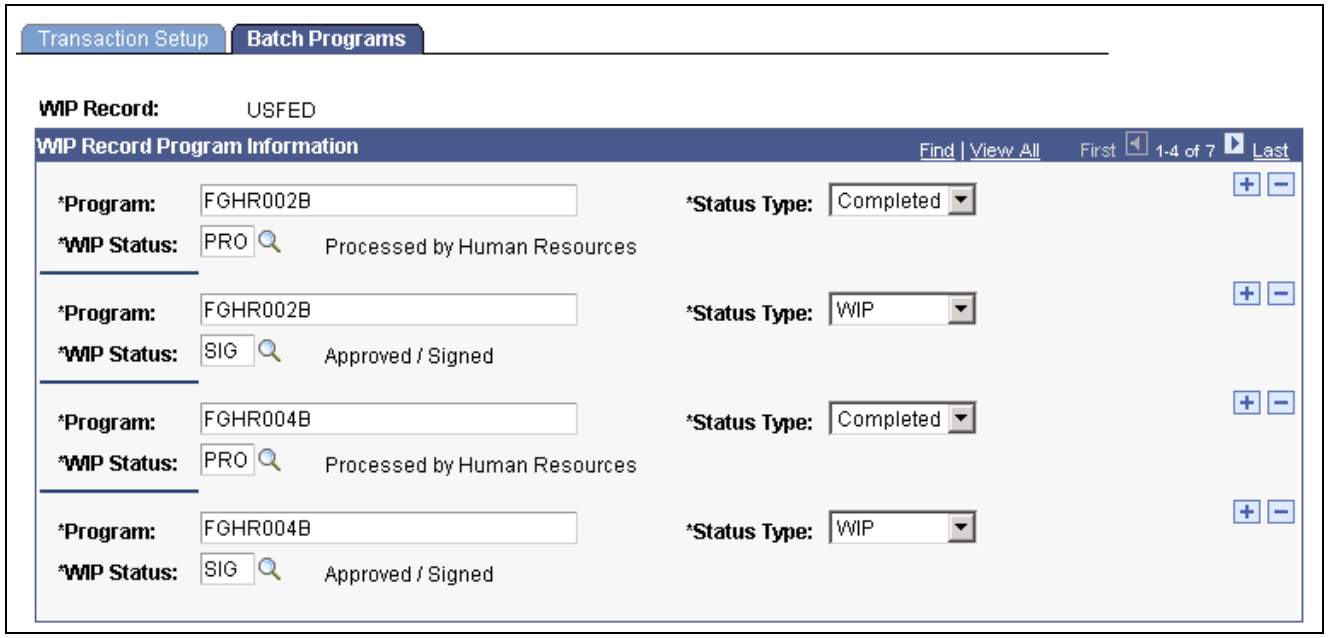
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Reviewing all Data Rows

Continue reviewing and modifying data in the delivered data rows on the page. Add additional data rows if required.

Specifying Batch Process Insertion Parameters

Access the Batch Programs page.



Batch Programs page

Program Enter the name of the SQR, COBOL, or Application Engine process that inserts a new row. The row that the system inserts is the highest effective-dated row with the status type that is specified in the *Status Type* field on this page.

Add rows as necessary to add programs.

Status Type Specify the status type for which a new row is to be inserted by the program. Options are as follows:

- *Completed:* The system searches for both *Completed* and *Corrected.*
- *WIP:* The system searches for *Work-in-progress, Completed,* and *Corrected.*

WIP Status Select the WIP status to be inserted on the new row.

Example

For example, based on the exhibit above, the *FGHR002B* process inserts the highest effective-dated row with the status type *Completed* and displays *PRO (Processed by Human Resources)* in the WIP Status field.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs"

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Defining WIP Activity Processing

To define WIP activity processing, use the Approval Flow component (GVT_WIP_ACTVTY).

This section discusses how to:

- Associate WIP activities with components.
- Set default action and reason for components.
- Specify valid WIP status values and workflow routing.
- Specify data entry availability.
- Define approval steps and notifications for federal self-service transactions.

Pages Used to Define WIP Activity Processes

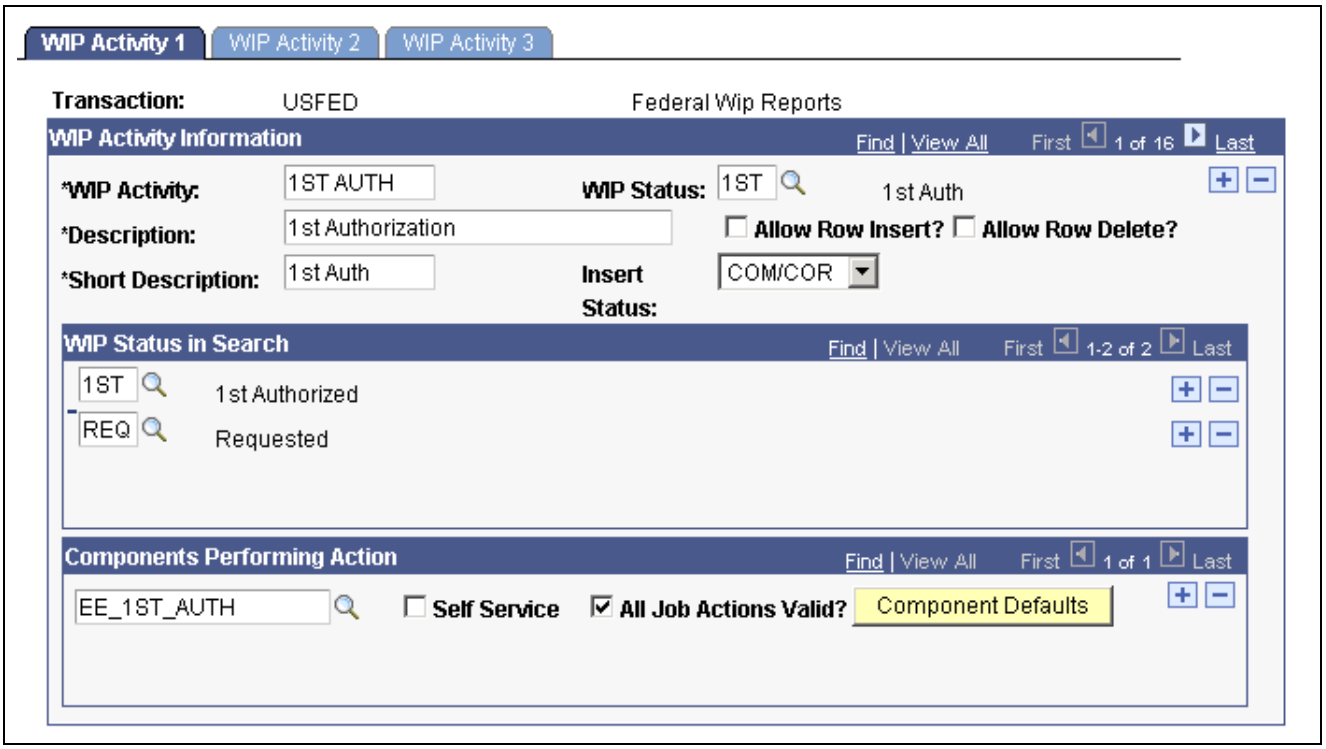
Page Name	Object Name	Navigation	Usage
WIP Activity 1	GVT_WIP_ACTVTY1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 1 Select *USFED* as the Transaction value in the search page.	Associate WIP activities with the components in which the action can be processed and specify other processing controls.
Component Defaults page	GVT_WIP_PGRP_SEC	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 1 Select *USFED* as the Transaction value in the search page. Click the Component Defaults button on the WIP Activity 1 page.	Select component defaults for action, reason, NOA, and legal authority.
WIP Activity 2	GVT_WIP_ACTVTY2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 2 Select *USFED* as the Transaction value in the search page.	Specify valid WIP status values, workflow routing, and PAR tracking for each combination of WIP activity and component.

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Page Name	Object Name	Navigation	Usage
WIP Activity 3	GVT_WIP_ACTVTY3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 3 Select *USFED* as the Transaction value in the search page.	Specify data entry availability for each combination of WIP activity and component.
Define Steps	GVT_WIP_ACTVTY4	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps Select a transaction beginning with *FE* as the Transaction value in the search page.	Define the number of approval steps, the corresponding action to take, and specify workflow notifications for the self-service transaction.
Workflow Notification Details	FE_WF_DETAIL	Click the Workflow Notification Details link on the Define Steps page.	Define the workflow objects that are used for the notifications that are generated for a particular approval step and action.

Associating WIP Activities with Components

Access the WIP Activity 1 page.



WIP Activity 1 page

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WIP Activity Information

WIP Activity Enter the activity for which you are defining controls.

WIP Status Select the default WIP status that appears when you insert a new row or when you are in Add mode.

Allow Row Insert? For effective-dated records only. Select to permit users to insert rows using this WIP activity.

Allow Row Delete? For effective-dated records only. Select to permit users to delete rows using this WIP activity.

Insert Status Specify the status types from which row insert is permitted.

WIP Status in Search

Select the WIP status codes to include in search records. The search records for the components that are linked to this activity retrieve only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

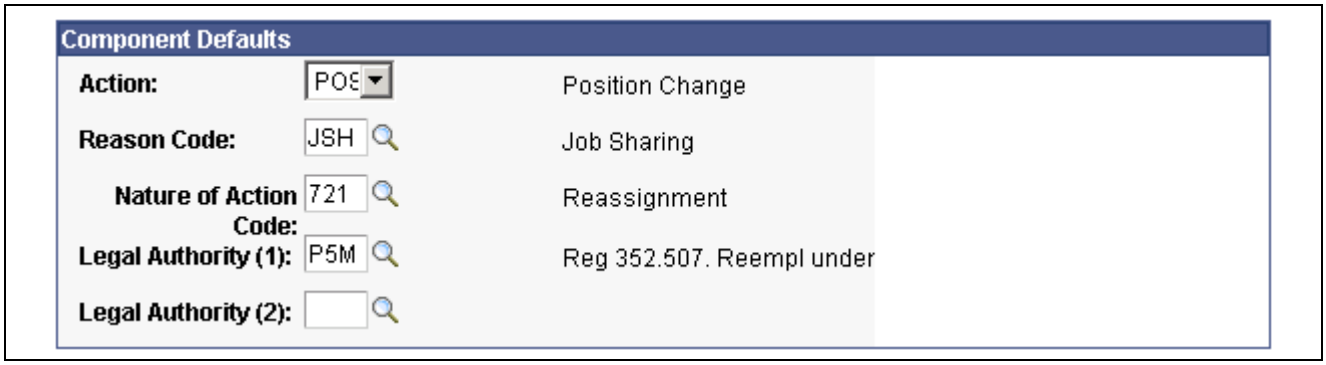
Self Service Select if the component is a self-service component. When this option is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.

All Job Actions Valid? Select if all job actions are valid for this component.

Component Defaults Click this button to access the Component Defaults page, where you enter the valid job action, reason, NOA code, and legal authorities.

Set Default Action and Reason for Components

Access the Component Defaults page.



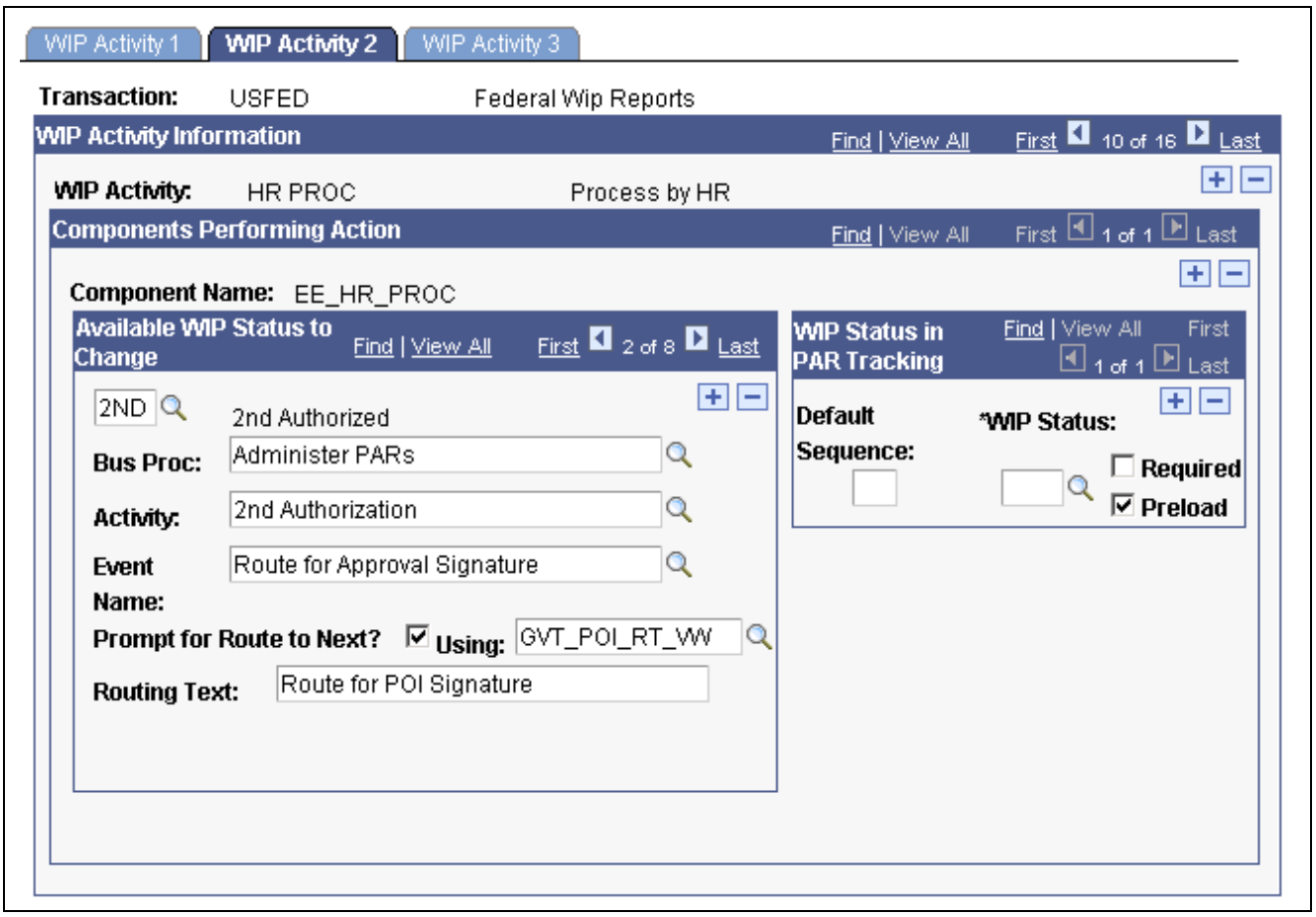
Components Defaults page

Select the values that the system enters by default in the component for this WIP activity.

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Specify Valid WIP Status Values and Workflow Routing

Access the WIP Activity 2 page.



WIP Activity 2 page

Components Performing Action

This scroll area contains a row for each component listed for the WIP activity on the WIP Activity 1 page.

Available WIP Status to Change

The statuses that you specify in this group box are the only statuses available for selection in the WIP Status field on the PAR (personnel action request) pages in the component.

Bus Proc (business process), **Activity,** and **Event Name**

The Bus Proc, Activity, and Event Name fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes.

To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.

Prompt for Route to Next?

Select to specify the routing prompt list views that are to be used on the prompt page.

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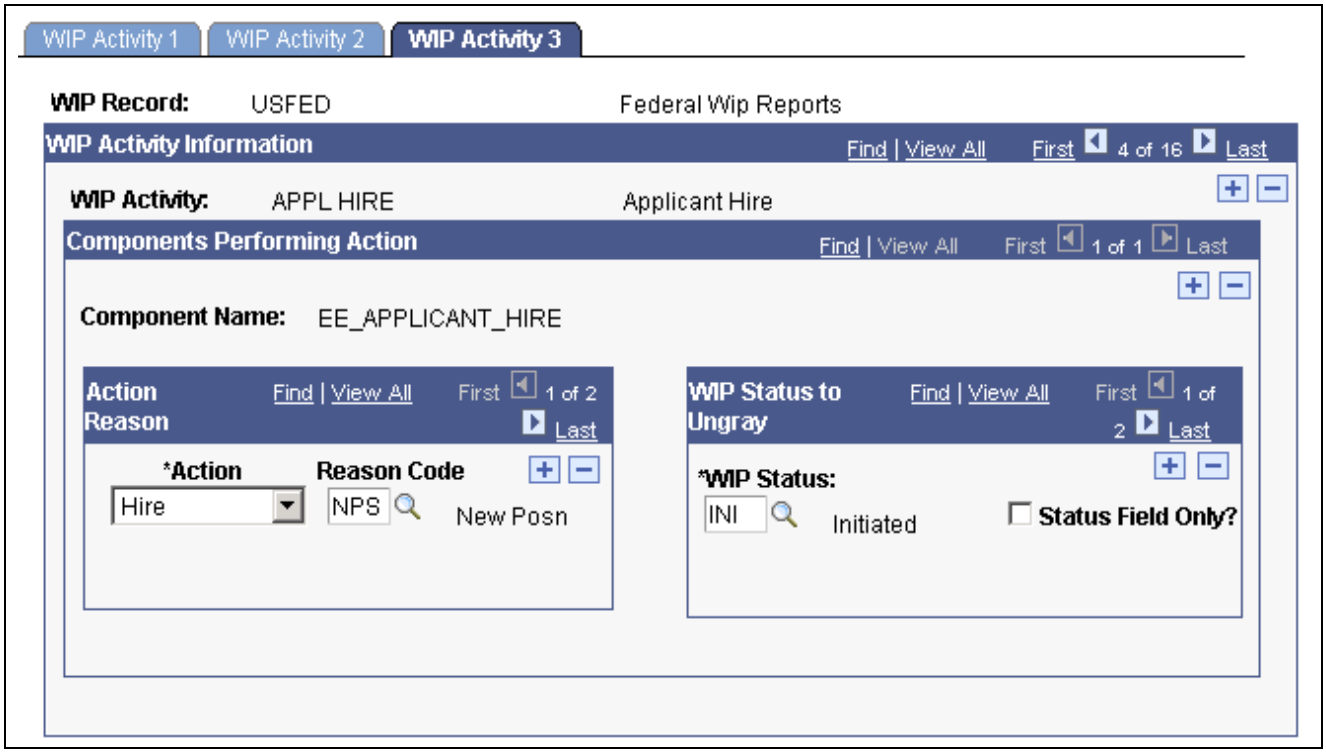
	When you select this option, the Using and Routing Text fields appear, where you enter the parameters for the routing process.
Using	A prompt page appears when the user saves the component if you have set up the activity with Prompt for Route to Next? selected for the component. On the prompt page, the user selects from the list of employees who are in the result set of the view that you select in the Using field on the WIP Activity 2 page. The user selects an employee from the results set to whom to route the request for the next level of approval.
Routing Text.	Specify the verbiage your users will see when prompted with the option of routing this personnel action.

WIP Status in PAR Tracking

Default Sequence	Select the default sequence of a WIP status in PAR tracking.
WIP Status	Select the WIP status for the sequence you are defining.
Required	Select if the sequence is required.
Preload	Preload is the default sequence.

Specify Data Entry Availability

Access the WIP Activity 3 page.



WIP Activity 3 page

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Action Reason

The Action Reason group box appears only if the All Job Actions Valid? option is cleared on the WIP Activity 1 page for the combination of activity and component. The Action and Reason Code values you select here control what values are available from the Action/Action Reason prompts when administering the PAR using the component and activity.

Action Enter the action for the selected activity and component.

Reason Code Select a valid reason code for the selected activity and component. Only reason codes appropriate to the selected action are available.

WIP Status to Ungray

All fields on the page are unavailable for data entry if the WIP status is not one of the values selected here for the activity the user is in.

WIP Status Select the WIP statuses that enable data input in the component.

Status Field Only? Select if only the status field is available for entry. Use this option when a reviewer is allowed to change the WIP status but is not allowed to change the underlying data in the action.

Defining Approval Steps and Notifications for Federal Self-Service Transactions

Access the Define Steps page.



Define Steps page

When you search for transactions that begin with FE, the system accesses the Define Steps page rather than the WIP Activity pages for approval setup. The *PeopleSoft Enterprise eProfile 9.0 PeopleBook* documents this page in detail.

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See Also

PeopleSoft Enterprise eProfile 9.0 PeopleBook, "(USF) Setting Up Approvals," Defining Approval Steps

PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook, "(USF) Managing Direct Reports"

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CHAPTER 34

Setting Up PeopleSoft HelpDesk for HR – 360° View

This chapter provides an overview of PeopleSoft Enterprise HelpDesk for HR and discusses how to:

- Extract and display HRMS information.
- Set up security for PeopleSoft HelpDesk for HR.
- Set up direct reports for PeopleSoft HelpDesk for HR.

Understanding PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR – 360° View provides a complete view of a person's HRMS data. This PeopleSoft Enterprise CRM application is set up and operated from CRM but extracts and displays data stored in PeopleSoft HRMS.

As part of the PeopleSoft HelpDesk for HR setup, you must:

- Set up HRMS security giving HelpDesk agents access to the data of the people they will be serving.
- Set up the direct report structure for the managers in your organization.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook: PeopleSoft HelpDesk

Extracting and Displaying PeopleSoft HRMS Information

PeopleSoft HelpDesk for HR extracts and displays the following information from PeopleSoft HRMS:

- Personal
- Job
- Position summary
- Payroll summary
- Benefits summary
- Dependent and benefits
- Direct reports

You cannot modify the information from the HelpDesk pages.

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Setting Up Security for PeopleSoft HelpDesk for HR

Data permission security for PeopleSoft HelpDesk for HR works the same way as it does for all of HRMS. The HelpDesk agents using PeopleSoft HelpDesk for HR must be have access to data in order to view it on the 360 Degree View page.

Agent Levels and Permissions

There are three levels of HR HelpDesk Agents in the CRM database – Level 1, Level 2 and Level 3. Level 1 and Level 2 Agents cannot access certain HRMS pages through the Action Links. Besides, the Level 1 Agent can only view the HRMS pages but cannot make changes. The following table shows the pages that each agent can access in HRMS database.

Action Links	Level 1 Agent	Level 2 Agent	Level 3 Agent
HRMS – Personal Information	No	Yes	Yes
HRMS – Emergency Contact	Yes	Yes	Yes
HRMS – Job Summary	Yes	Yes	Yes
HRMS – Job Data Information	Yes	Yes	Yes
Benefits – Benefits Summary	Yes	Yes	Yes
Benefits – Dependent Benefits	No	Yes	Yes
Benefits – Disability Plans	Yes	Yes	Yes
Benefits – Enroll In Benefits	No	Yes	Yes
Benefits – FSA Plans	Yes	Yes	Yes
Benefits – Health Plans	Yes	Yes	Yes
Benefits – Leave Plans	Yes	Yes	Yes
Benefits – Life/ADD Plans	Yes	Yes	Yes
Benefits – Pension Plans	Yes	Yes	Yes
Benefits – Retirement Plans	Yes	Yes	Yes
Benefits – Savings Plans	Yes	Yes	Yes
Benefits – Vacation Plans	Yes	Yes	Yes
Payroll – Direct Deposit – US	No	Yes	Yes
Payroll – Direct Deposit – USF	No	Yes	Yes
Payroll – General Deduct - US	No	No	Yes

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Action Links	Level 1 Agent	Level 2 Agent	Level 3 Agent
Payroll – General Deduct – USF	No	No	Yes
Payroll – Paycheck – US	Yes	Yes	Yes
Payroll – Paycheck – USF	Yes	Yes	Yes
Payroll – Paysheet – US	No	No	Yes
Payroll – Paysheet – USF	No	No	Yes
Payroll – Savings Bond – US	Yes	Yes	Yes
Payroll – Tax Data – US	No	No	Yes
Payroll – Tax Data – USF	No	No	Yes
Stock – Stock Activity	No	Yes	Yes
Stock – Stock Exercise	No	Yes	Yes
Training – Course Enrollment	No	Yes	Yes
Training – Training Summary	Yes	Yes	Yes

See Also

Chapter 5, “Setting Up and Administering HRMS Security,” page 37

Setting Up Direct Reports for PeopleSoft HelpDesk for HR

To set up Direct Reports for PeopleSoft HelpDesk for HR, use the Direct Reports Setup component (SS_LINK_TBL).

PeopleSoft HelpDesk for HR can only retrieve the appropriate reporting structure for a person if you have set up the access type on the Direct Reports Setup page.

Page Used to Set Up Direct Reports for PeopleSoft HelpDesk for HR

Page Name	Object Name	Navigation	Usage
Target Information page	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup	Set up the access type for the HD_360_COMPONENT.

Setting Up Direct Reports Access Type

To set up the access type:

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1. Access the Direct Reports Setup component and select the component HD_360_COMPONENT.
2. On the Target Information page choose the Access Type *By Supervisor Id*.
3. Save the page.

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CHAPTER 35

Setting Up and Working with Self-Service Transactions

Self-service transactions serve as extensions of a core PeopleSoft application. They enable workers to update their personal information or to perform some basic task required by their job.

This chapter discusses how to:

- Configure self-service transactions.
- Review transactions.
- Set up access to direct reports data.
- Use workflow with self-service transactions.

Note. PeopleSoft delivers two different workflow technologies for self-service transactions. Delivered self-service transactions with workflow are preconfigured for either the Approval Workflow Engine (AWE) framework or the technology described in this chapter.

See Also

Chapter 28, "Setting Up and Working with Approvals," page 625

Configuring Self-Service Transactions

To configure self-service transactions, use the Self Service Workflow Configurations component (WF_CO_CONFIG).

This section provides an overview of rules for self-service transactions and discusses how to:

- Set up approvals and database updates.
- Set up administrator notification rules.
- Set up component interface rules.

Note. If the self-service transaction uses the Approval Workflow Engine for approval processing, you must also set up the transaction for use with that engine and its framework.

See Chapter 28, "Setting Up and Working with Approvals," page 625.

Understanding Rules for Self-Service Transactions

You can set rules that define whether the transaction:

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- Goes through an approval process.
- Updates the database or sends a notice to the administrator to complete the transaction manually.
- Notifies a specific person when problems occur during the processing of the transaction or when a transaction successfully completes.

Which Transactions Can Be Configured

This table lists the configurable transactions and indicates the approval and delegation features that are delivered active for each:

Configurable Transaction Description	Approval Workflow Delivered Active	Delegation Initiation Delivered Active	Delegation Approval Delivered Active
Performance Document	Yes (AWE)		Yes (AWE)
Address Change			
Change Full/Part Time Status		Yes	
Change Location		Yes	
Marital Status			
Name Change			
Promotion	Yes (AWE)	Yes (AWE)	Yes (AWE)
Reporting Change	Yes (AWE)		
Retire Employee		Yes	
Ad Hoc Salary Change	Yes		
Terminate Employee		Yes	
Training Enrollment			
Training Enrollment by Manager	Yes		
Transfer	Yes (AWE)	Yes (AWE)	Yes (AWE)

You can change the delegation setting for any transaction on the Workflow Transactions page. For workflow that does not use the Approval Workflow Engine (AWE) framework, you can enable transactions for delegation initiation, but not for delegation approval.

See Chapter 29, “Setting Up and Working with Delegation,” page 695.

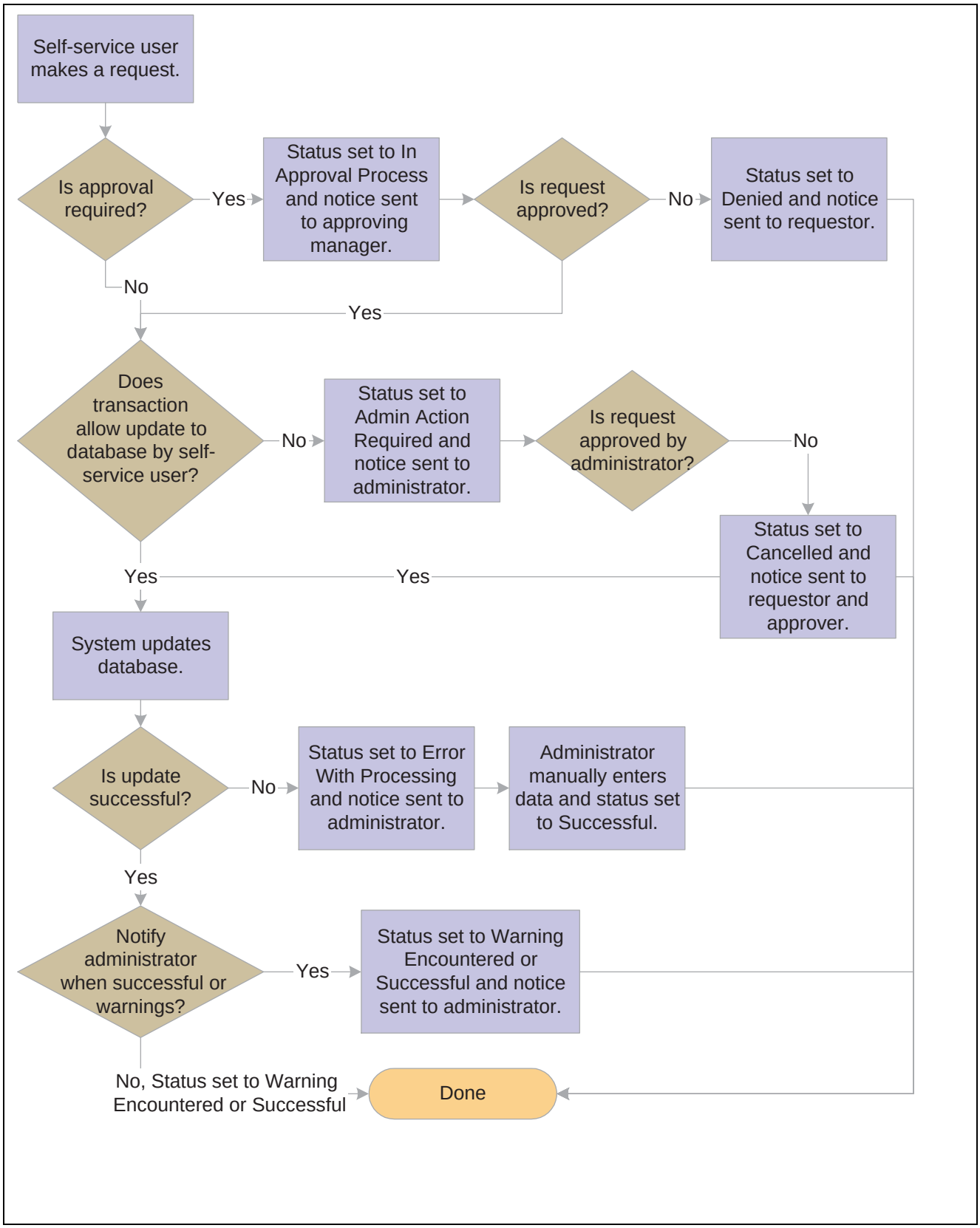
Transactions that use the Approval Workflow Engine functionality and the delegation functionality require additional configuration. PeopleSoft delivers these transactions preconfigured for using these functionalities.

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Overview of the Self-Service Processing

This diagram maps out the process a self-service transaction takes when the transaction is set up to follow the configuration rules.

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Process flow for transactions using Process Configuration

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Note. If the transaction uses the Approval Workflow Engine (AWE) framework and an appropriate user is not found, the system automatically routes the transaction to the AWE administrator for review and approval. If an appropriate user is not found for a transaction that does not use AWE for workflow, the system sends an error notification to the administrator who can view the error using the Self-Service Inquiry page. If you enter an alternate user on the General Profile Information page, make sure the User ID entered has permission to access the necessary pages.

Exceptions to the Rules

Some transactions update the worker's job data. These self-service rules cannot override information controlled by Position Management.

Position Management Setting	Worker's Job	Auto-Update of Database
None	Not Applicable	Is allowed.
Partial	In a position	Not allowed. Exception to this rule is when a manager is requesting a reporting change for a worker. If the worker is in a position and an ID was entered in the Supervisor ID field automatic update is allowed. **Note.** If you select Partial Position Management on the Installation page, the system automatically updates position data if you also select the Position Override check box on the Workforce Administration - Job page. If you select Full Position Management on the Installation page the system automatically updates all position data.
Full	In a position	Not allowed. Exception to this rule is transferring and promoting a worker. This is because managers promote or transfer workers by selecting a new position number, not changing the existing one. So, automatic updates will insert the new position number and update all the related fields; position data is not touched.

See Also

Chapter 28, "Setting Up and Working with Approvals," page 625

Chapter 29, "Setting Up and Working with Delegation," page 695

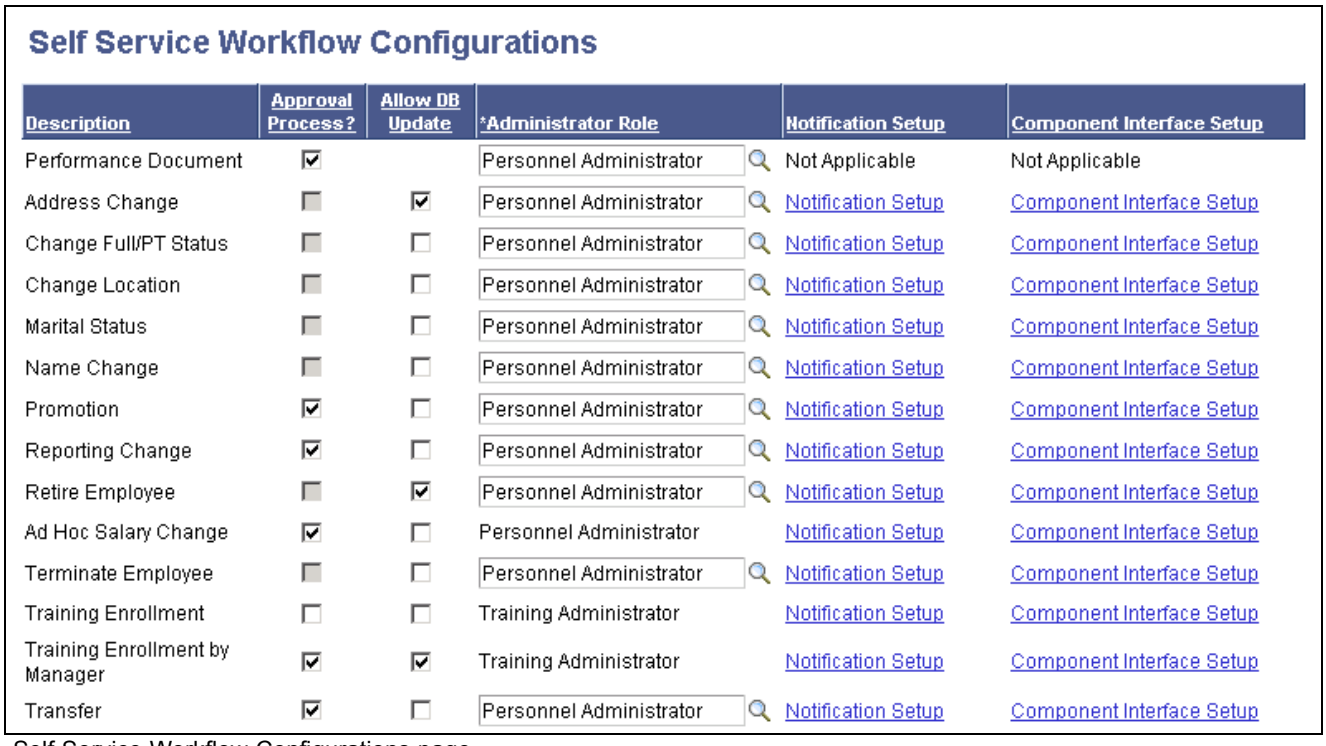
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Pages Used to Set Up Rules for Self Service Transactions

Page Name	Object Name	Navigation	Usage
Self Service Workflow Configurations	WF_CO_CONFIG	Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Self Service Workflow Configurations	Determines whether transaction should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.
Admin Notification Setup	WF_HR_TRANS_NOT	Click the Notification Setup link on the Self Service Workflow Configurations page.	Defines if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.
SS Component Interface Setup	SS_TRANS_CIDTL_SEC	Click the Component Interface Setup link on the Self Service Workflow Configurations page.	Defines the name of the component interface used by the transaction and location of error and warning messages.

Setting Up Approvals and Database Updates

Access the Self Service Workflow Configurations page.



Self Service Workflow Configurations

Description	Approval Process?	Allow DB Update	*Administrator Role	Notification Setup	Component Interface Setup
Performance Document	☑		Personnel Administrator	Not Applicable	Not Applicable
Address Change	☐	☑	Personnel Administrator	Notification Setup	Component Interface Setup
Change Full/PT Status	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Change Location	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Marital Status	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Name Change	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Promotion	☑	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Reporting Change	☑	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Retire Employee	☐	☑	Personnel Administrator	Notification Setup	Component Interface Setup
Ad Hoc Salary Change	☑	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Terminate Employee	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Training Enrollment	☐	☐	Training Administrator	Notification Setup	Component Interface Setup
Training Enrollment by Manager	☑	☑	Training Administrator	Notification Setup	Component Interface Setup
Transfer	☑	☐	Personnel Administrator	Notification Setup	Component Interface Setup

Self Service Workflow Configurations page

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Description Lists the self-service transaction delivered with the system that is designed to work with the Process Configuration process.

Approval Process? This check box is only available to those transactions designed to use an approval process. If selected, the system requires Manager level approval. If not selected, manager level approval is not required.

Note. Transactions that use the Approval Workflow Engine framework require additional approval configuration.

See Chapter 28, "Setting Up and Working with Approvals," page 625.

Allow DB Update If selected, this check box allows the transaction to update the database. If not selected, an administrator will be notified of the change and need to complete the process request. Administrators can complete the request on the Workflow Inquiry page or in the Self-Service transaction pages.

Administrator Role Identifies the role of the person who is responsible for reviewing the results of the transaction if errors occur.

If Notify on Success or Notify on Warnings is selected on the Admin Notification Setup page, this role receives notifications when processing is successful or warnings are encountered.

Notification Setup Click this link to access the Admin Notification Setup page.

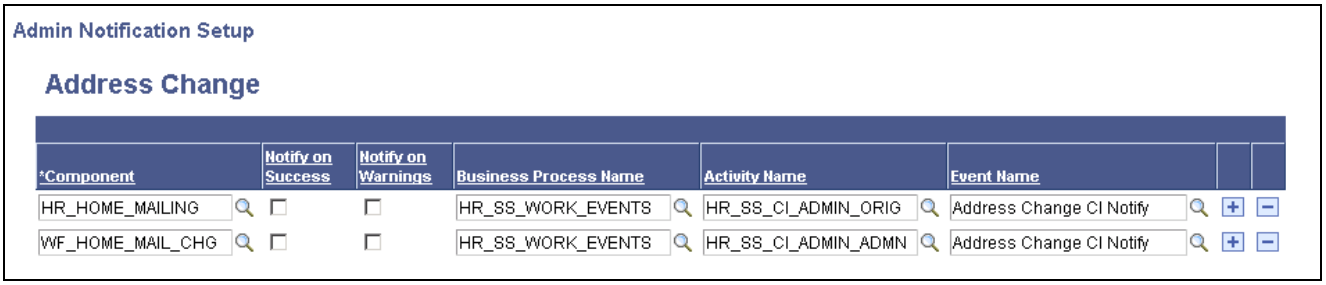
Component Interface Setup Click this link to access the SS Component Interface Setup page.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Setting Up Administrator Notification Rules

Access the Admin Notification Setup page.



Admin Notification Setup page

Component The name of the transaction.

Notify on Success Applicable only if Allow DB Update is selected on the Configuration Options page. Select to have the role selected on the Configuration Options page receive an email when automatic updates are successful.

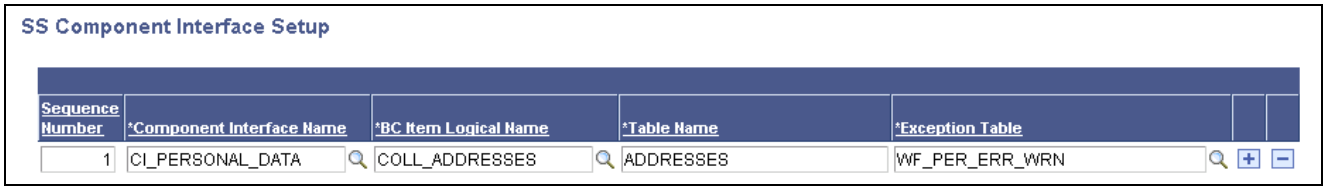
Notify on Warnings Select to have the role selected on the Configuration Options page receive an email when warning messages are generated during a successful HR database update.

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Business Process Name, Activity Name, and Event Name This is predefined system data that can be changed if you want to use a different business process.

Setting Up Component Interface Rules

Access the SS Component Interface Setup page.



SS Component Interface Setup page

Note. You do not need to modify this page unless you use component interfaces or exception tables that you have created or modified. This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Transactions

This section discusses how to review transaction activity.

Note. Use the Approval Monitor to review transactions that use the Approval Workflow Engine framework.

See Also

Chapter 28, "Setting Up and Working with Approvals," Administering Approvals, page 683

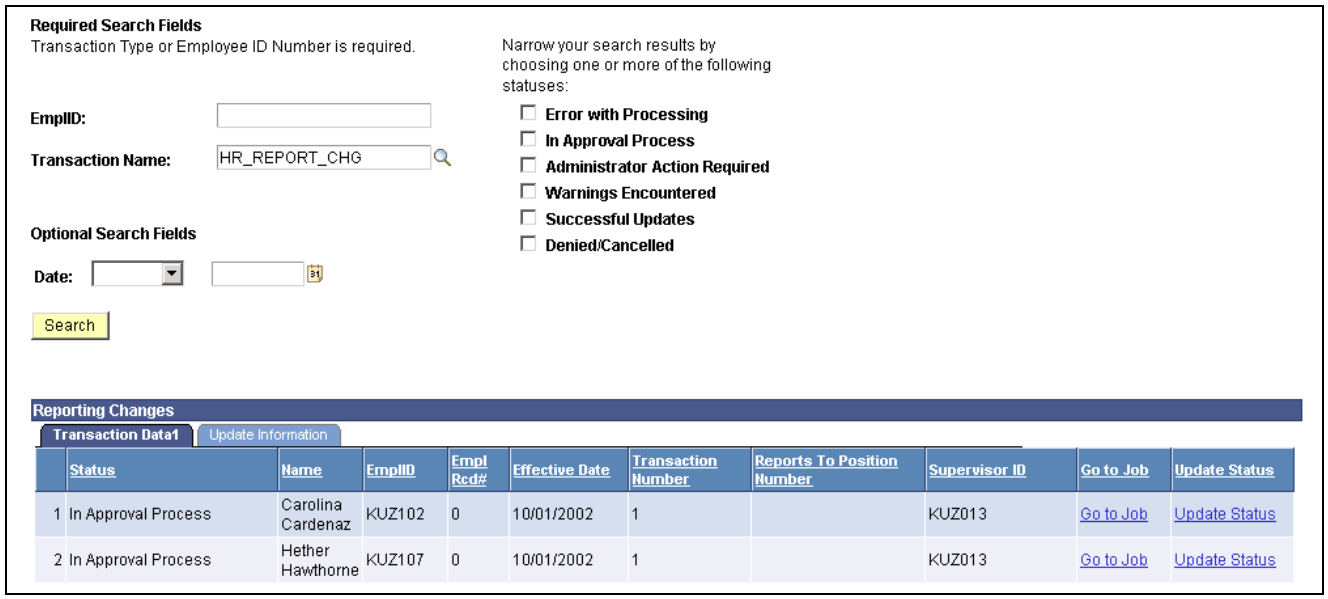
Pages Used to Review Transactions

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Administrators review activity for self-service transactions that do not use the Approval Workflow Engine framework.
Workflow Inquiry (USF)	FE_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry (USF)	(USF) Administrators review activity for self-service transactions that do not use the Approval Workflow Engine framework.

Reviewing Transaction Activity

Access the Workflow Inquiry page.

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Workflow Inquiry page

Required Search Fields

To see the activity for a specific worker enter the ID in the EmplID field. Make sure to tab out of the field.

To see the activity for <name of transaction> select <object name for transaction> in the Transaction Name field. Make sure to tab out of the field.

To select activity with a specific status, select the check box next to the name of the status. You can select one or more statuses.

Optional Search Field

To see the activity for transaction that occurred on a specific date, enter the date in the Date field.

Search

Click this link to find transactions that match the search criteria. Results are displayed below the Search button.

Search Results

Information about the transaction appears below the search area. Click the various tabs to display information relevant to the transaction:

- Click the Errors or Warnings links to display error and warning messages.
- Click the Go To link to display the component page relevant to the transaction.
- Click the Update Status link to view or update the status.

Setting Up Access to Direct Reports Data

To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

This section discusses how to:

- Determine access to manager self-service.
- Set up direct reports.

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- Set up transaction instructional messages.

Note. If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" chapter.

See Chapter 36, "Working with Common Components," Configuring Direct Reports Functionality, page 822.

Pages Used to Set Up Direct Reports

Page Name	Object Name	Navigation	Usage
Target Information	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information	Set up worker data access for the Manager self-service option.
Instructional Text	SS_LINK_TBL2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Instructional Text	Add instructional messages to the Select Employee page (OPRROWS) for this transaction component.service.
Configure Direct Reports UI	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI	Select the ePerformance or eProfile transaction that you want to configure for direct reports or user interface behavior. See Chapter 36, "Working with Common Components," Configuring Direct Reports Functionality, page 822.
Configure Direct Reports UI	HR_DR_UI_CFG_2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI Click the Configure button for the selected transaction.	Configure direct reports or user interface behavior for ePerformance or eProfile self-service transactions. See Chapter 36, "Working with Common Components," Configuring Direct Reports Functionality, page 822.

Determining Access to Manager Self-Service

The system determines who can access the manager self-service components and data by determining the answers to these questions:

- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the manager self-service components when you define their component access on the Permission List page. In the Direct Reports Setup component, you specify whose data a user can see for a particular manager self-service transaction.

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The system determines what kind of reporting relationship exists between managers and their staff. Reporting relationships are determined on two pages: the Work Location page (JOB_DATA1) and the Department Profile page (DEPARTMENT_TBL_GBL). On the Work Location page, you indicate who a worker's manager is. On the Department Profile page, you indicate who manages a department and the staff who report to that department.

Note. This section does not apply to the manager role in PeopleSoft Enterprise Talent Acquisition Manager.

See Also

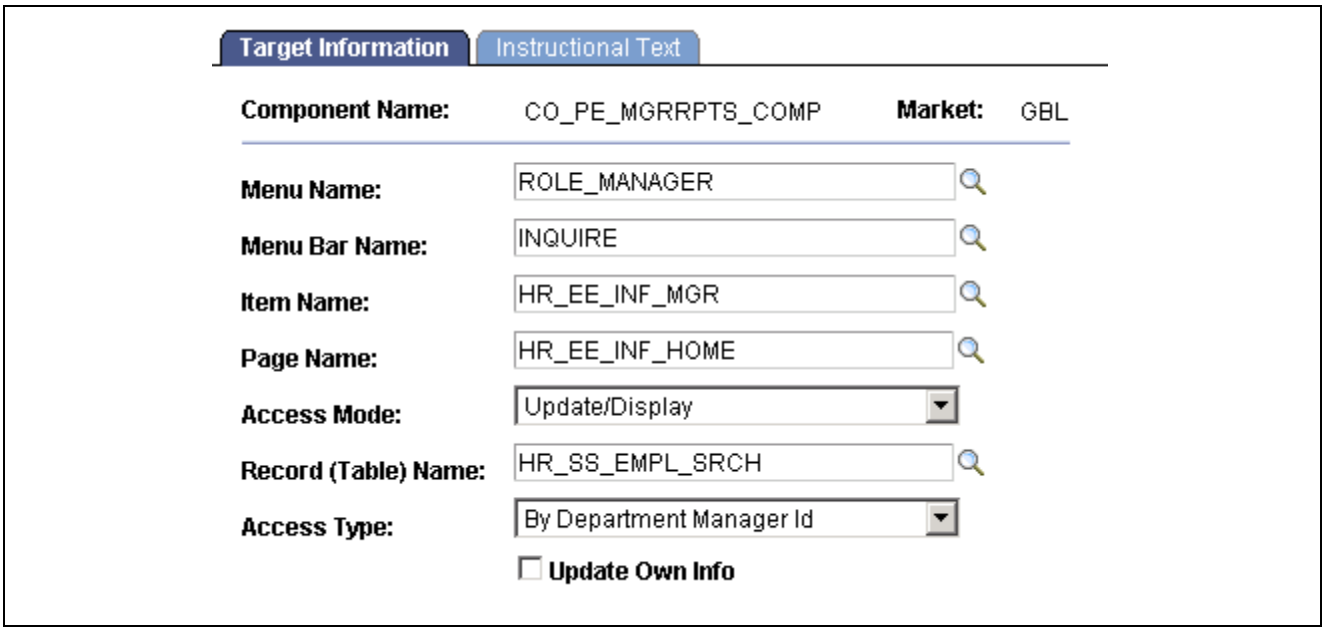
Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 276

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Employee Job Location and Position Information

Chapter 11, "Setting Up Organization Foundation Tables," Defining Basic Information About a Department, page 268

Setting Up Direct Reports

Access the Target Information page.



Target Information page

Note. If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" chapter.

See Chapter 36, "Working with Common Components," Configuring Direct Reports Functionality, page 822.

Note. To determine technical names of the system objects, use PeopleSoft Application Designer.

Component Name Enter the component name as defined on the menu in PeopleSoft Application Designer.

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The component name is the name of the Select Employee page that the system displays when the user selects a Manager self-service transaction. It isn't the name of the transaction component.

Menu Name Select *ROLE_MANAGER.* All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.

Menu Bar Name Select the name of the menu bar that the transaction component is under.

Item Name Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page.

The transaction component contains pages that the manager uses to view or manipulate staff data.

Page Name Enter the object name of the transaction component's page. The object name for each Manager self-service transaction is listed in the introduction table of the page discussion.

If a transaction component has more than one page, enter the name of the transaction page that the system displays first (usually the first page in the component) when a user selects a person name.

Access Mode Select which action the user performs in the transaction. Options are *Add, Update/Display, Update/Display All,* and *Correction.*

Record (Table) Name Enter the object name of the record that makes up the page of the transaction component.

Access Type This field defines the reporting relationship used by the Select Employee page for this transaction component. Available options are:

- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system

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presents the user with a list of people whose job record indicates that they report to that user's position.

- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info (update own information) Not applicable to self service. Select to allow managers to update their own information in this transaction component.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Chapter 5, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 80

Setting Up Transaction Instructional Messages

Access the Instructional Text page.



Instructional Text page

Direct Reports - Page Instructional Text

Title Message Set and **Title Message Number** Enter the title message set and number of the transaction instructions title that the system displays on this component's Select Employees page.

Message Text Displays the text of the transaction instruction title that is associated with the Title Message Number. The system displays this text on this component's Select Employees page.

Instructions Message Set and **Instructions Message Number** Enter the number of the instructions message set and number for the instruction message that the system displays on this component's Select Employees page.

Explain Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page.

Tells the user how to select the employees whose data they want to view or manipulate.

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Using Workflow with Self-Service Transactions

To use workflow with self-service transactions, use the Set Workflow Defaults component (WF_SYSTEM_DEFAULTS), Transaction Categories component (EO_TRAN_CATS), Workflow Transactions component (EO_TRANSACTIONS), System Workflow Rules component (EO_SYS_WF_RULES), Workflow Status component (HR_WF_STATUS), and Workflow User Preferences component (HR_SS_WF_EE_PREF).

This section discusses how to:

- Activate workflow message defaults.
- Set user notification preferences.
- Define rules for workflow notifications.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Pages Used to Activate Workflow

Page Name	Object Name	Navigation	Usage
Worklist System Defaults	WF_SYS_DEFAULTS	PeopleTools, Workflow, Defaults & Messages, Set Workflow Defaults	Set default parameters for workflow messages.
Workflow Transaction Categories	EO_TRAN_CATS	Set Up HRMS, Common Definitions, Self Service, Transaction Categories, Workflow Transaction Categories	Defines the category for self-service transactions. Generally, all self-service transactions are assigned to HR_TRANSACTIONS. This data is supplied by PeopleSoft and it is recommended that you not change this information.

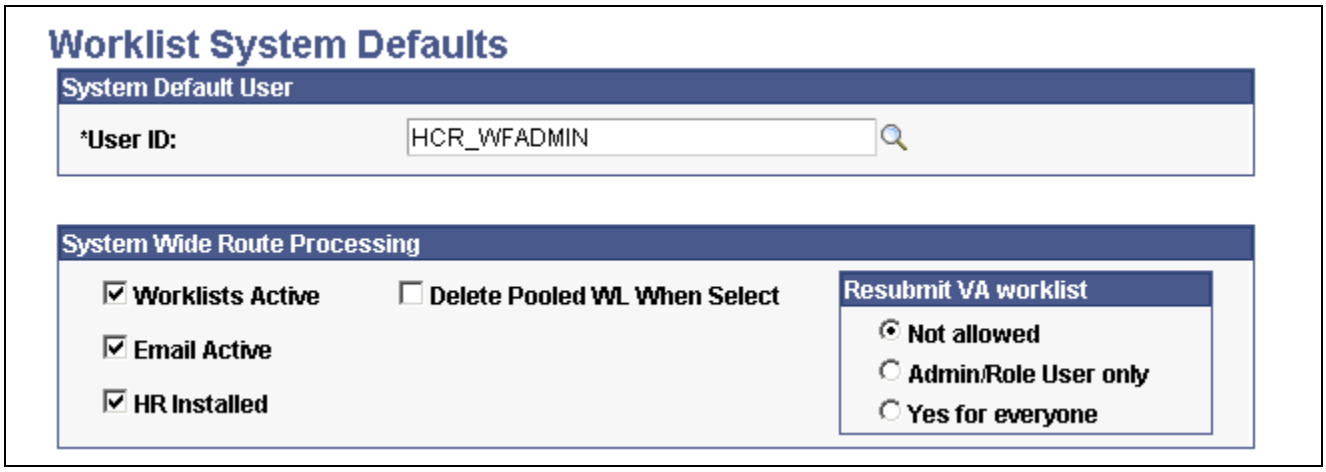
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Page Name	Object Name	Navigation	Usage
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Self Service, Workflow Transactions	Register self-service transactions as workflow transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that do not use the Approval Workflow Engine, the a category is supplied by PeopleSoft and we recommend that you not change this information. For transactions that use the Approval Workflow Engine, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval. See Chapter 28, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 641.
System Workflow Rules	EO_SYS_WF_RULES	Set Up HRMS, Common Definitions, Self Service, System Workflow Rules	For every SetID where you plan to use workflow, set the rules for workflow notification.
Workflow Status	HR_WF_STATUS	Set Up HRMS, Common Definitions, Self Service, Workflow Status	For each self-service transaction, specify what workflow is triggered. Changes to the approval path can be made, but is not recommended.
Workflow User Preferences	HR_SS_WF_EE_PREF	Self Service, Workflow User Preferences	Set up a user's notification method for workflow messages.

Activating Workflow Message Defaults

Access the Worklist System Defaults page.

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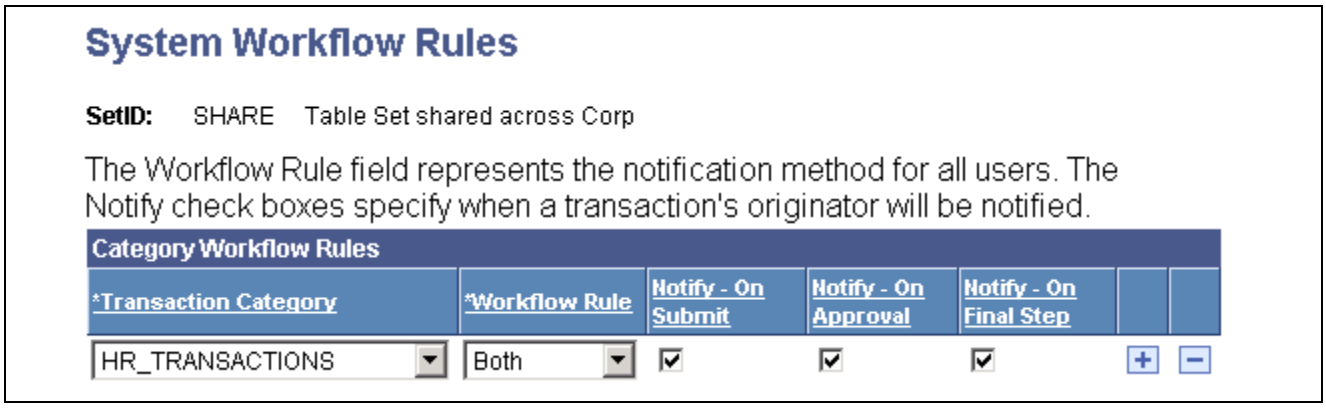


Worklist System Defaults page

Make sure the Worklist Active, Email Active, and HR Installed check boxes are selected.

Defining Rules for Workflow Notifications

Access the System Workflow Rules page.



System Workflow Rules page

For different rules to exist for different business units, specify these rules at the SetID level.

Note. You must specify this information when you implement PeopleSoft HRMS.

Transaction Category Select a transaction category.

Workflow Rule Define how the system notifies users when they're required to perform a function. Values include:

- *Email:* Notify the user via email.
- *Worklist:* Notify the user by placing an entry in the user's worklist.
- *Both:* Notify the user by both email and worklist.
- *None:* No notification.
- *User:* Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.

Notify User - Entry Select if users are to receive confirmation when initiating transactions.

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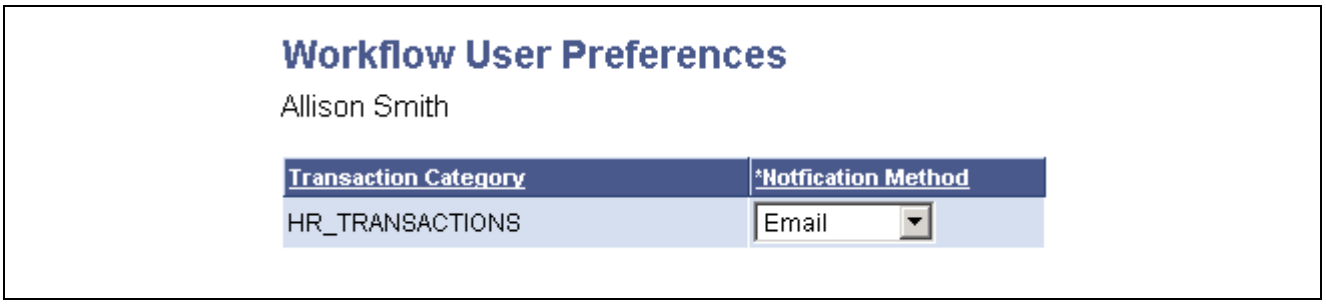
Notify All	Select if users are to be notified each time someone processes one of their transactions.
Notify - Final disposition	Select if users are to be notified when the final disposition has been made for the request.

See Also

Appendix C, "Delivered Workflows for PeopleSoft HRMS," page 901

Setting User Notification Preferences

Access the Workflow User Preferences page.



Workflow User Preferences page

Select the method of workflow notifications.

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CHAPTER 36

Working with Common Components

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

- Configure direct reports functionality.
- Configure person search.
- Configure the HR notepad.
- Set up the text catalog.

Note. PeopleSoft Human Resources also delivers as common components the approvals workflow, delegation, and XML publishing functionality. These features are discussed in their respective chapters.

See Also

Chapter 28, "Setting Up and Working with Approvals," page 625

Chapter 29, "Setting Up and Working with Delegation," page 695

Chapter 31, "Working with HCM Transformation Framework," page 749

Understanding PeopleSoft HRMS Common Components

This section lists common elements and discusses common component pages.

Common Elements Used in this Chapter

Object Owner ID — Identifies the application in which a common component is used. This is delivered functionality.

Sub ID (sub application ID) — Used to further partition component entries by function. . For example, the Sub ID of *M* (Manager) allows component entries different from those of a Sub ID of *E* (Employee).

Common Component Pages

PeopleSoft provides common pages to perform functionality across multiple Human Capital Management (HCM) applications. These pages are implemented as plug-in applications that you can easily configure and embed into an application via provided APIs.

These applications are typically used to capture, store and present information for a particular generic function within the context of a calling application (for example, an application such as eRecruit, ePerformance or Benefits Administration).

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Data Structures

Each common component manages its own data source. These common components have keys. All applications that embed the plug-in share the same data structure that uses a configurable key structure to accommodate the different requirements that each application has for organizing this data. Each application defines, or registers, the actual keys that are used when the plug-in runs within the context of the application that has embedded it. You register the keys by making an entry for the application in the plug-in's configuration page, which is keyed by the object owner ID of the embedding application.

User Interface

The use of plug-ins enables all applications that embed a plug-in to present the data consistently. For example, the same format is used to capture and present context-sensitive notes, whether the user is in eRecruit, ePerformance, Payroll for North America, or Benefits. To provide context-sensitive instructional text, labels, and so forth, each of the plug-in applications uses the text catalog to provide context sensitivity while maintaining a consistent style across all of HCM.

Configurable Behavior

Some embedding applications need the ability to enable, disable, or modify the plug-in functionality. Applications manipulate these configuration options inside the plug-in's configuration page—the same place it registers its keys.

HCM plug-ins, except for the text catalog, are embedded in an application by placing a graphic button on a page, and a simple API call on the button's FieldChange PeopleCode. The Text Catalog is generally invoked via an API in component-build, and/or PageActivate code.

Warning! Be careful when modifying configurations. PeopleSoft does not support some modifications, for example changing key values, that might cause other functionality in the application to not work as intended.

Configuring Direct Reports Functionality

To configure direct reports functionality, use the Configure Direct Reports UI (HR_DR_UI_CFG) and component.

This section provides an overview of direct reports and discusses how to:

- Configure components and transactions for direct reports functionality.
- Select the actions and fields that appear on the direct reports UI.
- Test the direct reports API.
- View exceptions and data returned by a method.
- View the trace log of method executions.
- Test the direct reports user interface.

See Also

PeopleSoft Enterprise ePerformance 9.0 PeopleBook, "Generating Documents," Generating Documents as a Manager

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Understanding Direct Reports Functionality

Direct reports information is used throughout HCM applications, especially in the manager self-service applications. Typically, direct reports information is used in a way that involves navigating an organizational hierarchy. For example, a manager uses Direct Reports to promote or give a raise to an employee. You may use direct report information in:

- Drill-down mode, enabling managers to select workers for processing in a self-service application.
- Chain of command mode, which determines workflow for approvals and notifications.

There are two major components for implementing direct reports functionality:

- Data service.

  The data service navigates an organization structure and returns a list of workers that report to a particular manager or a management hierarchy for a particular worker. The data service is completely unaware of its context, which enables to service both online and batch requests.

- User Interface.

  This is a common, configurable user interface (UI) that is de-coupled from data service. It receives information from the data service and presents it in a streamlined, consistent, reusable UI that enables users to visually navigate an organizational structure and select one or more workers for processing.

Direct Reports for Self Service Applications

There are two methods of setting up direct reports functionality. If you are setting up direct reports for the following applications, use the Direct Reports Setup (SS_LINK_TBL) component:

- PeopleSoft Enterprise eDevelopment
- PeopleSoft Enterprise eCompensation
- HRMS Portal Pack
- PeopleSoft Enterprise ePay
- PeopleSoft Enterprise Stock Administration

Note. Otherwise, use the Configure Direct Reports UI component described in this section.

See Also

Chapter 35, “Setting Up and Working with Self-Service Transactions,” Setting Up Access to Direct Reports Data, page 811

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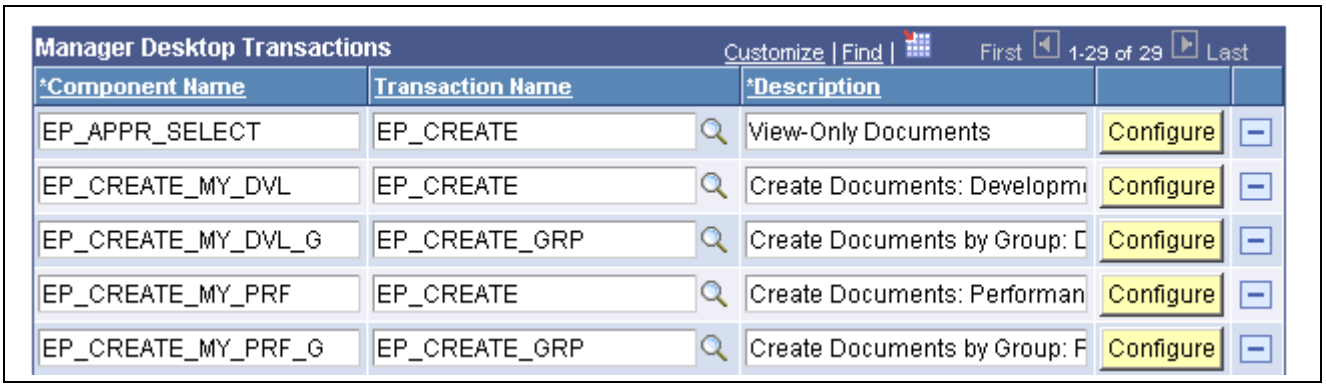
Pages Used to Configure Direct Reports Functionality

Page Name	Object Name	Navigation	Usage
Manager Desktop Transactions	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions	Configure the components and transactions that include the direct reports data functionality.
Manager Desktop Transactions - Configure	HR_DR_UI_CFG_2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions Click the Configure button for an application on the Manager Desktop Transactions page.	Select the actions and fields that appear on the direct reports UI for a transaction.
Invoke Direct Reports API - Set/Execute	HR_DRPT_API_EXEC	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute	Test the direct reports API.
Invoke Direct Reports API - Execution Results	HR_DRPT_API_RSLTS	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Execution Results tab on the Invoke Direct Reports API - Set/Execute page.	View the exceptions and data returned by a method.
Invoke Direct Reports API - Trace Results	HR_DRPT_API_TRACE	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Trace Results tab on the Invoke Direct Reports API - Set/Execute page.	View the trace log of a method execution.
Invoke Direct Reports UI API	HR_DRPT_API_UITEST	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports UI API, Invoke Direct Reports UI API.	Test the direct reports user interface.

Configuring Components and Transactions for Direct Reports Data Functionality

Access the Manager Desktop Transactions page.

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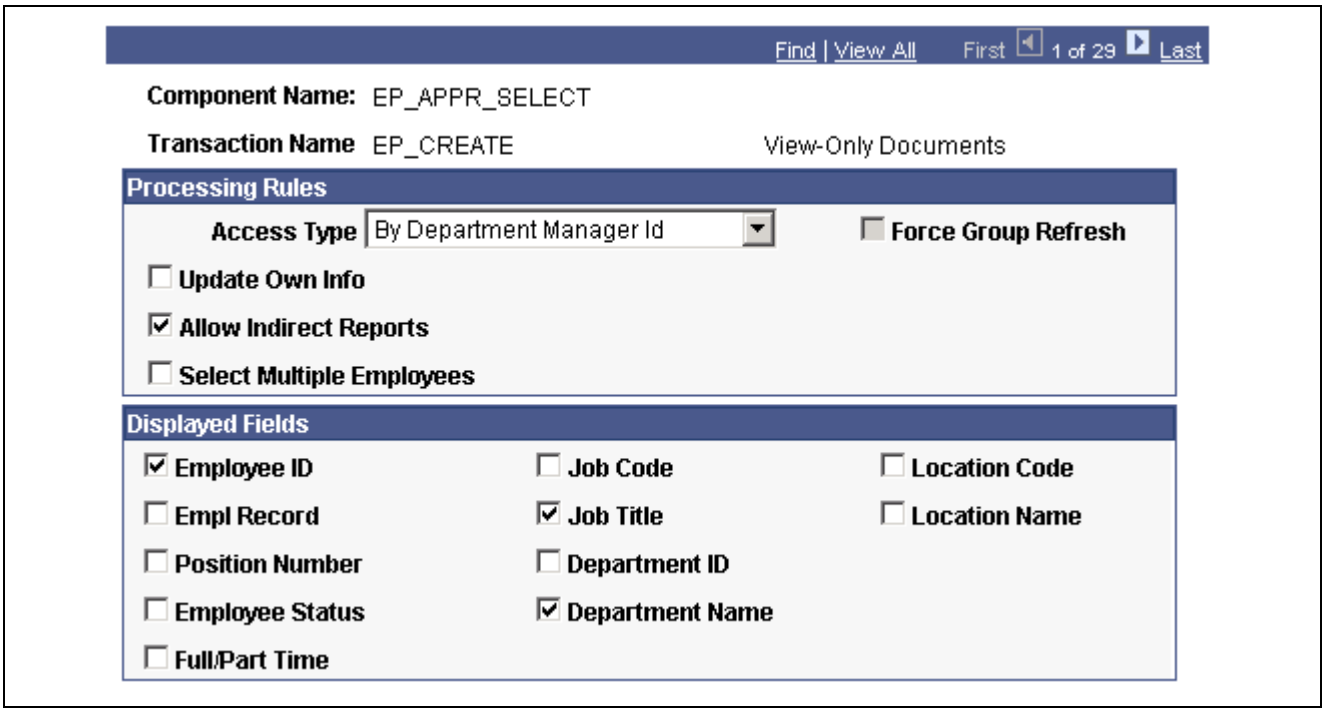


Manager Desktop Transactions page

Displays a list of components and transactions for which direct reports functionality is enabled. You can add a new component and transaction or click the Configure button to specify how the direct reports API and UI function within the context of the component and transaction.

Selecting the Actions and Fields that Appear on the Direct Reports UI

Access the Manager Desktop Transactions - Configure page.



Manager Desktop Transactions - Configure page

Processing Rules

Access Type Select the reporting relationship to use for determining who reports to whom. This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options are:

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- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info Select to indicate that the user can update their own records. When you select this check box, the manager's information is returned in the direct reports results list along with their direct reports or management hierarchy.

Allow Indirect Reports Select to return indirect reports of the user. This navigates down the organizational hierarchy and returns direct reports of direct reports and so forth until the lowest reporting level is reached.

Select Multiple Employees Select to enable the user to select more than one worker from the search results. If this field is selected, a check box appears next to the names in the results list, otherwise a radio button appears.

Note. You should not modify this value on delivered transactions, as they are built for selection of single or multiple values and if you change the setting, the transaction as delivered might not work.

Force Group Refresh Select to run the Group Build process (GBP002) to refresh the group membership prior to displaying direct reports. If you do not select this check box, the group members as of the last scheduled run of the process appear on the page. The system only makes this check box available if you select the access type *By Group ID*.

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Displayed Fields

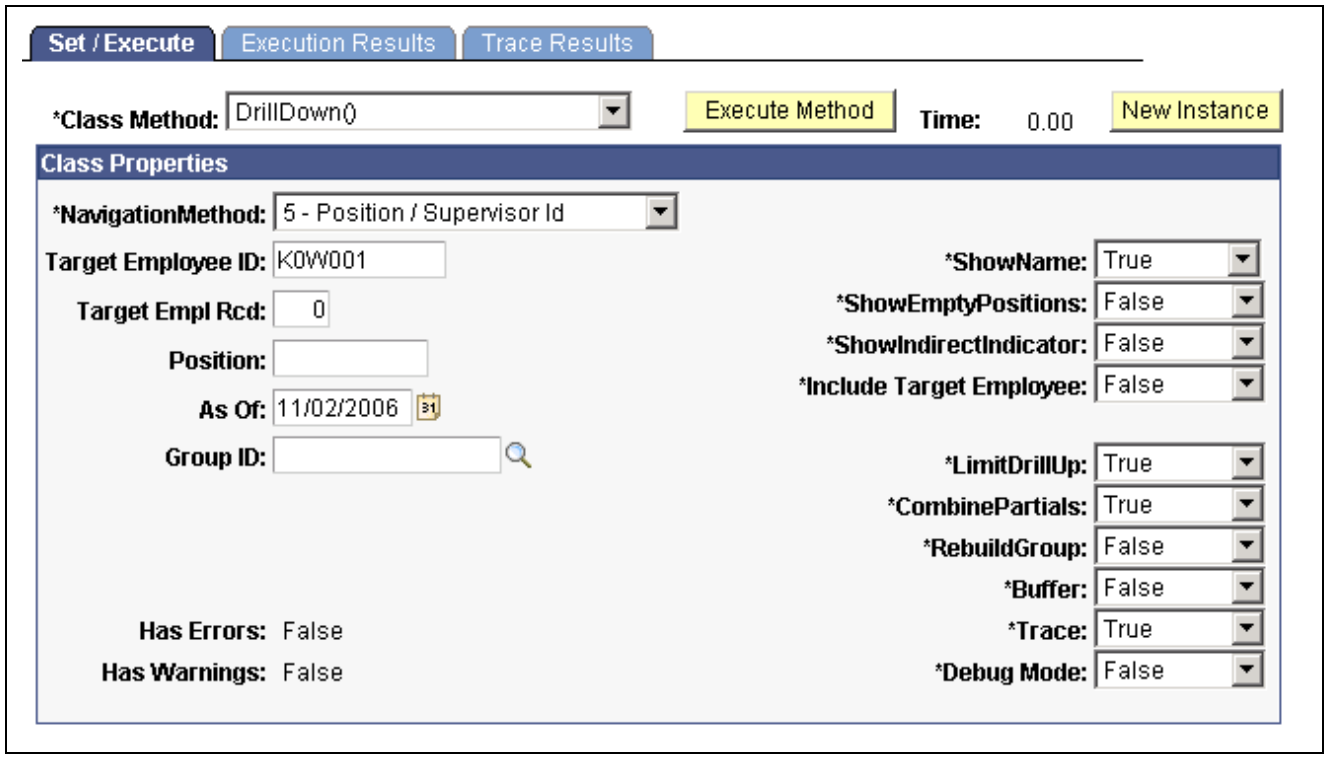
Select one or more fields to appear within the direct reports list when rendered by the application.

See Also

Chapter 35, “Setting Up and Working with Self-Service Transactions,” page 803

Testing the Direct Reports API

Access the Invoke Direct Reports API - Set/Execute page.



Invoke Direct Reports API - Set/Execute page

Class Method Select a method from the available options:

- *GetSupervisor()*

  Gets the supervisor for the target worker. This method is useful if the application needs to determine the target worker’s supervisor, but not the supervisor’s direct reports. For example, to send a notification to an worker’s supervisor, the application must determine the identity of the supervisor.

- *DrillDown()*

  Logically navigates down one level in the reporting structure to expose all of the direct reports for the worker . This is the most common use of the application class — this method returns the direct reports for a worker/job.

- *DrillUp()*

  Logically navigates up one level in the reporting structure to expose the worker’s supervisor and all the supervisor’s direct reports.

- *GetPeers()*

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Invokes the GetSupervisor() method for the target worker, and then invokes DrillUp() to expose all of the direct reports for this supervisor (which is the same as returning all the peers for a particular person).

Execute Method Click to execute the method using the class properties you set.

Class Properties

The properties and their default values, if any, of the selected class appear in this page region. You can change any of these before executing the method.

NavigationMethod Select the method to use when determining reporting relationships. The options are: *1 - Department Security Tree*, *2 - Supervisor Id*, *3 - Department Manager Id*, *4 - Reports to Position*, *5 - Position / Supervisor Id*, *6 - Position / Dept Manager*, and *7 - Group ID*.

Target Employee ID Enter the Employee ID of the target employee.

Target Empl Rcd Enter the Employee Record number of the target employee.

Position Enter the position of the target employee.

As Of Enter the As Of date to use when determining reporting relationships.

Group ID Enter a Group ID when NavigationMethod is *Group Id*.

ShowName Return employee names in the DirectReports Rowset? Default: *True.*

ShowEmptyPositions When the Navigation Method is position-based, should unfilled positions be returned in the DirectReports Rowset? Default: *False*.

ShowIndirectIndicator Should the DirectReports Rowset include an indicator for each row that indicates whether that EmplID/ERN (employee ID/employee record number) has direct reports? Default: *False.*

Note. Not applicable when NavigationMethod = *Department Security*or *Group Id*.

IncludeTargetEmployee Should the Target Employee be filtered out of the returned DirectReports and Supervisor rowsets? When *True*, the target employee is not filtered out. When *False* (which is the default), circular reporting relationships are not shown.

LimitDrillUp Should the user be allowed to DrillUp to a level higher than the target employee/job that was first specified? (For example, when used in a Manager SS (manager self-service) transaction, should I be able to drill down 2 levels, and then up 3 levels to expose and select my peers?). On the other hand, when used in a notification process, drilling up beyond the initial target employee/job is essential. When *True* (which is the default), DrillUp is limited.

CombinePartials When using one of the Partial Position Management navigation methods, should the secondary method be applied even if the primary method returns valid data? Default: *True*.

Rebuild Group When the NavigationMethodis *Group Id*, this forces the group to be rebuilt, even if group results for this Effdt already exist.

Buffer Should the Service buffer the next level up and down to increase performance? Default: *False*.

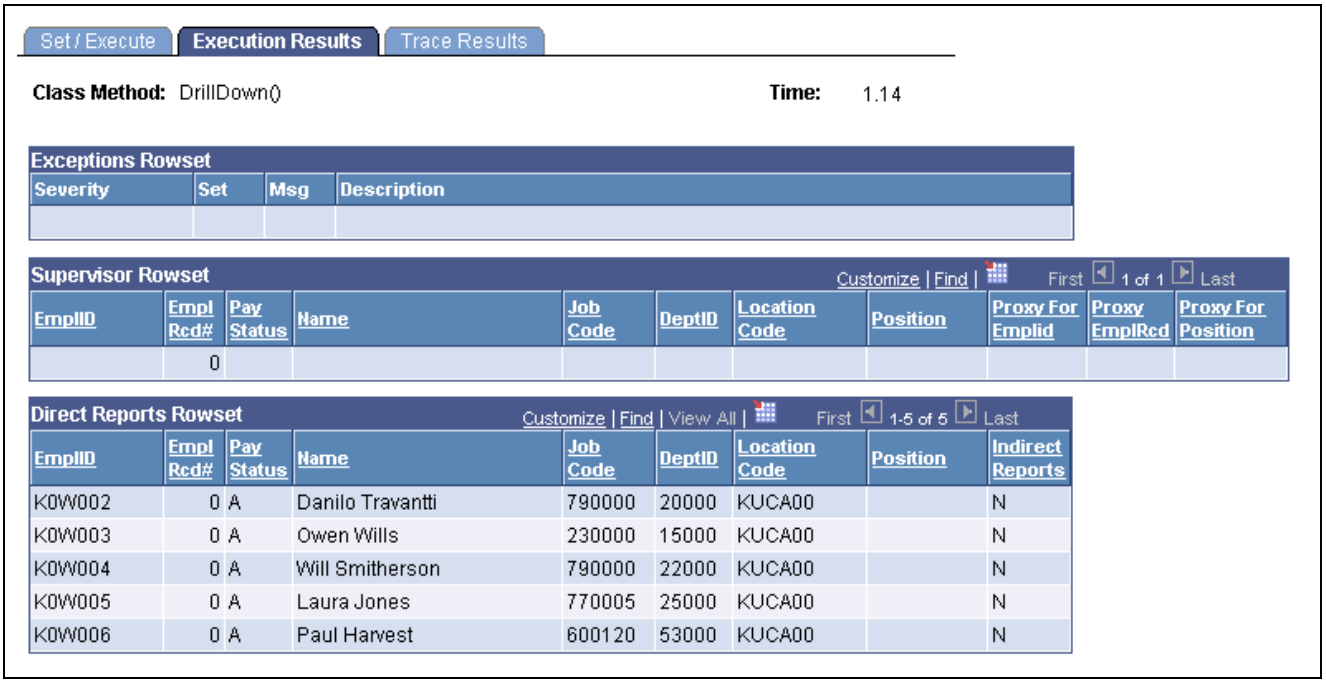
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Trace Should the service generate a trace of processing when executing class method? Default: *False*.

Debug Mode When Debug Mode = *True*, any exceptions encountered during execution are displayed prior to the results set being displayed.

Viewing Exceptions and Data Returned by a Method

Access the Invoke Direct Reports API - Execution Results page.



Set / Execute | Execution Results | Trace Results

Class Method: DrillDown() **Time:** 1.14

Exceptions Rowset

Severity	Set	Msg	Description

Supervisor Rowset Customize | Find | First 1 of 1 Last

EmplID	Empl Rcd#	Pay Status	Name	Job Code	DeptID	Location Code	Position	Proxy For Emplid	Proxy EmplRcd	Proxy For Position
	0									

Direct Reports Rowset Customize | Find | View All | First 1-5 of 5 Last

EmplID	Empl Rcd#	Pay Status	Name	Job Code	DeptID	Location Code	Position	Indirect Reports
KOW002	0	A	Danilo Travantti	790000	20000	KUCA00		N
KOW003	0	A	Owen Wills	230000	15000	KUCA00		N
KOW004	0	A	Will Smitherson	790000	22000	KUCA00		N
KOW005	0	A	Laura Jones	770005	25000	KUCA00		N
KOW006	0	A	Paul Harvest	600120	53000	KUCA00		N

Invoke Direct Reports API - Execution Results page

This page enables you to view results of the method execution.

Viewing the Trace Log of Method Executions

Access the Invoke Direct Reports API - Trace Results page.

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Set / Execute | Execution Results | Trace Results

Execution Trace Results — Customize | Find | First 1-25 of 25 Last

	Sub-Method Name	Trace Information
1	DrillDown()	AppClass Method Invoked.
2	iDrillDown()	private method invoked.
3	iDrillDown()	class property NavigationMethod= 5
4	iDrillDown()	class property TargetEmplid= K0W001
5	iDrillDown()	class property TargetERN= 0
6	iDrillDown()	class property AsOfDate= 2006-11-02
7	iDrillDown()	class property ShowName= True
8	iDrillDown()	class property ShowIndirectIndicator= False
9	iDrillDown()	class property ShowEmptyPositions= False
10	iDrillDown()	class property CombinePartials= True
11	iDrillDown()	class property LimitDrillUp= True
12	iDrillDown()	class property RebuildGroup= False
13	iDrillDown()	class property BufferNextLevel= False
14	GetPosition()	Lookup position for Emplid: K0W001, ERN: 0, Effdt: 2006-11-02.
15	GetPosition()	Returns Position: .

Invoke Direct Reports API - Trace Results page (1 of 2)

16	FetchReportsMethod4()	method 4 - Cannot resolve position. This Target Emplid (K0W001) is not assigned to a Position.
17	FetchReportsMethod4()	The returned rowset contains only 1 row, which is a dummy row.
18	FetchReportsMethod2()	Method returns 5 rows.
19	MergeRowsets()	merging rowsets - RS_ByPosition (primary): 1 rows, RS_Fallback (secondary): 5 rows.
20	MergeRowsets()	merged 5 secondary rows into primary rows, returns 5 rows.
21	MergeRowsets()	0 secondary rows were duplicates of a primary row.
22	RemoveTargetEmployee()	Searching for Target Employee in rowset.
23	iDrillDown()	private method returns 5 rows in DirectReports rowset.
24	DrillDown()	Pushed Target onto Breadcrumb[2].
25	DrillDown()	Class Method returns 5 rows in DirectReports rowset.

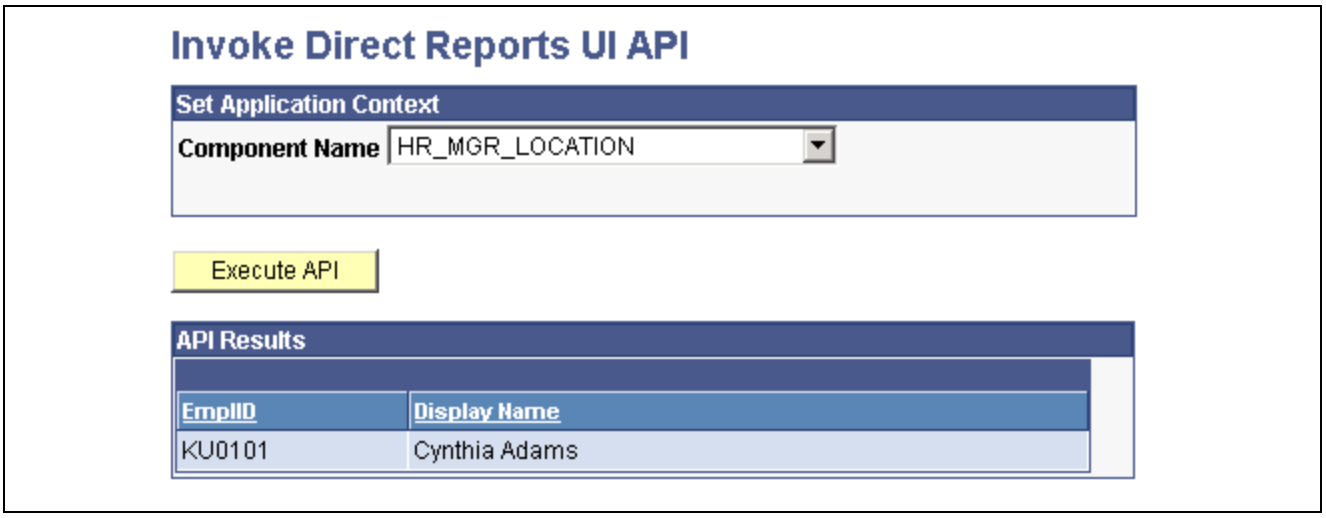
Invoke Direct Reports API - Trace Results page (2 of 2)

Data appears on this page only if you select *True* for the Trace class property.

Testing the Direct Reports User Interface

Access the Invoke Direct Reports UI API page

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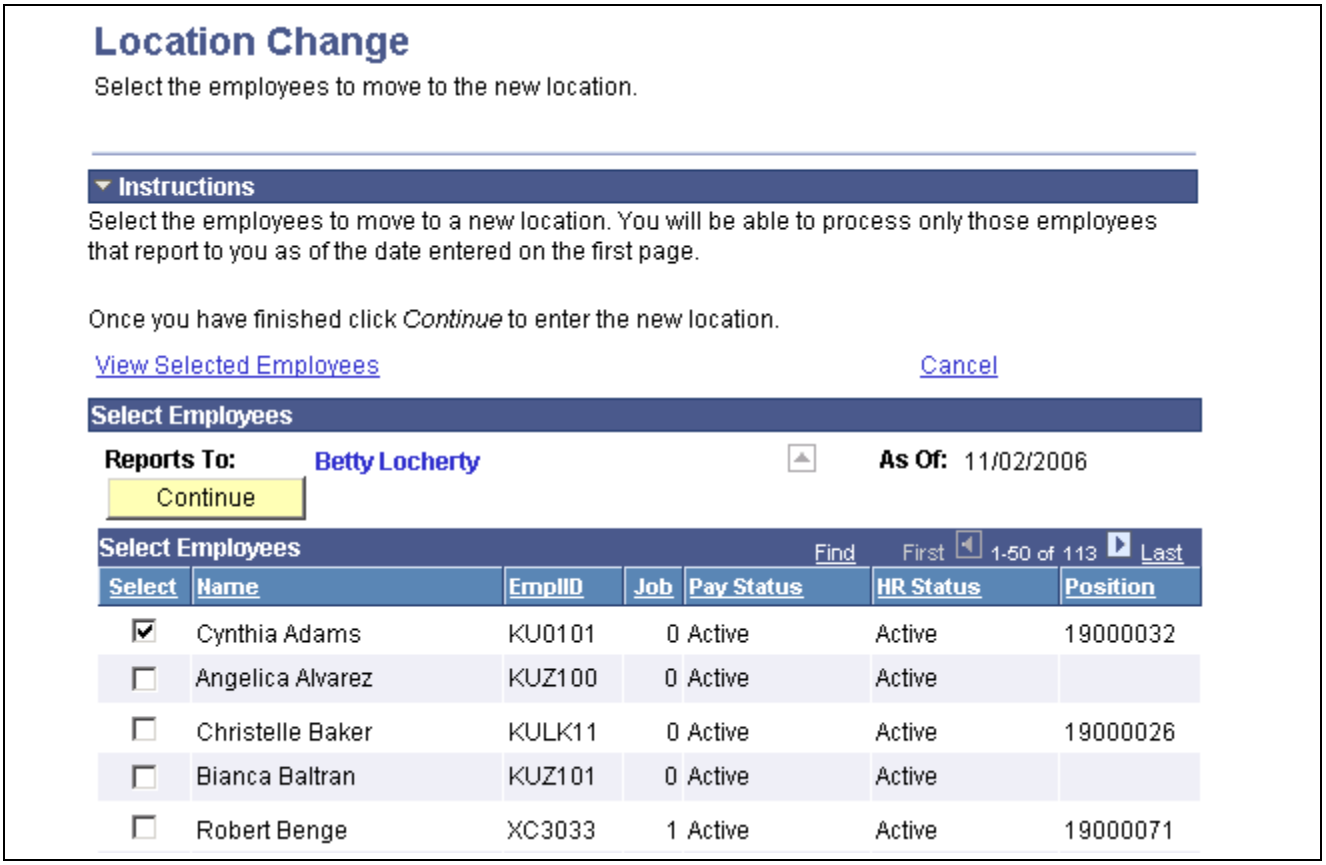


Invoke Direct Reports UI API page

The testing of this API shows the results set that the you will see based on the current configuration.

Select a Component Name and click Execute API. The direct reports plug-in executes within the context of the component and returns the results to the API Results grid.

For example, the results shown above were returned by selecting *Cynthia Adams* from within the Location Change component.



Example of Location Change page

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Configuring Person Search

To configure the person search, use the Configure Person Search (HR_PSS_CONFIG) component

This section provides an overview of simple person search and discusses how to:

- Configure components for simple person search.
- Test simple person search.

Understanding Simple Person Search

This page enables users of an application to search for and select a person to process. Using this component, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

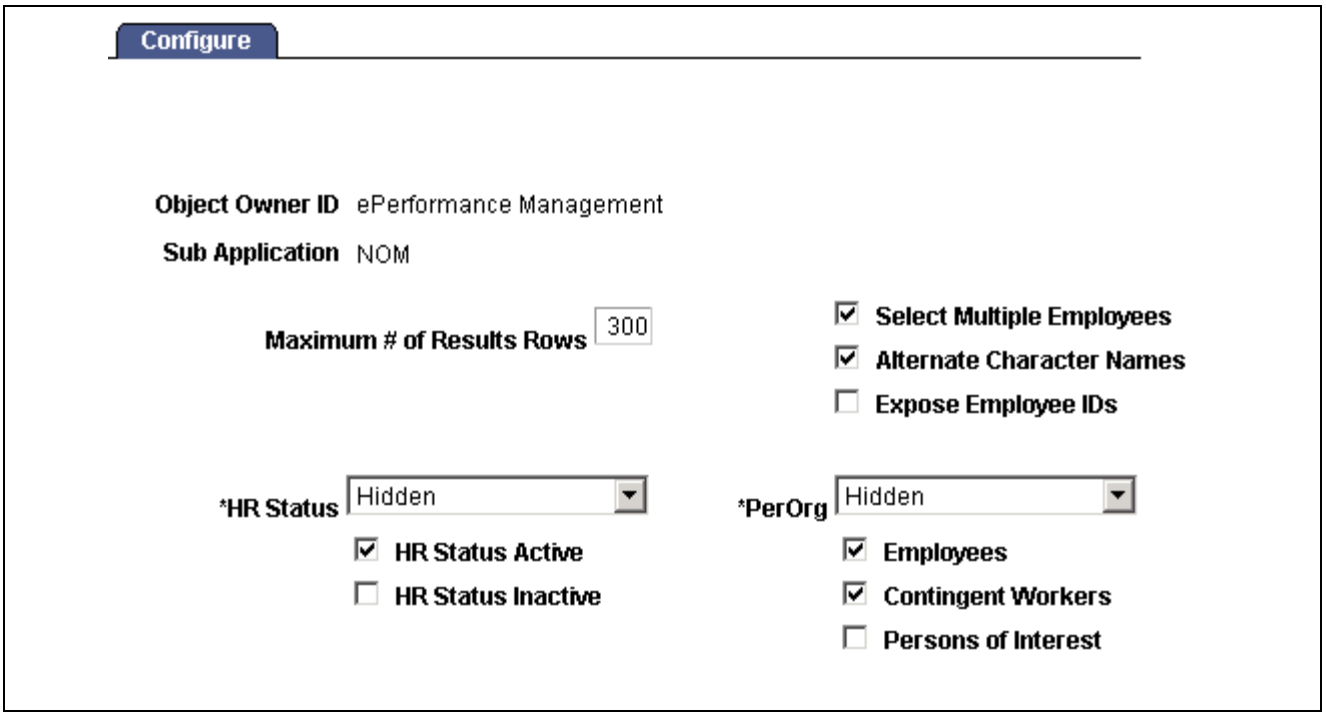
Pages Used to Configure Simple Person Search

Page Name	Object Name	Navigation	Usage
Configure	HR_PSS_CONFIG	Set Up HRMS, Common Definitions, Person Search Match, Configure Simple Person Search, Configure	Configure components for simple person search.
Invoke Person Search API	HR_PSS_TEST_API	Set Up HRMS, Common Definitions, Person Search Match, Invoke Person Search API, Invoke Person Search API	Test the simple person search within the context of an application.
Person Search - Simple	HR_PSS_SEARCH	This page is invoked from several calling applications.	Search for and select a person.

Configuring Components for Simple Person Search

Access the Configure page:

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Configure page

You select the options that govern how an application searches for and returns person information on the Simple Person Search page within an application.

Maximum # of Results Rows Enter the maximum results rows to return to the calling application. Any rows that meet the search criteria are returned and appear in the results list. If a search returns more than the maximum number of rows, the user is prompted with a message that the search returns more than the maximum number of people and asks them to narrow the search.

HR Status Select one of these values:

- *Hidden*

  HR status values for the persons found by the search do not appear in the results list.

- *Display Only*

  HR status values for the persons found by the search appear in the results list.

- *Enterable*

  Enables the user to search by HR status values. These appear as check boxes on the Person Search page.

HR Status Active Select to return rows for active workers only. This check box is selected by default.

HR Status Inactive Select to return rows for inactive workers only.

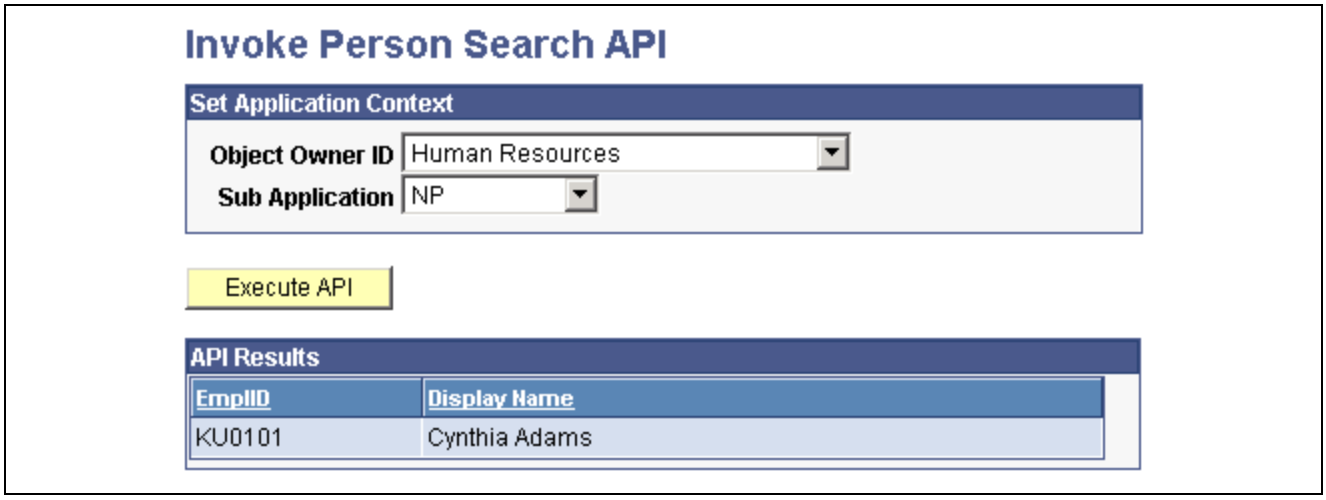
Select Multiple Employees Select to enable the user to select more than one person from the search results. If you select this field, a check box appears next to the names in the results list, otherwise a radio button appears.

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Alternate Character Names	Select to enable the user to search for names by entering the search string in alternate character format. If you configured the system to enable the entry of names in alternate character format, this check box is selected by default.
Expose Employee IDs	Select to have the person's ID appear in the results details. This field is clear by default.
Per Org (Person Organizational Relationship)	Select one of these values to control how the person's relationship to the organization is used on the Person Search page: • *Hidden* The organization relationship does not appear in the results list. • *Display Only* The organization relationship appears in the results list. • *Enterable* Enables the user to select the person organization relationships to include in the search. These appear as check boxes on the Person Search page.
Employees	Select to only return employees in the search results. This field is selected by default.
Contingent Workers	Select to only return contingent workers, for example, temps or contractors, in the search results.
Persons of Interest	Select to only return other persons of interest, for example, retirees or job applicants, in the search results.

Testing Simple Person Search

Access the Invoke Person Search API page.



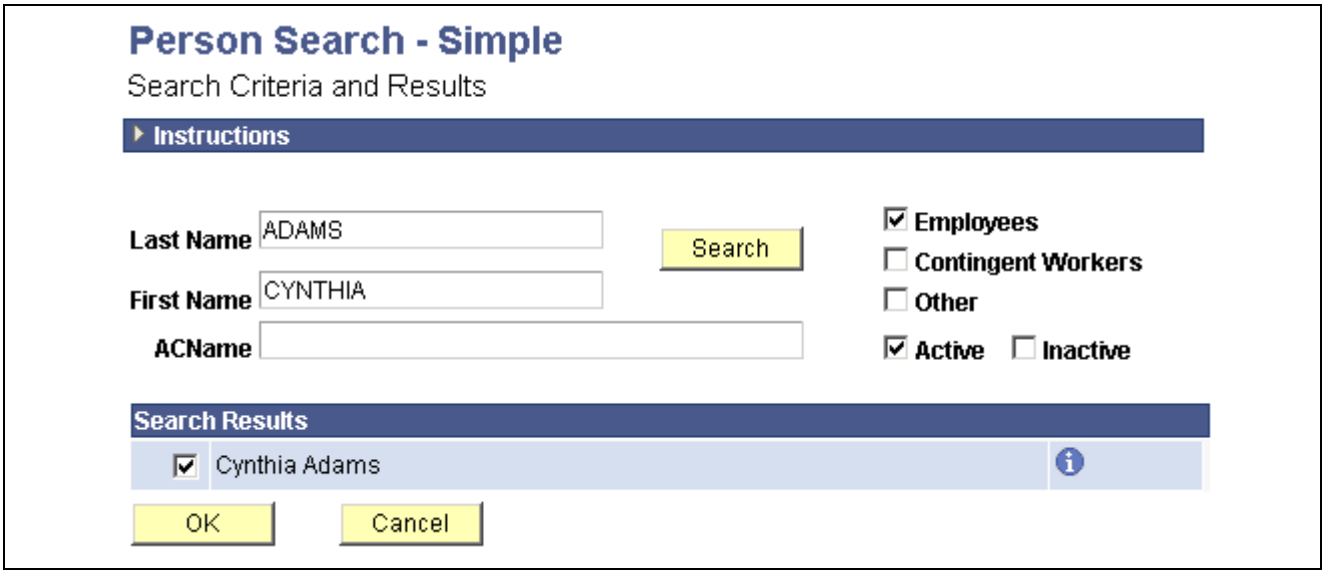
Invoke Person Search API page

This page enables you to test the configuration of the Simple Person Search page within the context of an application and sub application that you select. When you click Execute API the search page is rendered as you configured it for the application. You can enter any search criteria to view how the results appear.

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Viewing Simple Person Search Results

Access the Person Search - Simple page



Person Search - Simple page

Configuring the HR Notepad

To configure the HR Notepad, use the HR Notepad Configuration (HR_NP_CONFIG) component.

This section provides an overview of the HR Notepad and discusses how to:

- Configure HR Notepad for application use.
- Set up keys for storing notes.
- Configure application note page links.
- Test the Notepad configuration.

Understanding the HR Notepad

A notepad is a logical grouping of text-based notes, or a collection of notes that a user has entered within the context of an application. For example, an employee might have a performance notepad within the context of ePerformance, and a manager might have a recruiting notepad within the context of eRecruit.

You can integrate the plug-in application that maintains the HR Notepad (Notepad) into any HCM application. This application enables the user to record logical notes that are relevant to a row of application data. A common data structure, partitioned by application, is used to store notes.

The Notepad provides a consistent user interface (UI) that enables users to create, edit, view, and delete text-based notes. The Notepad UI is a single component that contains two pages for selecting and maintaining notes, a secondary page for displaying warnings and errors, and a tertiary page for viewing note history.

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Although the Notepad UI is consistent across all applications, detailed Notepad presentation and behavior specific to a given application are defined in a configuration table entry for the application. This entry defines the behavior of the Notepad UI and the keys that are used for the particular application. You can use this configuration table to integrate the Notepad pages into applications for which PeopleSoft does not currently deliver Notepad functionality, add Notepad functionality to applications that you build with PeopleTools, or modify the appearance of Notepad pages.

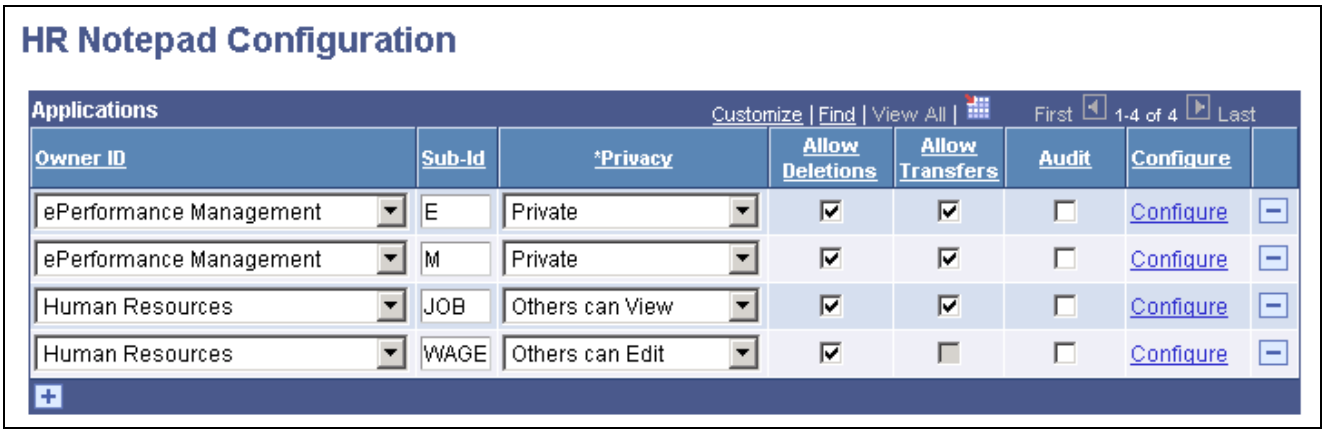
Pages Used to Configure the HR Notepad

Page Name	Object Name	Navigation	Usage
HR Notepad Configuration - Select Application	HR_NP_CONFIG_HDR	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration	Configure the HR Notepad for use by an application.
HR Notepad Configuration - Configure Keys	HR_NP_CONFIG2	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration Click the Configure link for an application on the HR Notepad Configuration page.	Set up the keys for storing notes.
HR Notepad Configuration - Configure Links	HR_NP_CONFIG3	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration Click the Configure Links link on the HR Notepad Configuration - Configure Keys page.	Configure the links that appear on application note pages.
Notepad API	HR_NP_TEST_API	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Invoke HR Notepad API, Notepad API	Test the notepad configuration.

Configuring the HR Notepad for Application Use

Access the HR Notepad Configuration - Select Application page.

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HR Notepad Configuration - Select Application page

Privacy Select from these options:

- *Private:* Only the owner of the note can access the note.
- *Others Can View:* Anyone can view existing notes in this partition, but only the note owner can update an existing note.
- *Others Can Edit:* Anyone can view and edit existing notes in this partition.

Allow Deletions Select to permit users to delete notes.

Allow Transfers Select to permit users who entered and therefore are the owner of a note to transfer ownership of a note to another individual.

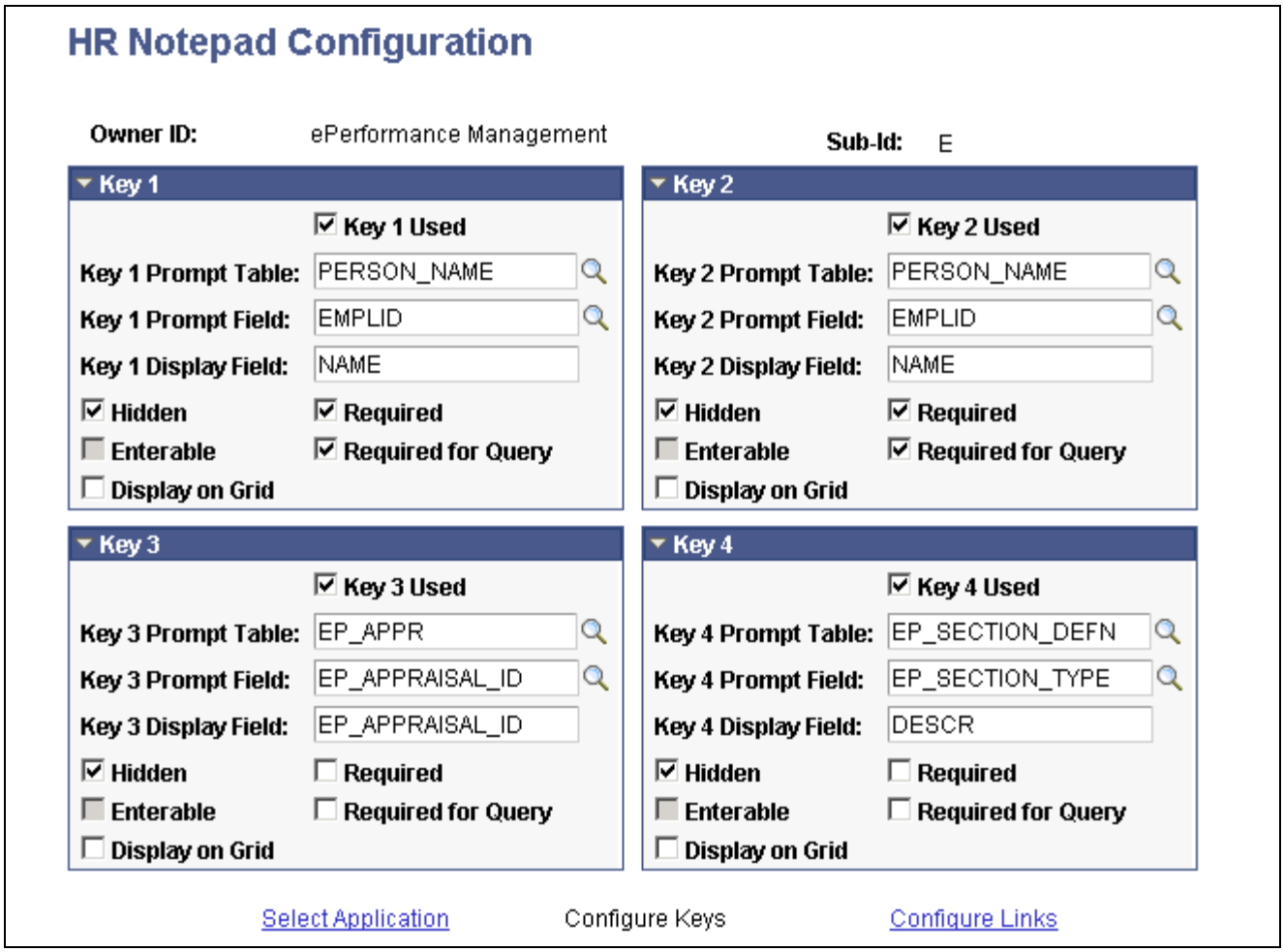
Audit When selected, this check box enables the Audit Changes feature for the partition. The system will automatically retain a history of all changes made to existing notes, including transfers and deletions.

Configure Click to access to the Configure Keys page.

Setting Up Keys for Storing Notes

Access the HR Notepad Configuration - Configure Keys page.

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HR Notepad Configuration - Configure Keys page

This page consists of four regions, one for each of the context keys. The description and use of these fields are identical to the *Key 1* fields described below.

Key 1 Used Select to indicate that the partition uses this particular context key. When selected, all of the controls in the Key 1 page region are enabled.

Key 1 Prompt Table Select the table that is used to provide a prompt list and validate the entry when a user enters a value into the Key 1 search field in the UI.

Key 1 Prompt Field Select the field within the prompt table that is used to provide the values in the prompt list. You must enter a value in this field if you enter a value in the Key 1 Prompt Table field.

Key 1 Display Field Select the field in the prompt table that appears in the UI as a related field for the value of Key 1. This field is optional. If not specified, then there is no related-display field for the context key. For example, you do not usually specify a Display Field for a date or number context key.

Hidden Select to indicate whether this key field is exposed on the UI pages. This field is selected by default.

Required Select to indicate that this key field is required when adding a note. This field is clear by default.

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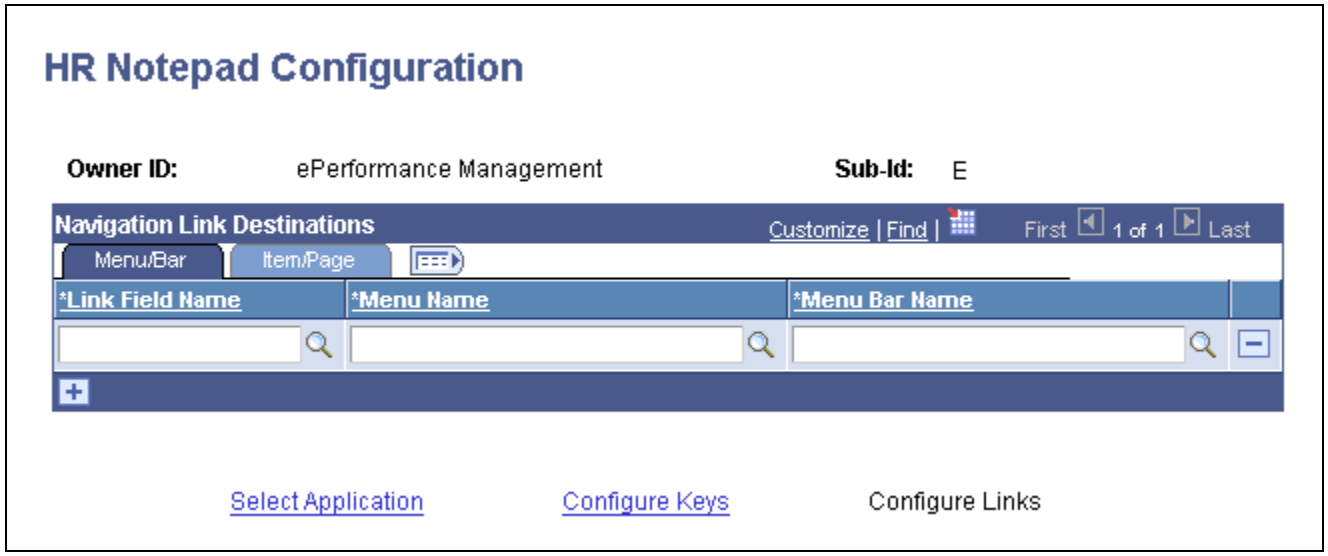
Enterable Select to indicate that the user is permitted to enter a value into this key field in the UI search criteria. This field is selected by default. You might clear this field in cases which the key is automatically populated by the API and exposed on the UI, but you do not want the user to change it.

Required for Query Select to indicate that the user must populate the key in the UI search criteria to see the list of notes that meet the search criteria, or to add a new note. This field is clear by default.

Display in Grid Select to display the context key value in the list of notes that meet the search criteria. You usually select this check box for any context key that has Required for Query cleared.

Configuring Application Note Page Links

Access the HR Notepad Configuration - Configure Links page.



HR Notepad - Configure Links: Menu Bar page

Use this page to define the navigation that takes place when the user clicks one of the navigation links at the bottom of the Notepad UI.

Link Field Name Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.

Menu Name Select the name of the menu to which the user is transferred when they click the link. The prompt table for this field is a view of all menus in the database.

Bar Name Select the name of the menu bar to which the user is transferred when they click the link. The prompt table for this field is a view of all menu bars for the menu specified in the Menu Name field.

Bar Item Name Select the name of the menu bar item to which the user is transferred when they click the link. The prompt table for this field is a view of all items for the menu bar specified in the Bar Name field.

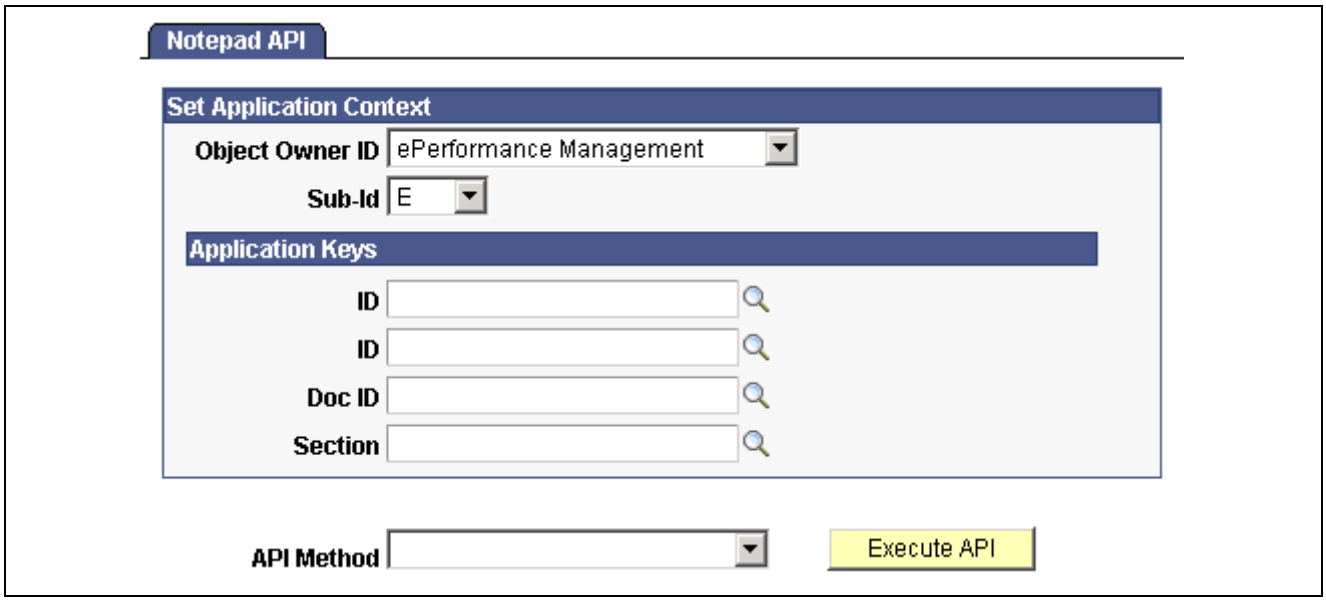
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Panel Item Name Select the name of the page to which the user is transferred when they click the link. The prompt table for this field is a view of all pages for the bar item specified in the Bar Item Name field.

Mode Select the operation mode for the page from the values *Add*, *Update/Display*, and *Correction*.

Testing the Notepad Configuration

Access the Notepad API page.



Notepad API page

Use this page to test the Notepad configuration for an application and sub-ID, if applicable.

The application keys that appear on this page are the ones that are defined for the Object Owner ID and Sub-ID. When you first access this page, only the Object Owner ID field is enterable. After you enter the Object Owner ID, the Sub-Id field is populated with any valid sub ids for the application. The application keys that appear correspond to the application keys that you configure on the HR Notepad Configuration - Configure Keys page

API Method Select the method to test.

- *Add()*
- *Edit()*
- *InvokeNotepad()*
- *View()*

Execute API Click to execute the API method with the keys you entered.

Configuring the Text Catalog

To set up the text catalog, use the Configure Text Catalog (HR_SSTEXT_CFG) and Translate Text Catalog (HR_SSTEXT_TEXT) components.

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This section provides an overview of the text catalog, lists common elements, and discusses how to:

- Configure the text catalog.
- Designate keys for text catalog entries.
- Define text catalog entries.
- View text catalog entries as HTML.
- Define translation for text catalog entries.
- Test text retrieval.
- View effective dates and context keys for a text ID.

Understanding the Text Catalog

The Text Catalog feature stores standard text that appears on the self-service pages within HRMS applications, including field labels, button names, links, page instructions, and warnings. It also includes the text and subject lines of automated email notifications. HRMS provides predefined text entries, but you can modify them by using the Text Catalog feature.

Entries in the Text Catalog feature are context-sensitive, meaning that a particular piece of text on a page can vary depending upon the page's usage or context. In this way, For example, instructional messages that appear for managers can differ from the messages that appear for workers.

Text Catalog Keys

Context-sensitivity is accomplished through the use of keys that enable the application to retrieve applicable text catalog entries. The keys for each application differ to meet the needs of the application.

Although you can have multiple versions of the same text, you do not have to set up a separate entry for every possible scenario. You can create one generic entry where all key values are blank, and then add entries for the situations that vary from the norm. Blank key values function as wildcards.

Warning! When the system looks for a match, it stops searching if the search keys narrow the possible choices to a single row—the lower-order search keys are ignored. If you do not set things up correctly, the system may return the wrong results. Plan ahead before making changes, particularly for complex scenarios. Random changes can lead to errors that are difficult to debug later.

You can test changes by using the Test Text Catalog page. To test an entry, enter the text ID that is associated with the text, plus any combination of key values, and click the Test button to view the text that the system retrieves for the keys values you entered.

Text IDs

To update a text entry, you need its ID. Use the Display Text ID option on the Configure page to find this information. When you activate this option, the text IDs appear in place of the corresponding text on self-service pages, warnings, and emails.

To view the correct text IDs, you need to create the conditions that cause the page, warning, or email to appear. For example, you might need to sign in using a particular role.

Note. You may want to activate this option, print a copy of the self-service pages, and then deactivate it. This provides a hardcopy reference of all the text IDs used on each self-service page.

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Common Elements Used in this Section

Text ID The unique identifier that you entered to access entries in the text catalog.

Usage The place where the entry is used: *Email Body, Email Subject, Error/Warning, Field Label, Grid/Scroll Heading, Groupbox Title, Hyperlink/Button, Page Instructions,* or *Page Title.* The only text entries that you cannot modify are translate values and error messages that appear in Microsoft Windows error boxes. You can use this field to search the Maintain Text Catalog page when you don't have the text ID, but you do have the specific text.

Effective Date The date on which a particular text catalog entry becomes active. Delivered text is defined as system data in the PeopleSoft HRMS database and has an effective date of 1/1/1900.

Important! To prevent future updates to PeopleSoft ePerformance from overwriting any text entries that you add or modify, use a later effective date when you add new text entries, and insert a new effective date when you modify delivered text.

Pages Used to Work with the Text Catalog

Page Name	Object Name	Navigation	Usage
Configure Text Catalog: General	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog	Configure the text catalog for an application.
Configure Text Catalog: Key 1, Configure Text Catalog: Key 2, Configure Text Catalog: Key 3, Configure Text Catalog: Key 4	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog Select the Key 1, Key 2, Key 3, or Key 4 tab on the Configure Text Catalog: General page.	Designate keys that are used to store and retrieve text catalog entries.
Maintain Text Catalog	HR_SSTEXT_TEXT	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog	Define text catalog entries, and define the values for context-sensitive keys.

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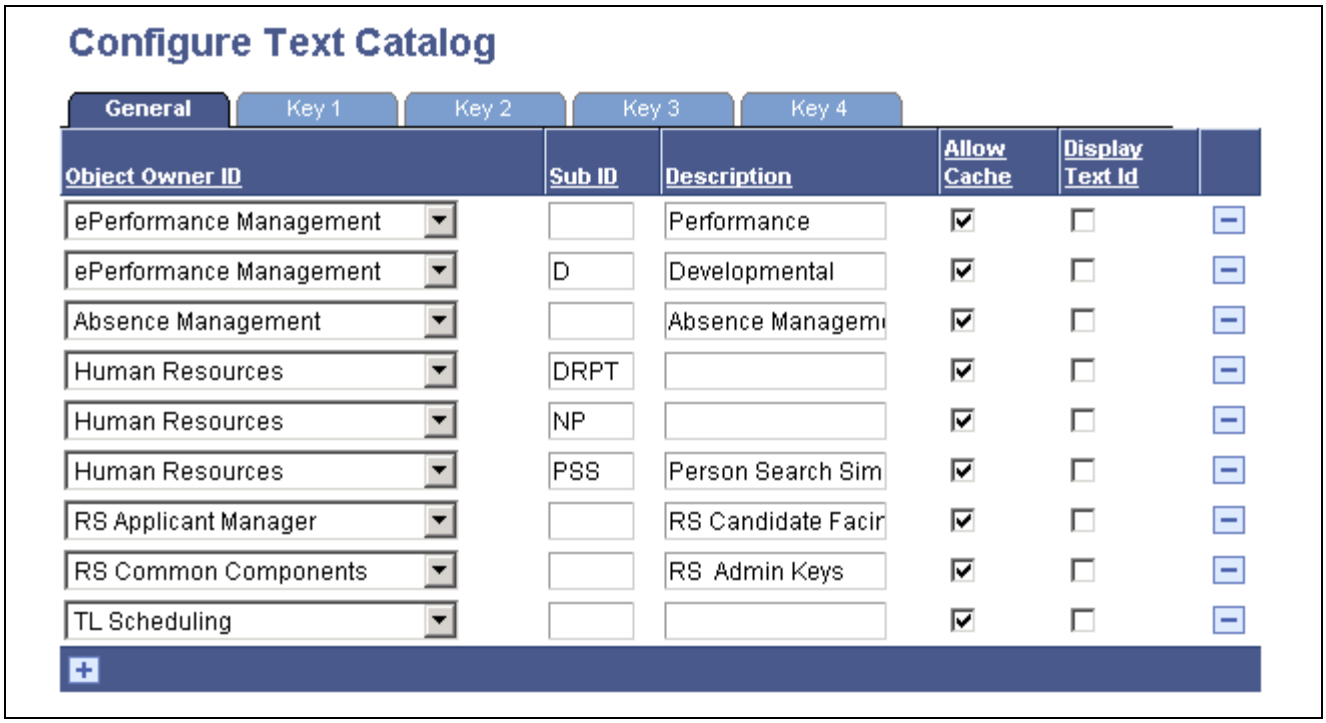
Page Name	Object Name	Navigation	Usage
Maintain Text Catalog: HTML View	HR_SSTEXT_HTML	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog Click the View / Edit as HTML link on the Maintain Text Catalog page. • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog Click the View / Edit as HTML link on the Maintain Text Catalog page.	View text catalog entries as HTML.
Text Catalog - View All Keys	HR_SSTEXT_ALLKEYS	• Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog Click the View all effective dates and context keys for this Text ID link on the Maintain Text Catalog page or the Test Text Catalog page and then click the view keys link. • Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog Click the link View all effective dates and context keys for this Text ID on the Maintain Text Catalog page or the Test Text Catalog page and then click the view keys link.	View versions and context-key entries for a particular text ID and effective date combination.
Self-Service Text Translation - Descriptions	HR_SSTEXT_LANG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Self-Service Text Translation, Descriptions	Select and describe the languages into which a text catalog entry is translated.

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Page Name	Object Name	Navigation	Usage
Self-Service Text Translation - Catalog Text	HR_SSTEXT_LANG2	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Self-Service Text Translation, Catalog Text	Enter translations for text catalog entries
Test Text Catalog	HR_SSTEXT_TEST	Set Up HRMS, Product Related, ePerformance, Text Catalog, Test Text Catalog	Test the text retrieval for a text ID, using any combination of key values.

Configuring the Text Catalog

Access the Configure Text Catalog: General page.



Configure Text Catalog: General page

Use this page to add or remove applications from the text catalog and to configure options that affect the operation of the text catalog within an application. The page shot above shows the PeopleSoft HCM applications that are delivered with the text catalog feature enabled.

Allow Cache Select this check box to load the entire contents of the text catalog into cache upon access to the application. This enhances system performance because the system does not have to do a database call every time it needs to retrieve a text catalog entry.

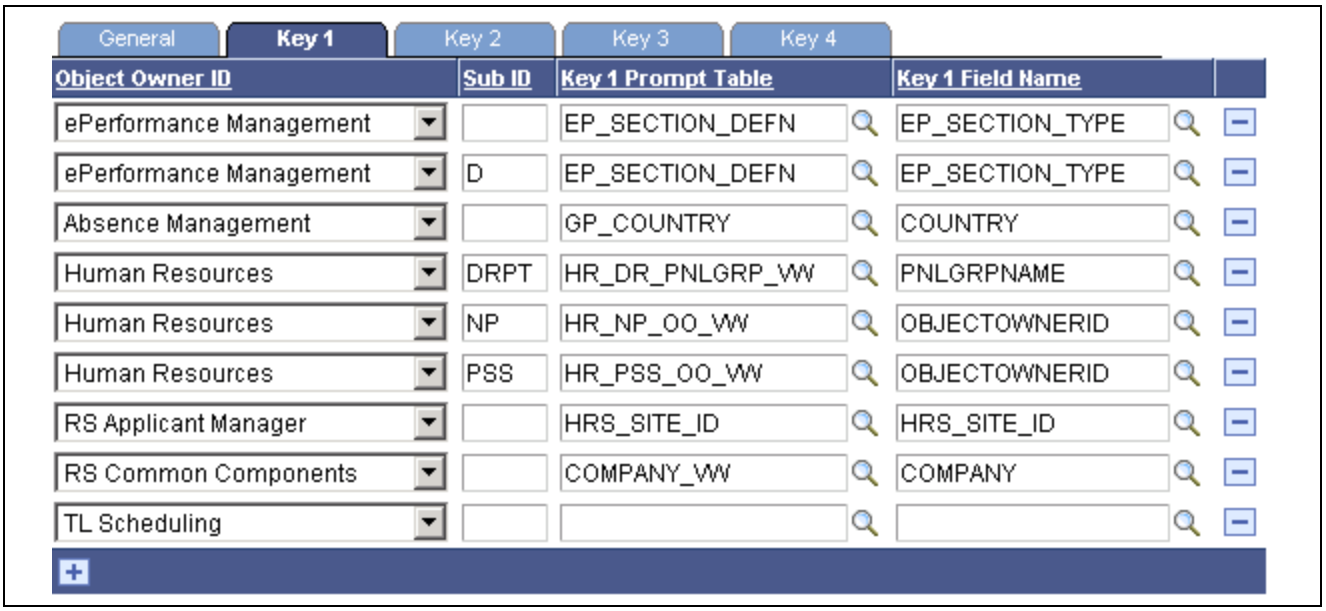
Display Text ID Select to have the system identifiers of the text entry appear instead of the corresponding text. You can use this option to find out which text ID corresponds to a particular piece of text that you want to modify.

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Designating Keys for Text Catalog Entries

Access the Configure Text Catalog: Key 1 page.

Note. The Key 2, Key 3, and Key 4 pages are identical in appearance and usage to the Key 1 page.



Configure Text Catalog: Key 1 page

Key 1 Prompt Table Select the object name of the prompt table that defines the values by which the text catalog is partitioned for an application.

The values in this prompt table appear when a text catalog entry is defined and modified. You select the value that pertains to the context in which the entry appears on self-service pages or notifications.

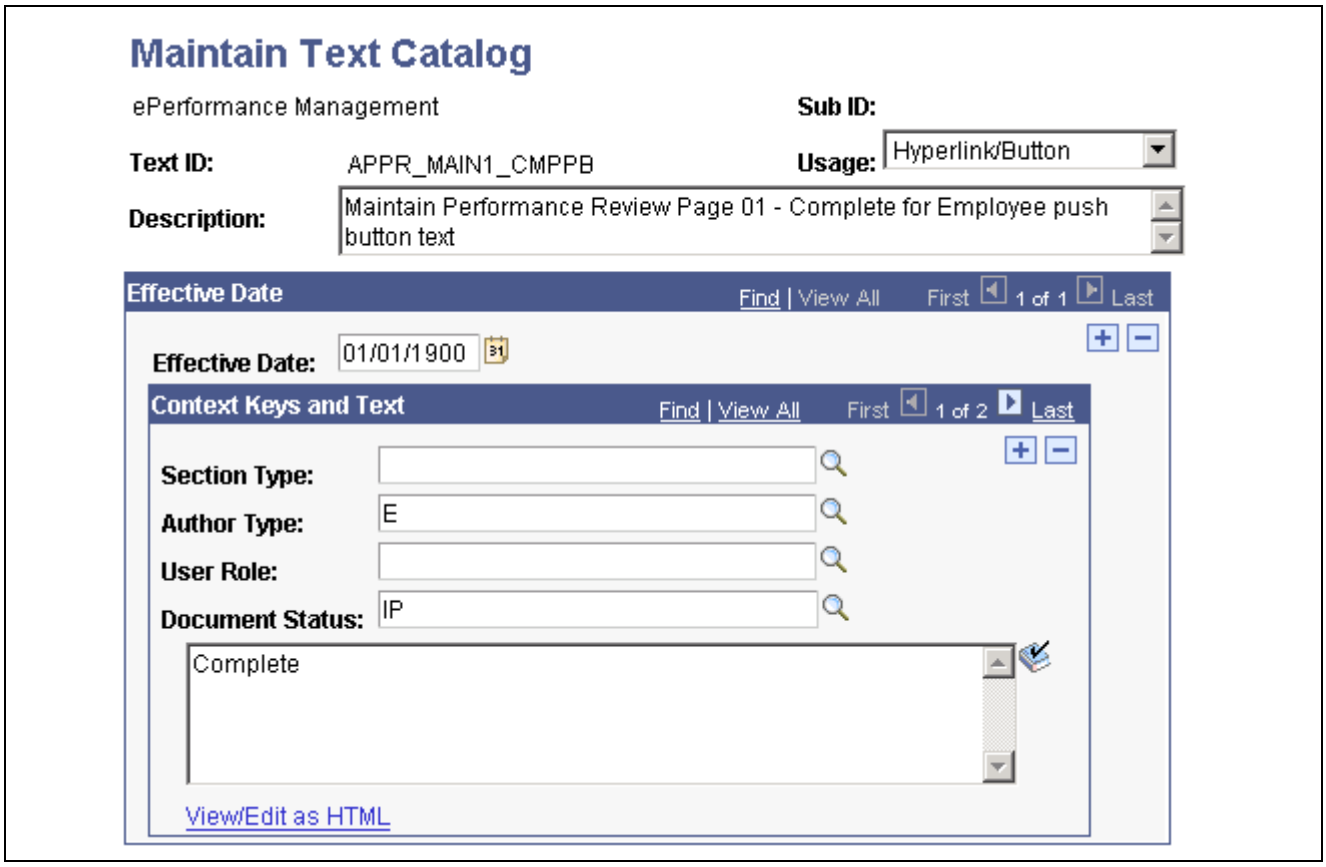
Key 1 Field Name Select the field in the prompt table that contains the value that appears in the prompt list for this key.

Note. If you enter a value for the prompt table, you must also enter a value for the field name in the same row.

Defining Text Catalog Entries

Access the Maintain Text Catalog page.

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Maintain Text Catalog page

Context Keys and Text

The context keys that appear on this page are determined by the text catalog configuration for the application. Use the context keys to target the message or text to a particular audience or specify the conditions under which the text is appropriate.

Note. A blank value for any key is a wildcard and means that the entry appears in all contexts of the key.

For example, the page shot above shows a configuration of a button for the ePerformance application. The button text that is defined in the text box applies only to employees and only when the evaluation status is *In Progress*.

For each text ID and effective date combination, define a complete wildcard entry in which you leave all key fields blank. This entry, known as the root entry, is the default text entry that's used when no section type, author type, user role, or document status is specified.

View/Edit as HTML Click to view and edit the HTML tags if the text will appear in an HTML area on the page.

Text Substitution

The text strings that are substituted for specific tokens, such as %1 and %2, are different for each application that uses substitution in the text catalog. They are delivered with the application.

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Token substitution in the text catalog works in the same way as in the PeopleTools Message Catalog. You supply the values for the tokens in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on performance documents. To use this feature, you must know PeopleCode.

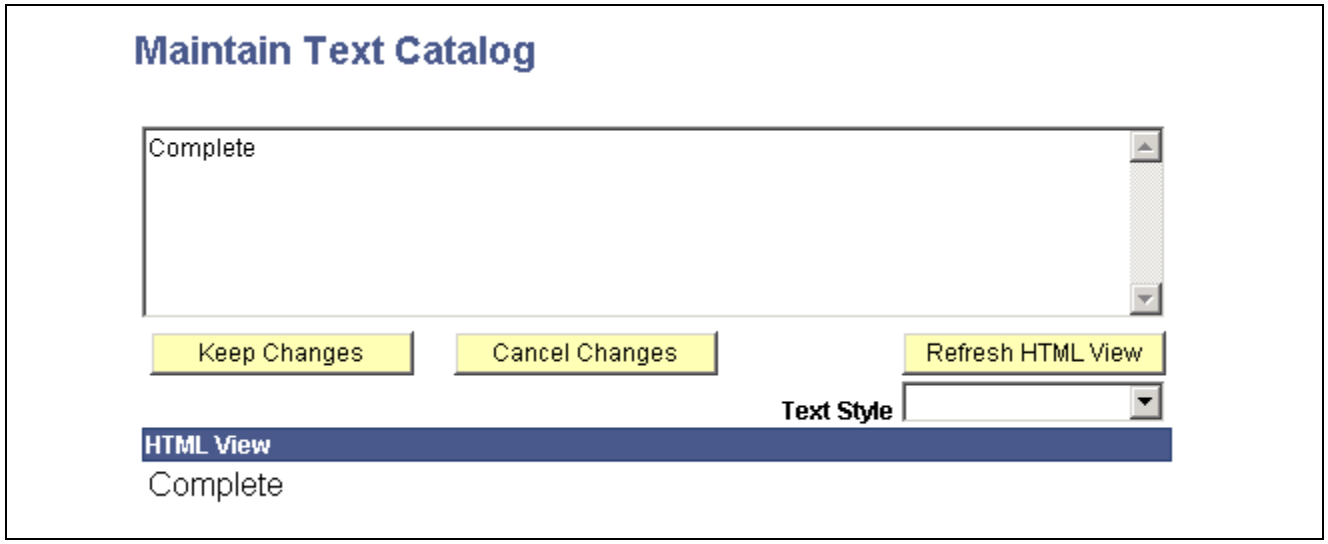
If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the text catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Viewing HTML for Text Catalog Entries

Access the Maintain Text Catalog: HTML View page



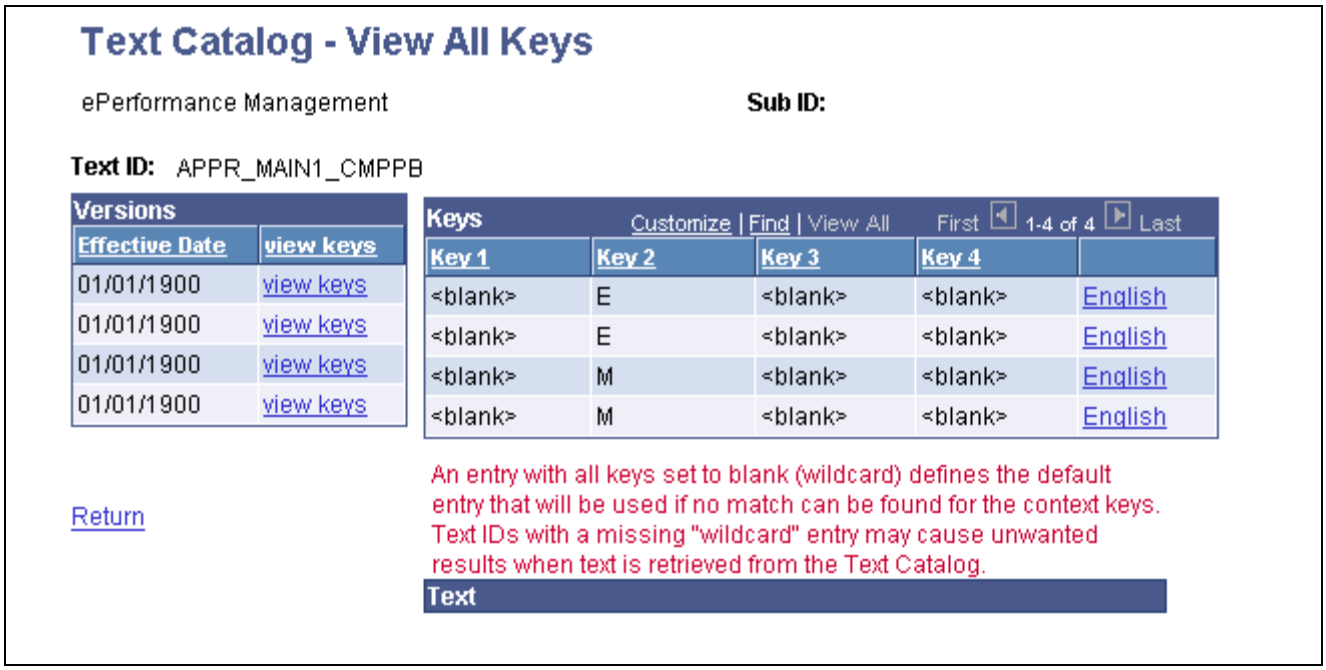
Maintain Text Catalog: HTML View page

Text Style Select the style to apply to the text. After you apply a style (for example, *Bold* or *Error* to a text entry, the HTML View page region shows how the text will appear on self-service pages.

Viewing Effective Dates and Context Keys for a Text ID

Access the Text Catalog - View All Keys page.

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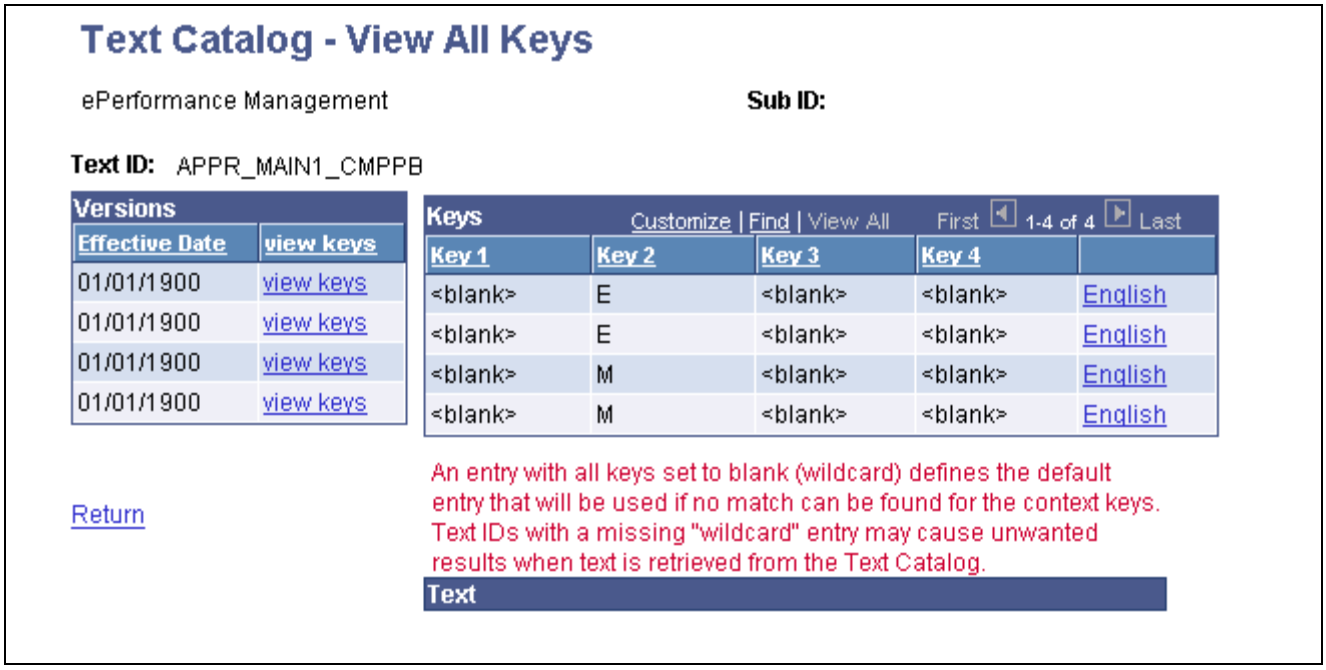
Text Catalog - View All Keys page

The Versions group box lists all effective-dated versions of the selected text ID.

Click the View Keys link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

Viewing Effective Dates and Context Keys for a Text ID

Access the Text Catalog - View All Keys page.



Text Catalog - View All Keys page

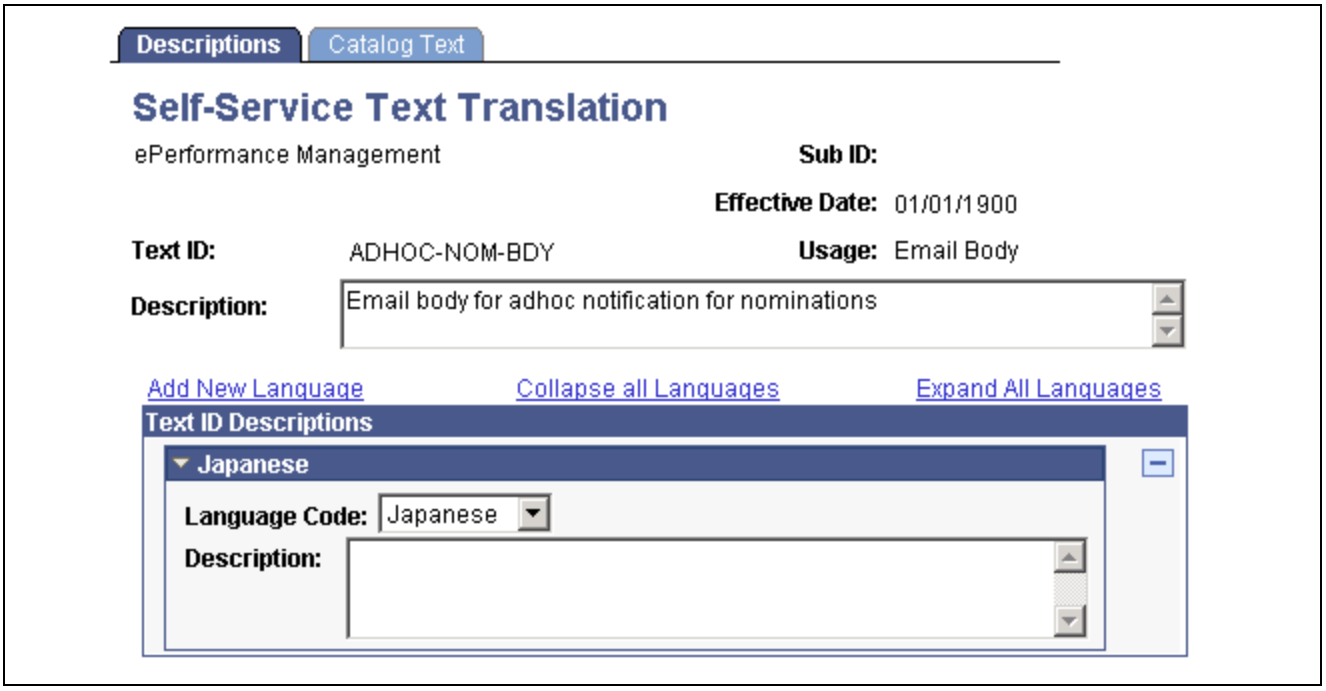
The Versions group box lists all effective-dated versions of the selected text ID.

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Click the View Keys link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

Translating Text Catalog Entries

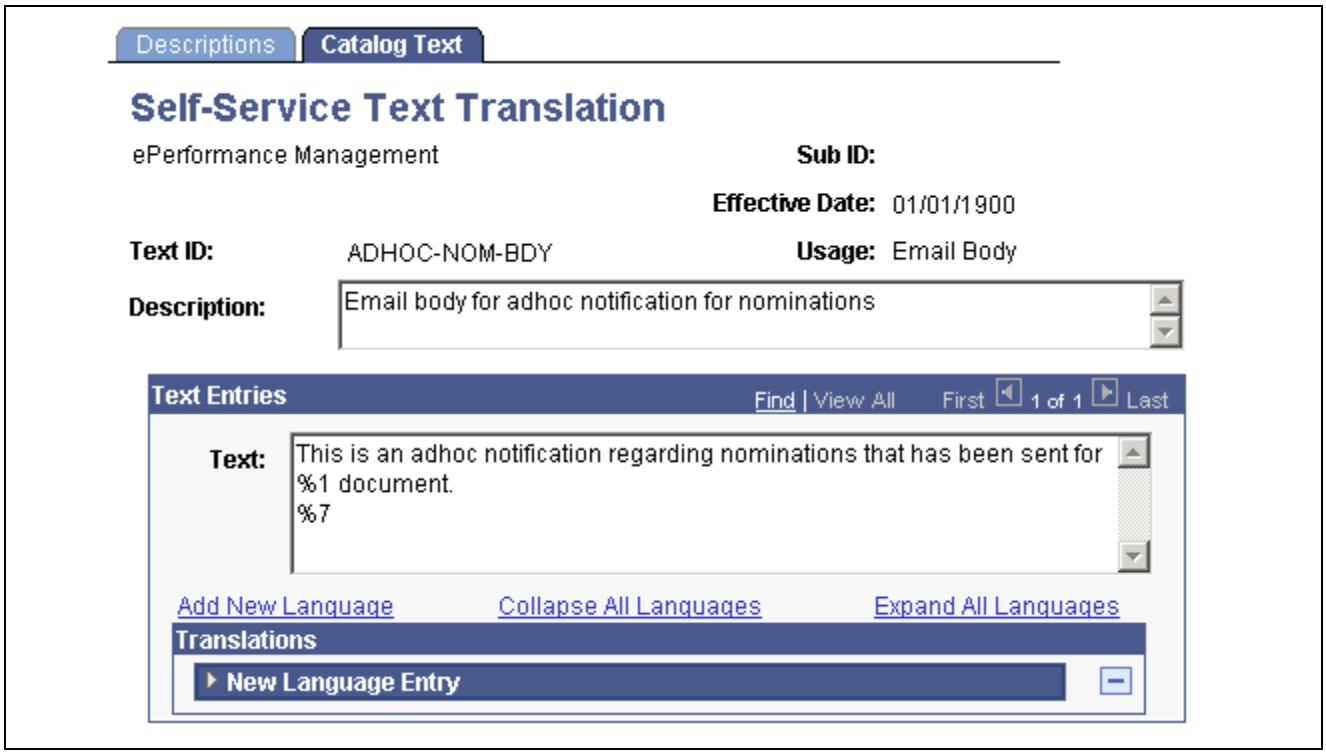
Access the Self-Service Text Translation: Descriptions page.



Self-Service Text Translation: Descriptions page

Use this page to view a text catalog entry and the languages into which it is translated. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages appears. You can add and remove languages on this page, but you cannot enter translation text.

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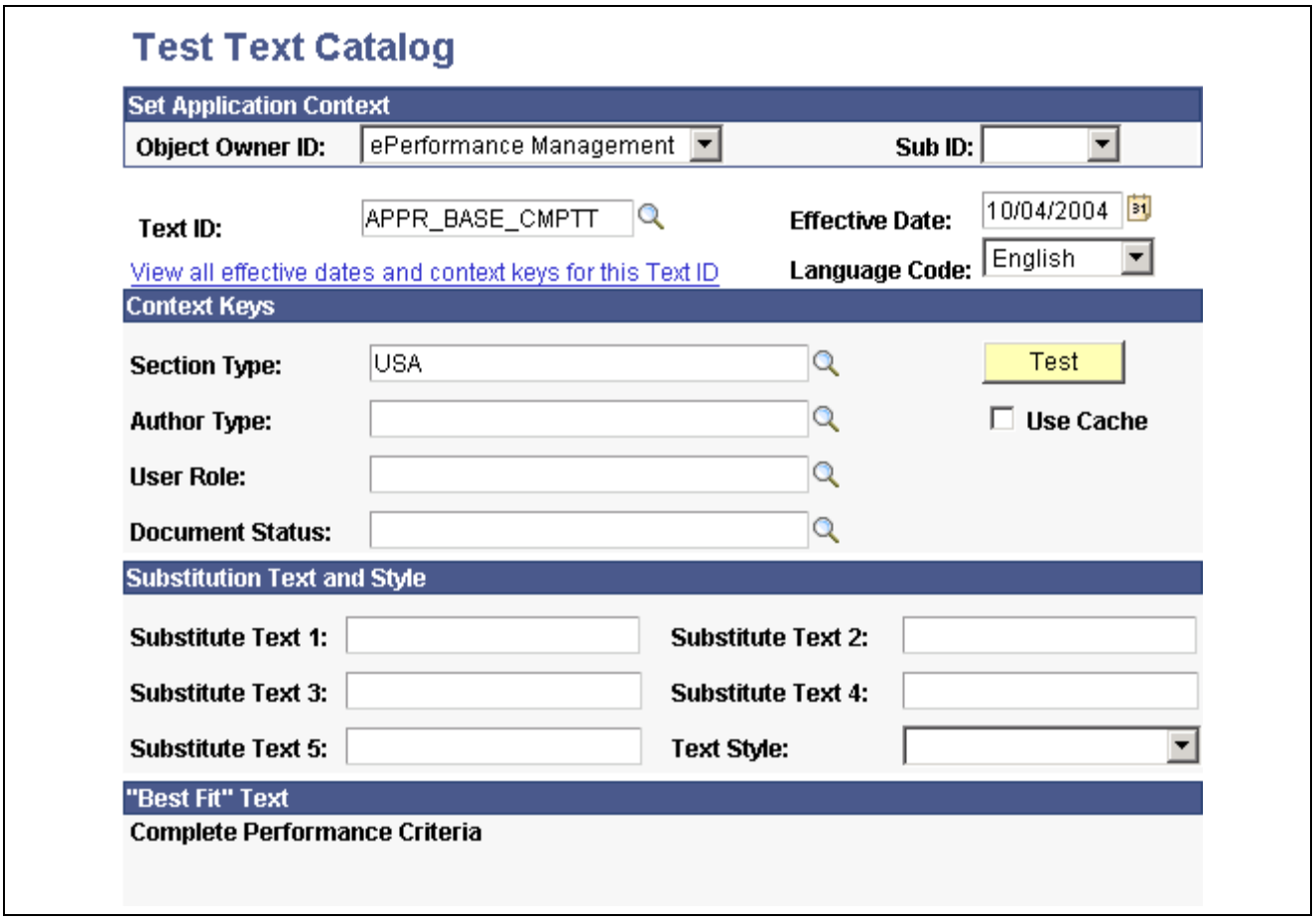
Self-Service Text Translation: Catalog Text page

Use this page to enter translations into the text catalog. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages and translation entries appears. You can add and remove languages on this page and view the text you are translating.

Testing Text Retrieval

Access the Test Text Catalog page.

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Test Text Catalog page

This page enables you to enter parameters for testing how the entries in the text catalog appear on self-service pages, given a set of parameters that you enter.

To test the text retrieval:

1. Enter the text ID for the text.
2. (Optional) Enter values for any key fields.
   - If you leave all key fields blank, the system returns the root text when you click the Test button.
   - If you enter values for key fields, the system searches for the text with the best fit.
3. (Optional) Enter values in one or more of the Substitution Variable fields.

   When you click the Test button, the system replaces the variable (%1, %2, %3, %4, and %5) in the text entry with the value that you enter here.
4. (Optional) Select a text style to see the returned text rendered in a particular HTML style.

   This features helps you visualize how the text appears on the self-service page. Values are *Add'l Inst* (additional instructions), *Bold, Error, Page Inst* (page instructions), and *Page Title.*
5. Click the Test button.

   The text entry that best matches the search criteria and context keys for the selected text ID appears.

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CHAPTER 37

(USF) Working With Mass Organization Changes

This chapter provides an overview of mass organization changes and discusses how to perform mass organizational changes.

Understanding Mass Organization Change

Governmental changes and mandates might require making the same organizational change to a large group of your PeopleSoft Human Resources records. For example, an agency restructuring may require that you transfer of a group of employees from the Office of the Director, Budget Division to the Office of the Director, Account Standards Division. Instead of performing this transfer manually, record by record, you can make the changes all at once using the Mass Organization Change functionality.

The Mass Organizational Change processes enable you to make changes based on department and position changes. Using the Mass Organization Changes features, you can:

- Transfer employees into existing departments or positions.
- Create new departments or positions, changing the organizational structure and transfer employees into the new departments or positions.
- Merge employees from multiple departments or positions into new or existing departments and positions.

You perform mass organization changes by defining the changes, setting up any necessary information, and then executing the change. Based upon the definitions you enter, the Mass Organization Change process updates the affected records. This process creates Federal personnel action changes into the system as you defined them. This occurs in the same manner as if you had entered them directly online.

Mass changes affect a large number of rows of data in the system, which makes this a powerful tool. Therefore, you must give careful consideration to selecting the person in your organization who is allowed to perform mass organizational changes.

Note. If you are performing several mass change operations, assign each one a unique mass organization change ID to help you retain and identify all of them. You can group them when you set up your run process. We also recommend breaking down large changes into smaller changes to help reduce error and the burden on the system.

Before You Begin

To perform mass organization changes, you must be familiar with PeopleSoft Tree Manager. This section assumes that you know how to use PeopleTools Tree Manager.

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See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Performing Mass Organizational Changes

This section discusses how to:

- Perform mass organizational changes.
- Define mass changes.
- Generate Mass Organization Changes

Performing Mass Organization Changes

To perform mass organization changes for positions:

1. (optional) Create a new department or position or make changes to an existing department or position.

Department Organizational Change	Position Organization Change
1. If you are creating a new department, add the new department to the Departments USF component (DEPARTMENT_TBL). **Note.** If you are using tree-based data permission security, don't forget to add the new department to the department security tree and refresh SJT_CLASS_ALL. See Chapter 11, "Setting Up Organization Foundation Tables," (USF) Setting Up Federal Departments, page 274. 2. If you use tree-based security and are modifying the department security hierarchy, make the changes in PeopleSoft Tree Manager. See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 77.	1. If you are creating a new position, add the new position to the Add/Update Position Info component (POSITION_DATA). See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions. 2. If you are modifying the position hierarchy, make the changes in PeopleSoft Tree Manager or the organizational structure in the Add/Update Position Info component. **Note.** You can access the Add/Update Position Info component from the HR: Position tree by adding a new node, (to add a new position) or double clicking on an existing node (to update an existing position). See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*, "Maximizing Position Data," Maintaining Your Organizational Structure.

3. (optional) Recreate the hierarchy.

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Department Organizational Change	Position Organization Change
If you made changes to the department hierarchy, re-create it by running the Refresh Department Table (FGHR006) process from the Build Department Organization page (RUNCTL_FGHR006).	If you've made changes to the reporting hierarchy, rebuild the position tree or position structure by running the SQR Build Position Structure (POS006A) process from the Build Position Structure page.

4. Define the mass organization change on the Mass Organization Change page (GVT_MOC_DATA).

   Enter the effective date of the change, the action and reason, the nature of action (NOA) and leagal authority code or codes and descriptions, and the old and new department or position.

5. Generate mass organization change data.

   Use the Apply MOC page (RUNCTL_GVT_MASSORG) to generate mass organization changes based on the Mass Organization Change data setup. This determines which employees in the departments or positions you identified are affected and inserts new rows of Federal personnel action data.

6. Generate the Mass Org Exception report (FGHR034 SQR) to identify who was in an affected department or position.

   If an employee wasn't processed, modify their records manually.

7. (position change only) Print the descriptions and/or notices.

   Print the necessary position descriptions using the SQR Process FGOF8. Run a few random reports from this process to test and verify the changes that were performed.

Pages Used to Perform Mass Organizational Changes

Page Name	Object Name	Navigation	Usage
Mass Organization Change	GVT_MOC_DATA	Workforce Administration, Collective Processes, Mass Organization Changes USF, Define Changes, Mass Organizational Change	Define mass changes.

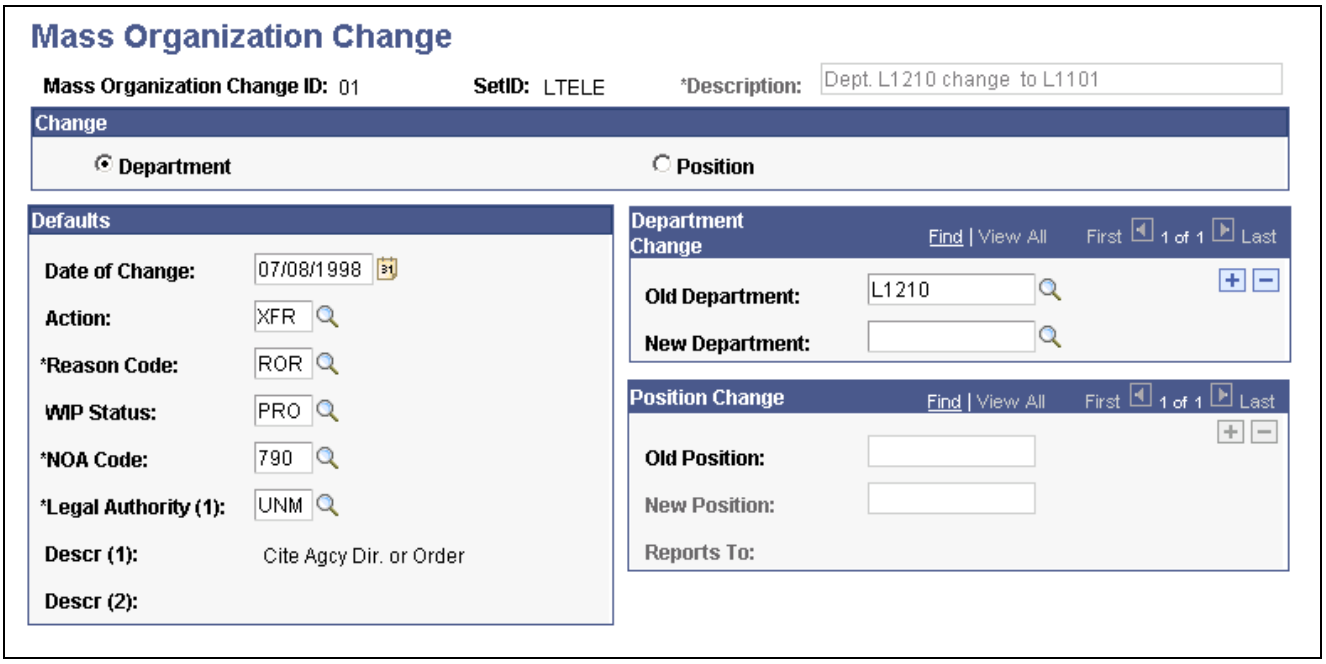
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Page Name	Object Name	Navigation	Usage
Parameters	RUNCTL_ASOFDATE	Workforce Administration, Collective Processes, Mass Organization Changes USF, Build Position Structure, Parameters	Run the Build Position Structure SQR (POS006A) to link the positions in the system and create the reporting hierarchy represented in the Indented Position Report. See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*, "Maximizing Position Data," Running the Organizational Structure Reports. See Appendix D, "PeopleSoft Application Fundamentals for HRMS Reports," POS006A - Build Position Structure − Manage Positions, page 1047.
Refresh Department Table	RUNCTL_FGHR006	Workforce Administration, Collective Processes, Mass Organization Changes USF, Build Department Organization, Refresh Department Table	Re-create the departmental hierarchy information for the Departments component, if you made changes to the security tree.
Apply MOC (apply mass organization changes)	RUNCTL_GVT_MASSORG	Workforce Administration, Collective Processes, Mass Organization Changes USF, Apply Changes, Apply MOC	Run the Application Engine process GVT_MASSORG to generate mass organization changes to your system data, based on the information that you entered on the Mass Organization Change page.
Mass Org Exception Report (mass organization exception report)	RUNCTL_FGHR034	Workforce Administration, Collective Processes, Mass Organization Changes USF, Mass Org Exception Report, Mass Org Exception Report	Run this report to identify those employees that were in a position or department identified in the processed Mass Organization Change ID but who the system did not process. Modify the records of these employees manually.
OF8 Report	RUNCTL_FGOF8	Workforce Administration, Collective Processes, Mass Organization Changes USF, OF8 Report, OF8 Report	Run this report to track position history and to verify a mass position change.

Defining Mass Changes

Access the Mass Organization Change page.

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Mass Organization Change page

Change

Indicate if the change is a department or position change. When you select Department, the system makes the fields in the Position Change group box unavailable. When you select Position, the system makes the fields in the Department Change group box unavailable.

Defaults

The system inserts the values you enter here into the new job data rows it creates for the employees affected by this mass organization change.

Date of Change Enter the date the change takes effect. The system uses this date as the effective date on the new Job Data row.

Action and **Reason Code** Select the action and reason for the change.

Note. Remember that some actions will set payroll or HR status and/or update employee dates. Review the processing or defaulting that action triggers in the system on the Actions component (ACTION_TBL).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions.

NOA Code (nature of action code) , **WIP Status (work-in-progress status)** , and **Legal Authority (1).** Select the NOA code, WIP status, and legal authority (the WIP Status and Legal Authority (1) fields are required).

See Chapter 14, "(USF) Setting Up Human Resources Management Tables," Setting Up Nature of Action Codes, page 332.

See Chapter 33, "(USF) Setting Up the Work-in-Progress Management System," Setting Up WIP Status, page 787.

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See Chapter 14, "(USF) Setting Up Human Resources Management Tables," Setting Up Legal Authority Codes, page 332.

Department Change

You can add more than one row to accommodate changes to a number of departments. If you are merging two departments into one, for example, enter two rows and select one old department in one row and the other old department in the other and select the new department they are merging into in the New Department field in each row.

Old Department Enter the name of the department that is being changed.

New Department Enter the new department name.

Position Change

You can add more than one row to accommodate changes to a number of positions.

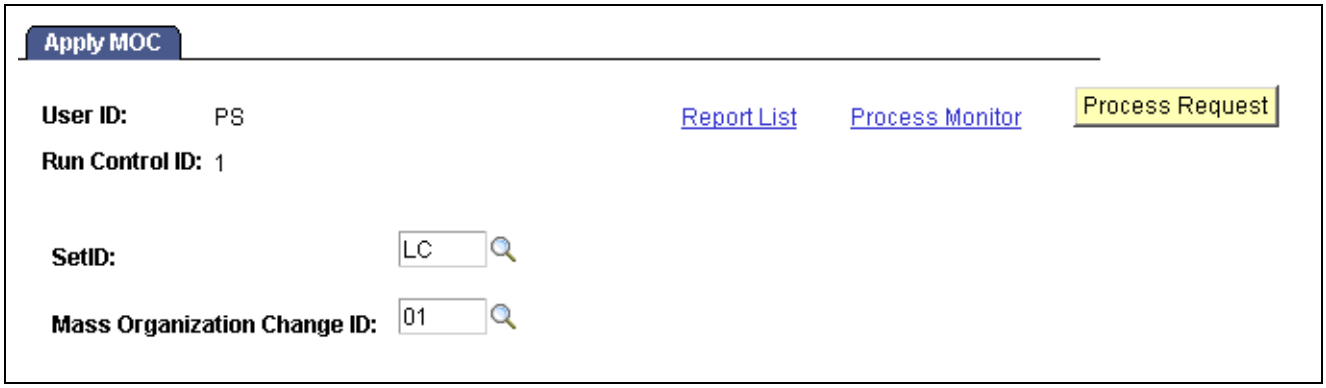
Old Position Enter the old position name.

New Position Enter the new position name.

Reports To Enter the position that the new position reports to.

Generating Mass Organization Changes

Access the Apply MOC page.



Apply MOC page

Mass Organization Change Id Select the ID of the mass organization change that you want to process. You set up mass organization change IDs on the Mass Organization Change page.

This process:

- Determines the affected employees in the departments or positions identified in the mass organization change ID.
- Inserts a new row of Federal personnel action data for each affected employee with the default information selected for the mass change ID.
- Generates a PDF file that records the action for each employee. You can access the file using through the Process Monitor link.

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Review the file to see if there are discrepancies for any rows of data for any of the employees that were updated by the process. You can correct the discrepancies by entering them directly into the Federal HR Processing USF component.

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CHAPTER 38

Working with PeopleSoft Directory Interface for PeopleSoft HRMS

This chapter provides an overview of PeopleSoft Directory Interface for HRMS customers. This chapter discusses how to:

- Load data for HRMS.
- Use PeopleSoft Directory Interface with HRMS.

Note. If you have also licensed PeopleSoft Enterprise Campus Solutions, please refer to the *PeopleSoft Enterprise Campus Solutions Application Fundamentals PeopleBook, "Working with PeopleSoft Directory Interface for PeopleSoft Campus Solutions"*

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HRMS database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

Loading Directory Data Using the DSMAPINPUT FullSync Load Process

This section provides an overview of the directory load processes and discusses how to:

- Clean the temporary tables.
- Run the full data publish.
- Review transactions using the services operations monitor.
- Run the entry membership process.

Understanding the Directory Load Process

Once you have set up PeopleSoft Directory Interface you can load the data into the directory using the Directory Load process or the DSMAPINPUT FullSync Load process.

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Use the DSMAPINPUT FullSync Load process to load only people and their job data. Use the Directory Load process when you are loading location and department entries in addition to person and job data.

Note. The Directory Load process sometimes experiences performance issues when loading a large volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Load process.

Note. Both the DSMAPINPUT FullSync Load and the Directory Load processes overwrite any existing data in the directory.

Pages Used to Load the Directory Using the DSMAPINPUT FullSync Load Process

Page Name	Object Name	Navigation	Usage
Directory Load	EO_RUNCTL_DS_LOAD	Enterprise Components, Directory Interface, Load Directory, Directory Load	• Clean the temporary files. • Run the Entry Membership process.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Use to load person and job data into the directory.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Services Operations Monitor, Monitoring, Asynchronous Services, Monitor Overview	Use to review the status of the DSMAPINPUT_FULLSYNC service operation.

Cleaning the Temporary Tables

Run the Clean Temp Tables (DSMAPINPUT) process from the Directory Load page.

1. Specify the appropriate map name and click Run.
2. Select the DS_CLEANTEMP process from the list and click OK.

Note. Do *not* run the Directory Load (EO_DS_AUDIT) process at this time.

Running the Full Data Publish

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC service operation is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The Full Data Publish utility uses the DSMAPINPUT_FULLSYNC service operation and loads multiple streams of emplID data into the directory.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*

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3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC*.
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

Review Transactions Using Service Operations Monitor

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC service operation within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page of the Asynchronous Services component.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Run the Entry Membership Process

After verifying on the Monitor Overview page that all message subscriptions are complete, run the Entry Membership (DSMAPINPUT) process to load members into directory groups based on the Entry Membership Rules.

1. Access the Directory Load page.
2. Specify the appropriate map and click Run.
3. Choose the DS_ENTRY process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Auditing Directory Data Using the DSMAPINPUT FullSync Process

This section provides an overview of the directory auditing processes and discusses how to:

- Clean and load the temporary tables.
- Run full data publish for DSMAPINPUT_FULLSYNC_A.
- Review transactions using the Service Operations Monitor.
- Load directory group members and merge LDIF files.

Understanding the Directory Audit Process

Once you have loaded data into the directory and started processing transactions, you can regularly run the Directory Audit process or DSMAPINPUT FullSync Audit process to compare the data in the database to that in the directory.

Use the DSMAPINPUT FullSync Audit process to audit only people and their job data. Use the Directory Load process when you are auditing data that includes location and department entries in addition to person and job data.

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Note. The Directory Audit process sometimes experiences performance issues when loading a auditing volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Audit process.

Pages Used to Audit the Directory Using the DSMAPINPUT FullSync Audit Process

Page Name	Object Name	Navigation	Usage
Directory Audit	EO_RUNCTL_DS_AUDIT	Enterprise Components, Directory Interface, Run Directory Audit, Directory Audit	• Use to clean and load the temporary files. • Load members into directory groups using entry membership rules and merge contents of multiple LDIF files into a single file.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Use a set of rules to publish the DSMAPINPUT_FULLSYNC_A service operation.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Services Operations Monitor, Monitoring, Asynchronous Services, Monitor Overview	Use to review the status of the DSMAPINPUT_FULLSYNC_A service operation.

Cleaning and Loading the Temporary Tables

Run the Clean Temp and Load from Dir (EODS_CLEANLD) process from the Directory Audit page.

1. Specify the appropriate map name and click Run.
2. Select the EODS_CLEANLD process from the list and click OK.

Note. Do *not* run the Directory Load (EO_DS_AUDIT) process.

Running Full Data Publish for DSMAPINPUT_FULLSYNC_A

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC_A is a FullSync service operation that is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The queue is partitioned on the emplID field to enable parallel processing. The Full Data Publish utility publishes the service operation. The subscription utility processes multiple streams of emplID data simultaneously. Each subscription produces a unique LDIF file containing LDAP commands for a range of people.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once.*

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3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC_A*.
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

Note. You can choose to use your own service operation instead of DSMAPINPUT_FULLSYNC_A but you must add FULLSYNC_A to the name of the service operation from the directory map. For example, if PERSMSG is a configured service operation specified on the map for person entries, name the service operation PERSMSG_FULLSYNC_A.

Review Transactions Using Service Operations Monitor

Monitor the service operation queue to determine the status of the DSMAPINPUT_FULLSYNC_A message within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Loading Directory Group Members and Merge LDIF Files

After verifying on the Monitor Overview page that all service operation subscriptions are complete, run the Entry Membership and LDIF Merge (EODS_LDIFMRG) process to load members into directory groups based on the Entry Membership Rules and to merge the contents of all the LDIF files that were generated during the full table publish. You can review the merged file later, modify the contents, and import them into the directory later.

To run the Entry Membership and LDIF Merge process:

1. Access the Directory Audit page.
2. Specify the appropriate map and click Run.
3. Choose the EODS_LDIFMRG process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Using PeopleSoft Directory Interface with HRMS

This section discusses how to:

- Access sample mappings and delivered service operations.
- Use sample mappings.
- Review delivered service operations.

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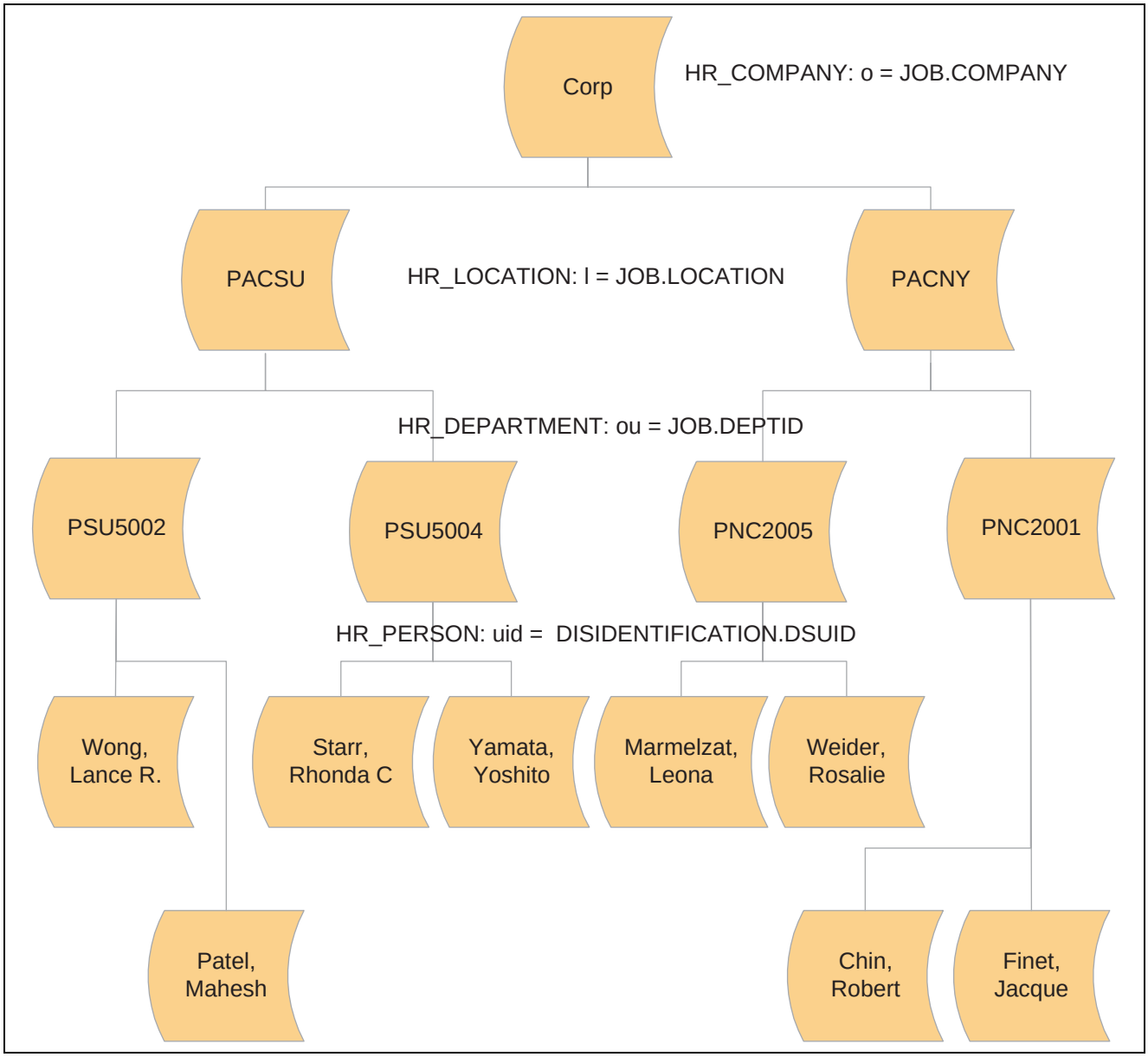
Accessing Sample Mappings and Delivered Service Operations

If you have licensed PeopleSoft Directory Interface for HRMS, PeopleSoft provides you with sample mappings and service operations for HRMS.

Using Sample Mappings

To use sample mappings that PeopleSoft delivers, establish directory IDs in the Directory Configurations component (PSDSSETUP) and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

We developed the sample mappings assuming that you are using the tree structure illustrated below:



Sample Directory Interface Tree

Note. PeopleSoft delivers HR_LOCATION, HR_DEPARTMENT, and HR_PERSON as sample mappings

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Reviewing Delivered Service Operations

The following sections describe the delivered sample service operations and PeopleCode functions that are related to your directory mappings.

Directory Interface Service Operations

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Service Operation Name	Directory Entry
DSLOCATION_SYNC	Location Entry (syncs entire record)
DSLOCATION_SYNC_EFF	Location Entry (syncs current row)
DSDEPT_SYNC	Department Entry (syncs entire record)
DSDEPT_SYNC_EFF	Department Entry (syncs current row)
DSWORKFORCE_SYNC	Job Entry (syncs entire record)
DSWORKFORCE_SYNC_EFF	Job Entry (syncs current row)
DSPERSON_BASIC_SYNC	Person Entry (syncs entire record)
DSPERSON_BASIC_SYNC_EFF	Person Entry (syncs current row)

Note. The Directory Interface engine, using the message level HCDI_SERVICES: HCDIUtilities.runPOIandIdentifictn, populates the DSIDENTIFICTN table with HRMS values that you can use for creating directory interface maps. For example, it generates a Universal Unique Identifier string and stores it in DSIDENTIFICTN.DSUUID and a default Unique Identifier, stored in DSIDENTIFICTN.DSUID. The default unique identifier defaults to the current person's email address, or, if blank, to the First Name + Last Name.

The UID field is limited to fifty characters. The system truncates the person's name if it exceeds fifty characters.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

DSMAPINPUT Message

The DSMAPINPUT service operation, which corresponds to Directory Input, is a sample service operation that combines a person's job and personal data into one service operation. The DSWORKFORCE_SYNC mservice operation publishes person's job information. The DSPERSON_BASIC_SYNC service operation publishes a person's personal information.

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In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the service operation is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT service operation with the employee's job and personal data. This enables you to map job and personal data for one service operation to one directory entry.

BuildMappingMessage Syntax

The BuildMappingMessage function populates a service operation with data that is stored in another service operation and with data from the local database. After populating the service operation from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the original published service operation, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map name])
```

The function performs the following tasks:

- Copies data in the same record from the input service operation into the output service operation.
- Searches for empty records in the output service operation.
- Examines data in the service operation for key values for empty records.
- If it finds key values for empty records, populates empty records in the output service operation by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name. Otherwise, calls the mapping function for each map referencing the output service operation.

The BuildMappingMessage is found in the application package and class that is associated with handler of the _EFF service operation. For example, you can find the BuildMappingMessage for the DSLOCATION_SYNC_EFF service operation in theDSMappingSub application class, which is part of DSLOCATION_SYNC_EFF application package. The BuildMappingMessage code is in the FUNCLIB_EO_DS derived record, DSMAPMESSAGE field, FieldFormula event.

Parameters

Name	*Type*	*Description*
input service operation	Message	Pass the message containing the originally published data.
output service operation	String	Specify the name of the message to be created, populated, and passed to the mapping function.

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Name	Type	Description
online flag	Boolean	Set to *true* if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

An example:

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

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CHAPTER 39

Working with Integration Points in Enterprise HRMS

This chapter discusses how to:

- Identify integrations for your implementation.
- Activate service operations and queues.
- Work with HRMS local integrations.
- Work with other HRMS integrations.

Identifying Integrations for Your Implementation

PeopleSoft uses PeopleSoft Integration Broker to integrate HRMS applications with:

- Other PeopleSoft Enterprise HRMS applications inside of the database (local integrations).
- PeopleSoft applications outside of Enterprise HRMS.
- Third-party applications.

Use the Interactive Services Repository (ISR) on Customer Connection to identify the integrations that you need for your implementation. Documentation provided with the ISR application on Customer Connection provides instructions for using search pages to query the repository using a variety of criteria:

- By integration point name.
- By product.
- Integrations between products.
- By business process.
- By integration technology.
- Using an advanced search page.

  The advanced search page enables you to combine the individual search criteria into a single search.

Click an integration point in the search results to see its details.

See Also

Customer Connection, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository

The ”Interactive Services Repository” PDF instructions on Customer Connection, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository.

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Activating Service Operations and Queues

Integration messages are connected to service operations, which are delivered inactive. You must activate the service operations that your organization uses.

In the PeopleTools, Integration Broker, Integration Setup, Service Operations component:

- Verify or select the Active status for the service operation on the General page.
- Verify or select the correct routing status on the General page.
- Activate the appropriate handlers and associated application classes on the Handlers page.
- Activate the correct routing on the Routings page.

In the PeopleTools, Integration Broker, Integration Setup, Queues component, set the status of the corresponding service operation queue to *Run.*

Note. You must also configure Integration Broker.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Components for PeopleSoft HRMS and Campus Solutions 9.0 PeopleBook

Working with HRMS Local Integrations

The system uses a local to local integration when the database that does the publish also has a handler and associated application class on the service operation that triggers other processing within that database.

Setup Requirements

When using local integrations, you must configure only the local node, but the application server must be running both the publish and subscribe servers. The local gateway and node must be properly configured. For local to local integrations, you must activate the asynchronous routing within the local node (local to local).

This table lists the local to local service operations in alphabetical order:

Service Operation	Service Operation	Service Operation
ACCOUNT_CHARTFIELD_ FULLSYNC	EP_REVW_RATING	PSXP_CLEANATTR
ACTUAL_TIME_ADD	EP_SUB_COMP	PSXP_RATTR
ACTUAL_TIME_BATCH_ADD	EP_SUB_DEV	PTAF_MASS_APPROVALS
AWARD_GRANT_ISSUE	EP_SUB_PROF	PUNCHED_TIME_ADD
BUDGET_POSITION_FULLSYNC	EP_SUB_WRT	QAS_CRASH_MSG
BUS_UNIT_FS_FULLSYNC	ESTIMATED_TIME_BATCH_ADD	ROLE_MAINT

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Service Operation	Service Operation	Service Operation
BUS_UNIT_FS_SYNC	FUND_LOAD	TIME_DEVICE_EMPL_ATT_ FULLSYNC
BUS_UNIT_GL_FULLSYNC	GP_POST_GL	TIME_DEVICE_EMPL_ATT_SYNC
BUS_UNIT_GL_SYNC	GRANT_AWARD_UPDATE	TIME_DEVICE_PER_HRS_ FULLSYNC
COUNTRY_FULLSYNC	HCR_EM_EVENT	TIME_DEVICE_PROFILES_ FULLSYNC
COUNTRY_SYNC	HCR_EM_EVENT_QUEUE_1	TIME_DEVICE_RESTRICT_ FULLSYNC
DEPBEN_SYNC	HCR_EM_EVENT_QUEUE_2	TIME_DEVICE_RPTG_CODE_ FULLSYNC
DEPT_FULLSYNC	HCR_EM_EVENT_QUEUE_3	TIME_DEVICE_RPT_ELMNT_ FULLSYNC
DEPT_FULLSYNC_EFF	HIRE_REQUEST	TIME_DEVICE_SCHEDULE_ FULLSYNC
DEPT_SYNC	HR_ACCT_CD_LOAD	TIME_DEVICE_SUPERVSOR_ FULLSYNC
DEPT_SYNC_EFF	HR_CHARTFLD_COMBO_SYNC	TIME_DEVICE_TASK_VALS_ FULLSYNC
DETAIL_CALENDAR_FULLSYNC	JOURNAL_GEN_APPL_ID_ FULLSYNC	TIME_DEVICE_TEMPLATES_ FULLSYNC
ELAPSED_TIME_ADD	LOCATION_SYNC	TIME_REPORTING_CODE_ FULLSYNC
EP_CHK_SUG	PAYMENT_ERECRUIT_ ACKNOWLEDGE	TREE_CHANGE
EP_CHK_WRD	PAYMENT_ERECRUIT_ISSUED	UOM_FULLSYNC
EP_COMPETENCY	PAYMENT_ERECRUIT_REQUEST	UOM_SYNC
EP_COMP_DEV	PERSON_ERN_DELETE	USER_PROFILE
EP_COMP_PROF	POST_HIRE_REQUEST	VAR_COMP_PAYMENT_ ACKNOWLEDGE
EP_DEV_TIP	PRODUCT_CHARTFIELD_ FULLSYNC	WORKFORCE_FULLSYNC
EP_JPM_CAT_ITEMS	PRODUCT_CHARTFIELD_SYNC	WORKFORCE_SYNC
EP_JPM_CAT_ITEM_RD	PROJECT_ACTIVITY_FULLSYNC	WP_PSHARING_MSG

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Service Operation	Service Operation	Service Operation
EP_JPM_CAT_I_RLAT	PROJECT_FULLSYNC	
EP_RATING_MDL	PSXP_ARCHATTR	

See *Enterprise PeopleTools PeopleBook: Integration Broker*

Working with Other HRMS Integrations

Integrations that support particular business processes are documented throughout PeopleSoft HRMS PeopleBooks.

This table provides references to integration information in HRMS PeopleBooks:

PeopleBook	Reference
PeopleSoft Enterprise Global Payroll 9.0 PeopleBook	See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Integrating with PeopleSoft Enterprise General Ledger".
PeopleSoft Enterprise Global Payroll 9.0 PeopleBook	See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Integrating with Variable Compensation Functionality".
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance	See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance*, "Setting Up Manage Professional Compliance".
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Variable Compensation	See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Variable Compensation*, "Managing Awards Approval and Payout".
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook	See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Integrating with PeopleSoft Enterprise Time and Labor".
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook	See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Integrating with PeopleSoft HRMS and Enterprise Expenses".
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook	See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Integrating with Enterprise General Ledger".
PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook	See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Integrating with PeopleSoft Payables".
PeopleSoft Enterprise Stock Administration 9.0 PeopleBook	See *PeopleSoft Enterprise Stock Administration 9.0 PeopleBook*, "Administering Variable Compensation Grants," Variable Compensation Integration.
PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook	See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Managing Employee Referral Programs".
PeopleSoft Enterprise Time and Labor 9.0 PeopleBook	See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*, "Using Time Collection Devices," Receiving Time from a TCD.

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PeopleBook	Reference
PeopleSoft Enterprise Time and Labor 9.0 PeopleBook	See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*, "Integrating with PeopleSoft Financials and Enterprise Performance Management".
PeopleSoft Enterprise Time and Labor 9.0 PeopleBook	See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*, "TCD Interface".
PeopleSoft Enterprise Time and Labor 9.0 PeopleBook	See *PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*, "TCD Interface".

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository in the Implementation Guide section of Customer Connection.

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APPENDIX A

Group Build Implementation for Developers

This appendix discusses how to:

- Build applications or batch programs that include group build functions.
- Work with group versions.

Building Applications or Batch Programs that Include Group Build Functions

This section discusses how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This section discusses what a developer must do to use Group Build in the application that he or she is building. (We refer to this application as the client application.)

Note. Please read this entire section before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

   Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build application. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table*.

   If you want a table for your application where you can add, delete, or modify rows, you must perform this optional step. Your table will be taken into account for the construction and purge processes of the Group Build application.

   There are two ways to set up your own table:

   a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

      This record becomes your client application result table.

   b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can

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contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab». For example, if your result table is defined as DEPTID, define your modified query as follows:

– All fields from GB_QRY_LINK_VW.

– All of your additional fields.

2. (Optional) Add two fields on the client application record to store the group ID and group as of date. If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

   In PeopleSoft Application Designer, add two fields to the client application record (MyClientModuleRecord):

   - The field GB_GROUP_ID for storing the Group ID.

     This field should prompt on GB_GROUP_TBL.

   - The field MyAsOfDate for storing the as of date of the group.

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.
   a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.
   b. Create a new field: MyClientModule_GEN_BTN.
   c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.
4. In PeopleSoft Application Designer, Include the work page GB_API_WRK in the client application component.
   a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.
   b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.
5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.
   a. Insert the view GB_QRY_LINK_VW (required).
   b. Insert the record(s) that are needed for joins and criteria.
   c. Write your query according to the Group Build limitations.

      See Group Build Query Limitations for Developers

   d. Add all necessary prompts on the criteria tab.

      Prompt values are bound using the GB_BIND API call.

   e. Verify that your query is PUBLIC.
   f. Save your query as MyDeveloperQueryName.
6. Add modified fields on the client application page.
   a. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.
   b. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.
   c. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.
7. Add PeopleCode to implement calls to Group Build API.

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Warning! All calls to Group Build API must be done from level 0 of your client application page.

a. Make calls to Group Build API in the FieldChange PeopleCode event.

b. Set the PeopleCode Event Properties to Application Server.

c. Select Application Server on the PeopleCode Event Properties page.

See PeopleCode API Functions.

8. Implement PeopleSoft Security to see if a group can be used in the component.

a. GB_GROUP_ID field must be on the page, and the recordfield properties must be set to prompt table edit on Record GB_GROUP_SEC_VW.

b. Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on level 0 of the page. The fields must be display-only and hidden.

PeopleCode API Functions

This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode. Specifies which API group, query name for refinement, and results table to use.

- Specifies which group, query name, results table to use.

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name, result_table_⇒
name)
```

  - The parameter group_id is required.
  - The parameter AsOfDate is required.
  - The parameter query_name specifies a developer query name for refinement. It is optional. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).
  - The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

  - Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.
  - The parameter prompt_code must be defined as a prompt in the developer query.
  - The parameter value is required.

- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```

  - Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.
  - The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

```
&group_version_number = GB_EXEC(refresh_flag)
```

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- This API generates and executes the SQL statement.
- It returns the version number of the generated group.
- If the parameter refresh_flag is set to *Y,* the SQL statement is generated each time you call the function. If the refresh_flag is set to *N,* the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.

• Deleting the content of the result table.

```
GB_DELETE()
```

• Disabling/enabling the generic workflow and the specific workflow.

```
GB_SET_JOB_WF(job_name)
```

- Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.
- The parameter job_name is optional.
- If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow section.
- Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).
- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
/* Use this instruction if you plan to use GB_GRP_RES_TBL */
GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.MyAsOfDate, «⇒
 », « ») ;
/* Bind all parameters for the default Query : The Effdt of JOB */
GB_BIND_DATE(Any Date ) ;
/* Execute the SQL and fill the group result table */
&MyVersion = GB_EXEC ( « Y » ) ;   /* <Y> Forces to rebuild the group even if one⇒
 is available */
* The list of employees for the group is now available for your own usage */
/* The code presented above populates the Group Result table GB_GRP_RES_TBL */
/* You can now use this record to populate your scrolls or can be used as a join⇒
 for a SQL Statement */
/* ADD YOUR CODE HERE  */
/* Clear the group result table only in the case you know the group will not be⇒
 used anymore*/
[GB_DELETE() ;]
```

Scenario 2

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If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
/* Give your result table name to GB_DECLARE  (STEP 1 must have been previously⇒
 performed) and your Query Name if  you created one */
GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord. MyAsOfDate,⇒
 « MyDeveloperQueryName », «MyClientModuleResultTable ») ;
/* Bind all parameters for MyDeveloperQueryName */
/* Each prompt in MyDeveloperQueryName must be binded */
GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;
[…]
GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;
/* Or use local variable for binding */
GB_BIND(« :n », &MyLocalVarn) ;
/* Execute the SQL and fill the group result table */
&MyVersion = GB_EXEC ( « N » ) ;   /* <N> Don't rebuild the group if it is⇒
 available */
/* Employee group is now available for your module */
/* This populates the group result table MyClientModuleResultTable  */
/* You can now use this record to populate your scrolls or work on this table… */
/* ADD YOUR CODE HERE  */
/* Clear the group result table only in the case you know the group will not be⇒
 used anymore*/
[GB_DELETE() ;]
```

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This section discusses what a developer has to do to use Group Build in the application that he or she is building, using PeopleSoft Application Engine. (We refer to this application as the client application.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

   In this record, add:

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- The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.
- The field VERSIONGBQDM.

3. In PeopleSoft Application Engine, create a new program .

   This program must contain:

   - A retrieval of parameters.

```
Step01.SQL:
%Select(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, AE_GBP002_AET.GB_⇒
REFINE_DATE)  SELECT GB_GROUP_ID  , GB_EFFDT  , GB_REFINE_DATE  FROM PS_RUN_⇒
CNTL_HR  WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

   - A call to Group Build PeopleCode API.

```
Step02.PeopleCode:
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
GB_SET_PANELGROUP("APPENGINE");   /* This is due to a tools issue and will⇒
 disappear as soon as the TPRD is closed */
GB_RESET();
&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, "", "");
&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);
AE_GB_API_AET.REFRESH_SW.Value = "N";   /* You can see that the REFRESH_FLAG is⇒
 set to “N”  Equivalent to GB_EXEC(“N”). As we can’t call a section with direct⇒
 parameters, we must use the cache record of the AE API to perform this⇒
 operation */
```

   - A call to Group Build AE API GB_EXEC.

```
Step02.Call Section:
Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC Directly.⇒
 You will always use the GB_API AppEngine Lib.
```

   - Version number of the group.

```
Step01.SQL:
UPDATE PS_RUN_CNTL_HR  SET VERSIONGBQDM = %Bind(AE_GB_API_AET.VERSIONGBQDM) ⇒
 WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

   Note. Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

   When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

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Differences Between PeopleCode and Application Engine APIs

Question	Answer
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. • In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

Developing Client-Specific Workflow

This section provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build application. Workflow must be fully implemented by the client application developer. This section discusses the main differences between the Group Build workflow and the standard way of implementing workflow.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client application to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the user directly to the calling-client application page.
- The business event is triggered from the client application page.

The worklist record table has to contain key fields for accessing the client application page, so map those fields to the appropriate client application page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client application page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client application key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client application developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.

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2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client application page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and user ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.
11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

1. Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client application page will be recorded.
    a. Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.
    b. Add a workflow flag, WF_FLAG.
2. Design MySpecificWorkflowDerived/Work.
    a. Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).
    b. Make the fields invisible.
3. Define a worklist record, MyWorklistRecord, for routing to the calling client application page.

    BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

    Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.
4. Define the Database Agent (DBAG) query.

    The DBAG query is responsible for calling the client application key field values: group ID, group version number, and user ID.
    a. In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:
    b. Go to PeopleSoft Query.
    c. Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and user ID.
    d. Include in your criteria prompts on group ID and version number.
    e. Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".

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5. Design the MySpecificBusinessProcess.
    a. In PeopleSoft Application Designer, define a business process.

       MySpecificBusinessProcess has two activities:

       MySpecificWorkflowModule

       MySpecificWorkflowModuleResult

       Each activity has only one step branching to the client application page:

    b. In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.

    c. Define each item and its required attributes.

       The business event is triggered from the MySpecificWorkflowDerived/Work record.

    d. Add workflow PeopleCode, using the button Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.

    e. On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).

    f. On the Field Map page, specify the mapping between the worklist record fields and your client application page keys.

    g. For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.

    h. For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your application fields.

    i. Define the Database Agent items:

       Define the target component on the Message Attributes page and provide the path to your client application component.

       In the Query Name field, enter the database agent query defined in Step 5.

       Define the mapping between the query selection fields (second column) and your client application page fields (last column).

6. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess
    a. Add a new process of type Database Agent on the Process Definitions page.

    b. On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:

       E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName

       kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -kbind2=:DERIVED_HR_GB.VERSIONGBQDM

       /A stands for Activity Name

       /MD stands for Message Definition

       -kbind1 and −kbind2 are bind variables from the API work page.

7. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

   Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

8. Add calls to Group Build API on your client application.

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On the FieldChange PeopleCode event of your Group Build calling button, use Group Build API as described at Step 7 in the first section of this documentation. Don't forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.

9. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

Working with Group Versions

This section provides an overview of version numbers and discusses how to work with versions (for developers).

Understanding Version Numbers

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working with Versions (for Developers)

Before reading this section, see "Building Applications or Batch Programs That Include Group Build Functions".

You can implement Group Build in an application by:

- Using the default developer query.

  The default developer query works with the default Group Result Table.

- Creating your own query.

  If you use your own query, you can define more parameters and/or more fields in a personal Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.
- The Group Results Table.

Note. You can bypass the versioning mechanism by calling GB_EXEC("Y"). Then the group is generated each time it is called.

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Note. When using Developer Query or User Query, keep in mind that GB_QRY_LINK_VIEW is based on the JOB record. When Group Build generates the SQL, the system replaces all references to GB_QRY_LINK_VIEW with JOB. If, after this is done, the left REC.FIELD is the same as the right REC.FIELD, Group Build will not process the line in the SQL generation.

For example, if you have the criteria GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT in Query, Group Build will replace it with JOB.EFFDT <= JOB.EFFDT. The system will then remove the line because the left REC.FIELD is the same as the right REC.FIELD. As a result, the Query count may differ from the one returned by Group Build.

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APPENDIX B

PeopleSoft HRMS Application Diagnostic Plug-ins

This chapter provides an overview of application diagnostics and lists the diagnostic plug-ins delivered with HRMS.

Understanding Application Diagnostics

Enterprise PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Centre.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the global support center analyst working with you.
- Support for rowset retrieval.

HRMS has delivered a number of diagnostic plug-ins, which are application-specific queries, with this version. We will post any plug-ins we develop post-GA on Customer Connection.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Running Diagnostics with Diagnostic Framework"

Delivered Application Diagnostic HRMS Plug-Ins

These tables list the diagnostic plug-ins delivered by application.

Human Resources Manage Base Benefits

Manage Base Benefits delivers the one plug-in.

BA_EVENT_DIAGNOSTICS

The BA_EVENT_DIAGNOSTICS plug-in (Benefits Event Definition and Rules Setup Information):

- Uses the following additional parameters:
  - Event Rule ID

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- Effective Date

- Provides a diagnosis of the Benefit Event Setup and Coverage Code Rules associated with it.

  Data is extracted from the three primary tables: BAS_EVENT_RULE, BAS_EVENT_CLASS, and BAS_CVG_CD_RULE. Use this diagnostic to view the underlying data as it is defined in the database for the processing to be used by the Benefits Administration processing.

Human Resources Manage Base Compensation and Budgeting

Manage Base Compensation and Budgeting delivers the one plug-in.

SP_DIAGNOSTICS_SALARY_STEP

The SP_DIAGNOSTICS_SALARY_STEP plug-in (Salary Step Details):

- Uses the following additional parameters:
  - SetID
  - Sal Admin Plan
  - Grade
  - Effective Date
- Provides a diagnosis of salary step details for a given plan.

ePerformance

ePerformance delivers two plug-ins:

- Document Templates

Note. This diagnostic script can also be used with Manage Employee Reviews.

- Debug/Trace Results

Document Templates

The Document Templates plug-in:

- Uses the following parameters:
  - Template ID
  - Effective Date
- Provides a diagnosis of the structure of the document template that created a particular document. This provides critical information to the support analyst for resolving an issue with a document. These tables, all keyed by template ID and effective date, are dumped:
  - Template Header (EP_TMPL_DEFN)
  - Process Participant Roles (EP_TMPL_PARTIC)
  - Document Sections (EP_TMPL_SECTION)
  - Role-Level Rules (EP_TMPL_ROLE)
  - Common Content: Items (EP_TMPL_ITEM)
  - Common Content: SubItems (EP_TMPL_SUBITEM)

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Debug/Trace Results

The Debug/Trace Results plug-in:

- Uses the following parameters:
  - Document ID
  - User Role
- Provides a diagnosis of the Debug/Trace results table view (EP_DBG_DIAG_VW) that is created by the built-in Debug/Trace facility. This information is keyed by document ID and user role.

  Additionally, a Send to PeopleSoft link on the Calculation Debug/Trace inquiry page enables the user to navigate to the Application Diagnostics launch page and send this data to PeopleSoft.

Global Payroll

Global Payroll provides the following plug-ins:

- GP_DIAG_000
- GP_DIAG_005
- GP_DIAG_010
- GP_DIAG_020
- GP_DIAG_030
- GP_DIAG_040
- GP_DIAG_100
- GP_DIAG_200

GP_DIAG_000

The GP_DIAG_000 plug-in (Return General Information):

- Uses the following parameters:
  - Operating System
  - 3–char ISO Country Code
- Provides a diagnosis of the following tables and information:
  - PSRELEASE: Release information.
  - PSOPTION: License information.
  - PS_INSTALLATION: HRMS installation information.
  - PS_GP_PIN: Last element number.
  - PS_GP_INSTALLATION: Global Payroll installation information.
  - PS_MAINTENANCE_LOG: Bundles and fixes applied to the database.
  - PS_GP_COUNTRY: Country information.

Note. If COUNTRY parameter is empty, the system returns country information for the calendar group. If COUNTRY parameter is equal to *ALL,* the system returns all countries.

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GP_DIAG_005

The GP_DIAG_005 plug-in (Return Log File):

- Uses the full file path and file name to the location of file as a parameters.
- Provides a diagnosis of the file specified in the “Full Path + the log file name” field.

GP_DIAG_010

The GP_DIAG_010 plug-in (Return SQL Stored Statement):

- Uses the COBOL Program Name as a parameter.
- Provides a diagnosis of PSSQLSTMT_TBL, which returns all SQL statements used for the COBOL name specified in the COBOL Program Name field.

GP_DIAG_020

The GP_DIAG_020 plug-in (Return AE Program Definition):

- Uses the Application Engine Name as a parameter.
- Provides a diagnosis of the following Application Engine information:
  - PSAEAPPLDEFN
  - PSAEAPPLSTATE
  - PSAESECTDTLDEFN
  - PSAESTEPDEFN
  - PSAESTEPMSGDEFN
  - PSAESTMTDEFN
  - PSSQLTEXTDEFN

GP_DIAG_030

The GP_DIAG_030 plug-in (Return Element Definition):

- Uses Element Name 1 - 5 as a parameter.
- Provides a diagnosis of the following tables, based on the element type returned, for each of up to five element definitions:
  - Element name information: PS_GP_PIN
  - Take Element: GP_ABS_TAKE, GP_ABS_TAKE_CFG, GP_ABS_TAKE_DAY, GP_ABS_TAKE_ELM, GP_ABS_TK_FCST
  - Accumulator Element: GP_ACCUMULATOR, GP_ACM_MBR
  - Array Element: GP_ARRAY, GP_ARRAY_FLD, GP_ARRAY_KEY, GP_ARRAY_PRC
  - Bracket Element: GP_BRACKET
  - Count Element: GP_COUNT
  - Date Element: GP_DATE
  - Duration Element: GP_DURATION, GP_DUR_GNRN
  - Earning - Deduction Element: GP_ERN_DED, GP_ELM_DFN_SOVR, GP_PIN_CMPNT, GP_RCP_DED

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- Element Group Name: GP_ELEM_GRP, GP_ELEM_GRP_MBR
- Fictitious Calculation Element: GP_FC_IN, GP_FC_OUT, GP_FC_OUT_DTL, GP_FC_SEG, GP_FC_TBL
- Formula Element: GP_FORMULA, GP_FORMULA_CLUE, GP_FORMULA_DTL, GP_FORMULA_VAR
- Generation Control Element: GP_GCTL, GP_GCTL_DTL
- Historical Rule Element: GP_HIST_ELEM, GP_HIST_RULE
- Process Element: GP_PROCESS, GP_PROCESS_DTL
- Proration Element: GP_PRORATION
- Rate Code Element: GP_RATE_CODE
- Section Element: GP_SECTION, GP_SECTION_DTL
- System Element: GP_SYSTEM_PIN
- Variable Element: GP_VARIABLE
- Write Array Element: GP_WA_ARRAY, GP_WA_FLD

GP_DIAG_040

The GP_DIAG_040 plug-in (Return Array/WA Audit):

- Uses the 3 char ISO Country Code as a parameter.
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_ARRAY_D: All arrays of a country not synchronized with the record definition.
  - PS_GP_DIAG_WA_D: All write arrays of a country not synchronized with the record definition.

GP_DIAG_100

The GP_DIAG_100 plug-in (Return Organizations Setup Data):

- Uses the Calendar Group ID parameter.
- Provides a diagnosis of the following tables and information:
  - PS_GP_PYENT: Pay entity information.
  - PS_GP_PYENT_DTL: Pay entity detail information.
  - PS_GP_CAL_RUN: Calendar group information.
  - PS_GP_CAL_RUN_DTL: Calendar group detail information.
  - PS_GP_CALENDAR: Calendar information.
  - PS_GP_RUN_TYPE: Run type information.

GP_DIAG_200

The GP_DIAG_200 plug-in (Return Employee Information):

- Uses the following parameters:
  - EmplID
  - Employee Record Number

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  - Calendar Group ID
  - Calendar ID
- Provides a diagnosis of the following tables and information:
  - PS_GP_DIAG_JOB_D: Payroll information (but no compensation data).
  - PS_GP_DIAG_EMPL_D: Dates.
  - PS_GP_DIAG_CTR1_D: Contract information.
  - PS_WKFCNT_TYPE: Related contract information.
  - PS_GP_DIAG_CTR2_D: Related contract information.
  - PS_GP_PAYEE_DATA: Payee information.
  - PS_GP_DIAG_PI_D: Positive input (but no amount data).
  - PS_GP_NET_DIST_DTL: Banking and payment information.
  - PS_GP_RTO_TRGR: Trigger information.
  - PS_GP_SEG_TRGR: Related trigger information.
  - PS_GP_DIAG_P_SEG_D: Payroll result headers (but no gross and net data).
  - PS_GP_DIAG_MSG_D: Payroll error messages.

Time and Labor

Time and Labor provides the following plug-ins:

- TL_DIAGNOSTICS_TA_EMPL_PAY
- TL_DIAGNOSTICS_TA_EMPL_GRP
- TL_DIAGNOSTICS_TA_TACODE
- TL_DIAGNOSTICS_TA_RPTD_TIME
- TL_DIAGNOSTICS_PT_INV_PAYTIME
- TL_DIAGNOSTICS_PT_DUP_SEQ
- TL_DIAGNOSTICS_PT_INV_OFFSET
- TL_DIAGNOSTICS_SETUP_TIMEPRD
- TL_DIAGNOSTICS_SETUP_TIMEZONE
- TL_DIAGNOSTICS_SETUP_RULEPGM
- TL_DIAGNOSTICS_SETUP_ EXWRKGRP
- TL_DIAGNOSTICS_SETUP_TCD

TL_DIAGNOSTICS_TA_EMPL_PAY

Payable time for employees are displayed for the given date range. The exceptions created (if any) for that date range are also displayed.

The TL_DIAGNOSTICS_TA_EMPL_PAY plug-in:

- Uses the following parameters:
  - EmplID

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- Employee Record
- Start Date
- End Date

• Provides a diagnosis of:

- SQL for the View: TL_DU_TA_PT_VW

  SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TRC, A.TL_QUANTITY, A.PAYABLE_STATUS FROM PS_TL_PAYABLE_TIME A

- SQL for the View: TL_DU_TA_EX_VW

  SELECT A.EXCEPTION_ID, A.EMPLID, A.EMPL_RCD, A.DUR, A.EXCEPTION_SOURCE, A.MSG_DATA1 FROM PS_TL_EXCEPTION A

- Create SQL:

  SELECT %DateOut(EARLIEST_CHGDT), TA_STATUS FROM PS_TL_TR_STATUS WHERE EMPLID= :1 AND EMPL_RCD = :2

TL_DIAGNOSTICS_TA_EMPL_GRP

If the Run Control ID has a dynamic group included, the list of employees in the group is resolved. These employees are checked if they are Active between the Process Through Date and Process Through Date – 31 days.

The TL_DIAGNOSTICS_TA_EMPL_GRP plug-in:

• Uses the Run Control ID as a parameter.

• Provides a diagnosis of:

- SQL for the View: TL_DU_TA_GRP_VW

  SELECT A.EMPLID, A.EMPL_RCD, A.EFFDT, A.EMPL_STATUS FROM PS_JOB A

- SQLExec:

  SELECT %DATEOUT(A.THRUDATE) FROM PS_TL_TA_RUNCTL A WHERE A.RUN_CNTL_ID=:1 AND A.OPRID=:2

- CreateSQL:

  SELECT DISTINCT A.EMPLID, A.EMPL_RCD FROM PS_JOB A WHERE (EXISTS (SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID='Z' AND B.INCLUD_EXCLUDE_IND='+' AND A.EMPLID=B.EMPLID AND A.EMPL_RCD=B.EMPL_RCD) OR EXISTS(SELECT 'X' FROM PS_TL_GROUP_DTL B1 WHERE B1.GROUP_ID IN (SELECT B.GROUP_ID FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID <> 'Z') AND A.EMPLID=B1.EMPLID AND A.EMPL_RCD=B1.EMPL_RCD)) AND NOT EXISTS(SELECT 'X' FROM PS_TL_RUN_CTRL_GRP B2 WHERE B2.RUN_CNTL_ID=:1 AND B2.GROUP_ID='Z' AND B2.INCLUD_EXCLUDE_IND='-' AND A.EMPLID=B2.EMPLID AND A.EMPL_RCD=B2.EMPL_RCD) AND EMPL_STATUS='A' AND (A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J1 WHERE A.EMPLID=J1.EMPLID AND A.EMPL_RCD= J1.EMPL_RCD AND J1.EFFDT <=%DATEIN(:2)) OR A.EFFDT =(SELECT MAX(EFFDT) FROM PS_JOB J2 WHERE A.EMPLID=J2.EMPLID AND A.EMPL_RCD=J2.EMPL_RCD AND J2.EFFDT >%DATEIN(:2) AND J2.EFFDT <=%DATEIN(:3) AND J2.EMPL_STATUS='A'))

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TL_DIAGNOSTICS_TA_TACODE

The TL_DIAGNOSTICS_TA_TACODE plug-in (listing of SQL Object IDs and SQL statements used in the time administration process):

- Uses the SQL Object ID as parameter.
- Provides a diagnosis of the SQL for the View: TL_DU_TA_SQL_VW.

  SELECT A.SQLID, A.SQLTEXT FROM PSSQLTEXTDEFN A

TL_DIAGNOSTICS_TA_RPTD_TIME

This lists the reported time details of an employee in a give date range based on the reported status (input parameter). If the EmplID is not given as input this lists all the employees with the specific reported status in the given date range.

The TL_DIAGNOSTICS_TA_RPTD_TIME plug-in:

- Uses the following parameters:
  - EmplID
  - Reported Time Status
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_TA_RPT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_VW B WHERE B.FIELDNAME = ’REPORTED_STATUS’ AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQL for the View: TL_DU_TA_RPL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM, A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME FROM PS_TL_RPTD_TIME A, XLATTABLE_LNG B WHERE B.FIELDNAME = ’REPORTED_STATUS’ AND B. FIELDVALUE = A.REPORTED_STATUS
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME=’REPORTED_STATUS’ AND %Upper(A.XLATLONGNAME) = :1
  - SQLExec:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME= ’REPORTED_STATUS’ AND %Upper(A.XLATLONGNAME) = :1
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE A.FIELDNAME=’REPORTED_STATUS’
  - Create SQL:

    SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE A.FIELDNAME= ’REPORTED_STATUS’

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TL_DIAGNOSTICS_PT_INV_PAYTIME

The TL_DIAGNOSTICS_PT_INV_PAYTIME plug-in (lists payable time where payable status is rejected by payroll for a date range):

- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of:
  - SQL for the View: TL_DU_PT_PT_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY , B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A , XLATTABLE_VW B WHERE ((A.PAYABLE_STATUS =’RP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’CL’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’TP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’SP’ AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME=’PAYABLE_STATUS’ AND B. FIELDVALUE = A.PAYABLE_STATUS
  - SQL for the View: TL_DU_PT_PTL_VW

    SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY , B.XLATSHORTNAME FROM PS_TL_PAYABLE_TIME A , XLATTABLE_LNG B WHERE ((A.PAYABLE_STATUS =’RP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’CL’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’TP’ AND A.PAYROLL_REQ_NUM =0) OR (A.PAYABLE_STATUS =’SP’ AND A.PAYROLL_REQ_NUM <>0)) AND B.FIELDNAME = ’PAYABLE_STATUS’ AND B. FIELDVALUE = A.PAYABLE_STATUS

TL_DIAGNOSTICS_PT_DUP_SEQ

The TL_DIAGNOSTICS_PT_DUP_SEQ plug-in (lists duplicate sequence numbers for the offsets) provides a diagnosis of SQL for the View: TL_DU_PT_SEQ_VW:

SELECT A.SEQ_NBR, COUNT(*) FROM PS_TL_PAYABLE_TIME A GROUP BY A.SEQ_NBR HAVING COUNT(*) > 1

TL_DIAGNOSTICS_PT_INV_OFFSET

The TL_DIAGNOSTICS_PT_INV_OFFSET plug-in (lists the Payable time offsets rejected by Payroll) provides a diagnosis of SQL for the View: TL_DU_PT_OFF_VW:

SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.SEQ_NBR, A.TL_QUANTITY, A.PAYABLE_STATUS, A.RECORD_ONLY_ADJ, A.ORIG_SEQ_NBR FROM PS_TL_PAYABLE_TIME A WHERE EXISTS (SELECT ‘X’ FROM PS_TL_PAYABLE_TIME C WHERE A.EMPLID =C.EMPLID AND A.EMPL_RCD =C.EMPL_RCD AND A.DUR=C.DUR AND A.ORIG_SEQ_NBR=C.SEQ_NBR AND C.ORIG_SEQ_NBR <> 0 AND C.RECORD_ONLY_ADJ = ’N’ AND C.PAYABLE_STATUS NOT IN (’ES’,’NA’) AND C.TL_QUANTITY > 0 AND NOT EXISTS (SELECT ’X’ FROM PS_TL_PAYABLE_TIME A2 WHERE A2.EMPLID =C.EMPLID AND A2.EMPL_RCD =C.EMPL_RCD AND A2.DUR=C.DUR AND A2.ORIG_SEQ_NBR=C.SEQ_NBR AND A2.TL_QUANTITY < 0)) OR EXISTS (SELECT ‘X’ FROM PS_TL_PAYABLE_TIME C1 WHERE A.EMPLID =C1.EMPLID AND A.EMPL_RCD =C1.EMPL_RCD AND A.DUR=C1.DUR AND A.ORIG_SEQ_NBR=C1.SEQ_NBR AND C1.ORIG_SEQ_NBR =0 AND C1.RECORD_ONLY_ADJ = ’N’ AND C1.PAYABLE_STATUS NOT IN (’ES’,’NA’) AND EXISTS (SELECT ’X’ FROM PS_TL_PAYABLE_TIME A1 WHERE A1.EMPLID=C1.EMPLID AND A1.EMPL_RCD =C1.EMPL_RCD AND A1.DUR=C1.DUR AND A1.TL_QUANTITY < 0 AND A1.ORIG_SEQ_NBR=C1.SEQ_NBR))

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TL_DIAGNOSTICS_SETUP_TIMEPRD

The plug-in displays the Period IDs that are not built over the given date range, along with the workgroup from PS_TL_WRKGRP_TBL.

The TL_DIAGNOSTICS_SETUP_TIMEPRD plug-in:

- Uses the following parameters:
  - Start Date
  - End Date
- Provides a diagnosis of SQL for the View: TL_DU_ST_TP_VW:

  SELECT PERIOD_ID, WORKGROUP FROM PS_TL_WRKGRP_TBLCreateSQL:SELECT DISTINCT A.PERIOD_ID FROM PS_TL_TIME_PERIODS A WHERE A.PERIOD_ID NOT IN (SELECT DISTINCT B.PERIOD_ID FROM PS_TL_CALENDAR B WHERE ((%DateIn(:1)>B.START_DT AND %DateIn(:2)<B.END_DT) OR (%DateIn(:1)<B.END_DT AND %DateIn(:2) >B.START_DT)))

TL_DIAGNOSTICS_SETUP_TIMEZONE

The Plug-in obtains the time zone of the employee using the input EmplID and displays the time zone offsets within the given date range.

The TL_DIAGNOSTICS_SETUP_TIMEZONE plug-in:

- Uses the following parameters:
  - EmplID
  - Start Date
  - End Date
- Provides a diagnosis of SQLExec:

  SELECT B.TIMEZONE FROM PS_TL_EMPL_DATA B WHERE B.EMPLID= :1 AND B.EFFDT=(SELECT MAX(EFFDT) FROM PS_TL_EMPL_DATA A WHERE A.EMPLID=:1 AND A.EFFDT<=%DateIn(:2) AND A.TIME_RPTG_STATUS=‘A’)

TL_DIAGNOSTICS_SETUP_RULEPGM

The plug-in is used to display the list of workgroups that do not have Rule Programs associated to them.

The TL_DIAGNOSTICS_SETUP_RULEPGM plug-in provides a diagnosis of SQL for the View: TL_DU_ST_RUL_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.RULE_PGM_ID = ’ ’

TL_DIAGNOSTICS_SETUP_ EXWRKGRP

The plug-in displays the list of all exception time reporter type workgroups with missing Schedule ID. Workgroups of exception time reporter type are displayed if a Schedule ID is not attached to them.

The TL_DIAGNOSTICS_SETUP_ EXWRKGRP plug-in provides a diagnosis of SQL for the View: TL_DU_ST_SCH_VW.

SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.TIME_RPTG_TYPE = ’E’ AND A.SCHEDULE_ID=’ ’

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TL_DIAGNOSTICS_SETUP_TCD

The plug-in verifies the TCD setup data. For the given TCD ID input, the plug-in traces the TCD (message node name), message name, message status, transaction status and type of transaction. It also verifies checks for the Integration type. Displays whether the Inbound, outbound directories are specified for Flat file type of integration.

The TL_DIAGNOSTICS_SETUP_TCD plug-in:

- Uses the TCD ID as a parameter.
- Provides a diagnosis of:
  - SQL for the View: TL_DU_ST_TCD_VW

    SELECT A.RQSTMSGNAME, A.MSGNODENAME, B.MSGSTATUS, C.XLATSHORTNAME, A.EFF_STATUS FROM PSNODETRX A, PSMSGDEFN B, XLATTABLE_VW C WHERE A.RQSTMSGNAME=B.MSGNAME AND C.FIELDNAME=’TRXTYPE’ AND C.FIELDVALUE=A.TRXTYPE
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_VW A WHERE A.FIELDNAME = ’INTEGRATION_TYPE’ AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID=:1 AND B.EFFDT = (SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))
  - CreateSQL:

    SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_LNG A WHERE A.FIELDNAME = ’INTEGRATION_TYPE’ AND A.FIELDVALUE=(SELECT B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID =:1 AND B.EFFDT=(SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE B1.TCD_TYPE_ID=:1))CreateSQL:SELECT FILE_OUTPUT_DIR, FILE_ARCHIVE_DIR FROM PS_TL_INSTALLATION

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APPENDIX C

Delivered Workflows for PeopleSoft HRMS

This appendix provides general workflow information and discusses the delivered workflows for the following PeopleSoft Enterprise Human Resources applications:

- Administer Training
- Administer Workforce
- Manage Base Compensation and Budgeting
- Manage Employee Reviews
- Manage French Profit Sharing
- Manage French Public Sector
- Manage Professional Compliance
- Manage Variable Compensation
- Plan Careers

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

General Workflow Information

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

Note. While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

Note. You must set up workflow for PeopleSoft self service applications using pages on the Set Up HRMS, Common Definitions, Self Service menu.

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See Chapter 35, "Setting Up and Working with Self-Service Transactions," Using Workflow with Self-Service Transactions, page 816.

Creating Role Users Using a Message Agent

PeopleSoft HRMS includes a message agent that enters all of people with an active job record as role users automatically.

While you could manually assign each employee to a role on the User Profile component, this process is tedious if you're designating many employees as users. Some workflow processes could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

Functionality	Query
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Delivered Workflows for Administer Training

This section discusses PeopleSoft Human Resources Administer Training workflows. The workflows are listed alphabetically by workflow name.

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Approve Training Request Event

This section discusses the approve training request event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to HR Technical/Administrator notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	HR Technical/Admin
Email Template	Approve Training WL
Business Process	Approve Training Request
Business Activity	APPROVE_TRAINING_REQ_USF
Business Event	Approve Training Request Event

Authorize Training Event

This section discusses the authorize training event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to Training Administrator for authorization.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Training Administrator
Email Template	Authorize Training Request WL
Business Process	Authorize Training Request
Business Activity	AUTHORIZE_TRAINING_REQ_USF
Business Event	Authorize Training Event

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Request Training Event (CSE)

This section discusses the request training event (cse) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	COURSE_ENROLLMENT1
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (CSE)
Business Process	Course Session Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (CSE)

Request Training Event (SCE)

This section discusses the request training event (sce) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	CRSE_ENRL_WL
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (SCE)
Business Process	Student Course Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (SCE)

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Request Training Event (ST)

This section discusses the request training event (st) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (ST)
Business Process	Student Training
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (ST)

Send Confirmation

This section discusses the send confirmation workflow.

Description

Event Description	Upon a student being enrolled in a class, the student will receive an email with the details of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Confirmation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Confirmation

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Send Cancellation

This section discusses the send cancellation workflow.

Description

Event Description	When a course has been cancelled, the enrolled students will receive email with the details of the course in which he/she is enrolled and that has been cancelled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Cancellation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Cancellation

Send Rescheduling

This section discusses the send rescheduling workflow.

Description

Event Description	When a course has been rescheduled, the enrolled students will receive email with the new schedule of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Rescheduling
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Rescheduling

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Delivered Workflows for Administer Workforce

This section discusses Administer Workforce workflows. The workflows are listed alphabetically by workflow name.

(USF) 60 Day Review

This section discusses the 60 Day Review workflow.

Description

Action Description	Upon the '60 Day Tenure Notices' process being run to identify Tenure Conversions, a worklist item is sent to the supervisor(s) of all employees who will reach their Tenure Conversion dates within the next 60 days. Upon the '60 Day Probation Term Notices' process being run to identify Probation Terms, a worklist item is sent to the supervisor(s) of all employees who will reach their Probation Termination dates within the next 60 days. Upon the '60 Day WGI Notices' process being run to identify WGI's (Within Grade Increases), a worklist item is sent to supervisor(s) of all employee for whom WGI's are due within the next 60 days.
Notification Method	Worklist

Workflow Objects

Event	GVT_60_DAY_REV
Workflow Action	Manual
Role	Supervisor-Part Posn Mgt
Email Template	Ten Conv WL Notice PT WL Notice WGI WL
Business Process	60 Day Notice Select
Business Activity	ROUTE_TO_WORKLIST
Business Event	Notice Ten Conv Event Notice Prob Term Event Notice WGI Event

(USF) Generic

This section discusses the Generic workflow.

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Description

Event Description	This is a common email and workflow event for administrator self-service notifications.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_HR_PROC
Workflow Action	Manual
Role	Roleuser By EMPLID
Email Template	Email Notification FE_HR_ADMIN_WL
Business Process	FE_NOTIFY_HR_ADMIN
Business Activity	FE_NOTIFY_HR_ADMIN
Business Event	Email Notification Notify HR Admin

Hire Employees

This section discusses the Hire Employee workflow.

Description

Event Description	The business event, Hire Employee, is triggered whenever a new employee is hired. The entire Hire Employee business process takes place within this one event. The system utilizes workflow to send notification about the new hire to various roles within the organization required to take action. Upon hiring an employee in France, the system also routes email/worklist items to the Personal Administrator for various events.

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Action Description	Benefits Administrator - The system directs an email to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs an email to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. (USF) MIS Administrator - Sends an email to the MIS Administrator to let him/her know about the new hire. Login ID's and/or PC equipment can be set up appropriately. Payroll Administrator - The system directs an email to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs an email to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. Variable Compensation Administrator - The system routes an email to the Variable Compensation Administrator to let him/her know about the new hire and determine if this new hire can be included into a compensation plan. Benefits Administrator - The system directs a worklist item to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs a worklist item to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. Payroll Administrator - The system directs a worklist item to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs a worklist item to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. An email is sent to the Personal Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date.
Action Description (continued)	An email is sent to the HR Administrator (FRA) when an employee is hired into the system with a start date in the future. This reminder warns them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) when an employee is hired into the system and additional information regarding the employee is needed.
Notification Method	Email, Worklist

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Workflow Objects

Event	JOB_DATA_EMP EE_HIRE
Workflow Action	Automatic
Role	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator Variable Compensation Administrator HR Administrator FRA Worklist Administrator
Email Template	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator VC_HIRE_EMAIL Single Hiring Statement SHS_EMAIL_DELAY Complete Employee Info
Business Process	Administer Workforce Recruit Employees ADMINISTER_WORKFORCE_USF REPORT_REGULATIONS
Business Activity	Hire Workforce Hire Workforce (USF) HIRE_WORKFORCE_FRA

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Business Event	Hire Employee VC_HIRE_EVENT SHS_HIRE_EVENT SHS_HIRE_DELAY SHS_HIRE_INFO

Maintain Job Data

This section discusses the Maintain Job Data workflow.

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Description

Action Description	Upon a change to an employee's service date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a job action change has been performed on an employee with multiple jobs, a worklist item is sent to the Benefits Administrator notifying them to review the Primary Job indicators and Flags. An email is sent to notify the Variable Compensation Administrator to review the changes and take appropriate action if necessary. Upon a change to an employee's Benefits System, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a change is made to an employee's Job record, if the action added or changed matches the Stock Action list (defined in Stock Action Reasons), then a worklist item is sent to the Stock Administrator to take appropriate action. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the Works Council for review. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email is sent to notify the employee. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the new manager informing them of the decision. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the current manager informing them of the decision. Works Council Specific - When the HR Administrator requests a job change for an employee, the request is routed via email and worklist item to the Works council for review and approval.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA WC_JOB_CHG_REQ_HR EE_HR_PROC
Workflow Action	Automatic

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Role	Benefits Administrator VC Administrator Stock Administrator Roleuser By EMPLID Works Council Representative
Email Template	Benefits Administrator Benefits Administrator1 Benefits Administrator2 Benefits Administrator3 Variable Comp Administrator Stock Admin Works Council Employee New Manager Current Manager Works Council
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF WORKS_COUNCIL_NOTIFICATION ADMINISTER_STOCK
Business Activity	Maintain Job Data Maintain Job Data (USF) WC_HR_DECISION WC_RJC_HR STOCK_ACTION

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Business Event	Change in Service Date MultiJob Change Job Change Primary Jobs Audit Change in Benefits System Stock_Action_List Notify WC Notify EE Notify New Manager Notify Current Manager

Maintain Personal Data

This section discusses the Maintain Personal Data workflow

Description

Action Description	Upon a change to an employee's birth date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. (CAN) Upon a change to an employee's Province of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur. Upon a change to an employee's state of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur.
Notification Method	Email, Worklist

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Workflow Objects

Event	PERSONAL_DATA EE_HR_PROC
Workflow Action	Automatic
Role	Benefits Administrator Payroll Administrator
Email Template	Benefits Administrator Payroll Administrator Payroll Administrator1
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF
Business Activity	Maintain Personal Data Maintain Personal Data (USF)
Business Event	Change in Birth Date Change Province in Canada Change State in U.S.

(USF) PAR Processing

This section discusses the PAR Processing workflow

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Description

Action Description	Upon the First Authorizer approving a PAR, a worklist item is sent to the Second Authorizer for review/approval as the next step in the process. When a request is routed to the First Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the First Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon the Second Authorizer approving a PAR, a worklist item is sent to the final approver in the process for Approval and Signature. When a request is routed to the Second Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the Second Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a request is routed to HR for final approval and signature, a worklist item is sent to the HR Administrator notifying them of the transaction to be processed. When a request is disapproved or returned by the final approver, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is disapproved or returned by the final approver, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon an employee submitting a PAR request, a worklist item is sent to the employee's manager for first level approval. When a request is routed to HR for approval and final processing and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to HR for approval and final processing and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a manager-submitted request is disapproved, a worklist item is sent to the employee's manager notifying them of the disapproval. When a manager-submitted request is disapproved, an email is sent to the employee notifying them of the disapproval. When an employee's manager submits a PAR request for an employee, a worklist item is sent to the first level approver (First Authorizor) for review and approval.

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Action Description (continued)	Once the Retro WGI request has passed the authorization and approval processes, it goes directly to the Human Resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Retro WGI for that employee. Once the Manual WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Manual WGI for that employee. Once the Probation Termination request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once the Tenure Conversion request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once a WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the WGI for that employee.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_1ST_AUTH EE_2ND_AUTH EE_APPROVAL EE_EMPL_REQ EE_HR_PROC EE_SUP_REQ GVT_COMP_ACTN
Workflow Action	Automatic
Role	PAR Authorizer Supervisor-Part Posn Mgt Roleuser by EmplID Personnel Administrator PAR Supervisor

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Email Template	2nd Authorizers Worklist Supervisor Worklist EMail Employee Approval Signature Worklist HR Worklist 1st Authorizers Worklist Retro WGI WL Manual WGI WL Except TC WL PT Comp WL TC Comp WL WGI Comp WL
Business Process	Perform 1st Authorization 1st Auth Disapprove/Return Perform 2nd Authorization 2nd Auth Disapprove/Return Perform Approval/Signature Approver Disapproval/Return Enter Employee Request HR Process Disapprove/Return Supervisor Disapproval/Return Enter Supervisor Request Processed Action
Business Activity	1st Authorization Disapprove/Return 2nd Authorization Approval/Signature Employee Request Supervisor Request PERFORM_AUTO_ACTION

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Business Event	Route to 2nd Authorization Route Disapproval/Return Route for Approval Signature Route to HR Route Request to Supervisor Route for 1st Authorization Retro WGI Event Manual WGI Event Except TC Review Notice PT Complete Notice TC Complete Notice WGI Complete

Terminate Employee

This section discusses the Terminate Employee workflow.

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Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.
Action Description	This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends a worklist item to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward. This event sends a worklist item to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward.
Notification Method	Email, Worklist

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Workflow Objects

Event	JOB_DATA
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Roleuser by EmplID Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Profit Sharing to be reviewed Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Administer Workforce
Business Activity	Terminate Workforce
Business Event	Notification Crse Enrollment Cancellation Profit Sharing Benefit Cancellation Payroll Termination Company Property Retrieval

(USF) Terminate Workforce

This section discusses the (USF) Terminate Workforce workflow

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Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.
Action Description	This event sends an email to the MIS Administrator notifying them that the employee has been terminated so appropriate action can be taken to disable system accounts. This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving. This event sends a worklist item to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving.
Notification Method	Email, Worklist

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Workflow Objects

Event	EE_HR_PROC
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Terminate Employee
Business Activity	Terminate Workforce (USF)
Business Event	Notification Crse Enrollment Cancellation Benefit Cancellation Payroll Termination Company Property Retrieval

Delivered Workflows for Manage Base Compensation and Budgeting

This section discusses PeopleSoft Human Resources Manage Base Compensation and Budgeting workflows. The workflows are listed alphabetically by workflow name.

Approve or Deny Ad Hoc Salary Changes

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Description

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

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Event Description	An administrator or manager approves or rejects an ad hoc salary change request.
Action Description	Employees receive an email when the administrator approves or rejects the ad hoc salary change request.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Approve or Deny Budgeted Salary Changes

This section discusses the Approve or Deny Budgeted Salary Changes workflow.

Description

Event Description	An administrator or manager approves or rejects a budgeted salary request for a group of employees.
Action Description	Manager receives an email when the administrator or approving manager approves or rejects the budgeted salary request for a group of employees.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Process Salary Change

This section discusses the Process Salary Change workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates group salary budget.
Notification Method	Email, Worklist

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Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Request Salary Change

This section discusses the Calculate Budgets workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates changes to group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Event	Request Salary Change
Workflow Action	Request Salary Change
Role	Roleuser by Roleuser Query

Delivered Workflow for Manage Employee Reviews

This section discusses Employee Review workflows.

Manage Employee Reviews Notification Events

This section discusses the Employee Review notification workflow.

Description

Event Description	When employees and managers use Employee Reviews to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant.
Action Description	Email notifications are sent to inform the appropriate persons of: the availability of documents for viewing and updating; a change in the status of documents; and the transfer of documents to a new manager.
Notification Method	email

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Delivered Workflows for Manage French Profit Sharing

This section discusses PeopleSoft Human Resources Manage French Profit Sharing workflows. The workflows are listed alphabetically by workflow name.

Approve Fund Release Request

This section discusses the Approve Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator approves an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request is approved.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	APP_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	APP_REL_REQ_EVENT

Error in Fund

This section discusses the Error in Fund workflow.

Description

Event Description	When the Process Interest and Payment process encounters an error an employee's fund, an email is sent to the administrator to notify them to review.
Action Description	The email notifies the administrator of an error in an employee's fund.
Notification Method	Email

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Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	HR Administrator FRA
Email Template	FUN_STA_ERR_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_ERR_EVENT

Modify Financial Organization

This section discusses the Modify Financial Organization workflow.

Description

Event Description	When employees change the financial organization on the Investment page of the Agreement Personalization component (WP_AGREEMENT_CUST), workflow is generated to notify the administrator of the change.
Action Description	Worklist and an email notify the administrator of the change in financial organization.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_AGREEMENT_CUST
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	MOD_FIN_ORG_MAIL
Business Process	MOD_FIN_ORG_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	MOD_FIN_ORG_EVENT

Modify Fund Status

This section discusses the Modify Fund Status workflow.

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Description

Event Description	When the fund status for a fund is modified by the Process Interest and Payment process, an email is sent to inform the member of the change.
Action Description	The email notifies employees of the change of fund status.
Notification Method	Email

Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	Employee
Email Template	FUN_STA_MOD_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_MOD_EVENT

Reject Fund Release Request

This section discusses the Reject Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator rejects an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request was rejected.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	REJ_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REJ_REL_REQ_EVENT

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Request Fund Release

This section discusses the Request Fund Release workflow.

Description

Event Description	Employee submits a request for release of profit-sharing funds from the Personal Entitlements component (WP_FUND_RELEASE). Workflow is generated to notify the administrator of the request.
Action Description	From the email or worklist, the system transfers the administrator to the Employee Release Detail page where he or she can view and approve or reject the fund release request.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_FUND_RELEASE
Workflow Action	Manual
Role	HR Administrator FRA
Email Template	REQ_FUN_REL_MAIL
Business Process	REQ_FUN_REL_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REQ_FUN_REL_EVENT

Delivered Workflows for Manage French Public Sector

This section discusses PeopleSoft Human Resources Manage French Public Sector workflows. The workflows are grouped by activity.

CAE Request (Hiring)

This section discusses the CAE Request workflow in the Hiring Activity.

Description

Event Description	When a hiring is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

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Workflow Objects

Event	HIRE
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE
Business Event	FP_CA_REQUIRE_E

Stamp Request (Hiring)

This section discusses the Stamp Request workflow in the CAE Allocation (hire process) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_STMPREQ_E

CAE Denied (Hiring)

This section discusses the CAE Denied workflow in the CAE Allocation (hire process) Activity.

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Description

Event Description	If the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the hiring.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_DENY_E

Stamp Denied (Hiring)

This section discusses the Stamp Denied workflow in the Stamp Assignment (hiring) Activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPDENY_E

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Stamp Granted (Hiring)

This section discusses the Stamp Granted workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPGRANTED_E

Stamp Postponed (Hiring)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email to the manager.
Action Description	The email informs the manager that the hiring is postponed
Notification Method	Email

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Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STBY_E

Delete Confirmed (Hiring)

This section discusses the Delete Confirmed workflow in the CAE Delete (hiring denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE_REFUSE
Business Event	FP_CA_DELETE_E

Grade Change

This section discusses the Grade Change workflow in the Grade Change activity.

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Description

Event Description	When a grade change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CHGT_RANK
Business Event	FP_CA_RKCHNG_C

Stamp Request (Grade and CAE Change)

This section discusses the Stamp Request workflow in the Grade and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_STMPREQ_C

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CAE Denied (Grade and CAE Change)

This section discusses the CAE Denied workflow in the Grade and CAE Change activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_DENY_C

Stamp Denied (New Grade)

This section discusses the Stamp Denied workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPDENY_C

Stamp Granted (New Grade)

This section discusses the Stamp Granted workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPGRANTED_C

Stamp Postponed (New Grade)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (new grade) activity.

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Description

Event Description	If the finance controller holds or postpones the CAE for the grade change, this workflow generates an email.
Action Description	An email informs the manager that the grade change process is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STBY_C

Delete Confirmed (New Grade)

This section discusses the Delete Confirmed workflow in the CAE Delete (new grade) activity.

Description

Event Description	When the headcount manager deletes the CAE request for grade change, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_RK_CHNG_DENIED
Business Event	FP_CA_DELETE_C

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Work Time Percentage Change

This section discusses the Work Time Percentage Change workflow in the Work Time Percentage Change activity.

Description

Event Description	When a Work Time Percentage (WTP) Change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for WTP.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CHGT_TPS_WORK
Business Event	FP_CA_WKRT_F

Stamp Request (WTP and CAE Change)

This section discusses the Stamp Request workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for WTP, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_STMPREQ_F

CAE Denied (WTP and CAE Change)

This section discusses the CAE Denied workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers the control to the manager who deletes the Work Time Percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_DENY_F

Stamp Denied (New WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New WTP) activity.

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Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE for work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPDENY_F

Stamp Granted (New WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPGRANTED_F

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Stamp Postponed (New WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates a worklist entry.
Action Description	The email informs the manager that the approval for the Work time Percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STBY_F

Delete Confirmed (New WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New WTP) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_PT_CHNG_DENIED
Business Event	FP_CA_DELETE_F

Double Change

This section discusses the Double Change workflow in the CAE and Grade and Work Time Percentage Change activity.

Description

Event Description	When a grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers the control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CHGT_RK_TPS
Business Event	FP_CA_WKRT_K

Stamp Request (Grade, WTP, and CAE Change)

This section discusses the Stamp Request workflow in the Grade and Work Time Percentage and CAE Change activity.

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Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the Finance Controller who stamps the CAE allocation for the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_STMPREQ_K

CAE Denied (Grade, WTP and CAE Change)

This section discusses the CAE Denied workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the Grade and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_DENY_K

Stamp Denied (New Grade and WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager so that he deletes the CAE for grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPDENY_K

Stamp Granted (New Grade and WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

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Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPGRANTED_K

Stamp Postponed (New Grade and WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the grade / work time percentage change is postponed.
Notification Method	Email

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Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STBY_K

Delete Confirmed (New Grade and WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New Grade and Work Time Percentage) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_PT_CHNG_DENIED2
Business Event	FP_CA_DELETE_K

CAE De-allocation Request

This section discusses the CAE De-allocation Request workflow in the Termination activity.

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Description

Event Description	When a termination is in progress, once the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who de-allocates the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_CA_DISCHG
Business Event	FP_CA_DISCH_D

Stamp Request (CAE De-allocation)

This section discusses the Stamp Request workflow in the CAE De-allocation activity.

Description

Event Description	When the headcount manager de-allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE de-allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_STMPREQ_D

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De-allocation Denied (CAE De-allocation)

This section discusses the De-allocation Denied workflow in the CAE De-allocation activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_DENY_D

De-allocation Denied (Stamp)

This section discusses the De-allocation Denied workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller denies stamping of the CAE for de-allocation, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who restores the CAE.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPDENY_D

Stamp Granted (CAE De-allocation)

This section discusses the Stamp Granted workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller approves the de-allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPGRANTED_D

De-allocation Postponed

This section discusses the De-allocation Postponed workflow in the CAE De-allocation Stamp activity.

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Description

Event Description	If the finance controller holds or postpones the CAE for de-allocation, this workflow generates an email.
Action Description	An email informs the manager that the termination is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Email Template	FP_CA_NOTIF
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STBY_D

CAE Request

This section discusses the CAE Request workflow in the Return activity.

Description

Event Description	When a return is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for the return
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_RETURN
Business Event	FP_CA_REINST_R

Stamp Request (Return)

This section discusses the Stamp Request workflow in the CAE allocation (simple return) activity.

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Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_STMPREQ_R

CAE Denied (Return)

This section discusses the CAE Denied workflow in the CAE allocation (simple return) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_DENY_R

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Stamp Denied (Return)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE allocation for the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPDENY_R

Stamp Granted (Return)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPGRANTED_R

Stamp Postponed (Return)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return is postponed
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STBY_R

Delete Confirmed (Return)

This section discusses the Delete Confirmed workflow in the CAE Delete (return) activity.

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Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_HIRE_REFUSE2
Business Event	FP_CA_DELETE_R

Double Change (Return)

This section discusses the Double Change workflow in the Return and Grade Change activity.

Description

Event Description	When a return and grade change activity is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_RKRETURN_H
Business Event	FP_CA_RKCHNG_H

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Stamp Request (Return and Grade Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_STMPREQ_H

CAE Denied (Return and Grade Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

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Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_DENY_H

Stamp Denied (Return and Grade Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPDENY_H

Stamp Granted (Return and Grade Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade change) activity.

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Description

Event Description	If the finance controller approves the allocation of the CAE for the return and grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPGRANTED_H

Stamp Postponed (Return and Grade Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade change process is postponed.
Notification Method	Email

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Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STBY_H

Delete Confirmed (Return and Grade Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and grade change) activity.

Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_REFUSE_H
Business Event	FP_CA_DELETE_H

Double Change (Return and WTP Change)

This section discusses the Double Change workflow in the Return and Work Time Percentage Change activity.

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Description

Event Description	When a return and work time percentage change process is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_WKRTRETURN_B
Business Event	FP_CA_WKRTCHNG_B

Stamp Request (Return and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the return and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_STMPREQ_B

CAE Denied (Return and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_DENY_B

Stamp Denied (Return and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and work time percentage) activity.

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Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPDENY_B

Stamp Granted (Return and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE for the Return and work time percentage change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPGRANTED_B

Stamp Postponed (Return and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and work time percentage change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STBY_B

Delete Confirmed (Return and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and work time percentage change denied) activity.

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Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_REFUSE_B
Business Event	FP_CA_DELETE_B

Triple Change (Return, Grade, and WTP Change)

This section discusses the Triple Change workflow in the Return, Grade, and Work Time Percentage Change activity.

Description

Event Description	When a return and grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

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Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_RKWKRTRETURN_Z
Business Event	FP_CA_RKWKRTCHNG_Z

Stamp Request (Return, Grade, and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return, grade, and work time percentage) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_STMPREQ_Z

CAE Denied (Return, Grade, and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade and work time percentage) activity.

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Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_DENY_Z

Stamp Denied (Return, Grade, and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade and work time percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and grade and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPDENY_Z

Stamp Granted (Return, Grade, and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPGRANTED_Z

Stamp Postponed (Return, Grade, and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

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Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STBY_Z

Delete Confirmed (Return, Grade, and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return with grade and work time percentage change denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return with grade and work time percentage change.
Notification Method	Worklist

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Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_REFUSE_Z
Business Event	FP_CA_DELETE_Z

Accept Tenure

This section discusses the Accept Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a Tenure Probation Period is in progress and the manager approves the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who grants tenure.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_ACCEPT_TENURE

Renew Tenure Probation Period

This section discusses the Renew Tenure Probation Period workflow in the Tenure Probation Period Validation activity.

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Description

Event Description	When a Tenure Probation Period is in progress and the manager renews the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who renews the probation period.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_RENEW_TEN_PPD

Refuse Tenure

This section discusses the Refuse Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a tenure probation period is in progress and the manager refuses the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who issues the termination order.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_REFUSE_TENURE

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Delivered Workflows for Manage Professional Compliance

This section discusses the Manage Professional Compliance workflows. The workflows are listed alphabetically by workflow name.

Professional Compliance Hire

This section discusses the Professional Compliance Hire workflow in the Professional Compliance Hire activity.

Description

Event Description	A person is hired and is subsequently added to the Professional Compliance business process. **Note.** This occurs only when a default Professional Compliance Type is associated with the job code of the person being hired.
Action Description	The PCMP_BUS_PROC business process: Adds the hire notification to the new hire's general supervisor's worklist. Sends an email notification to the new hire's general supervisor.
Notification Method	Email and worklist.

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Hire

Professional Compliance Add

This section discusses the Manage Professional Compliance add workflow.

Description

Event Description	A person is manually added to the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the general supervisor of the person informing them that the person has been added within the Professional Compliance business process and that further action is required.
Notification Method	Email

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Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Add

Professional Compliance Classification Change

This section discusses the Manage Professional Compliance classification change workflow.

Description

Event Description	There is a change in classification level for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of classification within the Professional Compliance business process and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Classification Change

Professional Compliance Job Change

This section discusses the Manage Professional Compliance job change workflow.

Description

Event Description	There is a job change for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of job and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

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Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Professional Compliance Recertification

This section discusses the Manage Professional Compliance recertification workflow.

Description

Event Description	The recertification Application Engine program runs for persons in the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends a notification to the compliance supervisor informing them of lapsed or upcoming license and certification expiration dates. If the certification information is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Re-Certification

Professional Compliance Termination

This section discusses the Manage Professional Compliance termination workflow.

Description

Event Description	There is a termination of a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process: Add the hire notification to the worklist. Sends an email notification to the compliance supervisor of the person informing them that the employee has been terminated and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

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Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Delivered Workflows for Manage Variable Compensation

This section discusses PeopleSoft Human Resources Manage Variable Compensation workflows. The workflows are listed alphabetically by workflow name.

Allocate Awards by Plan (Approval)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Plan (Denial)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email, Worklist

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Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Awards by Group (Approval)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts for group members or the award status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Group (Denial)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts for group members or the status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Group Funding

This section discusses the Allocate Group Funding workflow.

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Description

Event Description	Manager or approver makes changes to the variable compensation award for a group.
Action Description	Approving manager approves or denies changes to the variable compensation award for a group.
Notification Method	Email, Worklist

Workflow Objects

Event	Funds Change Event
Workflow Action	Funds Change Event
Role	Roleuser by Emplid Qry

VC Tree Changes

This section discusses the VC Tree Changes workflow.

Description

Event Description	Manager or approver makes changes to a variable compensation tree.
Action Description	Approving manager approves or denies changes to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Event	VC Tree Change Event
Workflow Action	VC Tree Change Event
Role	VC Administrator, HR Administrator

VC Tree Delete

This section discusses the VC Tree Delete workflow.

Description

Event Description	Manager or approver makes deletions to a variable compensation tree.
Action Description	Approving manager approves or denies the deletions to the variable compensation tree.
Notification Method	Email, Worklist

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Workflow Objects

Event	VC Tree Delete Event
Workflow Action	VC Tree Delete
Role	VC Administrator

VC Tree Rename

This section discusses the VC Tree Rename workflow.

Description

Event Description	Manager or approver renames a variable compensation tree.
Action Description	Approving manager approves or denies the renaming of the variable compensation tree.
Notification Method	Email

Workflow Objects

Event	VC Tree Rename Event
Workflow Action	VC Tree Rename Event
Role	VC Administrator

Delivered Workflows for Plan Careers

This section discusses the Plan Careers workflow.

(USF) Career Plan

This section discusses the career plan workflow.

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Description

Event Description	When a career plan is created or updated for an employee, a worklist entry is sent to the Supervisor.
Action Description	When a manager approves a career plan for an employee, a worklist entry is sent to the HR Developmental Staff role. When a manager disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor. When HR disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor.
Notification Method	Worklist

Workflow Objects

Event	CAREER_PLAN
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Manager Worklist
Business Process	Career Plan
Business Activity	Develop Career Plan (USF) Review Career Plan (USF)
Business Event	Submit Plan to Manager; Manager Approves Plan; Manager Disapproves Plan; HR Disapproves Plan.

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APPENDIX D

PeopleSoft Application Fundamentals for HRMS Reports

PeopleSoft Enterprise Human Resources supplies a group of standard reports to help you review the entries in the various tables you use to set up controls for your Human Resources system, including departments, companies, locations, and job codes. For international purposes, you can review the currency codes and exchange rates to see if you need to update the data.

This appendix provides summary tables of basic HRMS reports and Human Resources reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: Process Scheduler

Basic PeopleSoft HRMS Reports: A to Z

These tables list basic PeopleSoft HRMS reports as well as reports for specific PeopleSoft Human Resources business processes sorted by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Basic HRMS Reports

Report ID and Report Name	Description	Navigation	Run Control Page
AWEAUDIT Approvals Audit Report	Report includes data regarding approval transaction requests associated with the Approval Workflow Engine.	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Approvals Audit Report, Approvals Audit Report	HCSCAWE_RUN_CNTL
FGHR005 Salary Grade Table USF report	Print the contents of the Federal Salary Grade tables in various formats.	Setup HRMS, Product related, Compensation, Salary Grade Table Rpt USF, Pay Table	RUN_FGHR005
FGPER802 Geographic Location report	Produces a detailing of the Geographic Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FGPER803 Agency report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.	Set Up HRMS, Foundation Tables, Organization, Agency Report Table USF	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	PRCSRUNCNTL
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area.	Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage.	Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF	PRCSRUNCNTL
FGPER811 Handicap Table report	Prints all disabilities and their associated codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table	PRCSRUNCNTL
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA / Authority 1	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Priority Placement Table	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Job Code Table	PRCSRUNCNTL
GBP001 Group Member Overlapping	Shows when members belong to more than one group.	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	Set Up HRMS, Common Definitions, Group Build, Group Membership	RUNCTL_GBP002
PAY701 Bank/Branch	Lists banks/branches entered in the Bank/Branch table.	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	PRCSRUNCNTL
PAY710 ChartField Transaction Report	Lists ChartField codes used in transactions.	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Transaction Report	PRCSRUNCNTL
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Pay Group Table	PRCSRUNCNTL
PAY717 Earnings Program Table	Prints a detailing of your pay plan definitions.	Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Earnings Program	PRCSRUNCNTL
PAY760 Combination Code Report	Lists account codes set up in the Combination Code Table.	Set Up HRMS, Common Definitions, ChartField Configuration, Combination Code Report	PRCSRUNCNTL
PER506 Security Tree Audit	Lists discrepancies between entries in the Departments component and departments on department security trees.	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Report	PRCSRUNCNTL
PER701 Department Table report	Lists all departments by Department ID.	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.	Set Up HRMS, Foundation Tables, Organization, Company Table Report	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries −character codes.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Rpt USA	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Table Report CAN	PRCSRUNCNTL
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	PRCSRUNCNTL
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table.	Set Up HRMS, Common Definitions, Letters and Documents, Standard Letter Report	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table	PRCSRUNCNTL
PER714 Currency Rate Table report	Prints information about exchange rates.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report	PRCSRUNCNTL

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Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D. Before using this page, you must have run the CAR001 report process.	Benefits, Provide Company Cars, Print P11D Information	RUNCTL_COMPCAR001
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	Benefits, Provide Company Cars, Create List of Cars	PRCSRUNCNTL

Administer Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP013 Update Seniority Pay Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay − Load Data process (HR_CMP013_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay	RUNCTL_SENPAY2
CMP014S Update Seniority Eligibility Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig − Load Data process (HR_CMP014_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility	RUNCTL_SENPAY
CMP015 Refresh Employee Compensation	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	Workforce Administration, Collective Processes, Refresh Compensation	RUNCTL_CMP015
CMP016 Defaulting Rules Eligibility	Lists the workers eligible for the selected defaulting rules as of selected date.	Set Up HRMS, Foundation Tables, Compensation Rules, Defaulting Rules Eligibility Rpt	RUNCTL_CMP016

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Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	Set Up HRMS, Product Related, Benefits NLD, Reports, Pay Groups	PRCSRUNCNTL
INT004NL Earnings Table (NLD)	Reviews all the valid earnings codes that you entered into the system , along with the payroll calculation characteristics that you assign to each.	Set Up HRMS, Product Related, Benefits NLD, Reports, Earnings	PRCSRUNCNTL
INT005NL Deductions / Frequency (NLD)	Reviews all the valid deduction codes that are entered into the system. The SQR is sorted by plan type, deduction code, and effective date.	Set Up HRMS, Product Related, Benefits NLD, Reports, Deductions	PRCSRUNCNTL
INT006NL General Deduction/Frequency (NLD)	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the worker pay frequency, and any additional flat deduction amounts.	Set Up HRMS, Product Related, Benefits NLD, General Deduction/Frequency	PRCSRUNCNTL

Administer Salary Packaging Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PKG003 Packages Due for Review	Displays all workers with packages ready for review.	Compensation, Salary Packaging AUS, Create Packaging Reports, Packages Due For Review	RUNCTL_PKG003
PKG004 Package Model	Enables you to report on an applicant or a worker's salary package. The information contained in the report displays the details from the worker / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Models	RUNCTL_PKG004

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Report ID and Report Name	Description	Navigation	Run Control Page
PKG006 FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	Compensation, Salary Packaging AUS, Create Packaging Reports, FBT Reconciliation	RUNCTL_PKG006
PKG007 Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on a worker only basis, requires a start and end date of the period of time you want to report on.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Details	RUNCTL_PKG007

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for workers. (SQR)	Enterprise Learning, Training Reports, SF182	RUNCTL_SF182
MXSTP001 (Format) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP002 MXSTP002 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP003 (Format) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP004 MXSTP004 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003

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Report ID and Report Name	Description	Navigation	Run Control Page
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	Enterprise Learning, Training Reports, STPS DC-2B Format MEX	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/Events Certificates	Creates a Courses/Events Certificate.	Enterprise Learning, Training Reports, STPS DC-3 Format MEX	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/Events Certificates List	Creates a Courses/Events Certificates list.	Enterprise Learning, Training Reports, MEX STPS DC-4 Format	RUNCTL_STP007
MXSTP008 (Format) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
MXSTP009 MXSTP009 (Reverse)	See above	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
PER107GR (GER) Int. Prof. Education Status (internal professional education status)	Details the current status of workers who are enrolled in an internal education training plan. Includes only workers who selected the Intern check box and didn't select *Graduated* on the Professional Education page. (Crystal)	Enterprise Learning, Training Reports, Int Prof Education Status DEU	PRCSRUNCNTL
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (Crystal)	Enterprise Learning, Course Reports, Courses	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word for Windows)	Enterprise Learning, Student Enrollment, Create Training Letters	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (Crystal)	Enterprise Learning, Course Reports, Course Session Roster	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (Crystal)	Enterprise Learning, Course Reports, Course Waiting List	RUNCTL_TRN003
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (Crystal)	Enterprise Learning, Training Reports, Training Schedules	RUNCTL_TRN004

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (Crystal)	Enterprise Learning, Training Reports, Training Facility Schedules	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Active Scenario Summary	RUNCTL_TRN010
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Global Scenario Summary	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/certifications that students receive on successful completion of a course. (Crystal)	Enterprise Learning, Course Reports, Target Course Certifications	RUNCTL_TRN016
TRN017 Course Rating	Details ratings for sessions of a course. (Crystal)	Enterprise Learning, Course Reports, Course Rating	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	Enterprise Learning, Course Reports, Attendance Status	RUNCTL_TRN018
TRN019 Course Rating Templates	Serves as the evaluation template to be completed by students enrolled in a course session. (Crystal)	Enterprise Learning, Course Reports, Course Rating Templates	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (Crystal)	Enterprise Learning, Training Reports, Student Training History	RUNCTL_TRN020
TRN021 Training Program	Lists the training program for a worker. (SQR)	Enterprise Learning, Training Reports, Training Programs, Course Attend. School Program	RUNCTL_TRN021
TRN022 Statistics of EEs Enrolled (statistics of workers enrolled)	Lists the workers who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	Enterprise Learning, Training Reports, Statistics of EEs Enrolled, Course Statistics	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (Crystal)	Enterprise Learning, Course Reports, Course Description	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (Crystal)	Enterprise Learning, Course Reports, Course Category	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (Crystal)	Enterprise Learning, Course Reports, Course Equipment	RUNCTL_TRN025

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN026 Course Vendors	Lists vendors that are associated with a course on the Course Table. (Crystal)	Enterprise Learning, Course Reports, Course Vendors	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (Crystal)	Enterprise Learning, Course Reports, Prerequisite Courses	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (Crystal)	Enterprise Learning, Course Reports, Target Qualifications	RUNCTL_TRN028
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of workers in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page. (Crystal)	Enterprise Learning, Training Reports, 2483 Tax Declaration FRA	RUNCTL_TRN029
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved workers by the course duration. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Summary	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with a worker who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, worker expense, and session expense. (SQR)	Enterprise Learning, Training Reports, EE Session Cost Summary	RUNCTL_TRN032
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (Crystal)	Enterprise Learning, Training Reports, Training Instructor Schedules	RUNCTL_TRN033

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Report ID and Report Name	Description	Navigation	Run Control Page
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	Enterprise Learning, Training Reports, Equipment Checklist	RUNCTL_TRN034
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Distribution FRA	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Cost Details FRA	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists the contract history for a selected worker or all workers. You can specify a date range for the report for include all contract history.	Workforce Administration, Job Information, Contract Administration, Contract Information Report	RUNCTL_CNT001
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	Workforce Administration, Job Information, Reports, Print Wage/Separation USF	GVT_PRINT_ES931

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Report ID and Report Name	Description	Navigation	Run Control Page
FGHR017 Personnel Actions History	Lists all workers affected by each of the job actions you enter. It prints the following information: name, department, effective date, and reason for the action. For each worker the report lists original hire date, total years of service, worker type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	Workforce Administration, Job Information, Reports, Personnel Actions History USF	RUNCTL_FGHR017
FGPER810 Award Type Table	Generates an award type table report.	Workforce Administration, Job Information, Reports, Award Action USF	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	RUNCTL_FGSF61
FGSF75 Request for Preliminary Employment Data	Produces a Request for Preliminary Employment Data form.	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	RUN_CNTL_FGSF75
FGSF50 and FGSF52 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify worker and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	• Workforce Administration, Job Information, Reports, Request Personnel Action USF • Workforce Administration, Job Information, Reports, Notice of Personnel Action USF	RUNCTL_PAR
HR_EDM_NLD First Day Notification NLD	The First Day Notification (*Eerste Dag Melding*) notifies the tax authority of new employees prior to their start date.	Workforce Administration, Workforce Reports, First Day Notification NLD	RUNCTL_EDM_NLD
PER001 Department Action Notices	Lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Run the Refresh Employees Table process before running this report.	Workforce Administration, Workforce Reports, Department Action Notices	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER001CH CHE Company Statistics	This report provides information on worker wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.	Workforce Monitoring, Company Statistics CHE	RUNCTL_PER001_CHE
PER002 Employee Birthdays	Lists workers, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Birthdays Report	RUNCTL_PER002
PER003 Years of Service	Lists workers who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.	Workforce Administration, Job Information, Reports, Years of Service	RUNCTL_PER003
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each worker in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report	PRCSRUNCNTL
PER005 Employees on Leave of Absence	Lists all workers on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the worker's expected return date or as a reminder for you to enter the return from leave information in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER006 Mailing Labels	Produces a three-across set of mailing labels for all workers in your PeopleSoft Human Resources database. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.	Workforce Administration, Job Information, Reports, Temporary Employees	RUNCTL_ASOFDATE
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the worker counts as of the date you specify.	Workforce Administration, Workforce Reports, Employee Turnover Analysis	RUNCTL_FROMTHRU
PER015 Personnel Actions History	Lists all workers affected by each of the job actions you enter.	Workforce Administration, Job Information, Reports, Personnel Actions History	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all workers with addresses and home phone numbers.	Workforce Administration, Biographical, Home Address Report	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all workers with job action notices scheduled for a future date.	Workforce Administration, Workforce Reports, Pending Future Actions	RUNCTL_ASOFDT_COMP
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	Workforce Administration, Workforce Reports, Database Audit	RUNCTL_FROMTHRU
PER032 Passport/Visa Expiration	Lists workers and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER033 Citiznship/Country/Visa Audit	Lists discrepancies between worker citizenship country/status and visa data. Displays various discrepancies found for the worker citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	Workforce Administration, Personal Information, Citizenship, Citiznship/Country/Visa Audit	PRCSRUNCNTL
PER038NL NLD Law SAMEN Statistics	Produces the required SAMEN statistics information related to the number of people in the workforce born in a so-called SAMEN country, or of whom one of the parents has been born in one such country.	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report	RUNCTL_PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled workers and additional information about their disabilities.	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	DSB_RUNCTL_GER
PER054 ESP Official List	Compiles the information you need for Matricula book reporting.	Workforce Administration, Workforce Reports, Official List ESP	RUNCTL_PER054_ESP
PER058 Primary Job Audit	Lists all people whose job records show potential problems.	Workforce Administration, Workforce Reports, Primary Job Audit	RUNCTL_PER058
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	Workforce Administration, Personal Information, Disability, Disability Report ITA	RUNCTL_PER060
PER063JP Appointment Notification JPN	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual worker notifications of hire, rehire, retirement, transfer, and promotion.	Workforce Administration, Job Information, Reports, Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP Appointment List JPN	Runs appointment list reports.	Workforce Administration, Job Information, Reports, Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP Completion of IC Transfer JPN	Lists workers on temporary intercompany transfer.	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN	RUNCTL_PER065_JPN

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Report ID and Report Name	Description	Navigation	Run Control Page
PER066BE Termination Notification	Provides details of the contractual and compensation implications for a Belgian employer in case of a termination, based on the notification period according to the Claeys formula.	Workforce Administration, Collective Processes, Administration BEL, Create Notification	RUNCTL_PER066_BEL
PER066IT ITA Hiring Letters	Produces the hiring letter which is printed at hiring time and is signed by worker and employer. It gives details of the terms of the job, including probation period and duration.	Workforce Administration, Job Information, Reports, Hire Letter ITA	RUNCTL_PER066_ITA
PER066JP Employee Assignment List JPN	Lists workers by department, including Additional Appointment workers.	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	RUNCTL_EMPLIST_JPN
PER067BEL Social Report	Reports a variety of employer/worker information required by the government.	Workforce Administration, Workforce Reports, Social Report BEL	RUNCTL_PER067_BEL
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	Workforce Administration, Job Information , Reports, Hire Report CAN	RUNCTL_FROMTHRU
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active workers within each defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplymt Type Rpt	RUNCTL_FTCANAC

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Report ID and Report Name	Description	Navigation	Run Control Page
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	RUNCTL_PER105CN
PER106CN OEE Groups/Jobs Filled/Vacatd	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active workers within the defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action.	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	PRCSRUNCNTL
PER801SG Employee Listing	Provides worker information based on the run control selections of Department, Name, or EmplID.	Workforce Administration, Job Information, Reports, Employee Listing SGP	RUNCTL_EMP_LIST

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Report ID and Report Name	Description	Navigation	Run Control Page
SOCS_AFI_ESP AFI Report	The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. This file is submitted to the social security authorities.	Workforce Administration, Workforce Reports, AFI Report ESP	RC_SOCS_AFI_ESP
TAS001 Temp Assignment w/out End Date	Lists workers currently on temporary assignment where end dates have not been defined.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	RUNCTL_TAS001
TAS002 Temp Assignment due to Complete	Lists workers due to complete temporary assignments within user specified date range.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	RUNCTL_TAS002

Manage Base Benefit Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants Rpt	Lists active health plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	Benefits, Reports, Participation, Health Plan Participants	RUNCTL_ASODATE_BEN
BEN002 Life Insurance Participants Rpt	Lists active life plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	Benefits, Reports, Participation, Life Insurance Participants	RUNCTL_ASODATE_BEN
BEN003 Benefit Contributions	Summarizes benefit contributions by worker and employer.	Benefits, Reports, Contributions and Deductions, Benefit Contribution Register	RUNCTL_BEN003
BEN003CN Benefit Contributions Can.	Summarizes benefit contributions by worker and employer for Canadian companies. This report is the same as BEN003.	Benefits, Reports, Contributions and Deductions, CAN-Contribution Register	RUNCTL_BEN003CN
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for workers participating in savings plans with investment allocations. This program also creates an interface file for use by third-party administrators.	Benefits, Reports, Participation, Savings Investment Distributn	RUNCTL_BEN004

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN007 Leave Accruals	This report displays leave accrual information by leave plan and worker. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.	Benefits, Reports, Participation, Leave Accrual	RUNCTL_BEN_LANG
BEN008 Section 415 Compliance Rpt	The report lists worker amounts either over or under the Section 415 limit. It includes: Company, EmplID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.	Benefits, Reports, Regulatory and Compliance, Section 415 Compliance	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance Rpt	BEN009 reports on workers who have exceeded the Section 415 limits. It includes: Company, EmplID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.	Benefits, Reports, Regulatory and Compliance, Section 415 Noncompliance	RUNCTL_ASODATE_BEN
BEN020 FMLA Status Report	Displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests. You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those workers who will soon be going out on leave; what follow-up is needed to support the leaves; those workers who will soon exhaust their leave entitlement.	Benefits, Track FMLA (Family Medical Lv), Status Report	RUNCTL_BEN020

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN021 FMLA Payroll Audit	For workers on FMLA leave or who have recently completed leaves, displays EmplID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid), and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system.	Benefits, Track FMLA (Family Medical Lv), Payroll Audit Report	RUNCTL_BEN021
BEN022 BEN023 HIPAA Medical Certificates	BEN022 prints a eighteen-month history of a former worker's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	Benefits, Reports, Regulatory and Compliance, HIPAA	RUN_CNTL_HIPAA
BEN040 Billing Statement	Prints a bill for all workers with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	Benefits, Benefits Billing, Create Statements, Print Billing Statement	RUNCTL_BEN040

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN041 Delinquent Accnt	Displays charge and payment activity for workers who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table. You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.	Benefits, Benefits Billing, Reports, Delinquent Accounts	RUNCTL_BEN041
BEN042 Receivable Report	Displays all payment activity, include the amounts paid and how the amounts were applied. You can use this report to verify the dollar amount of payments received from workers. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.	Benefits, Benefits Billing, Reports, Accounts Receivable	RUNCTL_BEN042
BEN043 Billing History	Displays all billing account activity for a specific period of time, by worker. Use this report to answer questions from workers regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.	Benefits, Benefits Billing, Reports, History Activity	RUNCTL_BEN043
BEN044 Billing Calculation Errors	Lists billing calculation errors.	Benefits, Benefits Billing, Review Processing Results, Calculation Error Report	RUNCTL_BILL_CAL

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN045 Benefits Billing Audit	Displays workers with open charges and open credits; active enrollments audit; inactive enrollments audit; workers with holds longer than three months; and enrollment holds longer than three months. Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for workers with open charges and credits when an error condition exists.	Benefits, Benefits Billing, Reports, Billing Audit	RUNCTL_BEN_LANG
BEN050 Primary Jobs Audit	Identifies workers without a record in the Primary Jobs table, workers without a job in the Primary Jobs table, workers without a primary job flag turned on, workers without a primary job indicated for a specific benefit record, and, workers with more than one primary job designated for a specific benefit record number.	Benefits, Maintain Primary Jobs, Create Audit Report	RUNCTL_BEN050

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN110 Snapshot Premium Reporting	Using the results from the Benefits Enrollment Snapshot, calculates the full premium due to a benefit provider and reports the coverage and premium amount for each covered employee, sorted by Vendor and Plan Type. You can run this report three ways: (1) Run just the "Snapshot Premium - Calculation" process, which is an Application Engine which calculates and stores the individual premiums; (2) Run just the "Snapshot Premium - Report" which is an SQR report that uses the previously calculated premiums to report by Vendor and Plan Type; or (3) Run the combined "Snapshot Premium Reporting" job, which links both the calculation process and the reporting process together into a single run using the same run control criteria.	Benefits, Interface with Providers, Snapshot Premium	RUNCTL_BEN110
BEN140 Ben Billing Payment Interface	This program reads payment information from a third-party interface file and posts those payments against open accounts. Lists information about Benefits Billing payments processed by the batch interface process. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	Benefits, Benefits Billing, Billing Interface, Post Payments from File	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN141 A/R Interface	The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds worker information, the other holds the accounting information for the Benefits Billing charges and charge adjustments. Use this report to report to interface billing charges to an accounts receivable system.	Benefits, Benefits Billing, Billing Interface, Provide Billing to AR	RUNCTL_BILL_CAL
BEN701 FSA Benefit Table Listing	Lists information in the Flexible Spending Account Table. Use this report to verify that you have correctly updated and made changes to the table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Flexible Spending Account	RUNCTL_BEN_LANG
BEN702 Flat Rate Table	Prints information from the Flat Rate Table, where you define rates to be charged per selected frequency for a particular benefit program/plan.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Flat Rate	RUNCTL_ASODATE_BEN
BEN703 Disability Plan Table Listing	Prints information from the Disability Plan Table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Disability Plan	RUNCTL_BEN_LANG
BEN704 Age-Graded Rate Table Listing	The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and worker for each set of your age-graded rates.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Age Coverage Rate	RUNCTL_BEN_LANG
BEN705 Life AD/D Table Listing	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Life AD/D Plan Table	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN707 Savings Plan/ Investment Table	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the worker deductions and employer contributions and investment options.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Savings Plan	RUNCTL_BEN_LANG
BEN708 Calculation Rules Tbl Listing	Lists calculation rules information by calculation rule ID.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Calculation Rules	RUNCTL_BEN_LANG
BEN709 Benefit Plan Table Listing	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Plan	RUNCTL_BEN_LANG
BEN710 Leave Plan Table Listing	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan- Basic Attributes	RUNCTL_BEN_LANG
BEN710A Leave Plan Table (Svc Rates)	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan-Accrual and Bonus	RUNCTL_BEN_LANG
BEN711 Retirement Plan Table Listing	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Retirement Plan	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN713 Benefit Program	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, and payroll rules. This report serves as an audit trail for the information defined on the Benefit Program table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Program	RUNCTL_BEN713
BEN714 Service Rate Table Listing	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and worker portion. This report serves as an audit trail for the information defined on the Service Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Service Rate	RUNCTL_BEN_LANG
BEN715 Vacation Buy/Sell Plan Listing	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts. This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Vacation Buy/Sell	RUNCTL_BEN_LANG
BEN716CN Pension Plan Table Listing 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan–Canada- Basic	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN717CN Pension Plan Table Listing 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Rates	RUNCTL_BEN_LANG
BEN718CN Pension Plan Table Listing 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Limits	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table Listing	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement. This report serves as an audit trail for the information defined on the FMLA Plan table.	Set Up HRMS, Product Related, Base Benefits, FMLA (Family Medical LV), FMLA Plan Table Report	RUNCTL_BEN_LANG
BEN721 Limit Table List.	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan. This report serves as an audit trail for the information defined on the Limit table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Limit Table	RUNCTL_ASODATE_BEN

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Report ID and Report Name	Description	Navigation	Run Control Page
BEN731 Salary Rate Table	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID. This report serves as an audit trail for the information defined on the Salary Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Salary Rate	RUNCTL_ASODATE_BEN
BEN733 Base Benefit Audit Report	Summarizes potential worker data error conditions as related to Base Benefits business process. Includes workers without Employment records, workers without Job records, workers under 16 years old, workers with unusual dependents signed up for coverage, workers with spouses (or other dependents) both electing health benefits, workers with overage dependent coverage, and workers with incorrect health plans set up on the Benefit Program Table.	Benefits, Reports, Audits, Base Benefits Consistency Audit	RUNCTL_BEN_LANG
BEN734 Court Orders Audit Report	Lists workers not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	Benefits, Reports, Audits, Court Ordered Coverage Audit	RUNCTL_BEN734
BEN740 Billing Calendar Table Listing	Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period. Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	Set Up HRMS, Product Related, Base Benefits, Billing, Calendar Report	RUNCTL_BEN_LANG

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Report ID and Report Name	Description	Navigation	Run Control Page
CBR001 COBRA Qualify Ltr	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Initial Letter	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Secondary Letter	RUNCTL_CBR002
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	Benefits, Administer COBRA Benefits, Terminate COBRA Coverage, Create Termination Letter	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	Benefits, Administer COBRA Benefits, Create Open Enrollment Letter	RUNCTL_CBR004
CBR005 COBRA Event Summary	Lists all workers for whom a COBRA event occurred, along with the event status.	Benefits, Administer COBRA Benefits, Review Processing Results, Event Summary Report	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	Benefits, Administer COBRA Benefits, Review Processing Results, Enrollment Report	RUNCTL_CBR006
CBR007 COBRA Audit	Displays active workers enrolled in COBRA health coverage; workers and spouses (or other dependents) electing health benefits for the same dependent ID; and workers who have overage dependents.	Benefits, Administer COBRA Benefits, Review Processing Results, Audit Report	RUNCTL_ASODATE_BEN
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	Benefits, Administer COBRA Benefits, Review Processing Results, Error Report	RUNCTL_CBR008

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Report ID and Report Name	Description	Navigation	Run Control Page
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	Benefits, Interface with Providers, FEHB Reconciliation Report	GVT_RUN_FGPY017
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	Benefit, Conduct Nondiscrimination Tsts, Section 401 Testing, 401 Testing Report	RUNCTL_NDT004
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs:. *NDT005:* Eligible Cross Section Test (eligible employees test) *NDT006:* 55% Average Benefits Test *NDT007:* Concentration Test (5% Owner Test)	Benefit, Conduct Nondiscrimination Tsts, Section 129 Testing, 129 Testing Report	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	Benefits, Reports, Contributions and Deductions, PI Benefit Deductions Register	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Provider/Vendor Listing	RUNCTL_PAYVNDR
RDED001 Retroactive Deductions Requested - 'Not Processed Status	Lists retroactive deduction requests that have not been processed.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Pending Request Summry	RUNCTL_RTRODED1
RDED002 Retroactive Deductions in Progress - 'Calculate Status'	Lists retroactive deduction requests that have been processed.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Calculations	RUNCTL_RTRODED1

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Report ID and Report Name	Description	Navigation	Run Control Page
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by emplID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Load Summary	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Benefit/Ded Load Audit	RUNCTL_RTRODED3
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated workers. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Benefit/Ded Terminations	RUNCTL_RTRODED3

Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Department FTE	RUNCTL_FRMTHRU_DPT
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes	Set Up HRMS, Product Related, Commitment Accounting, Reports, Encumbrance Messages	RUNCTL_BUD009

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Report ID and Report Name	Description	Navigation	Run Control Page
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or workers within a department. This report can also print information about a specific position or worker when you enter worker or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	• Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report CAN • Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report USA	RUNCTL_BUD011C, RUNCTL_BUD011
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Full-Time Equivalent Rollup Report	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	• Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Retro Distribution Audit Rpt • Payroll for North America, Payroll Distribution, Commitment Accounting USA, Retro Distribution Audit Rpt	RUNCNTL_BUD020
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	• Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Predistribution Audit Report • Payroll for North America, Payroll Distribution, Commitment Accounting USA, Predistribution Audit Report	HP_RUNCTL_PDAUDIT

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Report ID and Report Name	Description	Navigation	Run Control Page
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	Payroll for North America, Payroll Distribution, GL Interface Reports, Gross and Fringe	HP_RCTL_GRSFR_RPT

Manage French Profit Sharing Reports

Report ID and Report Name	Description	Navigation	Run Control Page
WP0001FR Individual Report	Provides workers with details of their profit sharing amount when these are calculated, or when a worker leaves the organization. This report can be delivered with the worker's payslip.	Compensation, Profit-Sharing FRA, Manage Profit Sharing, Individual Report	RUNCTL_WP_IND_RPT
WP0002FR Agreement Report	This report is for administrators and lists all the workers that are eligible for a selected agreement and includes the status of the workers' funds, gross and net profit sharing amount, deductions, and investment method.	Compensation, Profit-Sharing FRA, Manage Profit Sharing, Agreement Report	RUNCTL_WP_AGRT_RPT

Manage French Public Sector Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FP_PROM Promotable Employees	Lists the workers promotable by a given date. To be launched after the FPA800 SQR.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	RUNCTL_FPAPROM
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists workers that have been evaluated and those who have not.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	RUNCTL_FPA025

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Report ID and Report Name	Description	Navigation	Run Control Page
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	Workforce Administration, Workforce Reports, Individual Orders Edit FPS	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	Workforce Administration, Workforce Reports, Collective Orders FPS	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	Workforce Administration, Workforce Reports, Collective Order Updates FPS	RUNCTL_FPA115
FPA400 Part-Time Schedule	Lists part-time workers, whose part-time will end soon	Workforce Administration, Workforce Reports, Part-Time Schedule FPS	RUNCTL_FROMTHRU
FPA405 Current PPd Schedule	Lists workers nearing the end of their probation period.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Current Probation Schedule Rpt	RUNCTL_FROMTHRU
FPA-AFFE Assignment − Request tbc	Lists requests for assignment changes that need to be approved	Workforce Administration, Workforce Reports, Assignment − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	Workforce Administration, Workforce Reports, Career − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPACNTR Contribution Call Letters	Contribution call letters contain the worker's address and the contribution amounts. Launch this report after FPA1100 SQR.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPACNTR2 Contribution Call Letters	See above.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPAEE_CA Employee Career/Action	Lists worker career data.	Workforce Administration, Job Information, Reports, Employee Career/Action FPS	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists worker civil service position data	Workforce Administration, Job Information, Reports, CS Position/Employee FPS	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment − Request Rejected	Lists rejected assignment change requests.	Workforce Administration, Workforce Reports, Assignment − Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPAHISTC Career − Request Rejected	Lists rejected career change requests.	Workforce Administration, Workforce Reports, Career − Request Rejected FPS	RUNCTL_FPACRYSTAL1

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Report ID and Report Name	Description	Navigation	Run Control Page
FPAHISTP CSPosition − Request Rejected	Lists rejected civil service position requests.	Workforce Administration, Workforce Reports, CSPosition − Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTS Compensation − Request Rejected	Lists rejected compensation change requests.	Workforce Administration, Workforce Reports, Compensation − Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time − Request Rejected	Lists rejected work time change requests.	Workforce Administration, Workforce Reports, Work Time − Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists civil service change requests requiring approval.	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA_RAT List of Employees to be Rated (employee ID)	Lists workers to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPARAT2 List of Employees to be Rated (employee/department list)	See above.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPA-REMU Compensation − Request tbc	Lists compensation change requests requiring approval.	Workforce Administration, Workforce Reports, Compensation − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time − Request tbc	Lists work time change requests requiring approval.	Workforce Administration, Workforce Reports, Work Time − Request tbc FPS	RUNCTL_FPACRYSTAL1
FPMACT1 Action List − Report 1	Lists action definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List − Report 1	PRCSRUNCNTL
FPMACT2 Action List − Report 2	Lists action definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List − Report 2	PRCSRUNCNTL
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/CS Position	PRCSRUNCNTL
FPMACTPR Retro Prcs Action Rules	Lists the retroactivity rules for action codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Prcs Action Rules	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FPMACTST Actions/Status	Lists actions authorized by status.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/Status	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Occupation	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Corps	PRCSRUNCNTL
FPMINDEX Index Value	Lists index/amount values.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Index Value	PRCSRUNCNTL
FPMJOBCD Job Code	Lists job code definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Job Code	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Civil Service Position	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Type of Point	PRCSRUNCNTL
FPMRANK1 Grade List − Report 1	Lists grade definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List − Report 1	PRCSRUNCNTL
FPMRANK2 Grade List − Report 2	List grade definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List − Report 2	PRCSRUNCNTL
FPMSALST Sal Grade Table/Scale-Steps	Lists salary grade table − steps.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Sal Grade Table/Scale-Steps	PRCSRUNCNTL

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Manage Labor Administration Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR015 (USF) Union Membership	(For U.S. federal government users) Lists each union organization and the workers who are members. Before you run this report you must run the Refresh Employees Table process.	Workforce Administration, Labor Administration, Reports, Union Membership USF	PRCSRUNCNTL
HRLAY001 Layoff Roster	Report on the setup and roster list information of a layoff roster.	Workforce Administration, Labor Administration, Reports, Layoff Roster Report	HR_RUNCTL_LAY001
HRLAY002 Bumping	This report displays worker Job Data history and job hierarchy enabling you to determine who has bumping rights in the event of a layoff.	Workforce Administration, Labor Administration, Reports, Bumping Report	HR_RUNCTL_LAY002
HRLAY003 Seniority	lists workers, their seniority dates, and the values for those dates.	Workforce Administration, Labor Administration, Reports, Seniority Report	HR_RUNCTL_LAY003
HRLAY004 Candidate List	This report lists the workers with recall rights that have not expired.	Workforce Administration, Labor Administration, Candidate List Report	HR_RUNCTL_LAY004
HRLAY005 Recall Roster	Report on the setup and roster list information of a recall roster.	Workforce Administration, Labor Administration, Recall Roster, Recall Roster Report	HR_RUNCTL_LAY005
HRLAY006 Layoff Roster Post Processing	When you process a layoff from the Process Layoff page, the process generates this report, listing those workers laid off. **Note.** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page.	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button.	HR_RUNCTL_LAY

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Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY007 Recall Rights Post Processing	• When you process a layoff from the Process Layoff page, the process generates this report, listing those workers who have received recall rights. **Note.** The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page. • When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing the recall rights of the workers who were rehired.	• Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_LAY, HR_RUNCTL_REINSTAT
HRLAY008 Recall Post Processing	When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing those workers recalled or reinstated.	• Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_REINSTAT
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against workers within a specified date range. The report itemizes actions by date, by incident, and by worker.	Workforce Administration, Labor Administration, Reports, Discipline Action Summary	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company.	Workforce Administration, Labor Administration, Reports, Grievance Detail	RUNCTL_OHS_NONE

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific workers.	Workforce Administration, Labor Administration, Reports, Employee Disciplinary Action	RUNCTL_OHS005
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions.	Workforce Administration, Labor Administration, Reports, Grievance Summary	RUNCTL_OHS_FROMTO
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the workers who are members. Run the Refresh Employees Table process before running this report.	Workforce Administration, Labor Administration, Reports, Union Membership	PRCSRUNCNTL
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more workers are required to submit this report.	Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA	RUNCTL_PER053
PER055 Union Fees	(ESP) Shows the workers and fees per union and month.	Workforce Administration, Labor Administration, Reports, Union Fees ESP	RUNCTL_PER055_ESP
PER059 Union Report ITA	(ITA) There are two Italian union reports. You can run a union report generating a list of workers and worker information by union. You can also run a union report listing the number of workers belonging to each union, sorted by category.	Workforce Administration, Labor Administration, Reports, Union Report ITA	RUNCTL_PER059
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	Workforce Administration, Labor Administration, Reports, Labor Relations Letters	RUNCTL_PER061
WP001 Employees Due Advancement	Create a list of all of the workers that the Process Wage Progression process will advance.	Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression	RUN_UPD_WP_ADVC
WP002 Exceptions	Lists all workers within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Exception Rpt, Exceptions Report	RUN_WP002

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Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF	RUNCTL_FGHR025
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History USF	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History USF	RUNCTL_FGASOFDT
FGHR028 (USF) Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception Override USF	RUNCTL_FGHR028
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (Crystal)	Organizational Development, Position Management, Position Reports, Occupation Series USF	PRCSRUNCNTL
FGOF8 (USF) OF8 Report	This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.	Organizational Development, Position Management, Position Reports, OF8 Report USF	RUNCTL_FGOF8
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (Crystal)	Organizational Development, Position Management, Position Reports, Position Title Table USF	PRCSRUNCNTL
FGPER823 (USF) Job Code	Print a list of all the job codes with effective dates.	Organizational Development, Position Management, Position Reports, Job Code USF	PRCSRUNCNTL

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Report ID and Report Name	Description	Navigation	Run Control Page
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization.	Organizational Development, Position Management, Position Reports, Vacant Position USF	RUNCTL_FGHR010
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	Organizational Development, Position Management, Position Reports, Position Status	RUNCTL_ASOFDATE
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions	RUNCTL_POS002
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History	RUNCTL_ASOFDT_COMP
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History	RUNCTL_ASOFDATE
POS006 Create Organizational Report	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.	Organizational Development, Position Management, Create Organizational Structure, Create Organizational Report	RUNCTL_POS006
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Create Organizational Report. (SQR)	Organizational Development, Position Management, Create Organizational Structure, Build Position Structure	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (SQR)	Organizational Development, Position Management, Position Reports, Vacant Position	PRCSRUNCNTL
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception/Override	RUNCTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	Workforce Monitoring, Professional Compliance, Reports, Company Compliance Plan	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	Workforce Monitoring, Professional Compliance, Reports, RI Observation	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	Workforce Monitoring, Professional Compliance, Reports, RI Review	RUN_CNTL_PCMP4

Manage Profiles Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMM007 Licenses, Certificates Renewal	Lists which workers need to renew a license or certificate.	Workforce Development, Profile Management, Reports, Licenses/Certificate Renewal	RUNCTL_CMM007
JPM_CATI_RPT Content Catalog Listing	Lists the content items that have been set up for a selected content type or for all content types.	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Catalog Listing	JPM_CATLIST_RPT
JPM_JPNP_RPT Non-Person Profile	Generate a PDF file for each non-person profile listed in the run parameters.	Workforce Development, Profile Management, Reports, Non-Person Profile Report	JPM_NPPROF_RPT
JPM_JPPP_RPT Person Profile	Generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters.	Workforce Development, Profile Management, Reports, Person Profile Report	JPM_PPROF_RPT

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Report ID and Report Name	Description	Navigation	Run Control Page
NVQ001 (GBR) UK NVQ - Employee Status	Lists workers assigned to an NVQ and their status.	Workforce Development, Profile Management, NVQ Reports UK, Employee Status	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units.	Workforce Development, Profile Management, NVQ Reports UK, Unit Listing	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units.	Workforce Development, Profile Management, NVQ Reports UK, NVQ Listing	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ − Unit/Element Listing	Lists the elements associated with NVQ units.	Workforce Development, Profile Management, NVQ Reports UK, Unit/Element	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes a worker's NVQ Unit plan. First run the NVQ - Initialize Plan process to generate this report.	Workforce Development, Profile Management, NVQ Reports UK, Employee Plan	PRCSRUNCNTL
PER011 Competency Inventory	Lists workers in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new workers and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.	Workforce Development, Profile Management, Reports, Competency Inventory	RUNCTL_PER011
PER034 Internal Resume	Creates a resume-like document from the data contained in the employee's PERSON profile and other information. Sections of the report include: name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards	Workforce Development, Profile Management, Reports, Internal Resume	RUNCTL_PER034

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Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	Compensation, Variable Compensation, Award Reports, Actual Awards	RUNCTL_VC_REP
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	Compensation, Variable Compensation, Variable Comp Reports, Budget	RUNCTL_VC_REP
VC003 Calculate Awards Report	View the results of the Award Calculation process.	Compensation, Variable Compensation, Award Reports, Calculate Awards	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances. The detailed report lists all workers in a plan by group and their carryover balances. The summary report lists the total carryover balance for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Carryovers	RUNCTL_VC_REP
VC005 Employee History Report	For each worker, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each worker's grand total values for all plans.	Compensation, Variable Compensation, Award Reports, Employee History	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.	Compensation, Variable Compensation, Variable Comp Reports, Funds Allocation	RUNCTL_VC_REP
VC007 Guarantee Report	View the worker guarantees. The detailed report lists all workers in a plan by group and their guarantees. The summary report lists the total guarantees for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Variable Comp Reports, Guarantee	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to workers. The report lists only awards that are beyond the status of Initial Calculation. The detailed report lists all workers in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value. The summary report lists the total non-monetary units for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Non Monetary	RUNCTL_VC_REP
VC009 Plan History Report	The report provides information about the plan definition and lists award values, proration, and approver information by payout period for the plan ID that you specify on the run control page.	Compensation, Variable Compensation, Award Reports, Plan History	RUNCTL_VC_REP
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page. The detailed report lists all workers in a plan by group, the worker's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan. The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.	Compensation, Variable Compensation, Award Reports, Variance	RUNCTL_VC_REP

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Report ID and Report Name	Description	Navigation	Run Control Page
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	Compensation, Variable Compensation, Variable Comp Reports, Organization and Group Goals	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of workers who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the workers' managers can use this information to ensure that these individuals get the appropriate awards.	Compensation, Variable Compensation, Variable Comp Reports, Tree Consistency Report	RUNCTL_VC_REP
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Stock Administration.	Compensation, Variable Compensation, Award Reports, Subscription Errors	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies workers who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	Compensation, Variable Compensation, Variable Comp Reports, Tree Member Overlap	RUNCTL_VCP001

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females. This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	RUN_CNTL_REG
HRS002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	RUN_CNTL_REG

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA-200 Log	RUNCTL_CALENDARYR
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations. This report is compliant with the EEOC requirements for single and multi-establishment reporting. A single-establishment employer needs to file one report, while a multi-establishment employer must file separate reports.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	RUNCTL_PER016
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of worker counts for the private sector.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	RUNCTL_PER017
PER019 Terminations Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group. It counts workers in each group, counts terminations, and expresses both counts as a percentage of the total population of active workers. It also calculates the termination rate. This report does not include workers whose Sex or Ethnic Group has not been indicated.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	RUN_CNTL_REG
PER022 EE0-5 Job Analysis	Supplies standard job category counts for school-related categories.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	RUNCTL_PER022
PER024 Job Group Analysis	Analyzes the makeup of your workforce by establishment, EEO job group, job title, and salary grade. For a given job title and salary grade, the report provides totals by minorities, by gender, and by ethnicity within gender. Use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	RUN_CNTL_REG2

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Report ID and Report Name	Description	Navigation	Run Control Page
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce by job groups within each establishment. These totals are further broken down by minority and gender, and then by ethnicity within each gender.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	RUN_CNTL_REG2
PER025 Workforce Analysis	Tracks hiring practices by department based on job titles, including the salary grade assigned to the title and the total number of workers and minorities who hold the title. Use the report to analyze patterns of discrimination in hiring practices. The report shows the percentage of minorities in each department.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	RUN_CNTL_REG2
PER027 VETS-100 Process	The report details the number of special disabled veterans, Vietnam-era veterans, and other protected veterans in your workforce by job category and hiring location, as well as the total number of workers, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	RUNCTL_PER027
PER027B VETS-100 Analysis	Reports on the VETS-100 data created by the VETS-100 process.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	RUNCTL_PER027C
PER027C Vets-100 Submit	Creates the digital file for submission to the government. You must run the VETS-100 Process before running this report.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	RUNCTL_PER027C
PER030 Job Group Roster	Lists personal and job data for workers such as ethnic group, gender, date they received the title, salary grade, hourly rate, monthly rate, department name, original hire date and job title at hire. Workers are grouped by their associated job group and establishment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	RUN_CNTL_REG2

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Report ID and Report Name	Description	Navigation	Run Control Page
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	RUNCTL_PER031
PER036 PRWORA - New Hire	This report provides the information employers furnish to the Federal Directory of New Hires after hiring a new worker.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, FEDERAL PRWORA - New Hire	RUNCTL_PER036
PER036S PRWORA - New Hire	Provides the information employers furnish to the State Directory of New Hires after hiring a new worker.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, STATE PRWORA - New Hire	RUNCTL_PER036_S
PER040 IPEDS-S	The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	RUNCTL_PER040

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements

(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ASCO	Prints a list of the ASCO reporting codes.	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

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(BRA) Meeting Regulatory Requirements Reports for Brazil

Report ID and Report Name	Description	Navigation	Run Control Page
BRCGED01 CAGED Report	The CAGED (*Cadastro Geral de Empregados e Desempregados)* report generates a file containing the monthly turnover of workers by establishment. Every establishment that has had any type of turnover (hiring, dismissing, or transferring worker that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	CAGED_RC_BRA
BREREG01 Employee Registry	The Employee Registry report generates a file containing workers' employment data, including hire date, retirement date, length of social security contributions.	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	EMPL_REG_RC_BRA

(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	Description	Navigation	Run Control Page
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements	RUNCNTL_PER102CN
PER715CN Pay Equity Table	Lists job evaluation information. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity	PRCSRUNCNTL
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, National Occupation Codes	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

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(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	Description	Navigation	Run Control Page
DIS001 Disability	Calculate the theoretical number of disabled workers who should work for the company and list the disabled workers, excluding temporary workers, trainees, and apprentices. For companies with more than 20 workers. (SQR) Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability	RUNCTL_DIS001_FRA
ELE001 Election	Provides the results of the staff representative elections for workers and management. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report	RUNCTL_ELE001
HRSHSFRA Single Hiring Statement	A statutory report that is filed at the time of hiring new workers. The system uses information from your worker, company, and establishment tables to generate the report.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement	SHS_FRA_RUN_CTL
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more workers. (SQR) Before running this report, define which contract types to include in the report using the Contract Type Group page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce	RUNCTL_REG001_FRA
REG002FR Personal Register	Lists workers for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality	RUNCTL_REG003_FRA

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Report ID and Report Name	Description	Navigation	Run Control Page
REG004FR BIAF report	This statutory report is for workers on fixed-term contracts and details the worker's training entitlement.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF	RUNCTL_BIAF_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of workers in the organization and their average salary. (Crystal) Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey − Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	RUNCTL_SOC001

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current worker count and the number of terminations.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Termination Analysis	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis	RUNCTL_PER025UK
PER030UK Job Group Roster	Lists your workers in job groups.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments	RUNCTL_UKNI

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF	RUNCTL_FGHR012
FGHR013A VETS-100 by SubAgency	Generates a Veterans employment report by sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by SubAgency USF	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by POI USF	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF	RUNCTL_FGHR014
FGHR014B EEO Groups by Series/SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF	RUNCTL_FGHR014

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Report ID and Report Name	Description	Navigation	Run Control Page
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing. Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDFF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Error Report	RUNCTL_FGHR019B
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF	RUN_FGSF113A
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF	RUN_FGSF113G

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(USF) Performing Regulatory Processing and Reporting"

Monitor Absence Reports

Report ID and Report Name	Description	Navigation	Run Control Page
ABS001 Absence Listing	Provides information about a worker's absence history. **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of worker absence periods.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods	RUNCTL_FROMTHRU
ABS003 Time Lost Due to Absence	Provides worker absence information. **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	RUNCTL_ABS003

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Report ID and Report Name	Description	Navigation	Run Control Page
ABS004UK Bradford Score	Lists worker absences for the regulatory region of GBR only. It lists department, name, emplID, worker type, job title, total number of absences, total number of days absent, and the Bradford Score. The Bradford Score column of this report is calculated based on the following information: • Total number of absences (A) • Total number of days absent (B) • A^2 X B **Note.** Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR	RUNCTL_ABS004UK
ABS005NL Illness Registration (1)	Calculates the illness totals, percentages, and frequencies.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS006NL Illness Registration (2)	Same as above.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS007NL Longterm Illnesses NLD	Provides a report of workers who have longterm illnesses from which they haven't fully recovered and are subject to the Dutch law *Wet Poortwachter.* You can use a worker checklist to track the status of a worker's illness. **Note.** This report can be run from PeopleSoft Human Resources or Global Payroll for the Netherlands. Based on the setting of the GPNLD installation flag, the report retrieves absence data from human resources or payroll tables.	Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD	RUNCTL_ABS007_NL

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Report ID and Report Name	Description	Navigation	Run Control Page
ABS702NL Create Statistics	Create absence statistics for a company in the Netherlands.Run this process before creating an Illness Registration report. Run for a certain month of the year.	Workforce Administration, Absence and Vacation, Absence Reports, Create Illness Statistics, Create Statistics	RUNCTL_ABS702_NL

Monitor Health and Safety Reports

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001BR PPP Report BRA	Tracks information on Work Area Hazard locations, Hazard	Workforce Monitoring, Health and Safety, Reports, PPP Report BRA	PPP_RC_BRA
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	Workforce Monitoring, Health and Safety, Reports, WCB Form 7 CAN	RUNCTL_OHS001CN
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	Workforce Monitoring, Health and Safety, Reports, Work Accident FRA	OHS001FR
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select.	Workforce Monitoring, Health and Safety, Reports, Accident DEU	RUNCTL_OHS501GR

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS001UK Injury/Dangerous Occurence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. **Note.** To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous Occ. GBR	RUNCTL_OHS_UK
OHS002GR Reportable Accident/Illness	Produces a Reportable Accident /Illness report for Germany.	Workforce Monitoring, Health and Safety, Reports, Reportable Accident/Illness DEU	RUNCTL_OHS002GR
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).	Workforce Monitoring, Health and Safety, Reports, Illness GBR	RUNCTL_OHS_UK
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Non-Employees In Incidents	RUNCTL_OHS_FROMTO

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	Workforce Monitoring, Health and Safety, Reports, Incident Location Summ DEU	RUNCTL_OHS003GR
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. This report is only available in German. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Illness DEU	RUNCTL_OHS504GR
OHS008BC Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	Workforce Monitoring, Health and Safety, Reports, WCB Incident CAN	RUNCTL_OHS_INC
OHS009 Incident Detail	In addition to the occurrence information, the report lists all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.	Workforce Monitoring, Health and Safety, Reports, Incident Detail	RUNCTL_OHS_INC

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Summary	RUNCTL_OHS_FROMTO
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Location Incident Summary	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Claim Summary Overview	RUNCTL_OHS_FROMTO
OHS013 Employees In Incidents	Summarizes workers involved in incidents that have occurred within a specified date range. It notes whether the worker has suffered an injury or illness (Crystal)	Workforce Monitoring, Health and Safety, Reports, Employees In Incidents	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for a worker involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Lost Work	RUNCTL_OHS_FROMTO
OHS014ES Incident Without Lost Work	Generates a list of accidents that didn't result in lost workdays. This report prints the Name, Gender, NSS, Accident Date, and Accident Type. This report must be printed by Work Center. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident w/o Lost Wages ESP	RUNCTL_OHS_FROMTO

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Report ID and Report Name	Description	Navigation	Run Control Page
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the worker filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Claim Detail	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Vehicle Incident Summary	RUNCTL_OHS_FROMTO
PER002CH Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	Workforce Monitoring, Health and Safety, Reports, Accident CHE	RUNCTL_PER002_CHE

Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARPLAN Employee Career Plan	Lists a worker's career plan as entered by different evaluators (Crystal).	Workforce Development, Career Planning , Career Reports, Career Plan	RUNCTL_CAR001
CARTRAIN Employee Career Training Plan	Lists a worker's training plan to meet career goals (Crystal).	Workforce Development, Career Planning , Career Reports, Career Training	RUNCTL_CAR002

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Report ID and Report Name	Description	Navigation	Run Control Page
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for a worker. (SQR). An IDP includes a worker profile, worker competencies, worker training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.	Workforce Development, Career Planning , Career Reports, Individual Development Plan, IDP	RUN_FGHR022

Manage Base Compensation and Budgets Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.	Compensation, Base Compensation, Salary Plan Reports, Salary Structure	RUNCTL_ASOFDATE
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment. The report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.	Compensation, Base Compensation, Salary Plan Reports, Job Grading by Evaluation Pts	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP003 Compa-Ratio Analysis	The report lists each worker in the salary grade and the midpoint amount of the salaries in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.* The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the worker's salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.	Compensation, Base Compensation, Salary Plan Reports, Ratio Analysis	RUNCTL_ASOFDATE
CMP004 Below Minimum Analysis	The Below Minimum Analysis report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	Compensation, Base Compensation, Salary Plan Reports, Below Minimum Analysis	RUNCTL_ASOFDATE
CMP005 Above Maximum Analysis	For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*	Compensation, Base Compensation, Salary Plan Reports, Above Maximum Analysis	RUNCTL_ASOFDATE

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the workers' previous and new compensation package. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.	Compensation, Base Compensation, Maintain Plans, Update By Plan/Paygroup	RUNCTL_CMP008
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to workers' job records before you run the Load Data process (HR_SP_CI) to actually insert new job records. This report displays the workers' previous and new Sal Admin Plan (salary administration plan), Grade, and Step. Generate this report after running the Update by Job Code application engine process. The report displays the workers' previous and new salary administration plan, grade, and step. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Job Code process run control page.	Compensation, Base Compensation, Maintain Plans, Update by Job Code	RUNCTL_CMP010

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Report ID and Report Name	Description	Navigation	Run Control Page
CMP011 Salary History by Employee	Displays each salary change for a worker during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Base Compensation, Compensation Reports, Salary History by Employee	RUNCTL_CMP011
CMP014 Salary History by Group	Provides the salary changes for the workers in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Base Compensation, Compensation Reports, Salary History by Group	RUNCTL_CMP014
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	Compensation, Base Compensation, Percentage Increase JPN, Salary Simulation Report	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	Compensation, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	Compensation, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt	RUNCTL_LMS_REPORT
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them. The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of a worker have an associated rate code class. Run this report before you run the calculation process.	Compensation, Forecast Compensation FRA, Process Forecast, Rate Codes w/out Class Rpt	RUNCTL_LMS_RATE_CL

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Report ID and Report Name	Description	Navigation	Run Control Page
PER008 Review Audit	Lists all worker reviews for the workers in a group.	Compensation, Base Compensation, Employee Review History, Review Audit	RUNCTL_PER008
PER012 Departmental Salaries	This report provides an alphabetical list of workers by department, basic job data information, and a breakdown of pay rates for each.	Compensation, Base Compensation, Compensation Reports, Salary History by Department	PRCSRUNCTL_LC_HR
PER013 Employee Compensation Changes	Lists workers who have had compensation rate changes within a selected time period.	Compensation, Base Compensation, Compensation Reports, Employee Compensation Changes	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for a worker during a specified time period.	Compensation, Base Compensation, Compensation Reports, Salary History by Company	RUNCTL_PER023
PER041 Merit Increase Report	Lists the merit increases and their approval status for the workers in a merit group.	Compensation, Base Compensation, Merit Increases, Report Merit Increases	RUNCTL_SP_MERIT
PER062JP (JPN) Grade Advance Candidate List	Lists workers who are eligible to advance from the grade you enter.	Compensation, Base Compensation, Salary Plan Reports, Grade Advance Candidates JPN	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B

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Performance Management Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Lists missing documents for a group of workers (Group ID) and a given document type and date range.	Workforce Development, Performance Management, Reports, Missing Documents Report	RUNCTL_EP_RPT
HEP002 Late Documents	Lists manager documents whose due date has passed.	Workforce Development, Performance Management, Reports, Late Documents Report	RUNCTL_EP_RPT

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to workers.	Compensation, Total Compensation, View Total Compensation, Total Comp Statement Report	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	Compensation, Total Compensation, View Total Compensation, Group Summary Compensation Rpt	TC_GRP_RUN_CNTL
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	Compensation, Total Compensation, View Total Compensation, Group Detail Compensation Rpt	TC_GRP_RUN_CNTL

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	Workforce Development, Faculty Events, Load Teaching Data CAN, FT Survey Stats CAN Rpt	RUNCTL_HPH905CN
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report	RUNCTL_EVENTS
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	Workforce Development, Faculty Events, Manage Cases, Case Review Status Rpt, Case Review Report	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	Workforce Development, Faculty Events, Tenure Reports, Employee Tenure Status	RUNCTL_EGPP03

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Report ID and Report Name	Description	Navigation	Run Control Page
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group. Administer Flexible Service also uses this report.	Workforce Development, Faculty Events, Tenure Reports, Tenure Calculation, Tenure Calc	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date. With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.	Workforce Development, Faculty Events, Tenure Reports, Tenure Years of Service, Tenure Service List	RUNCTL_EGPP06

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	Workforce Administration, Flexible Service EG, Employee Service Report	RUNCTL_EGPP04
PER049 Employee Service Calculation Results	Lists the results of the Normal Run background process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	Workforce Administration, Flexible Service EG, Calculated Service Report	RUNCTL_EGPP05

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Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (Crystal).	Workforce Administration, Global Assignments, Track Assignment, Employees on Assignment Report	RUNCTL_PER717

PeopleSoft HRMS Reports: Selected Reports

This section provides detailed information on individual reports. The reports are listed by report ID.

PER044 - Multiple Seniority Components − Basic Report

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.
- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.
- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Administering Seniority Pay"

PER033 - Citizenship/Country/Visa Audit − Administer Workforce

The report flags six different types of discrepancies. Specifically, it flags job records when the following pairs of data exist:

Citizenship Status	• Native or Naturalized. • Not Native or Naturalized.
Country of Citizenship	• Not the local country. • The local country.
Visa Record	• Exists for the local country. • Doesn't exist for the local country.

The report puts a page break between categories.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Managing Citizenship and Visa or Permit Information

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PER058 - Primary Job Audit − Administer Workforce

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for a worker's primary job only, you create an accurate worker count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have workers who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your worker job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for workers with multiple jobs.

This report lists all workers whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.
- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information," Running Job Data Reports

PER066JP - JPN Employee Assignment List Report

This report lists workers by department and supervisor level including workers with additional appointments.

To run the report, at least one Department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by Department then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.
- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Workers without supervisor levels, in alphanumeric emplID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL if the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

POS006A - Build Position Structure − Manage Positions

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

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When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.
- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Maximizing Position Data," Running the Organizational Structure Reports

POS008 - Exception/Override − Manage Positions

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the worker assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those workers whose HR Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Managing Position Data," Verifying Position Data

PKG006 - Salary Packaging FBT Reconciliation − Administer Salary Packaging

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the workers who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each worker and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

Note. The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging, "Managing Salary Packages," Running Salary Packaging Reports

HRH905CN - StatsCan FT Survey − Track Faculty Events

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada's summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

VC011 − Organization and Group Goals − Manage Variable Compensation

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.
- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Variable Compensation, "Setting Up and Using Weighted Goals," Running the Organization and Group Goals Report

VC013 − Subscription Error − Manage Variable Compensation

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award, the report identifies the worker, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)

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- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Request by User (Reject All)

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Variable Compensation, "Managing Awards Approval and Payout," Reporting on Award Payout and Distribution

BEN004 - Savings Investment Distributions − Base Benefits

This report lists the total deductions made to date and the total company contributions for workers participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for workers in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

BEN733 - Base Benefit Audit − Base Benefits

The Base Benefits Audit Report provides a summary of potential worker data issues as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

The audits performed are Employees without Employment records, Employees without Job records, Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage, Employees with incorrect health plans set up on the Benefit Program Table, and audits for consistency of marital and dependent relationships.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

CBR005 - COBRA Event Report − Base Benefits

This report provides data about COBRA beneficiaries at the Event Level. The report will list all workers to whom an event has occurred. The qualified status indicates whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

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CBR007 - COBRA Audit − Base Benefits

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and workers who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

CBR008 - COBRA Administration Error − Base Benefits

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

NDT004 - 401(k)/401(m) Nondiscrimination Testing − Base Benefits

Specify 401(k) or 401(m) for the report output.

If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001:* This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002:* You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003:* This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

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Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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