
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements

December 2006

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Contents

General Preface

About This PeopleBook Preface	.xi
PeopleSoft Enterprise Application Prerequisites.....	.xi
Application Fundamentals.....	.xi
Documentation Updates and Printed Documentation.....	.xii
Obtaining Documentation Updates.....	.xii
Downloading and Ordering Printed Documentation.....	.xii
Additional Resources.....	.xiii
Typographical Conventions and Visual Cues.....	.xiv
Typographical Conventions.....	.xiv
Visual Cues.....	.xv
Country, Region, and Industry Identifiers.....	.xv
Currency Codes.....	.xvi
Comments and Suggestions.....	.xvi
Common Elements Used in PeopleBooks.....	.xvi

Preface

PeopleSoft Enterprise Human Resources Meet Regulatory Requirements Preface	.xix
PeopleSoft Products.....	.xix
PeopleSoft Enterprise Application Fundamentals.....	.xix
PeopleBook Structure.....	.xix

Chapter 1

Getting Started with Meet Regulatory Requirements.....	1
Meet Regulatory Requirements Overview.....	1
Meet Regulatory Requirements Business Processes.....	1
Meet Regulatory Requirements Integrations.....	1
Meet Regulatory Requirements Implementation.....	2

Chapter 2

(AUS) Meeting Regulatory Requirements for Australia.....	3
Maintaining the ASCO Table.....	3
Pages Used to Maintain the ASCO Table.....	3

Creating Reports for the PSMPC.....	3
Understanding Australian PSMPC Reporting.....	4
Pages Used to Create Reports for the PSMPC.....	4
Entering Additional Employee Data.....	4
Processing the Snapshot and Change Reports.....	5

Chapter 3

(CAN) Meeting Regulatory Requirements for Canada.....	7
Understanding Regulatory Requirements for Canada.....	7
Setting Up Control Tables for Canadian Regulatory Reports.....	7
Pages Used to Set Up Control Tables for Canadian Regulatory Reports.....	8
Quantifying Job Evaluation Criteria.....	8
Reviewing NOC Codes.....	9
Running the Employment Equity Report.....	10
Understanding Employment Equity Reporting.....	10
Understanding Employment Equity Report Files.....	10
Understanding Inclusion of Employees in the Employment Equity Report.....	12
Understanding Salary Calculation.....	13
Page Used to Run the Employment Equity Report.....	16
Running the Employment Equity Report.....	16
Running Official Languages Reports.....	16
Understanding the Canadian Official Language Data File Report.....	17
Understanding the Canadian Official Language Reports.....	18
Page Used to Run Canadian Official Languages Report.....	24

Chapter 4

(FRA) Meeting Regulatory Requirements for France.....	25
Understanding French Regulatory Requirements.....	25
Prerequisites.....	26
Understanding Pension and Contingency Fund Data.....	26
Setting Up French Regulatory Requirements.....	28
Understanding Pages with System-Populated Fields.....	28
Pages Used to Set Up French Regulatory Requirements.....	28
Grouping Contract Types.....	31
Updating Groups.....	32
Updating Indicators.....	33
Setting Up Pension and Contingency Fund Institutions.....	34
Setting Up Pension/Contingency Fund Contracts.....	35

Reviewing Pension and Contingency Fund Information.....	38
Page Used to Review Employee Pension and Contingency Fund Contracts.....	38
Reviewing Employee Pension and Contingency Fund Contracts.....	38
Running the Disability Report.....	40
Understanding French Disability Reporting.....	40
Common Elements Used in This Section.....	41
Page Used to Run the Disability Report.....	42
Managing Elections and Running the Election Report.....	42
Understanding French Professional Elections Reporting.....	42
Pages Used to Manage Elections and Run the Election Report.....	43
Defining an Election.....	43
Recording Candidacies for Election Groups.....	44
Entering Voting Results.....	45
Validating Election Results.....	46
Determining Elected Candidates.....	47
Preparing and Running the Employee Survey Report.....	47
Understanding French Employee Survey Reporting Requirements.....	48
Pages Used to Prepare and Run the Employee Survey Report.....	49
Setting Up the Compute Employee Survey Process.....	49
Reviewing Calculation Results.....	51
Viewing Predefined Employee Survey Indicators for the Employee Survey Report.....	52
Running Workforce Reporting Statutory Reports.....	71
Prerequisites for the Single Hiring Statement.....	71
Pages Used to Run the Workforce Reporting Statutory Reports.....	73
Running the Monthly Workforce Report.....	73
Running the Workforce by Nationality Report.....	73
Running the Personal Register Report.....	73
Running the Single Hiring Statement Report.....	74
Running the BIAF Report.....	75
Preparing and Running the Training 2483 Report.....	76
Understanding the Training 2483 Reporting Requirements.....	76
Understanding Classification of Training 2483 Report Indicators.....	77
Understanding Calculation of the Report Indicators.....	86
Pages Used to Run and Edit the Training 2483 Report.....	92

Chapter 5

(GBR) Meeting Regulatory Requirements for the United Kingdom.....	93
Understanding U.K. Regulatory Requirements.....	93
Prerequisites.....	93

Meeting Working Time Directive Requirements.....	94
Pages Used to Monitor Working Time Directive Requirements.....	95
Setting Up Working Time Directive Parameters.....	95
Setting Standard Weekly Working Hours for Employees.....	96
Daily Exceptions.....	97
Monitoring Working Time Directive Compliance.....	98
Reviewing Employee Time Directive Compliance.....	99
Running the U.K. Regulatory Reports.....	99
Pages Used to Run the U.K. Regulatory Reports.....	100
Running the Northern Ireland Report.....	100

Chapter 6

(NZL) Meeting Regulatory Requirements for New Zealand.....	103
Setting Up the ARCI Table.....	103
Page Used to Set Up the ARCI Table.....	103
Creating or Modifying Classification Units.....	103

Chapter 7

(USA) Meeting Regulatory Requirements for the United States.....	105
Understanding U.S. Regulatory Requirements.....	105
Setting Up Control Tables for Regulatory Requirements.....	106
Pages Used to Set Up Control Tables for Regulatory Requirements.....	106
Defining Affirmative Action Plans.....	107
Defining Establishment Criteria for EEO-1 Reports.....	108
Defining Job Task Codes.....	111
Setting Up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Reporting.....	112
Understanding the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Report.....	112
Pages Used to Set Up the New Hire Report and Layout.....	114
Setting up Record Definitions.....	115
Setting Up System Variables.....	116
Setting Up Data Object Definitions.....	118
Defining Child and Related Data Objects.....	119
Setting Up Report Type Definitions.....	120
Setting Up Report Columns.....	120
Cloning a New Hire Report.....	122
Setting Up the New Hire Report Layout Definitions.....	123

Meeting Equal Employment Opportunity and Affirmative Action Plan Reporting Requirements.....	124
Using U.S. Establishment Functionality.....	124
Setting Up EEO Reporting Requirements.....	125
Understanding Adverse Impact Reporting Requirements.....	125
Meeting Job Group Movement Analysis Reporting Requirements.....	126
Understanding the Job Group Movement Analysis Report.....	126
Entering Applicant Data.....	126
Meeting VETS-100 Reporting Requirements.....	127
Setting Up the VETS-100 Report.....	127
Entering Data for the VETS-100 Report.....	128
Running the U.S. Regulatory Reports.....	130
Pages Used to Run the U.S. Regulatory Reports.....	131
Running the EEO-1 Job Analysis Report.....	134
Generating the PRWORA New Hire Report and Electronic File.....	135
Running the New Hire Report and Electronic File Process.....	135
Page Used to Generate the New Hire Report and Electronic File.....	135
Generating the New Hire Report and Electronic File.....	135
Viewing the New Hire Report Log.....	136

Chapter 8

(USF) Performing Regulatory Processing and Reporting.....	139
Understanding Regulatory Requirements for U.S. Federal Agencies.....	139
Setting Up Control Tables for Regulatory Reports.....	140
Pages Used to Set Up Control Tables for Regulatory Reports.....	140
Adding Regulatory Fields.....	140
Specifying Regulatory Edit Prefixes and Fields.....	142
Specifying Edit Content.....	143
Entering Edit Details.....	144
Processing CPDF Files.....	145
Understanding CPDF Reporting Requirements.....	146
Pages Used to Process CPDF Files.....	147
Defining Additional CPDF Reporting Controls.....	147
Producing the CPDF Files.....	148
Processing the CPDF Edits.....	148
Generating the CPDF Edit Errors Report.....	149
Processing the Dynamics Table.....	149
Processing the CPDF Status Table.....	150
Generating the Dynamic/Status Flat File Submissions.....	150
Updating CPDF Edits.....	151

Processing the CPDF Organizational Component Translations File Submission.....	151
Viewing CPDF Processing Results Using the Query Manager.....	152
Submitting Parent Locator Information.....	152
Page Used to View New Hire Data Export Statistics.....	153
Running EEO Reports.....	153
Pages Used to Run EEO Reports.....	154
Running VETS Reports.....	154
Page Used to Run VETS Reports.....	155
Running the Monthly Report of Federal Civilian Employment (SF113-A) and Full-time Equivalent/Work-Year Civilian Employment (SF113-G) Reports.....	155
Pages Used to Run SF113-A and SF113-G Reports.....	155
Running the SF113-G Report.....	155

Chapter 9

(GBR, USA, and USF) Meeting Disability Regulatory Requirements.....	157
(GBR) Understanding Disability and Discrimination Act Regulatory Requirements in the U.K.....	157
Prerequisites.....	157
Disability Accommodations Tracking.....	157
(USA, USF) Understanding ADA Regulatory Requirements in the U.S.....	158
Prerequisites.....	158
Managing Accommodation Data.....	158
Pages Used to Manage Accommodation Data.....	159
Entering Accommodation Requests.....	159
Entering Accommodation Options.....	160
Entering Accommodated Job Tasks.....	161

Glossary of PeopleSoft Enterprise Terms.....	163
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Index	189
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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.

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

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

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.
<i>Italics</i>	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 <i>O</i> .
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 ().

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.

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.

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.

PeopleSoft Enterprise Human Resources Meet Regulatory Requirements Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise Human Resources application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Meet Regulatory Requirements.

PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements* provides you with implementation and processing information for your PeopleSoft Enterprise Human Resources system.

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Meet Regulatory Requirements

This chapter discusses:

- Meet Regulatory Requirements business processes.
- Meet Regulatory Requirements implementation.

Meet Regulatory Requirements Overview

Meet Regulatory Requirements enables you to set up your system to monitor the regulatory requirements for a particular country.

Meet Regulatory Requirements Business Processes

Meet Regulatory Requirements provides these business processes:

- (AUS) Meet regulatory requirements for Australia.
- (CAN) Meet regulatory requirements for Canada.
- (FRA) Meet regulatory requirements for France.
- (GBR) Meet regulatory requirements for the United Kingdom.
- (NZL) Meet regulatory requirements for New Zealand.
- (USA) Meet regulatory requirements for the United States.
- (USF) Perform Central Personnel Data File edit processing.
- (GBR, USA, and USF) Meet disability regulatory requirements.

We discuss these business processes in the business process chapters in this PeopleBook.

Meet Regulatory Requirements Integrations

The Meet Regulatory Requirements business process integrates with these applications:

- All PeopleSoft Enterprise HRMS applications.

- Other PeopleSoft applications.
- Other third-party applications.

We discuss integration considerations in the implementation chapters in this PeopleBook.

See Also

Interactive Services Repository on Customer Connection

Meet Regulatory Requirements 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.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See Also

[“PeopleSoft Enterprise Human Resources Meet Regulatory Requirements Preface,” page xix](#)

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

(AUS) Meeting Regulatory Requirements for Australia

This chapter discusses how to:

- Maintain the Australian Standard Classification of Occupations table (ASCO).
- Create reports for the Public Service and Merit Protection Commission (PSMPC).

Maintaining the ASCO Table

PeopleSoft provides standard ASCO codes. You can modify existing codes or add new codes as ASCO standards change. You can also print a report of the ASCO codes that you use.

Pages Used to Maintain the ASCO Table

Page Name	Object Name	Navigation	Usage
ASCO Table (Australian Standard Classification of Occupations Table)	ASCO_TBL_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define ASCO Codes, ASCO Table Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, ASCO Codes, Asco Table	Define occupational codes per ASCO standard requirements.
ASCO Report - Prcsruncntl	PRCSRUNCNTL	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	Run the ASCO report (PER712AUS) that provides a list of the ASCO reporting codes.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (AUS) Meet Regulatory Requirements Reports for Australia

Creating Reports for the PSMPC

This section provides an overview of Australian PSMPC reporting and discusses how to:

- Enter additional employee data.
- Process the Snapshot and Change reports.

Understanding Australian PSMPC Reporting

The Australian PSMPC requires that all government agencies provide employment details for employees employed under the Public Service Act 1999. Agencies are required to supply this information to the PSMPC in two files that include a range of personal and employment data about the agency's workforce.

The first file, called the *Snapshot* report, describes the state of the agency at a particular point in time. The second file, the *Change* report, describes how the agency has changed over a specific period of time.

The reports supply the employees' current job details. If an employee performs another job for a period of more than 90 consecutive days, then the employee's substantive job is not reported.

Pages Used to Create Reports for the PSMPC

Page Name	Object Name	Navigation	Usage
APS Employee Additional Data (Australian Public Service employee additional data)	APS_PERSDTA_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, APS Employee Additional Data	Enter additional employee data required for APS reporting.
APS Movement Code (Australian Public Service movement code)	APS_MOVECODE_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define APS Movement, APS Movement Code	Define or modify codes for changes in employment status. These codes are used by APS for administering human resources functions when employees change positions or job status.
APS Other Language Codes (Australian Public Service other language codes)	APS_LNG_CD_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define APS Non-English Code, APS Other Language Codes	Define or modify codes for languages used in APS reporting.
APS PSMPC Reporting (Australian Public Service Public Service and Merit Protection Commission reporting)	APS_RUNCTL_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Create APS PSMPC, APS PSMPC Reporting	Process the Snapshot and Change reports for PSMPC reporting.

Entering Additional Employee Data

Access the APS Employee Additional Data page.

APS Employee Additional Data	
William Niles	Person ID: PU018
Australian Public Service	
Employment Category:	Ongoing
*Engagement Date:	04/21/1998
Previous Work Sector:	Not Given
1st Language Spoken:	Eng.+anoth
Mother's Primary Language:	Not Given
Arrival Year in Australia:	1980
1st Non English Language:	6 German
Father's Primary Language:	Not Given

APS Employee Additional Data page

Employment Category	Select the appropriate category to define the employee's position. Options are <i>Irreg. Duty</i> (irregular duty), <i>Ongoing</i> , <i>Specf Task</i> (specific task), and <i>Specf Term</i> (specific term).
Engagement Date	Select the date to record the engagement date of the current period of employment in APS.
Previous Work Sector	Select the employee's previous work sector.
1st Language Spoken	Select the language classification.
1st Non English Language	If you select <i>Other</i> (meaning other than English) as the first spoken language, select the employee's first language in this field.
Mother's Primary Language and Father's Primary Language	Select the employee's parents' primary language.
Arrival Year in Australia	Enter the year the employee first arrived in Australia.

Processing the Snapshot and Change Reports

Access the APS PSMPC Reporting page.

APS PSMPC Reporting page

- Company** Enter the company that you want to report on.
- Start Date and End Date** This date range is the period when employee details are processed.
 For the Change report, this date range is the period when change entities specified by APS, like maternity leave or postal code, has changed on the period specified on the run control.
 For the Snapshot report, employees who are active at the end date will be reported.
- Report Type** Select the report type. Options are *Change* and *Snapshot*.
- Contact Phone** Enter a number for the APS employment database project team to call in order to clarify information in the APS employee report.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (AUS) Meet Regulatory Requirements Reports for Australia

PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 3

(CAN) Meeting Regulatory Requirements for Canada

This chapter provides an overview of regulatory requirements for Canada and discusses how to:

- Set up control tables for Canadian regulatory reports.
- Run the Employment Equity report.
- Run official languages reports.

Understanding Regulatory Requirements for Canada

The Meet Regulatory Requirements business process provides the tools to meet Canadian federal reporting requirements in several areas. You can establish pay equity criteria and generate a report summarizing job classes and related evaluation criteria. To classify jobs for census or other reporting purposes, you need to review and update Canadian standard occupational classification codes.

To meet employment equity and official language reporting requirements, run reports to generate data extract files for loading into two federal government reporting systems: the Employment Equity Computerized Reporting System (EECRS) and the Treasury Board Secretariat's system for reporting on the Official Languages Act (OLA).

PeopleSoft provides the following Canadian regulatory reports:

- Employment Equity.
- National Occupational Codes.
- Official Languages Requirements.
- Pay Equity Table.

Setting Up Control Tables for Canadian Regulatory Reports

To set up the Canadian regulatory reports tables, use the Canadian Pay Equity Table (CAN_PAY_EQUITY_TBL), and Canadian Ntl Occ Class Table (CAN_NOC_TABLE) components.

This section discusses how to:

- Quantify job evaluation criteria.
- Review National Occupational Class (NOC) codes.

Pages Used to Set Up Control Tables for Canadian Regulatory Reports

Page Name	Object Name	Navigation	Usage
Canadian Pay Equity Table	CAN_PAY_EQUITY_TBL	Workforce Monitoring, Meet Regulatory Rqmts CAN, Define Canadian Pay Equity, Canadian Pay Equity Table	Quantify job evaluation criteria to meet requirements set by the Pay Equity Act. Associate pay equity job class codes with job codes in the Job Code table.
Canadian Ntl Occ Class Table (Canadian National Occupational Classification table)	CAN_NOC_TABLE	Workforce Monitoring, Meet Regulatory Rqmts CAN, Define Canadian NOC Codes, Canadian Ntl Occ Class Table	Review NOC codes for Canadian companies and associate NOC codes with job codes in the Job Code table. PeopleSoft delivers an extensive list of NOC codes, which you can change.
Pay Equity - Run Control	PRCSRUNCNTL	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity	Run the Pay Equity Table report (PER715CN), which lists evaluation information.
National Occupation Codes - Run Control	PRCSRUNCNTL	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, National Occupation Codes	Run the National Occupation Codes report (PER716CN), which lists the NOC codes used in categorizing job codes.

Quantifying Job Evaluation Criteria

Access the Canadian Pay Equity Table page.

Canadian Pay Equity Table

Job Class: KC1

Pay Equity Details

Find | View All

First 1 of 1 Last

*Effective Date: 01/01/1980

*Status: Active

Job Comparison Criteria

Pay Equity Effort Points:	1,000
Pay Equity Responsibility Pts:	500
Pay Equity Working Cond Points:	400
Pay Equity Skill Points:	300
Pay Equity Total Points:	2,200

Canadian Pay Equity Table page

Design the point system used in Job Comparison Criteria group box. Determine and enter points by comparing each of the factors to every other job class in the company. For example, you might assign more pay equity skill points to an engineer job class than a mailroom clerk job class because the engineering job requires more education and experience.

Pay Equity Effort Points	Enter points for the physical and mental effort required to perform a job.
Pay Equity Responsibility Pts (pay equity responsibility points)	Enter points for decision-making and responsibility for people, equipment, and budgets.
Pay Equity Working Conditions Points (pay equity working conditions points)	Enter points for the working environment, including dirt, noise, stress, and health risks.
Pay Equity Skill Points	Enter points for the education, experience, and special abilities that are required to perform a job in this job class.
Pay Equity Total Points	Displays the total points as you enter points.

Reviewing NOC Codes

Access the Canadian Ntl Occ Class Table page.

The screenshot shows a web application interface for the 'Canadian Ntl Occ Class Table'. At the top, there is a header bar with the title 'Canadian Ntl Occ Class Table'. Below this, the 'National Occupational' group is set to '0011'. A section titled 'NOC Details' contains several fields: '*Effective Date:' with the value '01/01/1900', '*Description:' with the value 'Legislators', 'NOC Occupational Group:' with the value '01' and a magnifying glass icon, and 'Can OEE Skill Level:' with a dropdown menu showing 'N/A'. Navigation controls at the top right of the 'NOC Details' section include 'Find | View All', 'First', '1 of 1', and 'Last'.

Canadian Ntl Occ Class Table page

NOC Occupational Group (National Occupational Classification occupational group)	Select the group to which this job classification code belongs. Occupational group codes are included in the translate table.
Can OEE Skill Level (Canadian Ontario Employment Equity skill level)	Select from the list of values.

Running the Employment Equity Report

This section provides overviews of employment equity reporting, Employment Equity report files, employee inclusion in the Employment Equity report, and salary calculation, and discusses how to run the Employment Equity report.

Understanding Employment Equity Reporting

If you're a federally regulated employer in Canada and required to report to the federal government on employment equity, Human Resources provides the Canadian Employment Equity 2.0 interface—the Employment Equity report (PER101CN)—which creates three data interface files for the federal government's Employment Equity Computerized Reporting System (EECRS). You don't have to enter the data in the database and then reenter the same data in EECRS each year.

The report retrieves extensive data for all Canadian employees in the organization who were active employees at any point during the calendar year. The report includes up to four promotion dates per employee within a given year, in ascending order.

The Employment Equity report is based on the interpretation of Employment Equity Reporting Guideline 11, as published by Human Resources Development Canada (HRDC). Because the interpretation of the guidelines can vary, there may be differences between your requirements and the rules that PeopleSoft has built into the generic solution. If the data imported into the EECRS does not meet Guideline 11, either modify the information once it has been imported into the EECRS or modify the Employment Equity report.

You are responsible for reporting accurate information to HRDC. The HRDC is the source of interpretation and final authority on all matters related to employment equity reporting, including the definition of salary and its rules for annualization and non-annualization. PeopleSoft doesn't assume this role.

Understanding Employment Equity Report Files

The Employment Equity report creates three files: employee.txt, promo.txt, and term.txt. The employee file includes information on temporary and permanent employees. The following tables lists the field names in each report file, the fields in PeopleSoft HRMS from which the report retrieves the data, and the tables where the fields are located.

Employee File

The following table lists the fields and tables used to create the employee.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee # (employee number)	Employee ID	PERSONAL_DATA	None
CMA Code (Census Metropolitan Area code)	Census Metropolitan Area	LOCATION_TABLE	Based on the location code in the employee job record, the report uses the CMA associated with that location code in the LOCATION_TBL table.

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Province Code	Numeric Code	STATE_NAMES_TBL	Based on the location code in the employee job record, the report uses the numeric code associated with that location code in the LOCATION_TBL table.
NOC Code (National Occupational Classification code)	Canadian NOC Code (Canadian National Occupational Classification code)	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the NOC code associated with the job code in the JOBCODE_TBL table.
SIC Code (Standard Industrial Classification code)	Canadian Industrial Sector	DEPT_TBLCAN_SBR	Based on the department ID in the employee job record, the report uses the SIC associated with that department ID in the DEPT_TBL table.
Employee Type Code	Temporary Full-/Part-Time Other	Derived value based on rules in Structured Query Report (SQR); data from a combination of PERSONAL_DATA and EMPLOYMENT records.	See Chapter 3, “(CAN) Meeting Regulatory Requirements for Canada,” Understanding Inclusion of Employees in the Employment Equity Report, page 12.
Employee Type Comment	Employment Status Full-Time Student	Derived value based on rules in SQR; data from a combination of PERSONAL_DATA and EMPLOYMENT records.	See Chapter 3, “(CAN) Meeting Regulatory Requirements for Canada,” Understanding Inclusion of Employees in the Employment Equity Report, page 12.
Gender	Sex	PERSONAL_DATA	None
Last Name	Name	PERSONAL_DATA	None
Given Name	Name	PERSONAL_DATA	None
Salary	Annual Rate	JOB	See Chapter 3, “(CAN) Meeting Regulatory Requirements for Canada,” Understanding Salary Calculation, page 13.
Aboriginal	Aboriginal	PERSONAL_DATA	None
Visible Minority	Visible Minority	PERSONAL_DATA	None.
Disabled	Disabled	PERSONAL_DATA	None
Hire Date	Hire Date	EMPLOYMENT	None
Termination Date	Termination Date	EMPLOYMENT	None

Promotion File

The following table lists the fields and tables used to create the promo.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee #	Employee ID.	PERSONAL_DATA	None
Promotion # (promotion number)	Derived values from SQR program; sequential count.	Based on a number of job records that meets appropriate criteria as defined by EECRS reporting rules.	None
Promotion Date	Derived value from EFF_DT.	JOB	None

Temporary Terms File (for Temporary Employees)

The following table lists the fields and tables used to create the term.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee #	Employee ID	PERSONAL_DATA	None
Term # (term number)	Derived field; sequential count.	CONTRACT_DATA	None
Start Date	CONTRACT_BEGIN_DT	CONTRACT_DATA	None
End Date	CONTRACT_END_DT	CONTRACT_DATA	None
Completed Date	Termination Date	EMPLOYMENT	Temporary employees only.

Understanding Inclusion of Employees in the Employment Equity Report

The Employment Equity report includes any employee in a Canadian regulatory region during the reporting year. This includes employees who were hired, rehired, transferred, or terminated, and anyone who was active, on leave, or suspended during the year.

The job record used in the data files includes the maximum effective date and effective sequence that is less than or equal to the year end. This may be a record from before the current year if an employee has had no job activity during the reporting year.

The minimum employee record number is used if more than one job is present. Data from personal data, diversity, disability, and employment records appears as of the report's run date. Data from the tables JOBCODE_TBL, DEPT_TBL, and LOCATION_TBL appears as of the end of the year.

Employees with Multiple Jobs

For employees with multiple jobs, the report provides information on only one job.

The report selects the job to include based on:

- Active job.
- Full-time job.

- Job with the highest salary.

The employee salary is reported as the sum of all job salaries.

Determination of Employee Type

Two fields in the employee.txt file are related to employee type: Employee Type and Employee Type Description (for an employee type categorized as *Other (04)*).

The system determines the appropriate category for each EECRS employee type:

Full-Time (01)	REG_TEMP = 'R' (regular) FULL_PART_TIME = 'F' (full-time) EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Part-Time (02)	REG_TEMP = R FULL_PART_TIME <> 'F' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Temporary (03)	REG_TEMP = 'T' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Other (04)	EMPL_STATUS in (L,P,S) or FT_STUDENT = 'Y' or (EMPL_STATUS not in (L,P,S) and has not worked in this reporting year (using LAST_DATE_WORKED)) Supersedes <i>Full-Time, Part-Time, Temporary,</i> and <i>Casual</i> .
Casual (05)	Employees who would otherwise be temporary but whose combined start and end dates (from contract data) add up to fewer than 12 weeks during the reporting year.

If the employee type code is *Other (04)*, the description field is populated as follows:

Full-Time Student	FT_STUDENT = 'Y'
On Leave of Absence	EMPL_STATUS = L,P
Terminated and hasn't worked during the year	EMPL_STATUS = T,U
Retired and hasn't worked during the year	EMPL_STATUS = R,Q
Deceased and hasn't worked during the year	EMPL_STATUS = D
Last Date Worked not in reporting year and not null	LAST_DATE_WORKED <> Null and < Reporting Year

Understanding Salary Calculation

The following stipulations regarding salary definition and calculation apply to Employment Equity Reporting Guideline 11:

- Salary should be annualized in some situations.
- If two activities with respect to earnings or job take place in a year, one that requires annualization and one that does not, then the most recent activity takes priority.

For example, if a new hire (annualized) is laid off that same year (non-annualized), the employee's salary should be non-annualized for this report.

- The salary figure includes salary, wages, commissions, tips, bonuses, and piece rates, but not overtime wages.
- When salary isn't annualized, the default salary figure provided is pulled from the CIT YTD tax in CAN_TAX_BALANCE field.

This information does not include overtime. If overtime is allowed, modify the data manually in the report files or modify the PER101CN report.

- Annualized salary does not include overtime.

Annualized salary information uses the ANNUAL_RT field. If you are not using PeopleSoft Payroll, the ANNUAL_RT is used in all circumstances.

Important! The final authority in interpretation of annualization or non-annualization rests with HRDC. You have the final responsibility for compliance with the EECRS reporting rules.

Salary Annualization

The following table shows when salary is annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

Employment Equity Report Annualization	Interface Functionality
New hires and promotions during the reporting period.	The Employment Equity report annualizes using ANNUAL_RT.
Unpaid leaves of absence granted at the request of employees who returned to work on or before December 31.	The Employment Equity report annualizes using ANNUAL_RT; however, paid leaves are non-annualized. If unpaid leave is still active at December 31, it is non-annualized.
New hires with a salary including commission; add salary and commission and annualize total.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in EECRS.
New hires with steady base salary; annualize only base salary and then add commission.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in EECRS.
Transferred employees as a result of a corporate transaction; employees considered new hires.	Human Resources does not specify how to complete corporate transactions. If you have terminated employees from one company and hired them in another one as the means of corporate transfer, they appear as new hires and PER101CN annualizes using ANNUAL_RT. Otherwise, modify the figure manually within EECRS.

The following table shows when salary is not annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

No Employment Equity Report Annualization	Interface Functionality
Temporary employees.	The SQR categorizes them as employee type <i>Temporary (03)</i> .
Seasonal workers who have worked a complete season.	All seasonal workers are considered to have worked a complete season. Human Resources does not use partial seasons.
Seasonal workers who work part of a season.	All seasonal employees are considered to have worked a complete season and do not have their salary annualized by the Employment Equity report. Modify data in EECRS manually if employees worked an incomplete season.
Employees who are temporarily laid off.	The SQR categorizes them as employee type <i>Other (04)</i> .
Employees recalled in accordance with the mid year collective agreement.	The Employment Equity report does not annualize.
Striking employees.	The Employment Equity report does not annualize.
Permanent employees working part of the year as full-time employees.	The Employment Equity report does not annualize.
Acting assignments.	Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
New hires with fluctuating base salary and commission.	Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
Employees with commission-only salary.	Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
Employees who change employment status mid year (temp to part-time, part-time to full-time, and so on).	Modify the provided figure manually in EECRS.

Page Used to Run the Employment Equity Report

Page Name	Object Name	Navigation	Usage
Employment Equity	RUNCTL_PER101CN	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity, Employment Equity	Run the Employment Equity report (PER101CN). This SQR creates an interface file that you can export to Canadian Employment Equity software.

Running the Employment Equity Report

Access the Employment Equity page.

Importing the Report into EECRS

When you import the interface file into EECRS, you have two options: merge the existing file or overwrite it. The default is to overwrite the file because normally you submit information for the whole organization at the same time.

If divisions in the organization prepare their information separately and you need to combine division files, you may need to use the merge option. Keep in mind that the merge option creates duplicate records. The EECRS software does not warn you about duplicate records or issue error messages. For this reason, the Canadian government strongly recommends that you back up your final files. Because you can inadvertently delete or overwrite existing employee data in EECRS, backing up your files ensures that you retain accurate records of the information submitted each year.

The Employment Equity report does not extract information about employers. Before you run the final report using the EECRS software, enter values in the EECRS Employer Information fields.

Troubleshooting

The Employment Equity report detects errors that can prevent the EECRS from successfully importing data.

If you find that records are missing from the import files when you run the Employment Equity report, information that is required for the EECRS report may not be included in the online pages. The PER101CN.LIS file identifies these situations and produces an error message.

Running Official Languages Reports

Canadian federal institutions are required to report on the official languages used in their departments in accordance with the Official Languages Act (OLA). Human Resources provides the Canadian Official Language Data File report and the Canadian Official Languages reports.

This section provides overviews of the Canadian Official Language Data File report and the Canadian Official Language reports and discusses how to run the Canadian Official Language Data File report.

Understanding the Canadian Official Language Data File Report

The Canadian Official Language Data File report (PER102CN) creates an import file used by the Official Languages Information System (OLIS II) software, which is required under the OLA to report official language information. The report captures information about permanent employees and temporary employees who work for periods of six months or more.

The following table lists the field names in the report, the fields in PeopleSoft HRMS from which the report retrieves the data, and the tables where the fields are located:

OLA Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Institution Code	Institution Code	COMPANY_TBL	None
Record ID	Employee ID	PERSONAL_DATA	None
First Official Language	Preferred Language	PERSONAL_DATA	None
Occupational Category	Occupational Category	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the occupational category associated with the job code in the JOBCODE_TBL table.
Language of Service to Public	Pub Svc Lng Can (public service language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to NCR	Intrl Ncr Lng Can (internal National Capital Region language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to Ontario North and East	Intrl On Lng Can (internal Ontario language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to Montreal	Intrl Mnt Lng Can (internal Montreal language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to Bilingual Quebec-Other	Intrl Qc Lng Can (internal Quebec language Canada)	PERS_OFFLNG_CAN	None
Language of Internal Service to New Brunswick	Intrl NB Lng Can (internal New Brunswick language Canada)	PERS_OFFLNG_CAN	None
Bilingualism Code	Bilingualism Code	PERSONAL_DATA	None
Comm Req Supervision to NCR	Supr Comm Ncr Can (communication requirements - supervision to National Capital Region Canada)	PERS_OFFLNG_CAN	Identifies whether or not the employee is required to provide bilingual supervision to employees located in the NCR.
Comm Req Supervision to Ontario North & East	Supr Comm On Can (communication requirements - supervision to Ontario North & East Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Ontario North & East.

OLA Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Comm Req Supervision to Montreal	Supr Comm Mnt Can (communication requirements - supervision to Montreal Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Montreal.
Comm Req Supervision to Bilingual Quebec-Other	Supr Comm Qc Can (communication requirements - supervision to Quebec and other Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of Quebec - other.
Comm Req Supervision to New Brunswick	Supr Comm Nb Can (communication requirements - supervision to New Brunswick Canada)	PERS_OFFLNG_CAN	The same as above, except applies to supervision of employees in the bilingual region of New Brunswick.
TBS Office Code	Office Cd Can (office code Canada)	LOCATION_TBL	This designates a point of service. The values should correspond to the office codes established by the TBS (Treasury Board Secretariat).

Understanding the Canadian Official Language Reports

The Canadian Official Language reports (PER108CN) provide summary information that is required by the OLA. The reports assume an as of date of December 31 of the current year, unless another date is specified.

There are five summary reports that are produced in a print format:

- Participation by Province.
- Participation by Occupational Category.
- Service to Public by Bilingual Office/Point of Service.
- Internal Service to Bilingual Regions.
- Supervision in Bilingual Regions.

Participation by Province

The Participation by Province summary report includes individuals whose most recent job record has a REG_REGION value equal to CAN and an EMPL_STATUS value equal to A, L, P, or S.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Province	JOB..LOCATION_CODE	JOBCODE_TBL	Displays the location code based on the employee JOB location code as indicated in the employee job code record.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Total # of Employees (total number of employees)	JOB.LOCATION_CD	JOBCODE_TBL	Displays the total number of employees for each province based on their JOB.LOCATION_CD. When an employee's JOB.LOCATION_CD is equal to the National Capital Region (NCR), that employee is included in the NCR count, not in the provincial count.
Total # of Employees First Official Languages English	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in the selected group who have a language code that isn't equal to <i>CFR</i> or <i>FR</i> . If the employee's language isn't French, then the report uses English.
Total # of Employees First Official Languages French	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in a selected group who have a language code that is equal to <i>CFR</i> or <i>FR</i> .

Participation by Occupational Category

The Participation by Occupational Category summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *S*.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Occupational Category	CAN_NOC_CD	JOBCODE_TBL	The Occupational Category field displays one of five occupational categories that corresponds to the CAN_NOC_CD code in the JOBCODE_TBL table. The categories are: • 91-Managers • 92-Professionals • 93-Specialists & Technicians • 94-Administrative Support • 95-Operational
Total # of Employees (total number of employees)	CAN_NOC_CD	JOBCODE_TBL	The count of selected employees with that occupational category.
Total # of Employees First Official Languages English	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in the selected group who have a language code that isn't equal to <i>CFR</i> or <i>FR</i> . If the employee's language isn't French, then the report uses English.
Total # of Employees First Official Languages French	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in a selected group who have a language code that is equal to <i>CFR</i> or <i>FR</i> .

Service to Public by Bilingual Office/Point of Service

The Service to Public by Bilingual Office/Point of Service summary report includes individuals whose most recent job record has an EMPL_STATUS value equal to *A*, *L*, *P*, or *S* and whose OFF_LNG_RQMT_CAN record has a PUB_SVC_LNG_CAN value of either *French*, *English*, or *Bilingual*.

Employees with a *Bilingual* value in the PUB_SVC_LNG_CAN field are counted in both the French and English columns, resulting in values that may total more than the value in the Resources Serving the Public field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Province	LOCATION_DESCR	LOCATION_TBL	None
Location	STATE_TBL.DESCR	STATE_TBL	None
Office Code	LOCATION_TBL.TBS_OFFICE_CD_CAN	LOCATION_TBL	None
Resources Servicing the Public	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location.
Resources Serving in English	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either <i>English</i> or <i>Bilingual</i> .
Resources Serving in French	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either <i>French</i> or <i>Bilingual</i> .

Internal Services to Bilingual Regions

The Internal Services to Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *S*.

Individuals must also have a value of either *English*, *French*, or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- INTRL_ON_LNG_CAN
- INTRL_NCR_LNG_CAN
- INTRL_MNT_LNG_CAN
- INTRL_QC_LNG_CAN
- INTRL_NB_LNG_CAN

Employees with a *Bilingual* value in any of these internal services fields are counted in both the French and English columns, resulting in values that may total more than the value in the Internal Services to Bilingual Regions field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Internal Services to Employees In: • National Capital Region • Ontario North & East • Montreal • Bilingual Quebec-Other • New Brunswick • Total	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	None
Resources Providing Internal Services	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>English</i> , <i>French</i> , or <i>Bilingual</i> in the Internal Languages field for each region.
Resources Serving in English	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>English</i> or <i>Bilingual</i> in the Internal Languages field for each region.
Resources Serving in French	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>French</i> or <i>Bilingual</i> in the Internal Languages field for each region.

Supervision in Bilingual Regions

The Supervision in Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *S*.

Individuals must also have a value of either *English*, *French*, or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- SUPR_COMM_ON_CAN
- SUPR_COMM_NCR_CAN
- SUPR_COMM_MNT_CAN
- SUPR_COMM_QC_CAN
- SUPR_COMM_NB_CAN

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located:

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Bilingual Supervision: • To Supervise Employees in NCR. • To Supervise Employees in Ontario North & East. • To Supervise Employees in Montreal. • To Supervise Employees in Bilingual Quebec-Other. • To Supervise Employees in New Brunswick. • Total.	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	OFF_LNG_RQMT_CAN	None

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
The Number of Supervisors Required to Be Bilingual	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>Bilingual</i> in the Supervisors Required field for each region.
Of These, the Number Qualified to Carry Out Their Duties in Both Official Languages	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	PERSONAL_DATA	None

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

Page Used to Run Canadian Official Languages Report

Page Name	Object Name	Navigation	Usage
Official Language Rqmts (official language requirements)	RUNCNTL_PER102CN	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements, Official Language Rqmts	Run the Canadian Official Languages Data File SQR (PER102CN), which creates an import file to report official languages information.

CHAPTER 4

(FRA) Meeting Regulatory Requirements for France

This chapter provides overviews of French regulatory requirements and pension and contingency fund data, and discusses how to:

- Set up French regulatory requirements.
- Review pension and contingency fund information.
- Run the Disability report.
- Manage elections and run the Election report.
- Prepare and run the Employee Survey report.
- Run workforce reporting statutory reports.
- Prepare and run the Training 2483 report.

Understanding French Regulatory Requirements

Human Resources provides resources for managing and reporting on various types of data that are required by French government regulations.

PeopleSoft provides the following French regulatory reports:

- Disability (DIS001).
- Election (ELE001).
- Employee Survey (SOC001).
- Monthly Workforce (REG001FR).
- Personal Register (REG002FR).
- Training 2483 (TRN029).
- Workforce by Nationality (REG003FR).
- Single Hiring Statement (HRSHSFRA).
- BIAF report (*Bordereau Individuel d'Accès à la Formation* report) (REG004FR).

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (FRA) Meet Regulatory Requirements Reports for France

Prerequisites

Set up control tables using the following pages before running French regulatory reports:

Control Table Page	Description
APE Table (<i>activite principale exercee</i> table)	Classify the company's primary industry, such as software, banking, or insurance. The APE codes are mandated by French law.
External Variables	Enter information related to salaries and social security ceilings that are established by the French government each year, and enter the disability rates for the Disability report.
INSEE Table FRA (National Institute For Statistical And Economical Studies table France)	Input the INSEE codes for the company's job codes. Then map the company's job codes to one of the INSEE codes.
URSSAF Code (<i>Union de Recouvrement de la Sécurité Sociale et des Allocations Familiales</i> code)	Store the codes of the local URSSAF offices. This government agency collects employee and employer contributions made for illness and work accidents.
Trn 2483 Parameters (training 2483 parameters)	Enter data required for the 2483 report. Much of the information required for the 2483 report is stored in the Human Resources system and payroll system.

In addition to setting up the control tables, you must set up Training 2483 report groups and indicators.

Understanding Pension and Contingency Fund Data

In France, employees and employers contribute to different types of pension funds:

- *Association des Régimes de Retraites Complémentaires* (ARRCO) is a complementary pension fund to which all employees can contribute.
- *Association Générale des Institutions de Retraite des Cadres* (AGIRC) is a complementary pension fund for executives.
- Contingency funds supplement standard social security payments.

The funds to which an employee contributes are determined by the employee's contract. The Category Status field in the French section of the Contract Data - Contract Type/Clause page defines employees' manager or non-manager status for pension fund processing.

Companies and establishments set up contracts with organizations, known as institutions, that manage a particular type of fund. For some contracts, it is mandatory that employee contribute to that fund but others are optional.

In Human Resources you set up the pension and contingency data as follows:

1. Set up the codes for the funds to which employees contribute.
2. Define the institutions that manage the pension and contingency funds.

For each institution define the institution number, the institution type (ARRCO, AGIRC, or Contingency), the fund managed by that institution, the DUCS and DADS codes for the institution, the institution address, and the SIRET number.

3. Define the pension/contingency contracts.

For each pension/contingency contract you define the membership number (contract number), the institution associated with the contract, and assign the contract to companies or establishments in the organization.

The pages for setting up the fund codes, institutions, and pension/contingency contracts are in Set Up HRMS, Product Related, Workforce Monitoring, Meeting Regulatory Requirements FRA and described in this chapter.

Pension and contingency funds are assigned to companies and establishments from the Pension/Contingency Contracts page, but you can also assign pension and contingency funds to individual employees from the Contract Data - Contract Type/Clauses page. The Contract Data component is described in the PeopleSoft Enterprise Human Resources: Administer Workforce PeopleBook.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Entering Additional Data in Human Resources Records”.

For AGIRC and ARRCO contracts, a contract defined on the Contract Type/Clauses page overrides any contracts defined at the company or establishment level. However, for contingency funds, contracts assigned at the employee level are added to funds defined at the company or establishment level. If you have PeopleSoft Enterprise Global Payroll for France installed, it takes into account all contingency contracts that are applicable to the employee.

The Pension/Cont. Contracts Review page enables you to view a list of the pension and contingency funds for which an employee is eligible. Access this page as follows: Workforce Monitoring, Meet Regulatory Rqmts FRA, Pension/Cont. Contracts Review. This page is described in this chapter.

See Chapter 4, “(FRA) Meeting Regulatory Requirements for France,” Page Used to Review Employee Pension and Contingency Fund Contracts, page 38.

If you have PeopleSoft Enterprise Global Payroll for France installed, refer to the PeopleSoft Enterprise Global Payroll for France PeopleBook for information about processing contributions through payroll.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, “Defining ARRCO, AGIRC, and Contingency Fund Contributions”.

Setting Up French Regulatory Requirements

To set up the French regulatory requirements, use the Contract Type Group (CNTRCT_TYPE_GRP), Action Group (ACTION_GRP_FRA), Country Group (COUNTRY_GRP), Define Employee Survey Indicators (SOC_INDIC_TBL_FRA), Election Group (ELECTION_GRP_TBL), Election Roll (ELECTION_RL_TBL), Mandatory Base Scheme (BSE_SCH_FRA_TBL), Contract Event (CTC_KND_FRA_TBL), Category Status (CTG_STS_FRA_TBL), Covered Population (CVD_POP_FRA_TBL), Job Category (JOB_CTG_FRA_TBL), Previous Employment Situation (WRK_EXP_FRA_TBL), Medical Organization (MED_ORG_FRA_TBL), Population Category (POP_CTG_FRA_TBL), Professional Status (PRF_STS_FRA_TBL), Funds Codes (FUND_FRA_TBL), Pension/Ctgcy Institutions (FUND_INST_FRA), and the Pension/Contingency Contracts (CNTRCT_FUND_FRA), 2483 Parameters (TRN_2483_PARM), and 2483 Indicators (GROUP_2483_TBL_GBL) components.

This section provides an overview of pages with system-populated fields and discusses how to:

- Group contract types.
- Update groups.
- Update indicators.
- Set up pension and contingency fund institutions.
- Set up pension/contingency fund contracts.

Understanding Pages with System-Populated Fields

The following pages are populated with system data:

- Mandatory Base Scheme.
- Contract Event.
- Category Status.
- Covered Population.
- Job Category.
- Medical Organization.
- Population Category.
- Professional Status.

On these pages, you can modify, delete, and add new codes. As legislative changes occur, you can easily update this data to comply with French legislation that applies to your organization. In some cases, not all the system data is populated, because only a few parts of this information may be relevant to your organization.

Pages Used to Set Up French Regulatory Requirements

Page Name	Object Name	Navigation	Usage
Contract Type Group	CNTRCT_TYPE_GRP	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Contract Type Group	Group contract types together. Before using this page, set up the Contract Type table.

Page Name	Object Name	Navigation	Usage
Action Group	ACTION_GRP_PNL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Action Groups, Action Group	Define action groups used by processes.
Country Group	COUNTRY_GRP	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Country Group	Modify country groupings. Before using this page, set up the Country table.
Employee Survey Group	GROUP_SHEETTBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Define Empty Survey Indicators, Employee Survey Group	Update the seven main groups defined by the French government.
Employee Survey Indicator	INDIC_SHEETTBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Define Empty Survey Indicators, Employee Survey Indicator	Update the indicators and link the indicators with the relevant application engine section.
Election Group	ELECTION_GR_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Election Group	Define the various groups that are active in the company.
Election Roll	ELECTION_RL_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Election Roll	Define the election rolls or candidacies.
Mandatory Base Scheme	BSE_SCH_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Base Scheme, Mandatory Base Scheme	Define the base scheme necessary for DADS, a French payroll report.
Contract Event	CTC_KND_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Contract Event	Define the contract events that are needed for DADS.
Category Status	CTG_STS_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Category Status	Define the category status needed for French payroll and DADS.

Page Name	Object Name	Navigation	Usage
Covered Population	CVD_POP_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Covered Population	Define the covered population needed for DADS.
Job Category	JOB_CTG_FRA_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Job Category	Define the job categories used in the company. This information is required for the Single Hiring Statement report.
Previous Employment Situation	WRK_EXP_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Previous Employment Situations, Previous Employment Situation	Review and update the previous employment codes used for the Single Hiring Statement report.
Medical Organizations	MED_ORG_FRA_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Medical Organizations	Define the medical organizations used in the company. This information is required for the Single Hiring Statement report.
Population Category	POP_CTG_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Population Category, Population Category	Define the population categories used by your company. Needed for DUCS, a French payroll report.
Professional Status	PRF_STS_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Professional Status, Professional Status	Define the professional status used in the company; this information is required for DADS.
Fund Codes	FUND_FRA_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Funds Codes, Fund Codes	Set up fund codes for pension/contingency funds. You associate fund codes with the pension/contingency institutions on the Institution Type page.
Institution Type	FUND_INST_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Pension/Ctgey Institutions, Institution Type	Define pension/contingency institutions. Specify the institution type, and the fund code, DADS and DUCS codes associated with the institution.

Page Name	Object Name	Navigation	Usage
Institution Address	FUND_INST2_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Pension/Ctgcy Institutions, Institution Address	Enter the pension/contingency institution's address information and enter the SIRET number for the institution. Note. This information doesn't roll into PeopleSoft Enterprise Pension Administration, which is a U.S. application.
Pension/Contingency Contracts	CNTRCT_FUND_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Pension/Contingency Contracts, Pension/Contingency Contracts	Set up contract information for pension/contingency contracts. Define your fund codes and institutions before you set up contract information.
Trn 2483 Parameters Setup (training 2483 parameters setup)	TRN_2483_PARM	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, 2483 Parameters, Trn 2483 Parameters Setup	Set up 2483 training parameters.
Trn 2483 Company Costs (training 2483 company costs)	TRN_2483_CPNY_COST	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, 2483 Parameters, Trn 2483 Company Costs	Set up 2483 training costs.
2483 Group	GROUP_2483_TBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, 2483 Indicators, 2483 Group	Set up 2483 indicator groups.
2483 Indicator	INDIC_2483_TBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, 2483 Indicators, 2483 Indicator	Set up 2483 indicators.

Grouping Contract Types

Access the Contract Type Group page.

Contract Type Group

Group Name: 2483-B-ALL

***Effective Date:** 01/01/1990   

Status: Active 

***Description:** All Group B indicators

Short Description: Group B

*SetID	*Contract Type	Description		
FRA 	ACE 	Access to First Job Contract		
FRA 	ADA 	Adaptation Contract		
FRA 	ADD 	Fixed Term Adaption Contract		
FRA 	APP 	Apprentice Contract		

Contract Type Group page

SetID and Contract Type Enter or look up a setID and a contract type to associate with this group name. These groups are used for legal reporting, including the Training 2483 report, Monthly Workforce report, and Personal Register report.

Updating Groups

Access the Employee Survey Group page.

Employee Survey Group **Employee Survey Indicator**

Type of Employee Survey: Trade & Services Company **Indicator Group:** 2

***Description:** Payment

Short Description: Payment

Comment: 

Number of Columns: 6

Descr. 1	Descr. 2	Descr. 3	Descr. 4	Descr. 5	Descr. 6
Executive	Act Exec	Technician	Worker	Non Qua EE	Total

Employee Survey Group page

Note. All groups and nearly all indicators that you must prepare for the Employee Survey report already exist in the Employee Survey Group table and the Employee Survey Indicator table as system data; however, the Employee Survey process does not determine all indicators. The system determines about half of the indicators. Use the Employee Survey Group page and the Employee Survey Indicator page to modify these groups and indicators, if necessary.

Number of Columns

Enter the number of columns on the Employee Survey report. When you change the number of columns, a corresponding number of Descr. (description) fields appear on the page.

The columns (number and value) are used as defaults when you add a new indicator. The report displays only the columns defined on the Employee Survey Indicator page.

Updating Indicators

Access the Employee Survey Indicator page.

Employee Survey Group Employee Survey Indicator

Type of Employee Survey: Trade & Services Company Indicator Group: 2 Payment

Find | View All First 1 of 29 Last

*Indicator: 211A

*Description: Annual Salary by Empl : Male

Short Description: 211A

Comment:

Number of Columns: 6

Computation Rules

*Data Source: Computed Pay WA Field

AE Section: NO

WA AE Section: IND211A

WA Field: GPFR_ES_TOTAL_COM

Element Name

Descr. 1	Descr. 2	Descr. 3	Descr. 4	Descr. 5	Descr. 6
Executive	Act Exec	Technician	Worker	Non Qua EE	Total

Employee Survey Indicator page

Indicator

The code is defined in the employee survey legal requirement.

Number of Columns

Displays the total number of columns and the corresponding column descriptions that are entered on the Employee Survey Group page. The number of Descr. (description) fields that appear at the bottom of the page is linked to the value that you enter in the Number of Columns field.

The descriptions that you enter are the headings for the categories, or columns, on the report. In this example, the *Payment* group displays the following columns in the report: *Executive*, *Act Exec*, *Technician*, *Worker*, *Non Qua EE* and *Total*.

Computation Rules

More than 60 PeopleSoft Application Engine processes are built into Human Resources for the majority of the indicators.

Data Source

Select the source used to compute data for the indicator. Options are *Absence WA Field*, *Computed*, *Computed Absence WA Field*, *Computed Pay WA Field*, *Not Computed*, and *Pay WA Field*.

Use *Computed* to compute the value for the indicator using only HR data (through an AE section). The other values (except for *Not Computed*) show that the indicator comes from Global Payroll results and are either calculated by Global Payroll and stored in a writeable array, or stored in a writeable array and then computed by an Application Engine section. Use *Not Computed* to indicate that the indicator is not computed.

PeopleSoft delivers this setup. However, you can modify it to calculate an indicator in a different way.

AE Section (application engine section)

Enter the section of the employee survey that PeopleSoft Application Engine should calculate for the given indicator.

Note. When the value is set to *NO*, it means that there is no PeopleSoft Application Engine process for the indicator. Changing this value without modifying the Application Engine results in an error and stops the overall process.

WA AE Section (writeable array application engine section)

Specify the Application Engine section used to compute payroll for the indicator.

WA Field (writeable array field)

Select the writeable array field to be used to compute payroll for the indicator.

Element

Displays the Global Payroll element associated with the writeable array shown in (WA) Field.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

Setting Up Pension and Contingency Fund Institutions

Access the Institution Type page.

Institution Type **Institution Address**

Institution #: KFAQ

Funds Institutions Find | View All First 1 of 1 Last

*Effective Date:	01/01/2000	*Status:	Active
*Description:	ACGME Mornay AGIRC		
Short Description:	ACGME		
*Institution Type:	AGIRC		
Fund Code:	MORNAY	Mornay Group	
DADS Code:	C067		
DUCS Code:	C067		

Institution Type page

Institution Type

Select the institution type. Valid values are:

AGIRC: Pension funds for managers (cadres).

ARRCO: Pension funds for managers and non-managers (non-cadres).

Contingency: Contingency funds.

Fund Code

Select the fund code to which the institution is affiliated.

DADS Code

Enter the DADS code to use for DADS reporting. This may be different from the institution code. Contact the institution to find out which the DADS code you should use.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, “Setting Up DUCS and DADS Reporting”.

DUCS Code

Enter the DUCS code for DUCS reporting. This may be different from the institution code. Contact the institution to find out which the DUCS code you should use.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, “Setting Up DUCS and DADS Reporting”.

Setting Up Pension/Contingency Fund Contracts

Access the Pension/Contingency Contracts page.

Pension/Contingency Contracts

Membership Number: KFM2

Pension/Contingency Contracts Find | View All First 1 of 1 Last

*Effective Date: 01/01/2000 *Status: Active

*Description: AGIRC contract

Short Description: AGIRC

*Institution #: K FAG ACGME Mornay AGIRC

Institution Type: AGIRC

Fund Code: MORNAY Mornay Group

Membership Date: 01/01/2000

☒ Mandatory ☐ Optional

Comment:

Population Category Customize | Find First 1 of 1 Last

	*Category	Category Description	Declared Population	*Base Calculation Type	Employee Rate	Employer Rate	Formula Name	Description
1					0.00	0.00		

Pension/Contingency Contracts page (1 of 2)

Companies Customize | Find First 1 of 1 Last

	*Company	Description
1	GF5	Societe Française de Regress

Establishments Customize | Find First 1 of 1 Last

	*Establishment ID	Description
1	GF1AI	Etbl Admin. Informatique

Pension/Contingency Contracts page (2 of 2)

Institution # (institution number)

Select the institution associated with the membership number.

See [Chapter 4, “\(FRA\) Meeting Regulatory Requirements for France,” Setting Up Pension and Contingency Fund Institutions, page 34.](#)

Institution Type

Displays the institution type that is defined on the Institution Type page.

Fund Code

Displays the institution’s fund code that is defined on the Institution Type page.

Membership Date

Enter the date that the contract was initially signed.

Mandatory, Optional

Select Mandatory if the contract applies to all employees in the companies and establishments selected. Select Optional if the contract applies to selected employees only.

If the institution type is *ARRCO* or *AGIRC*, the system selects Mandatory and the fields are display-only.

If a contract is optional, this affects the calculation of social and fiscal reinstatement in Global Payroll for France.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, “Defining ARRCO, AGIRC, and Contingency Fund Contributions,” Understanding ARRCO, AGIRC, and Contingency Fund Contributions.

Population Category

This scroll area is available for entry if the institution type is *Contingency* and you have PeopleSoft Enterprise Global Payroll for France installed. Use it to identify the population that is eligible for the contingency contract and define how contributions are calculated.

Category	Select the population category code that is eligible for the contract. Population category codes are defined on the Population Category page. An employee’s job code determines if the employee is eligible for a contract. Job codes are assigned an INSEE code, which in turn is linked to a population category code. See Chapter 4, “(FRA) Meeting Regulatory Requirements for France,” Pages Used to Set Up French Regulatory Requirements, page 28.
Declared Population	Use this field to override the default population category code defined in the Category field if the institution requires a specific code in the DUCS declaration.
Base Calculation Type	Select the base calculation type. If contributions are calculated by multiplying a base by a rate, select the funding base type which is used by Global Payroll for France to calculate contributions. Enter the rate values in the Employee Rate and Employer Rate fields. If contributions are not calculated by multiplying a base by a rate, select <i>Other</i> and select the formula in the Formula Name field.
Employee Rate	Enter the employee rate. This value is multiplied by the base you specified in the Base Calculation Type field to calculate the employee contributions. This field is not available if you select <i>Other</i> in the Base Calculation Type field.
Employer Rate	Enter the employer rate. This value is multiplied by the base you specified in the Base Calculation Type field to calculate the employer contributions. This field is not available if you select <i>Other</i> in the Base Calculation Type field.
Formula Name	Select the formula that calculates employee and employer contributions. This field is only available if you select <i>Other</i> in the Base Calculation Type field. If this field is left blank and the Base Calculation Type is <i>Other</i>, the system issues a warning message. See <i>PeopleSoft Enterprise Global Payroll 9.0 PeopleBook</i>, “Defining Calculation Elements,” Defining Formula Elements.

Companies

Select the companies that subscribe to the contract. This field is available if the contract is mandatory. If it is an optional contract you assign the contract to employees using the Update Contracts component (CONTRACT_DATA).

Establishments

Select the establishments that subscribe to the contract. This field is available if the contract is mandatory.

Note. If the contract is mandatory and you leave the Company and Establishment ID fields blank, the system issues an error message.

Reviewing Pension and Contingency Fund Information

This section discusses how to review employee pension and contingency fund contracts.

Page Used to Review Employee Pension and Contingency Fund Contracts

Page Name	Object Name	Navigation	Usage
Pension/Cont. Contracts Review	CNTRCT_EEFRA_INQRY	Workforce Monitoring, Meet Regulatory Rqmts FRA, Pension/Cont. Contracts Review, Pension/Cont. Contracts Review	Review the pension and contingency fund contracts for which an employee is eligible.

Reviewing Employee Pension and Contingency Fund Contracts

Access the Pension/Cont. Contracts Review page.

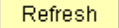
Pension/Cont. Contracts Review

Violette FROGER EMP ID: GF100ME101 Empl Rcd #: 0

Contract Number: 0001

Company: GF1 Societe Francaise informatique

Establishment ID: GF1AI Etbl Admin. Informatique

Inquire Date: 28/07/2006  

Pension/Contingency Contracts

Contract Details | Payroll Details 

	Membership Number	Description	Institution #	Institution Description	Institution Type	Fund Code	Fund Code Description
1	KFM1	ARRCO contract	KFAR	CGIS Mornay ARRCO	ARRCO	MORNAY	Mornay Group
2	KFM2	AGIRC contract	KFAG	ACGME Mornay AGIRC	AGIRC	MORNAY	Mornay Group
3	KFM3	Contingency contract (mandatory)	KFP1	Contingency pension 1	Contingency	MORNAY	Mornay Group

Pension/Cont. Contracts Review page: Contract Details tab

Inquire Date, Refresh

The system displays the employee's pension/contingency contract information as of the current date. If you want to view the information for a different effective date, enter the date and click the Refresh button.

Membership Number

Displays the number of the pension/contingency fund contract to which the employee is eligible. Click the link in this column to view the contract definition. The system displays the Pension/Contingency Contracts page.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Setting Up Country-Specific Tables," Maintaining INSEE Codes.

Institution # (institution number)

Displays the institution ID of the institution associated with the pension/contingency fund contract.

Institution Type

Displays the institution type. This is one of: *AGIRC*, *ARRCO*, or *Contingency*.

Fund Code

Displays the fund code associated with the institution.

Payroll Details

Access the Payroll Details tab.

Pension/Contingency Contracts

Contract Details | **Payroll Details** 

	Membership Number	Description	Institution Type	Mandatory / Optional	Payroll Use	Source
1	KFM1	ARRCO contract	ARRCO	Mandatory	☒	Estab.
2	KFM2	AGIRC contract	AGIRC	Mandatory	☒	Estab.
3	KFM3	Contingency contract (mandatory)	Contingency	Mandatory	☒	Estab.

Pension/Cont. Contracts Review page: Payroll Details tab

Mandatory/Optional	Indicates if the pension or contingency fund is mandatory for employees in the company or establishment to which the fund is linked.
Payroll Use	The check box is display-only and only applies to customers who have PeopleSoft Enterprise Global Payroll for France installed. The system selects the check box to indicate which contract is processed by payroll. Depending on your contract setup, employees may be eligible for multiple contracts of the same type. Contracts can be assigned at three levels: • To companies. • To establishments. • To individual employees (using the Contract Type/Clauses page). For AGIRC and ARRCO contracts only one contract is processed in payroll. The system selects the contract assigned at the lowest level for payroll processing. For example, if an employee is eligible for an AGIRC contract assigned to the company and a different AGIRC contract assigned to the employee's establishment, the contract assigned to the establishment is the one processed by payroll. If you assign a contract at the employee level, this takes precedence over the contracts for the employee's company or establishment. For contingency contracts, all contracts associated with the employee are processed in payroll. The system determines whether employees are eligible for contingency contracts assigned to their company or establishment by checking the population categories defined for the contract against the employee's population category code. Employees' population code is determined by the INSEE code linked to their job code.
Source	Indicates the level at which the contract is assigned to the employee: • <i>Estab.</i> (establishment): The contract was assigned to the establishment for which the employee works. • <i>Company</i>: The contract was assigned to the company for which the employee works. Note. If the contract was assigned at the employee level using the Contract Type/Clauses page, the Source field is blank.

Running the Disability Report

This section provides an overview of French disability reporting, lists common elements and lists the page used to run the Disability report.

Understanding French Disability Reporting

French legislation of 1987 requires firms with more than 20 employees to hire qualified disabled people. Before hiring the disabled person, the employer is required to notify the proposed employee's social security commission, COTOREP (*Commission Technique d'Orientation et de Reclassement Professionnel*), in an effort to combat fraud.

When you run the Disability report, it calculates the theoretical number of disabled employees that your company should hire by multiplying the disability rate by the number of people in the calculation population. The system determines the calculation population by subtracting those people who have special job codes that are defined by the INSEE (National Institute for Statistical and Economical Studies) or who are external consultants or trainees from the total population of your organization. The report also lists all the disabled employees employed by your company. Based on this report, the French government determines if your company complies with the law.

To prepare this report, ensure that you enter the correct codes in the INSEE table and have the correct Disability Rate code in the External Variables table.

Common Elements Used in This Section

Company Total Population	Displays the total company population. Each Human Resources French job code is linked to a four-digit INSEE socio-professional category description (<i>classification par categorie socio-professionnelle [PCS]</i>) code. The first table of the report lists all the PCS codes corresponding to a job code within your company, their description, and the number of men or women in each category.
Jobs Requiring Special Abilities	Displays exempt job codes and the number of men or women in the company's population who must be excluded from the calculation population. Exempt job codes define jobs that require capabilities incompatible with any kind of disability.
Reference Population	Displays the total population minus consultants and trainees but including the excluded jobs.
Calculation Population	Displays the total population minus the consultants, trainees, and excluded jobs.
Calculated Number of Disabled Employees	Displays the calculated, theoretical number of disabled employees whom the company should hire to comply with the law.

Page Used to Run the Disability Report

Page Name	Object Name	Navigation	Usage
Disability Report	RUNCTL_DIS001_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability, Disability Report	Run the Disability report. This report calculates the theoretical number of disabled employees who should work for the company and lists the disabled employees, excluding temporary workers, trainees, and apprentices. Note. Before running this report, enter the correct codes in the INSEE table and the correct disability rate code in the External Variables table. See <i>PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce</i>, “Setting Up Country-Specific Tables,” Maintaining INSEE Codes.

Managing Elections and Running the Election Report

This section provides an overview of French professional elections reporting and discusses how to:

- Define an election.
- Record candidacies for election groups.
- Enter voting results.
- Validate election results.
- Determine elected candidates.

Understanding French Professional Elections Reporting

Human Resources enables you to monitor professional elections for personnel representatives (*delegates du personnel*) and members of the work council (*comite d'entreprise*) in your organization if you are doing business in France.

Companies with more than 11 employees must elect personnel representatives to represent all of the employees before management. Companies with more than 50 employees must elect a work council to represent the employees in negotiations with management. Normally, the elections are every two years and follow stringent procedures.

Once you enter the election data, run the Election report to show the results of the elections to the employees and management.

Pages Used to Manage Elections and Run the Election Report

Page Name	Object Name	Navigation	Usage
Maintain Election Data - Group	ELECTION_GROUP	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Group	Define the characteristics of an election.
Maintain Election Data - Roll	ELECTION_ROLL	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Roll	Record candidacies for the groups in the election. Each trade union in the company delivers a list of candidates (incumbents and substitutes) for the election that you enter on this page.
Maintain Election Data - Votes,	ELECTION_VOTES	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Votes	Enter voting results.
Maintain Election Data - Results	ELECTION_RESULTS	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Results	Validate the election results by viewing the results for each roll in a group and the calculation of the number of seats obtained for each roll. You can modify the calculated results.
Maintain Election Data - Seats	ELECTION_SEATS	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Seats	Determine which candidates are declared elected for each roll. Generally, the candidate display-order entered on this page is more important than the actual number of votes each candidate received.
Runctl Ele001	RUNCTL_ELE001	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report, Runctl Ele001	Run the Election report, which provides the results of the staff representative elections for employees and management.

Defining an Election

Access the Maintain Election Data - Group page.

Group	Roll	Votes	Results	Seats
Company: KF1 Business I Description: KF001 Paris - Headquarter Election Date: 07/25/2000 Round: 1 Mandate Type: CE Wk Council				
Reserved for Monitor French Elections Find View All First 1-3 of 3 Last				
*Group		Voters	Incumbent	Substitute
KFCAD Managers		25	2	2
KFETA ETAM		75	3	3
KFWRK Workers		225	4	4

Maintain Election Data - Group page

Group Select the groups that are present from the list of prompt values. To enter more than one group, insert additional data rows.

Voters Enter the number of employee voters registered for this group.

Incumbent and Substitute Enter the number of incumbents and substitutes affected by the election. The incumbent number is copied into the Substitute field, but you can overwrite this value.

Recording Candidacies for Election Groups

Access the Maintain Election Data - Roll page.

Group	Roll	Votes	Results	Seats
Company: KF1 Business I Description: KF001 Paris - Headquarter Election Date: 07/25/2000 Round: 1 Mandate Type: CE Wk Council				
Reserved for Monitor French Elections Find View All First 1 of 3 Last				
Group: KFCAD Managers				
Reserved for Monitor French Elections Find View All First 1 of 1 Last				
*Roll		Number of Candidates		
KF001 Confed. Francaise du Travail		2		

Maintain Election Data - Roll page

Roll Enter rolls for each group by selecting them from the list of prompt values. To enter more than one roll for a group, insert additional rows.

Number of Candidates Displays the number of candidates. By default, this number corresponds to the numbers of incumbents to be elected in the group. You can override this value.

Note. If you change the number of candidates at the roll level on the Roll page, the system inserts or deletes rows on the Votes page. The number of Candidate rows on the Votes page is synchronized with the number of candidates that is defined at the roll level on the Roll page.

Entering Voting Results

Access Maintain Election Data - Votes page.

The screenshot displays the 'Maintain Election Data - Votes' page. At the top, there are tabs for 'Group', 'Roll', 'Votes', 'Results', and 'Seats'. Below the tabs, the page is divided into sections for 'Company', 'Election Date', 'Description', 'Round', and 'Mandate Type'. The 'Reserved for Monitor French Elections' section is highlighted, showing a table with columns for 'Candidate', 'Incumbent Votes', and 'Substitute Votes'. The table contains two rows of data, with the first row showing 12 votes for both incumbent and substitute, and the second row showing 7 votes for both. The page also includes navigation links like 'Find', 'View All', 'First', 'Last', and '1 of 3'.

Maintain Election Data - Votes page

This page shows three levels of the Reserved for Monitor French Elections group box.

Group For the election in question, enter the number of Invalid, Blank, Altered, and Regular votes for each group.

Roll Displays the roll as you entered it on the Roll page and the average number of Inc. (incumbent) and Sub. (substitute) votes.

Enter the number of altered votes and the number of regular votes for each roll.

Candidate If you enter the number of incumbent votes and substitute votes at the candidate level, the system displays the average number of votes for the incumbents and substitutes at the roll level.

If you enter no votes at the candidate level, the number of regular votes entered at the roll level appears by default as 0 in both the Incumbent Votes and Substitute Votes fields at the candidate level.

Validating Election Results

Access the Maintain Election Data - Results page.

Group	Roll	Votes	Results	Seats
Company: KF1 Business I		Description: KF001 Paris - Headquarter		
Election Date: 07/25/2000		Round: 1 Mandate Type: CE Wk Council		
Reserved for Monitor French Elections Find View All First 1 of 3 Last				
Group: KFCAD	Invalid: 2	Blank: 3	Altered: 1	Regular: 19
Turnout: 96.0	Quorum ☒	Seat Value: 9.50	Election Validated ☐	
Reserved for Monitor French Elections Find View All First 1 of 1 Last				
	Incumbent: 2	Total: 1	Substitute: 2	Total: 1
Roll	Votes	Seats	Indicator	Result
KF001	9.50	1	4.75	1

Maintain Election Data - Results page

- Group** For the election in question and for each group, displays a summary of Invalid, Blank, Altered, and Regular votes.
- Turnout** Displays the turnout for the roll, which is a ratio calculated by adding the invalid, blank, and regular votes at the group level and dividing this number by the number of voters defined on the Group page.
- Quorum** Selected by default if voter turnout for the group is greater than 50 percent. That is, the number of votes for a group (invalid, blank, and regular) is greater than the number of voters defined on the Group page divided by two.
- Seat Value** Displays the seat value (electoral quotient), which is calculated at the group level by dividing the number of regular votes by the number of incumbents defined on the Group page. The seat value must be the same for all rolls in a group.
- Election Validated** Select to validate the election.
- Roll** Displays the number of incumbent votes and substitute votes entered on the Votes page at the roll level for a particular group.
- Seats** Displays the number of seats to be allocated for the roll. This number is equal to the number of incumbent and substitute votes at the roll level divided by the seat value.
- Indicator** Displays the number that is calculated by dividing the number of incumbent and substitute votes by the number in the Incumbent Results field and the Substitute Results field plus one.
- Result** By default, displays the results from the calculation of the seats. You can change the results.

Determining Elected Candidates

Access the Maintain Election Data - Seats page.

The screenshot displays the 'Maintain Election Data - Seats' page. It features a navigation bar with tabs: Group, Roll, Votes, Results, and Seats. The main content area is divided into several sections. The top section contains fields for Company (KF1 Business I), Description (KF001 Paris - Headquarter), Election Date (07/25/2000), Round (1), and Mandate Type (CE Wk Council). Below this is a section titled 'Reserved for Monitor French Elections' with a table showing Group (KFCAD), Turnout (96.0), Quorum (checked), and Seat Value (9.50). Another 'Reserved for Monitor French Elections' section follows, with a table showing Roll (KF001), Incumbent (1), Substitute (1), and 10% Rule (unchecked). The bottom section, also titled 'Reserved for Monitor French Elections', contains a table with columns for Candidate, Final Order, and Elected status for both Incumbent and Substitute candidates.

Reserved for Monitor French Elections				
Group	Turnout	Quorum	Seat Value	
KFCAD	96.0	☒	9.50	

Reserved for Monitor French Elections				
Roll	Incumbent	Substitute	10% Rule	
KF001	1	1	☐	

Reserved for Monitor French Elections				
Candidate	Incumbent		Substitute	
	Final Order	Elected	Final Order	Elected
1	1	☒	1	☒
2	2	☐	2	☐

Maintain Election Data - Seats page

Group	Displays a summary from the Results page for each group, indicating the turnout and seat value and whether a quorum was reached.
Roll	Displays the number of incumbent and substitute seats obtained for each roll. This is the value entered in the Results field on the Results page.
10% Rule (10 percent rule)	For each roll, select to indicate whether the decision to declare the candidates elected is made by applying the 10 percent rule.
Candidate	Displays the candidate number. For each incumbent or substitute candidate, indicate the final order on the roll and whether the candidate was elected.

Preparing and Running the Employee Survey Report

This section provides an overview of the French Employee Survey reporting requirements and discusses how to:

- Set up the Compute Employee Survey process.
- Review calculation results.
- Viewing predefined employee survey indicators for the Employee Survey report.

Understanding French Employee Survey Reporting Requirements

The Employee Survey report (*le Bilan Social*) is an annual regulatory report that the French government requires from employers with more than 300 employees. The report is communicated to both labor unions and the government and provides an analysis of the company over the past three years for nearly 200 indicators.

There are three types of employee surveys for the three main types of industries. PeopleSoft delivers the most common type of employee survey—the one for the trade and services industry.

Indicators in that report include:

- The number of employees in the organization.
- The number of hires with an unlimited contract during a given year.
- The number of work accidents.

These indicators fall within seven groups set up by the French government: Employment, Compensation, Health and Safety, Work Conditions, Training, Professional Relations, and Others.

Here are the steps to prepare and run the Employee Survey report:

1. (Optional) Set up or modify the updating groups.
2. (Optional) Set up or modify the Employee Survey Indicators and link them with the application engines.
3. Run the Employee Survey process (HR_EMSURVEY) calculation for all indicators.
4. (Optional) Review the results of the process calculations.
5. Run the Employee Survey report to print the results of the process calculations, or export the data to a file.

Pages Used to Prepare and Run the Employee Survey Report

Page Name	Object Name	Navigation	Usage
Employee Survey Parameters	RUNCTL_EMSURVEY	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Compute Employee Survey, Employee Survey Parameters	Set up the Compute Employee Survey process.
Employee Survey Paygroups	RUNCTL_EMSURVEY2	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Compute Employee Survey, Employee Survey Parameters, Employee Survey Paygroups	Create a list of pay groups to refine the results of the Compute Employee Survey process.
Edit Employee Survey	EDIT_SHEET_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Edit Employee Survey	Review, and modify if needed, the calculation results run by the Compute Employee Survey process on each of the indicators.
Employee Survey Report	RUNCTL_SOC001	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	Run the Employee Survey report (SOC001). This report gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary.

Setting Up the Compute Employee Survey Process

Access the Employee Survey Parameters page.

Employee Survey Parameters		Employee Survey Paygroups	
Run Control ID:	GN2	Report Manager	Process Monitor Run
Period Definition for Requests			
As Of Date:		Fiscal Year	
Years Number:	1		
Organization			
Employee Survey:			
Company:	GBI 	Global Business Institute 9999	
Establishment ID:			
Indicators			
Indicator Group:			
Indicator:			

Employee Survey Parameters page

As of Date and Years Number

Enter the date for which you want to process the Employee Survey report. The report processes the calculation by civil years. For instance, to report on the year 2002, enter any date in 2002 and 1 in the Years Number field. To report on 2002, 2003 and 2004, enter any date in 2002 and 3 in the Years Number field. The maximum reporting period is three years.

Employee Survey

Select the type of survey to run.

Company

Select from the list of prompt values.

Establishment ID

Select from the list of prompt values. To run the calculation processes for all of the establishments in the company, leave this field blank.

Indicator Group and Indicator

To run one indicator, enter the indicator group and the indicator number. To run all of the indicators for an indicator group, specify the indicator group and leave the Indicator field blank. To run all of the calculation processes for the Employee Survey report, leave both the Indicator Group and Indicator fields blank.

Access the Employee Survey Paygroups page to refine payroll results for the employee survey.

Employee Survey Parameters | **Employee Survey Paygroups**

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) [Run](#)

Paygroup List		Customize	Find	View All	First	1 of 1	Last
	*Pay Group	Description					
1	GD1PG1	Paygroup1					

Employee Survey Paygroups page

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Reviewing Calculation Results

Access the Edit Employee Survey page.

Edit Employee Survey

User ID: SAMPLE **Type of Employee Survey:** Trade & Services Establishment

Run Control ID: AD

Period [Find](#) | [View All](#) First 1 of 1 Last

As Of Date: 01/01/1999

Employee Survey Group [Find](#) | [View All](#) First 1 of 1 Last

Indicator Group: 1 Employment

Employee Survey Indicators [Find](#) | [View All](#) First 1-2 of 54 Last

*Indicator: 111 Total Workforce

Executive	Act Exec	Worker	Total
1.000	1.000	3.000	5.000

*Indicator: 112 Full Time Workforce

Executive	Act Exec	Worker	Total
1.000	0.000	1.000	2.000

Edit Employee Survey page

Type of Employee Survey Displays the survey type.

As Of Date Displays the date that you ran the Compute Employee Survey process. Use the outer scroll bar to navigate between processes that are run with different as of dates.

Indicator Group and Indicator Displays the indicator and group. For each As Of Date process batch, you can review the results for each indicator group and each indicator for which

you have run the Compute Employee Survey process. Use the middle scroll arrow to navigate between indicator groups and the inner scroll arrow to navigate between indicators. For each indicator, you can modify the data calculated by the process.

Viewing Predefined Employee Survey Indicators for the Employee Survey Report

Legally, the Employee Survey report can be administered by company or by establishment. The following table lists the delivered indicators for the establishment and company employee surveys using the trade and services model.

Indicator	Description	AE Section	Employee Survey	Long Description
111	Total Workforce	IND111	Establishment and Company	Total workforce as of December 31. Part-time workers are taken into account; non-employees are not retrieved.
112	Full Time Workforce	IND112	Establishment and Company	Full-time workers with an unlimited contract who were hired more than one year ago (as of December 31 of each year).
113	Limited Contract	IND113	Establishment and Company	All limited contractors are retrieved.
114	Workforce per Month	IND114	Establishment and Company	Monthly average headcount for a given year.
115A	Total Workforce: Male	IND115A	Establishment and Company	Distribution by gender of the total workforce as of December 31.
115B	Total Workforce: Female	IND115B	Establishment and Company	Distribution by gender of the total workforce as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
115C	Total Workforce: Unknown	IND115C	Establishment and Company	Distribution by gender of the total workforce as of December 31 when sex is unknown.
116A	< 25 Years Old	IND116A	Establishment and Company	Distribution by age of the total workforce as of December 31.
116B	< 30 Years Old	IND116B	Establishment and Company	Distribution by age of the total workforce as of December 31.
116C	< 35 Years Old	IND116C	Establishment and Company	Distribution by age of the total workforce as of December 31.
116D	< 40 Years Old	IND116D	Establishment and Company	Distribution by age of the total workforce as of December 31.
116E	>= 40 Years Old	IND116E	Establishment and Company	Distribution by age of the total workforce as of December 31.
117A	< 1 Year of Service	IND117A	Establishment and Company	Distribution by company seniority date as of December 31.
117B	< 3 Years of Service	IND117B	Establishment and Company	Distribution by company seniority date as of December 31.
117C	< 5 Years of Service	IND117C	Establishment and Company	Distribution by company seniority date as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
117D	< 10 Years of Service	IND117D	Establishment and Company	Distribution by company seniority date as of December 31.
117E	>= 10 Years of Service	IND117E	Establishment and Company	Distribution by company seniority date as of December 31.
118A	French Employees	IND118A	Establishment and Company	Total workforce by nationality as of December 31 (French).
118B	Foreigner Employees	IND118B	Establishment and Company	Total workforce by nationality as of December 31: other.
119	Workforce Distribution	IND119	Establishment and Company	Workforce distribution by employee categorization as of December 31.
121	External Workforce	IND121	Establishment and Company	Non-employee workers as of December 31.
122	Student	IND122	Establishment and Company	Internship as of December 31.
123	Temporary Workforce	IND123	Establishment and Company	Monthly average number of leased workers for a given year.
124	Limited Contract Duration	Not delivered	Establishment and Company	
131	Unlimited Contract Hire	IND131	Establishment and Company	Number of employees hired with an unlimited duration contract during the given year.

Indicator	Description	AE Section	Employee Survey	Long Description
132	Limited Contract Recruitment	IND132	Establishment and Company	Number of employees recruited with a limited duration contract during a given year.
133	Seasonal Contract Hire	IND133	Establishment and Company	Number of employees recruited with a seasonal contract during a given year.
134	Under 25 Years Old Hired	IND134	Establishment and Company	Number of hired employees who are less than 25 years old during a given year.
141	Total Departure	IND141	Establishment and Company	Number of permanent departures during a given year.
142	Resignation	IND142	Establishment and Company	Number of permanent departures due to resignations during a given year.
143	Discharge - Redundancy	IND143	Establishment and Company	Number of permanent departures due to redundancy during a given year.
144	Discharge - Other	IND144	Establishment and Company	Number of permanent departures due to other reasons during a given year.
145	End of Limited Contracts	IND145	Establishment and Company	Number of end of limited contract during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
146	End While Qualification	IND146	Establishment and Company	Number of departures due to end while qualification during a given year.
147	Move to another Establishment	IND147	Establishment	Number of moves to another establishment during a given year.
148	Retirement - Early Retirement	IND148	Establishment and Company	Number of departures due to retirement or early retirement during a given year.
149	Death	IND149	Establishment and Company	Number of deaths during a given year.
151	Promotion	IND151	Establishment and Company	Number of employees who changed employee categorization during a given year.
161	Employees Lay Off	IND161	Establishment and Company	Number of employees having at least one layoff during a given year.
162A	Employees Lay Off With Pay	IND162A	Establishment and Company	Number of employee layoff pay hours during a given year.
162B	Employee Lay Off Without Pay	IND162B	Establishment and Company	Number of employee layoff hours without pay during a given year.
171	Disability	IND171	Establishment and Company	Number of disabled workers as of March 31.

Indicator	Description	AE Section	Employee Survey	Long Description
172	Disability Due to Work Accidents	IND172	Establishment and Company	Number of disabled workers due to a work accident in the present company as of March 31.
181	Leave of Absence	IND181A	Company	Number of leaves of absence during a given year— public holidays and annual holidays excluded.
181A	Leave of Absence	IND181A Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAY	Establishment	Number of leaves of absence during a given year— public holidays and annual holidays excluded.
181B	Theoretical Worked Days	Not Delivered Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_WRK_DAY	Establishment	Theoretical Worked Days during a given year.
181C	Leave of Absence Rate	IND181C	Establishment	Ratio between Leave of Absence Days and Theoretical Worked Days.
182	Leave of Absence - Sick	IND182 Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAYSCK	Establishment and Company	Number of leave of absence days due to sickness during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
183A	Leave of Absence - Sick : < 8 Days	IND183A Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_COUNT1	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
183B	Leave of Absence - Sick : < 30 Days	IND183B Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_COUNT2	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
183C	Leave of Absence - Sick : >= 30 Days	IND183C Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_COUNT3	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
184	Leave of Absence - Accident	IND184 Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAYACC	Establishment and Company	Number of leave of absence days due to work accident, work illness, or accident when commuting during a given year.
185	Leave of Absence - Maternity	IND185 Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAYMAT	Establishment and Company	Number of leave of absence days due to maternity during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
186	Leave of Absence - Vacation	IND186 Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAYVAC	Establishment and Company	Number of authorized leave of absence days for vacation during a given year.
187	Leave of Absence - Other	IND187 Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_LOA_DAYOTH	Establishment and Company	Number of unauthorized leaves of absence during a given year.
211	Annual Salary by Empl	Not delivered	Establishment and Company	
211A	Annual Total Compensation / Monthly Average Headcount – Male	Not Delivered Note. WA AE Section = IND211A and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
211B	Annual Total Compensation / Monthly Average Headcount – Female	Not Delivered Note. WA AE Section = IND211B and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
211C	Annual Total Compensation / Monthly Average Headcount – Unknown	Not Delivered Note. WA AE Section = IND211C and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
211BA	Average Monthly Salary – Male	Not Delivered Note. WA AE Section = IND211BA and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
211BB	Average Monthly Salary – Female	Not Delivered Note. WA AE Section = IND211BB and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
211BC	Average Monthly Salary – Unknown	Not Delivered Note. WA AE Section = IND211BC and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
212A	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Male	Not Delivered Note. WA AE Section = IND212A and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	
212B	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Female	Not Delivered Note. WA AE Section = IND212B and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	
212C	December Average Compensation w/o Non-monthly Bonus for Permanent Full Time Employee – Unknown	Not Delivered Note. WA AE Section = IND212C and WA AE Field = GPFR_ES_DEC_COMP	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
212BA	Non-monthly Bonus Percentage in Compensation Declaration – Male	Not Delivered Note. WA AE Section = IND212BA and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
212BB	Non-monthly Bonus Percentage in Compensation Declaration – Female	Not Delivered Note. WA AE Section = IND212BB and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
212BC	Non-monthly Bonus Percentage in Compensation Declaration – Unknown	Not Delivered Note. WA AE Section = IND212BC and WA AE Field = GPFR_ES_NMTH_BONUS	Establishment and Company	
213	Salary Scale	Not delivered	Establishment and Company	
221	Rate between Average Compensation of the 10% Highest Compensation and Average Compensation of the 10% Lowest Compensation	IND221	Establishment and Company	
221AA	Average Compensation of the 10% Highest Compensation	Not Delivered Note. WA AE Section = IND221AA and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	10% Highest Average Compensation.

Indicator	Description	AE Section	Employee Survey	Long Description
221AB	Average Compensation of the 10% Lowest Compensation	Not Delivered Note. WA AE Section = IND221AB and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	10% Lowest Average Compensation.
221B	Rate between Average Compensation of the Executive Employees and Average Compensation of the Qualified Workers	IND221B	Establishment and Company	Ratio between average compensation of the executive employees and average compensation of the qualified workers.
221BA	Average Compensation of the Executive Employees	Not Delivered Note. WA AE Section = IND221BA and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
221BB	Average Compensation of the Qualified Workers	Not Delivered Note. WA AE Section = IND221BB and WA AE Field = GPFR_ES_TOTAL_COMP	Establishment and Company	
222	Top 10 Highest Compensation Amount	Not Delivered Note. WA AE Section = IND222 and WA AE Field = GPFR_ES_TOTAL_COMP	Company	
231	Performance-Related	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
232	Hourly Wage Percentage	Not delivered	Establishment and Company	
241	Perks	Not delivered	Establishment	
242A	Expense for External Temporary	Not delivered	Establishment and Company	
242B	Expense for External Others	Not delivered	Establishment and Company	
251	Total Compensation	Not delivered	Company	
261	Profit-Sharing Global Amount	IND261	Company	
262	Profit-Sharing Average Amount	IND262	Company	
263	Stock Percent	Not delivered	Company	
311A	Work Accident	IND311A	Establishment and Company	Number of work accidents that result in leave of absence days during a given year.
311B	Theoretical Worked Hours	Not Delivered Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_WRK_HOURS	Establishment	
311C	Work Accident Frequency	IND311C	Establishment	
312A	Lost Days	IND312A	Establishment and Company	Lost days due to work accidents during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
312B	Theoretical Worked Hours	Not Delivered Note. WA AE Section = PAYABSNO and WA AE Field = GPFR_ES_WRK_HOURS	Establishment	
312	Lost Days	IND312A	Company	Lost days due to work accidents during a given year.
312C	Accident Severity Rate	IND312C	Establishment	The work accident severity equals the lost days due to work accidents times 10^6 divided by the theoretical worked hours.
313	Permanent Disability	IND313	Company	Number of permanent disabilities that are notified to the company during a given year.
313A	Permanent Disability: French	IND313A	Establishment	Number of permanent disabilities that are notified to the company during a given year.
313B	Permanent Disability: Foreigners	IND313B	Establishment	Number of permanent disabilities that are notified to the company during a given year.
314A	Fatal Accident at Work	IND314A	Establishment and Company	Number of fatal accidents at work during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
314B	Fatal Accident: Commuting	IND314B	Establishment and Company	Number of fatal accidents during commuting during a given year.
315	Stop Work Due to Accident	IND315	Establishment and Company	Number of accidents resulting in a stoppage of work during a given year.
316	Accident - Temporary	IND316	Establishment and Company	Number of nonemployee accidents at work during a given year.
317A	Social Security Contribution for Work Accident Rate	Not Delivered Note. WA AE Section = IND317A and WA AE Field = GPFR_ES_ACC_RATE	Establishment	Social Security Contribution for Work Accident Rate during a given year.
317B	Social Security Contribution for Work Accident Amount	Not Delivered Note. WA AE Section = IND317B and WA AE Field = GPFR_ES_ACC_AMNT	Establishment	Social Security Contribution for Work Accident Amount during a given year.
321	Accident - High Risk	IND321	Establishment and Company	Number of accidents linked to existing high risk during a given year.
322	Accident - Due to a Fall	IND322	Establishment and Company	Number of accidents classified as <i>due to a fall</i> during a given year.
323	Accident - Caused by a Machine	IND323	Establishment and Company	Number of accidents classified as <i>caused by a machine</i> during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
324	Road Accident	IND324	Establishment and Company	Number of accidents classified as <i>road accident</i> during a given year.
325	Accident - Caused by an Object	IND325	Establishment and Company	Number of accidents classified as <i>caused by an object</i> during a given year.
326	Accident - Others	IND326	Establishment and Company	Number of accidents classified as <i>other</i> during a given year.
331	Occupational Disease	Not delivered	Establishment and Company	
332	Disease Due to Work	Not delivered	Establishment and Company	
333	Jobs Can Cause Diseases	Not delivered	Establishment and Company	
341	Number of Security Meetings	Not delivered	Establishment and Company	
351	Security Training	Not delivered	Establishment and Company	
352	Security Budget	Not delivered	Establishment and Company	
353	Percentage Done	Not delivered	Establishment	
411	Worked Hours	Not delivered	Establishment and Company	
412A	Time Off in Lieu: Legal	IND412A	Establishment and Company	Number of employees who received legal time off during the given year.

Indicator	Description	AE Section	Employee Survey	Long Description
412B	Time Off in Lieu: Conventional	IND412B	Establishment and Company	Number of employees who received conventional time off during the given year.
413	Flextime	IND413	Establishment and Company	Number of employees with flextime as of December 31.
414A	Part-time: 20 -30 hrs a Week	IND414A	Establishment and Company	Number of employees working between 20 and 30 hours a week as of December 31.
414B	Part-time: Others	IND414B	Establishment and Company	Number of employees working part-time other than 20 to 30 hours a week as of December 31.
415	2 Days Time Off	Not delivered	Establishment and Company	
416	Annual Holidays - Average	IND416	Establishment and Company	Average number of annual holidays during the given year (time off in lieu not included).
417	Public Holidays Paid	Not delivered	Establishment and Company	
421	Alternate Hours	IND421	Establishment and Company	Number of employees with alternate hours as of December 31.
431	Noise >= 85 Db	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
432	Toxic Products Analyses	Not delivered	Establishment and Company	
441	Working Environment Improvement	Not delivered	Establishment and Company	
451	Improvement Program Expenses	Not delivered	Establishment and Company	
452	Percentage Done	Not delivered	Establishment	
461	Medical Exam	IND461	Establishment	Number of medical exam as of December 31.
461A	Medical Exam: Supervised Work	Not delivered	Establishment	
461B	Medical Exam: Others	Not delivered	Establishment	
462	Additional Medical Exam	IND462	Establishment	Number of additional medical exams given during the year.
462A	Additional Medical Exam: Supervised	Not delivered	Establishment	
462B	Additional Medical Exam: Others	Not delivered	Establishment	
463	Medical Intervention	Not delivered	Establishment	
471	Employees Unfit for Work	IND471	Establishment	Number of employees declared unfit for work by the work doctor during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
472	Employees Regraded	IND472	Establishment	Number of regraded employees due to an incapacity during a given year.
511	Training Total Payroll	Not delivered	Establishment and Company	
512	Training Budget	Not delivered	Establishment and Company	
513	Trainees	Not delivered	Establishment and Company	
514A	Trainees Hours Paid	Not delivered	Establishment and Company	
514B	Trainees Hours Unpaid	Not delivered	Establishment and Company	
515	Training Categories	Not delivered	Establishment and Company	
521	Training With Pay	IND521	Establishment and Company	Number of employees with a paid training leave during a given year.
522	Training Without Pay	IND522	Establishment and Company	Number of employees with an unpaid training leave during the given year.
523	Training Demand Reject	Not delivered	Establishment and Company	
531	Apprenticeship Contr	Not delivered	Establishment and Company	
611	Turnout at Elections	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
612	Time Allowed Used	Not delivered	Establishment and Company	
613	Union Representative Meetings	Not delivered	Establishment and Company	
614	Agreement	Not delivered	Company	
615	Leave of Working Education	Not delivered	Company	
621	Hours for Meetings	Not delivered	Establishment and Company	
622	Reception Procedure	Not delivered	Establishment and Company	
623	Information Procedure	Not delivered	Establishment and Company	
624	Individual Interview	Not delivered	Establishment and Company	
631	Non Judicial Action	Not delivered	Establishment and Company	
632	Judicial Inquiry	Not delivered	Establishment and Company	
633	Labor Inspector Notification	Not delivered	Establishment and Company	
711	Expense	Not delivered	Establishment and Company	
712	Payment to Works Council	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
721	Mutual Insurance: Health and Life	Not delivered	Company	
722	Mutual Insurance: Retirement	Not delivered	Company	

Running Workforce Reporting Statutory Reports

The section provides prerequisites for the single hiring statement and discusses how to:

- Run the Monthly Workforce report.
- Run the Workforce by Nationality report.
- Run the Personal Register report.
- Run the Single Hiring Statement report.
- Run the BIAF report.

Prerequisites for the Single Hiring Statement

The Single Hiring Statement retrieves information for new workers from your job data, company, and establishment tables. The following table lists the information that is required and the page where the information is entered for the worker.

Information	Page
Name and Prefix Gender Social security number Date of birth Nationality	Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details
Employee address	Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information
Previous work situation	Workforce Administration, Personal Information, Biographical, Modify a Person, Regional

Information	Page
First start date	The system creates the first start date (the hire date) using the date of the first job data record created with the Action of <i>Hire</i>. Review the First Start Date on the Employment Information page: Workforce Administration, Job Information, Job Data, Employment Information
SIRET number APE code Establishment address Establishment phone and fax number Establishment activity Medical organization code and address Company name Company/establishment point of contact	Define the person's company and establishment on the Work Location page on the following menus: • Workforce Administration, Job Information, Add Employment Instance or, • Workforce Administration, Job Information, Add Contingent Worker Instance or, • Workforce Administration, Job Information, Job Data, Work Location The system retrieves the company and establishment details from the Company table and Establishment table.
Job category Working hours	Workforce Administration, Job Information, Job Data, Job Information The system retrieves job category information from the Job Code table.
Contract end date	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content
Contract type	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses
Probation date	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature/Probation Info
Monthly gross salary	Workforce Administration, Job Information, Job Data, Compensation

Pages Used to Run the Workforce Reporting Statutory Reports

Page Name	Object Name	Navigation	Usage
Monthly Workforce Report	RUNCTL_REG001_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce, Monthly Workforce Report	Run the Monthly Workforce report.
Workforce By Nationality	RUNCTL_REG003_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality, Workforce by Nationality	Run the Workforce by Nationality report.
Personal Register	RUNCTL_REG002_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register, Personal Register	Run the Personal Register report.
Single Hiring Statement	SHS_FRA_RUN_CTL	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement, Single Hiring Statement	Run the Single Hiring Statement report, which is a statutory report that is filed at the time of hiring new employees. The system uses information from your employee, company, and establishment tables to generate the report.
BIAF Report (<i>Bordereau Individuel d'Accès à la Formation</i> report),	RUNCTL_BIAF_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF, BIAF Report	Run the BIAF report.

Running the Monthly Workforce Report

Access the Monthly Workforce Report page.

This report lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more employees.

Before running this report, define which contract types to include in the report using the Contract Type Group page.

Running the Workforce by Nationality Report

Access the Workforce By Nationality page.

This report provides a comprehensive analysis of the foreign workforce employed in a company.

Running the Personal Register Report

Access the Personal Register Report page.

This report lists employees for a given establishment of a company. Run the report for a specific establishment within an organization or for all establishments of an organization.

Running the Single Hiring Statement Report

Access the Single Hiring Statement page.

Single Hiring Statement

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Employee Selection Criteria

☒ By Hire Date ☐ By Employee ID ☐ By Group [Refresh](#) [Clear](#)

Employee Hired Between

Start Date: End Date: 08/11/2004

Employee List [Customize](#) [Find](#) First 1 of 1 Last

	Employee ID	Rcd#	Name	Estimates Hire Time	Exemption if First Hired	Exemption if Part-Time	
1					☐	☐	+ -

Single Hiring Statement page

You can automate the production of this report using workflow supplied by PeopleSoft. If you enable workflow, when an employee is hired, workflow adds an entry to the HR administrator's task list for the Single Hiring Statement.

Employee Selection Criteria

There are three ways to select the employees whom you want to include in the report. Depending on the method that you select, the system hides or displays fields.

- By Hire Date** Select to generate the Single Hiring Statement report for all employees hired within a specified period. Enter the date range in the Employee Hired Between group box.
- By Employee ID** Select to run the report for selected employee IDs. Use this option if you know the new employee IDs. Select the employees in the Employee List group box.
- By Group** Select to generate the report for employees in a group. The system displays the Group ID field when you select this option.
- Refresh** When you have defined the selection criteria, click this button to populate the Employee List group box with new employees who meet the criteria.
- Clear** Click to clear the Employee List. The system removes all employees listed.

Employees Hired Between

This group box appears if you select By Hire Date only. Select the start and end dates for the report. The system searches for employees who were hired between these dates.

Start Date The default start date is the end date entered the last time that the Single Hiring Statement was run.

Employee List

When you click the Refresh button, the system populates this group box with new employees who meet the criteria that you selected. You can also add employees to the list.

For each employee listed, complete the Estimates Hire Time field and select the Exemption if First Hired and the Exemption if Part-Time check boxes, if necessary. This information is printed on the report.

Running the BIAF Report

Access the BIAF Report page.

BIAF Report

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Contract Type: Fixed Term Adaption Contract

From Date: 08/11/2004

Thru Date: 08/11/2005

Group ID: H0GRP2 H0GRP2 for Reports

List of Employee(s)		Find	First	1 of 1	Last
*EmplID	Name				
1 B-BARET109	Future4 Term				

BIAF Report page

This report is for employees on fixed-term contracts and details the employee's training entitlement. French employers are required to contribute towards employee training through payments to official training organizations. The BIAF report includes information about the training organization that receives the employer's contributions and the terms and conditions of the training entitlement. You can print this report at any time during the employee's contract period.

You can run the BIAF report for:

- Individual employees, by adding employees to the List of Employee(s) group box.
- A group of employees, by selecting a group in the Group ID field.

Note. You must complete the From Date and Thru Date fields, whether you run the report for selected employees or for a group of employees.

Contract Type Select the type of fixed term contract from the following options: *Limited Contract*, *Fixed Term Adaption Contract*, or *Fixed Term Emp. Init Contract*. The report includes only employees with the selected contract type. If you leave this field blank, the report includes employees with any of these contract types.

From Date and Thru Date Select the hiring period for the report. The system searches for employees on fixed-term contracts whose hiring date is between the dates you specify.

Group ID	Select the group of employees to include in the report. The system searches the group for employees who meet the criteria defined in the Contract Type and From/Thru Date fields.
List of Employee(s)	To run the BIAF report for certain employees, add the employees to this group box.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Group Definitions”

Preparing and Running the Training 2483 Report

This section provides overviews of the Training 2483 reporting requirements, classification of Training 2483 report indicators, and calculation of report indicators.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training, “(FRA) Producing the French Training Report 2483”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (FRA) Meet Regulatory Requirements Reports for France

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

Understanding the Training 2483 Reporting Requirements

The Training 2483 (also called the Declaration 2483 report) is a French regulatory report that compiles information about the amount of money that a company has spent on employee vocational training. PeopleSoft delivers the definition of the legal groups and indicators with the system.

To prepare the Training 2483 report:

1. Set up training report groups.
2. Set up training report indicators.
3. Enter training report parameters.
4. Run the Compute Training Report 2483 (DEC2483) process calculation for all indicators.
5. (Optional) Review and edit the results of the process calculations.
6. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training*, “(FRA) Producing the French Training Report 2483”.

Understanding Classification of Training 2483 Report Indicators

This section contains information about the indicators that PeopleSoft provides for the Training 2483 report, and it discusses how these indicators are used. The indicators are classified by group and designated by letters *A* through *I*. Each letter represents a particular description. For example, *B* represents headcount while *C* represents total compensation. Indicators are either delivered by application process (calculated) or manually compiled.

List of PeopleSoft Indicators Classified by Group

The following table lists the indicators by group:

Group ID	Indicator ID	Indicator Description	Comments	Delivery
A	1	Monthly Average Headcount		Calculated
B	2(a)	Workers - Male		Calculated
B	2(b)	Workers - Female		Calculated
B	2(c)	Total number of male workers who attended training (including DIF, competency check and experience validation)		Calculated
B	2(d)	Total number of female workers who attended training (including DIF, competency check and experience validation)		Calculated
B	2(e)	Training Hours (including DIF, competency check and experience validation)		Calculated
B	2(f)	Total number of workers who attended DIF training		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	2(g)	Total number of DIF training hours attended by workers		Calculated
B	2(h)	Total number of hours of DIF balance for workers		Calculated
B	3(a)	Employees - Male		Calculated
B	3(b)	Employees - Female		Calculated
B	3(c)	Total number of male employees who attended training (including DIF, competency check and experience validation)		Calculated
B	3(d)	Total number of female employees who attended training (including DIF, competency check and experience validation)		Calculated
B	3(e)	Total employee training hours		Calculated
B	3(f)	Total number of employees who attended DIF training		Calculated
B	3(g)	Total number of DIF training hours attended by employees		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	3(h)	Total number of hours of DIF balance for employees		Calculated
B	4(a)	Technicians - Male		Calculated
B	4(b)	Technicians - Female		Calculated
B	4(c)	Total number of male technicians who attended training (including DIF, competency check and experience validation)		Calculated
B	4(d)	Total number of female technicians who attended training (including DIF, competency check and experience validation)		Calculated
B	4(e)	Total technician training hours		Calculated
B	4(f)	Total number of technicians who attended DIF training		Calculated
B	4(g)	Total number of DIF training hours attended by technicians		Calculated
B	4(h)	Total number of hours of DIF balance for technicians		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	5(a)	Executives - Male		Calculated
B	5(b)	Executives - Female		Calculated
B	5(c)	Total number of male executives who attended training (including DIF, competency check and experience validation)		Calculated
B	5(d)	Total number of female executives who attended training (including DIF, competency check and experience validation)		Calculated
B	5(e)	Total executive training hours		Calculated
B	5(f)	Total number of executives who attended DIF training		Calculated
B	5(g)	Total number of DIF training hours attended by executives		Calculated
B	5(h)	Total number of hours of DIF balance for executives		Calculated
B	6(a)	Total number of males		Calculated
B	6(b)	Total number of females		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	6(c)	Total number of males who attended training (including DIF, competency check and experience validation)		Calculated
B	6(d)	Total number of females who attended training (including DIF, competency check and experience validation)		Calculated
B	6(e)	Total training hours (including DIF, competency check and experience validation)		Calculated
B	6(f)	Total number of people who attended DIF training		Calculated
B	6(g)	Total number of DIF training hours		Calculated
B	6(h)	Total number of hours of DIF balance		Calculated
B	7	Professionalization Period Headcount		Calculated
B	8	Professionalization Period Training Hours		Calculated
B	9	Training allocation beneficiaries headcount		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	10	Training allocation financed hours		Calculated
B	11	Number of competency checks		Calculated
B	12	Number of Experience Validation trainings		Calculated
C	1	Total Annual Salaries	May be retrieved from DADS reporting if PeopleSoft Global Payroll France is installed.	Manually entered
C	2	Reduction Rate		Manually entered
D	3	Participation rate for Training Leave (CIF)		Manually Entered
D	4	Employer participation rate for Training Leave (CIF)	$C1 * D3$	Calculated
D	5	OPCA Payments for Training Leave (CIF)		Manually Entered
D	6	Insufficiency	$D4 - D5$	Calculated
E	7	Participation rate for DIF, and professionalization contracts and period		Manually entered
E	8	Employer Participation for DIF, and professionalization contracts and periods	$C1 * E7$	Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
E	9	OPCA payment for DIF, and professionalization contracts and periods		Manually entered
E	10	Insufficiency	E8 – E9	Calculated
F	11	Employer Participation (Training Plan)	C1 * C2	Calculated
F	a	Internal Training Cost		Calculated
F	b	External Training Cost		Calculated
F	b-a	Training Agreement Cost		Manually entered
F	b-b	Competency Check Cost		Manually entered
F	b-c	Experience Validation Cost		Manually entered
F	c	Trainee Salary Costs for Regular Courses, Competency Checks, and Experience Validation		Calculated
F	d	Paid Training Allocations		Calculated
F	e	OPCA (CIF, Professionalization, DIF) payment	D5 + D9	Calculated
F	f	OPCA CIF (DIF) payment		Manually entered

Group ID	Indicator ID	Indicator Description	Comments	Delivery
F	g	OPCA - Training Plan Payment		Manually entered
F	h	Other Payments, Financing, Cost		Manually entered
F	i	Subsidy		Manually entered
F	12	Total Training Cost	Fa + Fb + Fc + Fd + Fe + Ff + Fg + Fh – Fi	Calculated
F	13	Expense Surplus	This indicator is equal to indicator F12 minus indicator F11, if F12 is greater than F11	Calculated
F	14	Expense Insufficiency	This indicator is equal to indicator F11 minus indicator F12, if F11 is greater than F12	Calculated
F	15	Surplus Carry Forward	The surplus comes from the surplus calculated in Group I	Calculated
F	16	Difference (F14 – (F15))	This indicator is equal to indicator F14 minus indicator F15, if F14 is greater than F15. If the result is less than zero, this indicator is set to zero.	Calculated
G	17	CDD Total Annual Salaries	May be calculated if PeopleSoft Global Payroll France is installed.	Manually entered

Group ID	Indicator ID	Indicator Description	Comments	Delivery
G	18	Employer Obligation	Based on the Employer Obligation Rate This indicator is equal to: Employer Obligation Rate * G17	Calculated
G	19	OPCA CIF Payments		Manually entered
G	20	Difference (18) – (19)	G18 – G19	Calculated
H	21	Training Cost Insufficiency	This indicator is equal to indicator E10	Calculated
H	22	Regularization Payment		Manually entered
H	23	Payment/Company Work Council		Manually entered
H	24	Total Insufficiency	D6 + F16 + (2 * G20)	Calculated
H	25	Total Contribution	H21 + H22 + H23 + H24	Calculated
I	Total	Total Carry-Forward Surplus		Either manually entered, or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.

Group ID	Indicator ID	Indicator Description	Comments	Delivery
I	n – 1	Surplus of the previous year (Year minus 1 surplus)		Either manually entered, or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.
I	n – 2	Surplus of the year before the previous year (Year minus 2 surplus)		Either manually entered or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system.
I	n – 3	Surplus of two years before the previous year (Year minus 3 surplus)		Either manually entered or calculated if 2483 indicators have been calculated for the year before the declaring year and are stored in the system. Manually entered

Understanding Calculation of the Report Indicators

This section is for implementers of the Training 2483 report. Some indicators are calculated based on the data existing in the Administer Training business process in Human Resources. Others are calculated based on parameters that you input into the system through the Trn 2483 Parameters Setup (Training 2483 parameters setup) page.

Training costs are obtained from the Maintain Student Cost page, employee and instructor salary costs are obtained from the Trainees Salary Costs page, and the company costs are obtained from the Trn 2483 Parameters Setup page.

The Training 2483 report is complex. For some indicators, several conditions must be fulfilled for the indicators to be correctly calculated:

- The session start and end dates must be within a single calendar year.
Sessions that start in December and end in January will not be processed and must be split into two sessions to assign the costs to the correct declaring year.
- Costs are only obtained from departments that are part of the declaring company.

The chargeable costs and the chargeability criteria are computed by the Compute Student Costs process (this process is run from the Compute Student Cost page (RUNCTL_TRN013). The Compute 2483 FRA process computes the total compensation and expense aggregation.

Note. If you have implemented PeopleSoft Enterprise Learning Management and PeopleSoft Enterprise HR Administer Training, set up the learning catalog, instructors, vendors, and so forth, as well as the tracking of learning costs, enrollment and other day-to-day tasks in Enterprise Learning Management.

See PeopleSoft Enterprise Learning Management 9.0 PeopleBook, “(FRA) Managing French Regulatory Requirements”

Calculation of Indicator A

To calculate monthly average headcount for this indicator, only employees are counted—contract workers and persons of interest are excluded.

To calculate group A indicators:

- Set the HR status to *Active*, and set the payroll status to *Active*, *Leave of Absence*, *Leave With Pay*, *Suspended* or *Short Work Break*. HR and payroll status are defined in the Job Data component (JOB_DATA).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Updating Person and Job Information”.

- Set the contract status to *Active*. The contract status is defined on the Contract Status/Content page (Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “Entering Additional Data in Human Resources Records,” Tracking Workforce Contracts.

- The employee category must be active in the Employee Categorization (EMPL_CTG_L1) component (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement). Then an employee category must be assigned to the employee on the Job Data - Job Labor page.

Calculation of Group B Indicators

The selection for all group B indicators works in the same manner. It is based on the 2483–B–nn contract type group, where n is the indicator number.

To calculate indicators B2–B10, the following criteria are considered:

- Set up an employee contract and enter an employee category on the Contract Type Table page and link the employee to a labor agreement and enter an employee category on the Job Data - Job Labor page.
- Set the employee status to *Active*, *Leave of Absence*, *Leave With Pay*, *Suspended* or *Short Work Break*.
- Set up the 2483 Professional Category field as qualified worker or non-qualified worker (row 2), employee (row 3), technician (row 4), or executive (row 5) on the Employee Categorization page.
- For group B, employees and contract workers are taken into account, as well as a list of contract types defined on the Contract Type Group page (Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Contract Type Group). The contract type group used for group B is 2483–B–ALL.
- For the indicators dealing with courses, only sessions that are completed are taken into account, and the Attendance should be either *Completed* or *Incomplete*. These values are defined on the Course Session Enrollment page (Enterprise Learning, Student Enrollment, Enroll Individually) or the Course Student Enrollment page (Enterprise Learning, Student Enrollment, Enroll in Course).

- For columns (c) and (d), Professionalisation Period, Training Leave and Part Time Course are excluded. Clear the check boxes for those values on the Course Session Enrollment page or the Demand from Budget Training page (Enterprise Learning, Student Enrollment, Enroll in Course).
- For column (e), all training hours are added together.
- For columns (f) and (g), only DIF trainings are taken into account. Select the DIF check box on the Course Session Enrollment page or the Demand from Budget Training page.
- For column (h), the DIF balance hours are added up. This DIF balance is stored in TRN_DIFHIST_TBL record. If Global Payroll France is installed, this record can be updated by running the DIF Payroll Import application engine (Enterprise Learning, Result Tracking, DIF Payroll Import FRA). Otherwise it can be updated with data coming from another system.

The DIF balance can be checked on the Training Hours Details page (Enterprise Learning, Student Enrollment, Enroll in Course, Demand from Budget Training, then click the Track Training Hours Details link).

- For indicators 7 and 8, only professionalisation period trainings are taken into account. This information is defined on the Course Session Enrollment page or the Demand from Budget Training page.
- For indicators 9 and 10, training allocation is paid if the student has followed some training hours out of the working schedule, if the training is a DIF training, or the Training Plan Category is *Skill Development*. Select this value on the Course Session Enrollment page or the Demand from Budget Training page.

If Global Payroll France is installed, the training allocation amount and hours are imported from Global Payroll France when updating salary costs using the Update Salary Costs page (Enterprise Learning, Define Budget, Update Salary Costs). The training allocation amount and hours can then be reviewed or updated on the Trainees Salary Costs page: Allocation tab (Enterprise Learning, Define Budget, Trainees Salary Costs, Training Allocation tab).

- For indicator 11, only training with the Course Type *Comp Check* (competency check) selected are taken into account.
- Indicator 12 only takes experience validation into account.

To calculate indicators B11 and B12, the following criteria are also considered:

- The training must be financed entirely by the company. There should be no cost in the Financed Cost field on the Vendor page (Course Session Costs (Enterprise Learning, Define Course/Cost Details, Course Session Costs).
- The training session must be chargeable. This is determined on the Course Profile page (Enterprise Learning, Define Course/Cost Details, Courses).
- Training leave sessions and part time sessions are not reported in these indicators.
- Students who have an *Apprentice* contract type are not included.
- Students enrolled multiple times are reported only once.
- Students must have begun or completed a session during the year that the 2483 is based upon (session attendance = 'C'=Complete or 'I'=Incomplete).
- All session durations will be included for students enrolled multiple times.

When the attendance status is *C*, the session duration is obtained from the Course Session Profile page. If the attendance status is *I*, the duration is obtained from the Time Spent at Training field on the Course Session Enrollment page.

To calculate indicators B11 and B12:

- Set the employee status to *Active*, *Leave of Absence*, *Leave With Pay*, *Suspended*, or *Short Work Break*.

- For indicator 11, only training with the Course Type *Comp Check* (competency check) selected are taken into account. Set this value on the Course Profile page (Enterprise Learning, Define Course/Cost Details, Courses).
- For indicator 12, only training with the Course Type *Exp. Valid* (experience validation) selected are taken into account. Set this value on the Course Profile page.

Calculation of Group C Indicators

To calculate group C indicators:

- A value for indicator 1 can be entered manually.

If Global Payroll France is installed, the total salaries can be imported from Global Payroll. To import the salaries from Global Payroll, select the Interface with Payroll System check box in the C–Total Compensation section of the 2483 parameters - Trn 2483 Parameters Setup page (Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA).

- Enter a value for indicator 2. The default value is 1.60, which is applicable to a company that has more than 20 employees.

Calculation of Group D Indicators

To calculate group D indicators:

- Enter a value for indicator D3. The default value is 0.20.
- Indicator 4 is equal to the rate defined in D3 multiplied by the value of C1.
- Enter a value for indicator D5 manually.
- Indicator D6 is equal to the value of D4 minus the value of D5.

Calculation of Group E Indicators

To calculate group E indicators:

- Enter a value for indicator E7. The default value is 0.50.
- Indicator E8 is equal to the rate defined in E7 multiplied by the amount in C1.
- Enter a value for indicator E9 manually.
- Indicator E10 is equal to the value of E8 minus the value of E9.

Calculation of Indicator F11 – Employer Participation (Training Plan)

Indicator F11 is equal to the rate defined in C2 multiplied by the amount in C1.

Calculation of Indicator Fa – Internal Training Cost: Instructor and Non-Instructor Expenses

Indicator Fa is the sum of the instructor expenses, non-instructor personnel expenses, and furniture expenses. The calculation rules for indicator Fa – Internal Training Cost are based on the following costs:

- Internal instructor costs are defined on the Course Session Costs component and the Instructors pages.
- Non-Instructor Employee Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.
- Non-Instructor Session Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.

- Furniture and equipment expenses.

This cost category includes equipment and furniture required for the training. Furniture Employee Expense Costs are defined on the Course Session Costs component and according to the 2483 indicator on the Tuition Expense Type Table page.

- Other expenses.

This cost category includes all of the expenses that do not fall into the previous categories and are chargeable for the 2483 report. For example:

- Facility rental, cleaning, heating, and electricity.
- Expense related to the training organization, such as book rental, furniture rental, and document duplication.
- Magazine subscriptions.
- Administrative organization, which would include stamps, envelopes, telephones, and others.
- Costs related to training demand evaluation and Training Plan elaboration.
- Transport and lodging for instructors.

To calculate indicator Fa expenses:

- Set the employee status to *Active*, *Leave of Absence*, *Leave With Pay*, *Suspended*, or *Short Work Break*.
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).

Calculation of Indicator Fb - Competency Checks, Experience Validation, Annual Agreements, and Multi-Annual Agreements

To calculate indicator Fb - Competency Checks, Experience Validation, Annual Agreements, and Multi-Annual Agreements, the following costs are considered:

- For indicator Fb, only vendors with types set to *Consulting Firm* or *Training Provider* are taken into account. Enter these values on the Vendor Profile page (Enterprise Learning, Define Training Resources, Vendors).
- Vendor costs should be chargeable. Set the vendor cost on the Course Session Costs - Vendor page (Enterprise Learning, Define Course/Cost Details, Course Session Costs). This info can also be modified in the Maintain Student Costs component (Enterprise Learning, Cost Analysis).
- Set the employee status to *Active*, *Leave of Absence*, *Leave With Pay*, *Suspended*, or *Short Work Break*.
- Terminate the training session in which the employees were enrolled.
- Set the course type to *Competency Check* in the Course Table report.
- The vendor type must be annual or multi-annual.
- Ensure that the vendor is chargeable, certified, billed and the date of the bill is filled. Set these values in the Course Session Cost - Vendor page.
- Three kinds of external costs are calculated in the indicator Fb—Fb-a, Fb-b, and Fb-c:
 - Indicator Fb-a includes external costs for all course types except competency check and experience validation.
 - Indicator Fb-b includes external costs for competency check courses. In this case, the Financing Type of the vendor should be *Financing Training Leave Fund*. This value is set on the Vendor Profile page (Enterprise Learning, Define Training Resources, Vendors, Vendor Profile).
 - Indicator Fb-c includes external costs for experience validation courses.

Calculation of Indicator Fd – Paid Training Allocations

The following criteria are used to calculate paid training allocations in this indicator:

- A training allocation is paid if the student has followed some training hours out of the working schedule, if the training is a DIF training or the Training Plan Category is *Skill Development*. The Training Plan Category value is set on the Course Session Enrollment page or the Demand from Budget Training page.
- If Global Payroll France is installed, the training allocation amount and hours are imported from Global Payroll France when updating salary costs using the Update Salary Costs page (Enterprise Learning, Define Budget, Update Salary Costs). The training allocation amount and hours can then be reviewed or updated on the Trainees Salary Costs page: Allocation tab (Enterprise Learning, Define Budget, Trainees Salary Costs, Training Allocation tab).

Calculation of Indicators Fe – Fi

The following criteria are used to calculate these indicators:

- Indicator Fe is equal to the sum of D5 and E9.
- Indicator Ff is entered manually.
- Indicator Fg is entered manually.
- Indicator Fh includes all chargeable costs with a type different from *Furniture, Instructor, Instructor Lodging & Transport, or Non Instructor*. Set these values in the 2483 Type field on the Tuition Expense Type Table page (Enterprise Learning, Define Course/Cost Details, Tuition Expense Type).

The costs include the session and employee costs determined on the Course Session Costs - Expense page (Enterprise Learning, Define Course/Cost Details, Course Session Costs) and Employee Expense page (Enterprise Learning, Cost Analysis, Maintain Student Costs, Employee Expense).

- Indicator Fi is entered manually.
- Indicator F12 is equal to the sum of FA, FB, FC, FD, FE, FF, FG, and FH minus FI.
- Indicator F13 equals F12 minus F11, if F12 is higher than F11.
- Indicator F14 equals F11 minus F12, if F11 is higher than F12.
- Indicator F15 is subtracted from the number calculated in the final indicator reported in Group I.
- Indicator F16 equals F14 minus F15, if F14 is higher than F15.

Calculation of Group G Indicators

To calculate group G indicators:

- Enter a value for indicator G17 in the CDD Total Annual Salaries (17) field, or extract it from PeopleSoft Enterprise Global Payroll France. To extract indicator G17 from Global Payroll France, select the Interface with Payroll check box in the G-CDD Training Leave Financing section on the Trn 2483 Parameters Setup page (Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, 2483 Parameters).
- Indicator G18 is equal to the amount displayed in indicator G17 multiplied by the rate defined in the Employer Obligation Rate (18) field on the Trn 2483 Parameters Setup page. The default rate is 1.00.
- Enter a value for indicator G19 in the OPCA CIF Payments (19) field.
- Indicator G20 is equal to the value of indicator 18 minus the value of indicator 19.

Calculation of Group H Indicators

Group H indicators are calculated using the following criteria:

- Indicator H21 is equal to the amount calculated in E10.
- Enter a value for indicator H22 in the Regularization Payment (22) field.
- Indicator H23 is equal to the amount calculated in F11 multiplied by 50 percent if the Payment/Company Work Council is null. You can modify the Payment/Company Work Council on the Trn 2483 Parameters Setup page . If the Payment/Company Work Council value is not null, then indicator H23 is set to 0.
- Indicator H24 equals D6 added to F16 and to twice G20.
- Indicator H25 is equal to the sum of H21, H22, H23 and H24.

Calculation of Group I Indicators

Group I indicators are calculated using the following criteria:

- If the training expenses spent by the company during the years preceding the declaring year have exceeded the amount that is expected by the government, this surplus can be carried forward. The surplus is equal to the indicator F13 if this value is not zero.
- The indicators I (N-1), I (N-2), and I (N-3) are calculated using 2483 indicators that are determined the previous year. The surplus for the year prior to the declaring year is equal to the indicator F13 amount calculated the year before. Then the surplus calculated for the previous year to fill indicators I (N-1) and I (N-2) can be used to fill I (N-2) and I (N-3) of the declaring year.

For example, when declaring the 2006 training expenses/costs, indicator I (N-1) is updated with the indicator F13 calculated for 2005. I (N-2) and I (N-3) reported for 2006 are equal to I (N-1) and I (N-2) determined for 2005.

Pages Used to Run and Edit the Training 2483 Report

Page Name	Object Name	Navigation	Usage
Compute 2483	RUNCTL_DEC2483	Workforce Monitoring, Meet Regulatory Rqmts FRA, 2483 Tax Declaration, Compute 2483	Calculate all the 2483 indicators and store them in 2483 records.
Edit 2483	EDIT_2483_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, 2483 Tax Declaration, Edit 2483	Edit the Training 2483 report.

CHAPTER 5

(GBR) Meeting Regulatory Requirements for the United Kingdom

This chapter provides an overview of U.K. regulatory requirements and discusses how to:

- Meet Working Time Directive requirements.
- Run the U.K. regulatory reports.

Understanding U.K. Regulatory Requirements

The PeopleSoft system provides the following U.K. regulatory reports to help you perform equal opportunity monitoring of a U.K. workforce by classifying job applicants, job offers, positions filled, and employees in specific gender and ethnic groups:

- Adverse Impact.
- Job Group Roster.
- Joint Staffing Report.
- Northern Ireland Report.
- Termination Analysis.
- Workforce Analysis.

Prerequisites

Before you manage fair employment, equal opportunity, and disability discrimination issues for a U.K. workforce, enter the following employee information:

- Gender information on the Modify a Person - Biographical Details page.
- Ethnicity codes on the Modify a Person - Regional page.
- Disability information on the Disability page.

For the Northern Ireland Fair Employment Monitoring Return, set up additional organization, employee, and applicant data.

You need to:

- Identify the locations that are required to submit a Fair Employment Monitoring Return by selecting the Northern Ireland Reportable check box on the Location Profile page.
- Assign a Standard Occupational Classification (SOC) code to each of the organization's job codes on the Job Code Profile page.

- Assign an employee class on the Job Data - Job Information page.

The PeopleSoft system delivers the codes required on the Fair Employment Monitoring Return.

- Record employees' community background on the Modify a Person - Regional page.
- Record applicants' community background on the Applicant Eligibility/Identity page.

Warning! By law, Northern Ireland community background data for employees can be seen by a designated monitoring officer only. The PeopleSoft system includes a special role called HR Administrator NI (human resources administrator Northern Ireland) for this purpose.

See Also

Chapter 9, “(GBR, USA, and USF) Meeting Disability Regulatory Requirements,” page 157

Meeting Working Time Directive Requirements

To set up working time directives, use the Working Time Directive UK (WRK_TIME_PARAM_UK) component.

The European Working Time Directive as legislated in the U.K. restricts employers from requiring employees to work more than an average of 48 hours a week in any 17-week period. The legislation provides an opt-out provision in which employees choosing to work more than the legally allowed hours can do so by notifying the employer of this choice *in writing*. The directive also makes it illegal to discriminate, in pay or promotion, against employees exercising their right not to work more than 48 hours a week. Finally, the directive requires employers to provide 20 days of paid leave and standard daily break time allowances.

The system provides Working Time Directive components that enable parameters to be set and adjusted, employee work hours per week to be set, and work hours by employee and department to be monitored. The system enables exceptions to be noted for each employee if an employee requests exceptions.

This section discusses how to:

- Set up Working Time Directive parameters.
- Set standard weekly working hours for employees.
- Monitor Working Time Directive compliance.

Pages Used to Monitor Working Time Directive Requirements

Page Name	Object Name	Navigation	Usage
Working Time Directive Parameters and Defaults	WRK_TIME_PARAM_UK	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Working Time Directive UK, Working Time Directive Parameters and Defaults	Set up the Working Time Directive parameters. Although the directive provides guidelines for employers to follow and the system uses these parameters, the directive can change. In that case, the parameters need to be adjusted.
Working Hours Per Week (Employee)	WRK_TIME_EXCEP_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Working Time Directive, Working Hours Per Week (Employee)	Set standard weekly working hours for employees and note exceptions.
Daily Exceptions	WRKTIMEEXC_SEC_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Working Time Directive, Working Hours Per Week (Employee) Click the Daily Exceptions link.	Enter exceptions to the expected work schedule.
Hours Worked Per Reference Period (Department)	WRKTIME_DEPTINQ_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Review Dept Time Directive, Hours Worked Per Reference Period (Department)	Monitor Working Time Directive compliance by department.
Hours Worked Per Reference Period (Employee)	WRK_TIME_EEINQ_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Review Employee Time Directive, Hours Worked Per Reference Period (Employee)	Review Working Time Directive compliance by employee.

Setting Up Working Time Directive Parameters

Access the Working Time Directive Parameters and Defaults page.

Working Time Directive Parameters and Defaults		
Statutory Information		
Reference Period (weeks):	17	
Weekly Threshold (hrs/mins):	48	0
Contractual Hours		
Standard Weekly (hrs/mins):	42	30
Standard Daily (hrs/mins):	8	30
Std Daily Break (hrs/mins):	1	0

Working Time Directive Parameters and Defaults page

Statutory Information

Reference Period (weeks) The directive requires average hours to be calculated on a reference period of 17 weeks.

Weekly Threshold (hrs/mins) (weekly threshold [hours/minutes]) The directive requires no more than 48 hours worked in a week period.

Contractual Hours

Use this group box to define standard working hours for the organization if you are not using the Work Schedule component for this purpose. When you enter work schedule information here, the system uses information from this page if working time data is updated; therefore, the employee doesn't have to enter information in the Work Schedule component.

Standard Weekly (hrs/mins) (standard weekly [hours/minutes]) Enter the default standard weekly hours for contract employment.

Standard Daily (hrs/mins) (standard daily [hours/minutes]) Enter the default standard daily hours for contract employment.

Std Daily Break (hrs/mins) (standard daily break [hours/minutes]) Enter the standard daily minimum break allowance.

Setting Standard Weekly Working Hours for Employees

Access the Working Hours Per Week (Employee) page.

Working Hours Per Week

William NilesEMPID: PU018Empl Rcd #: 0

Week Beginning

Find | View All First 1 of 1 Last

02/05/2006

Work Schedule:

Holiday Schedule:

Total Worked (hrs/mins):

4130

[Daily Exceptions](#)

Working Hours Per Week (Employee) page

Enter an employee ID to access the page. If information is entered in the Work Schedule Table component, the system displays the work schedule and holiday schedule as entered on the Work Schedule page in the Assign Work/Holiday Schedules component. If no data is entered in the Work Schedule Table component, these fields do not appear.

Week Beginning

Click the calendar button to enter a date for the week.

Total Worked (hrs/mins) (total worked [hours/minutes])

Enter the total time worked for the week in hours and minutes. When you refresh the page, the system calculates the total time worked, adjusting for all absences (general, holidays, vacations, parental, and maternity). This calculation can be changed or corrected manually. If daily exceptions were added, the field is display-only. To change totals, you must click the Daily Exceptions link.

Daily Exceptions

Access the Daily Exceptions page.

Working Hours Per Week

William Niles

Week Beginning:02/05/2006 

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Expected Basic (hrs/mins):	0 0	8 30	8 30	8 30	8 30	8 30	0 0	42 30
Absence Indicator:								
Actual Worked (hrs/mins):	0 0	8 30	8 30	8 30	8 30	8 30	0 0	42 30
Break (hrs/mins):	0 0	1 0	1 0	1 0	1 0	1 0	0 0	5 0
Total Worked (hrs/mins):								37 30

Daily Exceptions page

Enter a date and click the link on the Working Hours Per Week page. Use this page to note exceptions, particularly those provided by the employee in writing. Update the working hours by entering daily exception hours in the Actual Worked and Break fields.

The page displays the expected work schedule as entered in either the Work Schedule Table component or the Contractual Hours group box on the Working Time Directive Parameters and Defaults page. It displays absences entered in the Absence component or the Parental or Maternity Leave component.

Monitoring Working Time Directive Compliance

Access the Hours Worked Per Reference Period (Department) page.

Hours Worked Per Reference Period

Department: 10000 Human Resources

Company: KAB Australian Business Institute

Begin Date: 02/05/2006  **End Date:** 02/11/2006 

Weekly Threshold (hrs/mins): 48 0

Hours Worked Per Reference Period (Department) page

Select a department to access the page. Enter the beginning date for the reference period. By default, the system calculates an end date based on the 17-week parameter. Although the system applies values by default for the dates and weekly threshold as entered on the Working Time Directive Parameters and Defaults page, these can be modified manually. Click the Refresh button to update the page when the fields are complete.

Reviewing Employee Time Directive Compliance

Access the Hours Worked Per Reference Period (Employee) page.

The page displays any employees for whom exceptions are entered, indicating that the exceptions may exceed the established working hours. Click the employee name link to view the weekly details for that employee.

If exceptions were entered at the daily level, the Daily Detail link appears on the line corresponding to the week for which the exceptions apply. Click the Daily Detail link to display the daily exceptions for that week.

Hours Worked Per Reference Period			
William Niles	EMP	ID: PU018	Empl Rcd #: 0
Reference Period (weeks):	17		
Begin Date:	02/05/2006 	End Date:	06/03/2006

Hours Worked Per Reference Period (Employee) page

By default, the system uses the 17-week reference period. You can change the value by entering a begin date for the period and clicking the Refresh button. The system automatically calculates the end date based on the reference period designated.

The system displays a Daily Detail link for the weeks for which daily exceptions were entered.

Running the U.K. Regulatory Reports

This section discusses how to run the regulatory reports for the U.K.

Pages Used to Run the U.K. Regulatory Reports

Page Name	Object Name	Navigation	Usage
Adverse Impact - Parameters	RUNCTL_FROMTHRU	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact, Parameters	Run the Adverse Impact report (APP001UK). This report displays job offers versus applications by UK-specific ethnic groups and by gender.
Termination Analysis - Parameters	RUNCTL_FROMTHRU	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Termination Analysis, Parameters	Run the Termination Analysis report (PER019UK). This report displays the current employee count and the number of terminations.
Workforce Analysis - Parameters	RUNCTL_PER025UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis, Parameters	Run the Workforce Analysis report (PER025UK). This report tracks hiring practices by department, or other organizational units, based on job titles in the department.
UK Job Group Roster	RUNCTL_PER030UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster, UK Job Group Roster	Run the Job Group Roster report (PER030UK). This report lists employees by job groups.
Joint Staffing	RUNCTL_ASOFDATE	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	Run the Joint Staffing report (PER037UK). This report displays the workforce by job code, gender, and full-time or part-time status.
Fair Empl. Monitoring Return (fair employment monitoring return)	RUNCTL_UKNI	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments, Fair Empl. Monitoring Return	Run the Northern Ireland Fair Empl. Monitoring Return report (UKNI001). This report indicates the religious composition of the workforce, job applicants, and appointees. This report format emulates the Monitoring return, which is required by organizations operating in Northern Ireland.

Running the Northern Ireland Report

Access the Fair Empl. Monitoring Return page.

Fair Empl. Monitoring Return

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Parameters - Part E

*EmplID: KG0001 Indira Tendulkar

*As Of: 01/01/1990

Public Authorities ☐

Fair Empl. Monitoring Return page

EmplID

Select the employee who is responsible for submitting the Fair Employment Monitoring Return. This is the person who signs the form and whose name appears in Part E of the form.

The system uses the selected employee's job data to determine the company for which the report is run.

As Of

Select the end date for the report. The system generates the report for the year ending on the date that you enter here.

CHAPTER 6

(NZL) Meeting Regulatory Requirements for New Zealand

This chapter discusses how to set up the Accident Rehabilitation and Compensation Insurance (ARCI) table.

Setting Up the ARCI Table

To set up the ARCI table, use the Class Unit Table (CLS_UNT_TBL_NZL) component.

ARCI is administered by the Accident Rehabilitation and Compensation Corporation, which regulates and administers a no-fault workers compensation plan. The codes in the ARCI table are used on the Company Table - Default Settings page. These codes identify an organization's employment risk level and provide the basis for determining the premium amounts paid to ARCI.

Note. The PeopleSoft system provides the standard classification units for ARCI.

This section discusses how to create or modify classification units.

Page Used to Set Up the ARCI Table

Page Name	Object Name	Navigation	Usage
Class Unit Table (classification unit table)	CLS_UNT_TBL_NZL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Class Units NZL, Class Unit Table	Create or modify the classification units used to calculate ARCI premiums.

Creating or Modifying Classification Units

Access the Class Unit Table page.

Class Unit Table

Class Unit: 73210

Class Unit Details

Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 **Status:** Active 

***Description:** Bank Operations

Short Desc: Bank Ops

ERP Rate: 1.27

Class Unit Table page

ERP Rate (employment risk premium rate)

Enter the rate based on the industry and the level of risk associated with that industry. The government provides these rates as set by regulation.

CHAPTER 7

(USA) Meeting Regulatory Requirements for the United States

This chapter provides an overview of U.S. regulatory requirements and discusses how to:

- Set up control tables for regulatory requirements.
- Set up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) reporting.
- Meet Equal Employment Opportunity and Affirmative Action Plan (EEO/AAP) reporting requirements.
- Meet Job Group Movement Analysis reporting requirements.
- Meet Veterans Employment and Training Service-100 (VETS-100) reporting requirements.
- Run the U.S. regulatory reports.
- Generate the PRWORA New Hire report and electronic file.

Understanding U.S. Regulatory Requirements

If U.S. government employment regulations apply to your company, you need to implement plans and practices to ensure that your company consistently meets U.S. reporting requirements.

Human Resources provides tables to help you manage the information that you need to comply with the Americans with Disabilities Act (ADA). Veterans Employment and Training Service (VETS) is the only report in which disabled employees are counted.

Additionally, PeopleSoft provides the following regulatory reports:

- Adverse Impact.
- EEO-1 Employer Information.
- EEO-1 Job Analysis Report.
- EEO-4 State and Local Govt.
- EEO-5 Job Analysis.
- IPEDS-S Report.
- Job Group Analysis.
- Job Group Analysis Summary.
- Job Group Movement Analysis.
- Job Group Roster.
- PRWORA - New Hire.

- OSHA-200 Log.
- OSHA-300 Incident Log.
- OSHA-300A Annual Summary.
- OSHA-301 Incident Report.
- Terminations Analysis.
- VETS-100 Report.
- Workforce Analysis.

See Also

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

Setting Up Control Tables for Regulatory Requirements

To set up the control tables for regulatory requirements, use the Affirmative Action Plan (AAP_TBL), Establishment Table (ESTAB_TBL1_GBL), Location Profile (LOCATION_TBL2_GBL), EEO Job Group (EEO_JOB_GROUP), Job Task Table (JOB_TASK_TABLE), Job Code Task Table (JOB_CODE_TASK_TABLE), Controlled Establishments (CONTROLLED_ESTABS), and Occupational Classif. Codes (US_OCC_TBL) components.

You must set up information in the Establishment table to meet U.S. regulatory requirements.

This section discusses how to:

- Define affirmative action plans.
- Define criteria for electronic filing of EEO-1 reports.
- Define job tasks codes.

Pages Used to Set Up Control Tables for Regulatory Requirements

Page Name	Object Name	Navigation	Usage
Affirmative Action Plan	AAP_TBL	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Affirmative Actn Plan, Affirmative Action Plan	Define the affirmative action plans. Affirmative action plans are defined by establishment ID.
Establishment Address	ESTAB_TBL1_GBL	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Establishments, Establishment Address	Identify the establishment, indicate its regulatory region, and enter the address and other country-specific information. Set parameters for electronic filing.

Page Name	Object Name	Navigation	Usage
Location Profile	LOCATION_TBL2_GBL	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Establishments, Go to Locations, Location Profile	Specify a salary administration plan for the location, as well as tax and country-specific location information.
EEO Job Group (Equal Employment Opportunity job group)	EEO_JOB_GROUP	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Groups, EEO Job Group	Set up EEO job group codes.
Job Task Table	JOB_TASK_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Tasks, Job Task Table	Define job task outcomes. For example, if a job requires an employee to pick up heavy boxes and move them, then define <i>moving</i> heavy boxes as the essential job task. Do not define the job task as <i>lifting</i> heavy boxes because an employee with a disability could use a forklift to move them.
Job Code Task Table	JOB_CODE_TASK_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Code Tasks, Job Code Task Table	Define job tasks associated with each job code.
Controlled Establishments	CONTROLLED_ESTABS	Workforce Monitoring, Meet Regulatory Rqmts, Review Controlled Estb Ids, Controlled Establishments	Shows all establishments that have designated the selected headquarters unit as their controlling establishment.
U.S. OCC Table (U.S. occupational classification codes table)	US_OCC_TABLE	Set Up HRMS, Product Related, Workforce Monitoring, Occupational Classif. Codes, U.S. OCC Table	Define U.S. occupation classification codes.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Organization Foundation Tables,” Defining Establishments

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Organization Foundation Tables,” Establishing Locations

Defining Affirmative Action Plans

Access the Affirmative Action Plan page.

Affirmative Action Plan

Establishment ID: KU001 Global Business Institute HQ

Plan Description: GBI HQ Affirmative Action Plan

Person Responsible: KU0001 Douglas Lewis

Plan Year Find | View All First 1 of 1 Last

*Start Date: 01/01/2000 End Date: 01/01/2001 ☐ Active

Job Groups Represented in Establishment Customize | Find | First 1-2 of 2 Last

	*EEO Job Group		Minority Goal	Female Goal	Allocate Goals	
1	KU01	Administrative Assistant	33	18	Allocate Goals	+ -
2	KU02	Administrative Employees	48	26	Allocate Goals	+ -

Affirmative Action Plan page

Plan Description Enter a description of this affirmative action plan.

Person Responsible Select the employee ID of the person responsible for administering this plan.

Plan Year

Start Date, End Date, and Active Enter the start date of this plan. The system calculates the end date and selects the Active check box if this is the current year plan.

Job Groups Represented in Establishment

EEO Job Group, Minority Goal and Female Goal Select an EEO job group and enter the minority goal and female goal for that job group.

Allocate Goals Click the Allocate Goals link to access Ethnic Group, Total Goal and Female Goal fields.

Allocate Goals

Ethnic Group, Total Goal and Female Goal Enter the plan's total and female goals for the selected ethnic group. Click the Roll Up Values links to add the goals for the Minority Goal and Female Goal. Click the Done button to return to the main page. These values will be rolled forward to the EEO Job Group Goals in the Job Groups Represented in Establishment group box.

Defining Establishment Criteria for EEO-1 Reports

Access the Establishment Address page.

Establishment Address		Phone Numbers	
Establishment ID: KU001			
Establishment Address Find View All First 1 of 1 Last			
*Effective Date:	01/01/1980	*Status:	Active
*Description:	Global Business Institute HQ		
Short Desc:			
*Reg Region:	USA	United States	☒ Headquarters Unit
Company:	GBI	Global Business Institute 9999	
Country:	USA	United States	
Address:	1400 Madison Ave Los Angeles, CA 94769 Orange County		
	Edit Address		

Establishment Address page (1 of 3)

USA

Section B

North Amer Ind Class Sys:		SIC:	
EEO Unit Number:		Vets 100 Unit Number:	
Controlling Establishment ID:	KU001	Controlled Establishments	

Section C

☒ EEO-1 Minimum 100 Employees	☐ EEO-1 Filed Previous Year
☐ EEO-1 Company Affiliated	Dun and Bradstreet Number:
*EEO-1 Gov't Contractor Type: Both Prime & Sub Contractor	

Section D

☐ Employ Apprentices
--

Section E

Location same as last year:	☒ Yes	☐ No	☐ No report last year
Major business activity same as last year:	☒ Yes	☐ No	☐ No report last year
Estab. major business activity:			
Headquarters Unit for Retail Banking			
Operations			

Establishment Address page (2 of 3)

Section G

Certifying Official: 
☐ **Copy Details from Headquarters**

Title:
Name:
Telephone:
Fax Number:
Email Address:

Location

As of Date: 

Locations			Customize Find View All 	First  1-6 of 25  Last
	SetID	Location Code	Description	
1	SHARE	KUAL00	Alabama Operations	
2	SHARE	KUAR00	Retirees Location	
3	SHARE	KUAZ00	Arizona Operations	
4	SHARE	KUCA00	California Location	
5	SHARE	KUCT00	Connecticut Operations	
6	SHARE	KUDE00	Delaware Operations	

[Go to Locations](#)

Establishment Address page (3 of 3)

Beginning in 2005, the U.S. Equal Employee Opportunity Commission only accepts EEO-1 Report submissions through their web-based filing system. Previously, the Commission accepted computer-generated printouts of the EEO-1 Report. For employers required to submit the annual EEO-1 Report, PeopleSoft provides a process for submitting the report via a Data File uploaded through the EEO-1 Web Application. While the submission of the EEO-1 report using Alternate Reporting Format (ARF) is voluntary, employers who elect to use this method must comply with all of its requirements without exception.

Establishment ID

In order for the system to select a valid list of EEO-1 employees, this field must *not* be blank on the employee's Job record.

Section C**EEO-1 Gov't Contractor Type**

Select a government contractor type. In order for the system to select a valid list of EEO-1 establishments, this field value should be any value other than *Not Applicable*.

Section G**Certifying Official**

Select a certifying official to populate the certification information of the EEO-1 report. Section G certification is associated with each establishment ID for the company. This allows unique certifying official data to be associated with the EEO-1 report for each establishment.

Copy Details From Headquarters

Select this check box to populate the certification information of the EEO-1 report from headquarters data if one certifying official is appointed to complete all establishment EEO-1 reports.

Defining Job Task Codes

Access the Job Code Task Table page.

Job Code Task Table

SetID: SHARE **Job Code:** 140035 Analyst-Financial
Location SetID: SHARE **Location Code:** KCQC00 Montreal Office

Job Code Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 **Total Percent Time Spent:** 100.00

Detail								Customize	Find View All	First	1-2 of 2	Last
	*Jobtask SetID	Job Task	Descr	*Imprtce	*Freq	*Cons.	% Time Spent					
1	SHARE	K00010	Data Conversion	Esse	Wee	Quite S	60.00					
2	SHARE	K00037	System Design	Margi	Daily	Very Mi	40.00					

Job Code Task Table page

Total Percent Time Spent	The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed 100%.
Jobtask SetID	Select from Jobtask SetID. Values come from the TableSet ID page.
Job Task	Select from Job Task. Values come from the Job Task Table page.
Imprtce (importance)	Select the importance of the job task to the particular job code.
Freq (frequency)	Enter how often the job task occurs for each job code. Values come from the Frequency table.
Cons. (consequence)	Select the result that occurs if the job task isn't performed.
% Time Spent (percentage time spent)	Enter the percentage of time that is spent on the job task.

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.

Setting Up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Reporting

To set up the PRWORA report, use the Record Definition component (HR_RFW_RECDEFN), Variable Definition component (HR_RFW_SYSVAR), Data Definition component (HR_RFW_DSODEFN), Report Type Definition component (HR_RFW_RPTDEFN), Clone Report Type As component (HR_RFW_RPTCLONE), and New Hire Report Configuration component (HR_RFWPRW_CONFIG).

This section provides an overview of the PRWORA report and discusses how to:

- Set up record definitions.
- Set up system variables.
- Set up data object definitions.
- Define child and related data objects.
- Set up report type definitions.
- Set up report columns.
- Clone a New Hire Report.
- Set up the New Hire Report layout definitions.

Understanding the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Report

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) was enacted as a means of locating individuals and recovering delinquent child support payments through wage garnishment. Consequently, employers are required to report specific information on all newly hired salaried employees generally within 20 days of their date of hire. States are responsible for collecting the data and administering the program.

Note. The PRWORA reporting feature provides the flexibility to maintain and manage state-specific regulatory reporting requirements. You must review and modify the Report Type Definitions to add information specific to your organization.

At the very minimum, employers must submit a report to the state that includes the following information :

- Employee name.
- Employee address.
- Employee Social Security number.
- Federal Employer Identification number.

Some states require more information such as:

- Employee's first day of work.
- Employee telephone number.
- Employee state of hire.
- Employee date of birth.
- Employer's State Identification number.

- Medical insurance coverage.

Additionally, some states require reporting of independent contractors who meet particular criteria. For example, the state of Massachusetts requires persons with earnings greater than \$600 per year be reported.

Note. It is the customer's responsibility to review the laws in your respective filing state and confirm the report layout is correct for your organization. Many states require organization-specific details that are not stored in your PeopleSoft system. This information must be entered in the "Override" field on the Report Type Definition page for the respective fields.

Report Assumptions

The following assumptions and defaults are made by the system when generating the PRWORA New Hire report:

- Primary name will be used (where name type = "PRI").
- Different telephone types may need to be reported. PeopleSoft has created views for the Business Phone where phone type = "BUSN". Home phone type will use "HOME". If you need to use "MAIN" as the primary business phone in your implementation, you only need to modify the view's WHERE clause to get this phone type.
- If there is a difference between the PeopleSoft Application Designer field definition and the state file layout definition, values may be truncated—for example, if the PeopleSoft Company Name and Address files are different lengths from the reporting agency's requirements.
- Some states require certain payroll- and benefits-related information to be reported on the New Hire submission file. In order to be reported correctly, PeopleSoft assumes the data coming from these tables is populated and maintained during the course of "on-boarding" employees.
- Foreign address information refers to the U.S. Department of Commerce FIPS Code Manual, National Institutes of Standards and Technology, FIPS PUB 10-4 to derive all country codes.
- Delivered new hire configurations will have an effective date of January 1, 2005.

Setting up the New Hire Report

The New Hire Report provides an online method of defining the PRWORA Federal- and State-level reporting requirements. With it, you can select the fields you want included in your New Hire Report, define records and variables, set up report columns, and clone copies of a report. Once the report is customized for your purposes, you can generate the appropriate data/text file for electronic reporting.

Setting up the New Hire Report Layout

The New Hire Configuration page contains the federal and state report definitions used by PeopleSoft HCM to generate the electronic reporting files for a particular regulatory region or state. From this page you can view and customize the report definition layout. Only those states supporting electronic filing are listed.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Pages Used to Set Up the New Hire Report and Layout

Page Name	Object Name	Navigation	Usage
Record Definition	HR_RFW_RECDEFN	Set Up HRMS, Common Definitions, Electronic Reporting, Record Definition	Define the PeopleSoft records used as a source for the reporting layout's required fields.
Variable	HR_RFW_SYSVAR	Set Up HRMS, Common Definitions, Electronic Reporting, Variable Definition	Define variables (or tokens) used to calculate (or specify) a field.
Data Object Definition	HR_RFW_DSODEFN	Set Up HRMS, Common Definitions, Electronic Reporting, Data Definition, Data Object Definition	Specify the database record and relationships between other database records to retrieve data from the database. This definition is used to extract the data from the database to generate the file layout and reports.
Relationships	HR_RFW_DSOREL	Set Up HRMS, Common Definitions, Electronic Reporting, Data Definition, Relationships	Define child and related data objects.
Report Type Definition	HR_RFW_RPTDEFN	Set Up HRMS, Common Definitions, Electronic Reporting, Report Type Definition	Define specific report attributes that apply across the entire report. This information is specified by the reporting agency.
Report Columns - Database Field	HR_RFW_RPTCOLS	Set Up HRMS, Common Definitions, Electronic Reporting, Report Type Definition, Report Columns	Define the required columns as records and fields in the report layout (header, body, and trailer records) as specified by the reporting agency. Attributes of the column can also be specified as a variable. Customer-specific values may be necessary in the "Override" column.
Report Columns-Variable	HR_RFW_RPTCOLS	Select the Variable tab on the Report Columns page.	This page is a continuation of variable information for the report column fields.
Clone Report Type As	HR_RFW_RPTCLONE	Set Up HRMS, Common Definitions, Electronic Reporting, Clone Report Type	Copy an entire existing report layout to a new report.

Page Name	Object Name	Navigation	Usage
New Hire Report Configuration	HR_RFWPRW_CONF	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, New Hire Report Configuration	The list of reporting entities (by state or federal) defined in the database. You can view the layout directly from this page. This information is used as a prompt for selecting which type of report and electronic file layout must be generated. See Chapter 7, “(USA) Meeting Regulatory Requirements for the United States.” Generating the PRWORA New Hire Report and Electronic File, page 135.

Setting up Record Definitions

Access the Record Definition page.

Record Definition

Record: COMPANY_TBL Record Type: Table Select All Fields

Use	Field Name	Description	Key		
☒	EFFDT	Effective Date	☒	+	-
☒	COMPANY	Company	☒	+	-
☒	ADDRESS2	Address Line 2	☐	+	-
☒	ADDRESS1	Address Line 1	☐	+	-
☒	CITY	City	☐	+	-
☒	ADDRESS3	Address Line 3	☐	+	-
☒	COUNTRY	Country	☐	+	-
☒	COUNTY	County	☐	+	-
☒	DESCR	Description	☐	+	-
☒	ADDRESS4	Address Line 4	☐	+	-
☒	FEDERAL_EIN	Federal EIN	☐	+	-
☒	POSTAL	Postal Code	☐	+	-
☒	STATE	State	☐	+	-

Record Definition page

Select All Fields

Select this button to bring in all fields of record.

Use	Select this check box to use this field in the report. Clear this check box to not use this field in the report layout.
Field Name	Actual database field name.
Description	This field defaults with the field description from the database object. This can optionally be overwritten to be more informative or to reflect the field description used by the reporting entity.
Key	Indicates whether the field is a database key on this record. PeopleSoft will default the keys of the record when it is initially defined. All key fields are grayed out and not editable by users.

Setting Up System Variables

Access the Variable page.

Variable

Variable Name: EMPLOYEE **Data Type:** Character

Variable Details

***Description:**

Comments:

☐ System Computed
☒ Constant

Constant Details

Value:

☐ Database Field

Database Field Details

Record: ☐ SetID **Record 1:**

Field Name: **Field Name 1:**

☐ PeopleCode

Application Class Details

Class ID: [Package Tree Viewer](#)

Path: **Method Name:**

Variable page

Use the Variable page to define the variables that will be used in the creation of the New Hire Report. Variables are defined to address particular attributes of the file layout required by the reporting entity. Reporting entities can specify on their required file layouts general, report-wide attributes, or attributes specific to an individual field.

An example of a report-wide variable may be that the report requires only Employees to be contained in the report population. Other states may require that Contingent Workers (for example, consultants) also be included in the report population. Variables are defined for constant values (EMP or CWR, respectively). Another example of a report-wide variable is if all date fields must use a specific format (for example, MMDDYYYY). Variables are defined specifying each possible format.

Variables are later specified on the Report Type Definition and Report Columns layout pages.

The Database Field Details define which variable value will be resolved whenever data is fetched from the appropriate record.

Data Type	Specify the type of data required by the reporting entity.
System Computed	Indicate a variable is system-computed if the variable content is generated at run time by the New Hire process. These values are delivered and maintained by PeopleSoft.
Constant	Select if the variable must always have a designated value. Selecting this option enables you to enter data into the Constant Details section. Define a variable as a constant. Examples include: • Employees are always indicated with EMP. • Contingent workers are always indicated with CWR. • A hire action is always 'HIR'.
(Constant) Value	Enter the value of the Constant.
Database Field	Select to make the field available for entry and define the Database Field Details.
Record	If Database Field is selected, specify the database Record and Field Name from which the variable's value will be resolved.
Field Name	If Database Field is selected, specify the database Record and Field Name from which the variable's value will be resolved.
SetID	Select this check box if the Record and Field Name are dependent upon the SetID of another record and field being populated first in order to resolve the Record and Field.
Record 1	Populate this field when SetID is selected. The setID Record1 and Field Name 1 must be resolved prior to deriving the value of Record and Field.
Field Name 1	Populate this field when SetID is selected. The setID Record1 and Field Name 1 must be resolved prior to deriving the value of Record and Field.
PeopleCode	Choose this button in order to define the Application Class Details. This type of variable is created when more complex logic must be applied in order to determine the variable's value.
Class ID	Select the Class ID of the PeopleSoft Application Class. The application class must be written before defining this variable.
Package Tree Viewer	Click the <i>Package Tree Viewer</i> link to access the Application Packages Lookup page.
Path	Select the PeopleSoft Application Class Path of the Class ID. The application class must be written before defining this variable.

Method Name Select the PeopleSoft Application Class Method Name of the Class ID. The application class must be written before defining this variable. Several methods are delivered, but you might have to add your own depending on the state's requirements.

Setting Up Data Object Definitions

Access the Data Object Definition page.

Data Object Definition Relationships

Data Object: COMPANY_TBL

Data Object Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/2004 *Record: COMPANY_TBL

*Description: Company Table Data Object

Data Retrieval Method

☐ None ☒ Database Query

Query Retrieval Criteria Find | View All First 1 of 1 Last

Sequence number: 1

Logical Operator: (☐ Entry Type 1: Record/Field Operation: = Entry Type 2: Variable

Record 1 Name: JOB Record 2 Name:

Field Name 1: EMPLID Field Name:

Variable Name 1: Variable Name 2: EMPLOYEE

JOB.EMPLID = VR[EMPLOYEE]

Data Object Definition page

The Data Object Definition page defines which main record is used and the criteria used to select information from the database. It also indicates whether the data object will be used as Level Zero or main driving object to generate the report. Data is fetched from the database based on the selection criteria entered for the data object.

Record The actual PeopleSoft record name.

Database Query Select this radio button in order to build the query retrieval criteria.

Logical Operator (AND, OR) These are logical operators. You use them within an IF statement. AND is used between two conditions. It indicates that both statements must be met for the selection to be made. For example, A and B must be true for a selection.

OR is used between two conditions. It indicates that only one of the statements must be met for selection to be made. For example, A OR B can be true for a selection.

Entry Type 1	Specify Record/Field or Variable type.
Operation	Relational Operators: Equal (=), Less than (<), Less than or equal (<=), Greater than (>), Greater than or equal (>=), Less than or Greater than (< >) (for example, not equal). Relational operators compare two expressions and provide a truth value. You can use parentheses to group expressions or to enhance readability.
Record 1 Name	When the entry type is "Record/Field," specify the record in the condition.
Field Name 1	When the entry type is "Record/Field," specify the field in the condition.
Variable Name 1	When the entry type is "Variable," specify the variable in the condition.
Entry Type 2	Specify Record/Field or Variable type for comparison to Entry Type 1 values.
Record 2 Name	When the entry type is "Record/Field," specify the record in the condition.
Field Name 2	When the entry type is "Record/Field," specify the field in the condition.
Variable Name 2	When the entry type is "Variable," specify the variable in the condition.
Query	The actual query generated by the conditions defined in the Query Retrieval Criteria section. This area is read-only.

Defining Child and Related Data Objects

Access the Relationships page.

The screenshot shows the 'Relationships' page for the 'COMPANY_TBL' data object. The 'Data Object Details' section shows an effective date of 01/01/2004 and a description of 'Company Table Data Object'. Below this, there are two sections: 'Child Data Objects' and 'Related Data Objects'. Each section has a table with columns for 'Sequence', 'Child/Related Data Object', 'Description', and 'Record Name'. The 'Child Data Objects' table is currently empty, and the 'Related Data Objects' table is also empty. There are search icons and navigation controls (First, 1 of 1, Last) for both tables.

Relationships page

The Relationships page is used to define child and related data objects. More criteria can be used to define additional conditions required to fetch the data from the child and related data objects.

Sequence	A unique number assigned to each child data object.
Child Data Object	A pre-defined data object that is a child of the current data object.
Related Data Object	A pre-defined data object that has a relationship to the current data object.

Additional Criteria

Define additional conditions required to fetch the data from child and related objects.

Setting Up Report Type Definitions

Access the Report Type Definition page.

Report Type Definition | **Report Columns**

Report Type: FED-NEWHIRE-RPT

Report Type Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/2004 *Status: Active

*Description: Federal Newhire Report *Data Object: JOB

Comments:

Report Type Variables Customize | Find | View All First 1-4 of 4 Last

Sequence	Variable Name	Description
10	YYYYMMDD	YYYYMMDD Date format
20	HIRE	Hire Action Variable
30	REHIRE	Rehire Action Variable
40	EMPLOYEE	Employee Variable

Report Type Definition page

This is the primary component used to define the electronic file layout definition template as required by the reporting entity (for example, the state or federal agency). There is a template defined for each state in this table. You probably need to modify the information on the Report Columns page where information is specific to your organization, particularly in the variable override field values.

On the Report Type Definition page, define any attributes that apply across the entire report. Attributes might include, for example, requiring that: any date fields are formatted YYYYMMDD, all numbers are left justified, and the report population should include all employees who are hired or rehired.

Data Object

The primary record used as a basis to select the majority of information. New Hire Reporting (PRWORA) would most likely be the JOB record data object, where EEO or I-9 electronic reporting may be based on the PERSON record.

Sequence

Enter a unique sequence number to control the order in which the table rows are read into the program

Variable Name

Enter the name of the report-wide variable.

Note. PeopleSoft recommends that you leave gaps between the sequence numbers. Then if it becomes necessary to insert new rows between existing rows, you do not have to alter the sequence numbers in the subsequent rows.

Setting Up Report Columns

Access the Report Columns - Database Field page.

Report Type Definition		Report Columns						
Report Type: FED-NEWHIRE-RPT								
Report Type Details Find View All First 1 of 1 Last								
Effective Date: 01/01/2004		Status: Active						
Description: Federal Newhire Report		Data Object: JOB						
Report Columns Information Customize Find First 1-48 of 48 Last								
Database Field Variable								
	*Output Type	Order	*Entry Type	Record	Field	*Length		
	Body	1	Variable			2	+	-
	Body	2	Record/Field	PERS_NID_VW	NATIONAL_ID	9	+	-
	Body	3	Record/Field	PERSONAL_DATA	LAST_NAME	16	+	-
	Body	4	Record/Field	PERSONAL_DATA	MIDDLE_NAME	16	+	-
	Body	5	Record/Field	PERSONAL_DATA	FIRST_NAME	30	+	-
	Body	6	Record/Field	PERSONAL_DATA	ADDRESS1	40	+	-
	Body	7	Record/Field	PERSONAL_DATA	ADDRESS2	40	+	-
	Body	8	Record/Field	PERSONAL_DATA	ADDRESS3	40	+	-
	Body	9	Record/Field	PERSONAL_DATA	CITY	25	+	-
	Body	10	Record/Field	PERSONAL_DATA	STATE	2	+	-
	Body	11	Variable			5	+	-
	Body	12	Variable			4	+	-

Report Columns - Database Field page

On the Report Columns page, define all headers, body, and trailers of the actual report. List all fields (for example, columns) and any specific formatting required for each field. Use this page to define the various attributes like the column length, output type, column number (sequence) and if any special processing is required.

In case file layouts change over time, simply insert a new, effective-dated row and all the Report Type Details will be copied forward to the new row. Update the new row accordingly. Keep the original row intact, in case a retroactive electronic file submission is necessary at a later date.

Down Arrow Used to move the active row down one (1) row at a time.

Up Arrow Used to move the active row up one (1) row at a time.

Output Type Specify if this row is for the *Header*, *Header1*, *Body*, *Trailer*, or *Trailer1*. The default is *Body*.

Entry Type Select *Variable* or *Record/Field*. If *Record/Field* is selected, then the Record and Field combination values must be entered. If *Variable* is selected, the record and field combinations are unavailable for entry. The variable is then editable on the Variable tab, or when the fields are expanded.

Record The database record used as a prompt for on-line PRWORA processing. This is a prompt table for the Record Definition.

Field Valid values are any field defined on the PRWORA Field Definition table for the chosen record.

Length

Indicate the length of the field to be used on the text file. This should be the length mandated by the reporting entity. This is specified here on the layout template, not at the PRWORA field definition page, because lengths can vary from state to state.

Access the Report Columns - Variable page

Report Type Definition

Report Columns

Report Type:

FED-NEWHIRE-RPT

Report Type Details

Find | View All | First 1 of 1 Last

Effective Date:

01/01/2004

Status:

Active

Description:

Federal Newhire Report

Data Object:

JOB

Report Columns Information

Customize | Find | First 1-48 of 48 Last

Database Field

Variable

Variable Name	Description	Override		
RECORD-IND	Record Identifier	W4	+	-
	National ID		+	-
	Last Name		+	-
	Middle Name		+	-
	First Name		+	-
	Address Line 1		+	-
	Address Line 2		+	-
	Address Line 3		+	-
	City		+	-
	State		+	-
ZIP5-PERSON	US ZipCode (5)		+	-
ZIP4-PERSON	US ZipCode(4)		+	-

Report Columns - Variable page

Variable Name

Select from the pre-defined list of variables that will represent the required reporting content.

Override

This field is visible and becomes available when it is necessary to provide a value that is specific to your organization and is applicable to all rows reported in the electronic file. This constant will be the value used during the PRWORA processing.

Note. Select Show All Columns to view all the report columns on one page.

Cloning a New Hire Report

Access the Clone Report Type As page.

Clone Report Type As

Report Type:	FED-NEWHIRE-RPT
Description:	Federal Newhire Report
New Report Type:	
Description:	
Effective Date:	01/01/2006 

Clone Report Type As page

Use this feature to copy an entire report type definition to a new report type.

Report Type The report type template (and description) selected to be copied.

New Report Type Provide a name for the new report type template along with a description.

Effective Date Provide the effective date the new report type definition will become effective.

Setting Up the New Hire Report Layout Definitions

Access the New Hire Report Configuration page.

New Hire Report Configuration

New Hire Report Configuration Details			Customize Find 	First  1-45 of 45  Last
*State	*Report Type	View Layout		
Federal	Federal Newhire Report	View Layout	+	-
Alaska	Alaska New Hire Report	View Layout	+	-
Alabama	Alabama New Hire Report	View Layout	+	-
Arkansas	Arkansas Newhire Report	View Layout	+	-
Arizona	Arizona New Hire Report	View Layout	+	-
California	California New Hire Report	View Layout	+	-
Colorado	Colorado Newhire Report	View Layout	+	-
Connecticut	CT New Hire Report	View Layout	+	-
District of Columbia	DC New Hire Report	View Layout	+	-
Delaware	Delaware New Hire Report	View Layout	+	-
Florida	Florida New Hire Report	View Layout	+	-
Georgia	Georgia NewHire Report	View Layout	+	-
Hawaii	Hawaii Newhire Report	View Layout	+	-
Idaho	Idaho Newhire Report	View Layout	+	-
Illinois	Illinois New Hire Report	View Layout	+	-

New Hire Report Configuration page

The New Hire Configuration page contains the actual file layout definitions which specify the content and layout of the resulting ASCII text output files. This page stores all federal and state report definitions used by PeopleSoft HCM and lists the entities currently supporting the New Hire (PRWORA) electronic reporting feature. If a state (or territory) does not submit new hire data electronically, that state (or territory) will not be listed.

This page is used later when selecting which layout to generate during the report generation process.

State	Select the state (or territory) or Federal reporting entity.
Report Type	Select the pre-defined report type definition that applies to the selected state (or reporting entity).
View Layout	Click to access the Report Type Definition page for the selected report type.

Meeting Equal Employment Opportunity and Affirmative Action Plan Reporting Requirements

Human Resources supports Equal Employment Opportunity/Affirmative Action Plan (EEO/AAP) reporting requirements by enabling you to classify jobs and positions filled by applicants and employees in specific gender and ethnic groups. Use this information to define affirmative action goals and timetables and generate the necessary government reports.

Requirements that have been set forth by the U.S. government have made it necessary that Affirmative Action plan and goal information be reported based on establishments and job groups. Regulations pertaining to EEO/AAP reporting are Executive Order 11246 (EEO) and Public Law 88-352, Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Act of 1972. Recordkeeping and reporting requirements have been amended by Title 41 of the Code of Federal Regulations part 60-2 (AAP reporting) and part 61-250 (VETS reporting).

Human Resources supplies standard reports with the appropriate information in the standard federal reporting format.

This section discusses:

- Using U.S. establishment functionality.
- Setting up EEO reporting requirements.
- Understanding adverse impact reporting requirements.

Using U.S. Establishment Functionality

The U.S. government set requirements for Affirmative Action plan and goal information reporting based on establishments and job groups. The establishment/location allows for a many-to-many relationship to exist between location and establishment ID.

You can enter the regulatory region that is associated with the location. Select one or more establishment IDs for the location. You can also use the establishment-location relationship for Affirmative Action planning, EEO, Occupational Safety and Health Administration (OSHA), and other U.S. federal reporting regulations. Enter one or more location codes to associate with the establishment.

Note. In order for reports to be counted, populate the establishment ID on the job record for employees in U.S. locations.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Defining Establishments.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Establishing Locations.

Establishments in Affirmative Action Reporting

EEO reports are organized by *establishment*. A company’s headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer is required to file a single report.

A multi-establishment employer (doing business at more than one hiring location) files separate reports for each of the following locations:

- The organization’s principal or headquarters office.
- Each hiring location employing 50 or more persons.

In addition, multi-establishment employers must file a consolidated report covering all establishments, as well as a list of all the establishments with less than 50 employees that are included in the tabulations on the consolidated report but for which no individual establishment report is filed.

Note. Human Resources does not provide consolidated reporting information for companies with a total of fewer than 50 persons if all establishments are located in a single state.

Setting Up EEO Reporting Requirements

The Equal Employment Opportunity Commission (EEOC) requires that most companies file one or more reports from the series EEO-1 through EEO-5. These reports count male and female employees in certain ethnic groups by federal employment categories. Before running the EEO reports, you need to set up the following data about your organization’s establishments and EEO job categories:

1. Create U.S. establishments on the Establishment - Establishment Address page.
2. Enter EEO job categories on the Job Code Table - Job Code Profile page.
3. Assign establishment IDs on the secondary page of the Location Table - Location Profile page.

Understanding Adverse Impact Reporting Requirements

The Adverse Impact report (HRS001) provides analysis information on recruitment and hiring practices to help determine whether specific actions by an employer are influenced by ethnicity, sex, or other EEO/AA issues. The report compares employment hiring decisions for white males to members of ethnic minorities and females. The government requires certain employers to assess adverse impact annually. This report helps in determining the effect of EEO/AA issues on hiring practices and employee movements in an organization, such as promotions, transfers, and terminations.

Use the report to detect evidence of adverse selection within ethnic groups in the recruitment and hiring activities. The report compares white males, selected ethnic groups, and sex, and includes a total for each group and for each category as a whole. In addition to the count totals, the report calculates the ratio of total offers in each group to the total applicants in the group, and the impact on ethnic minorities as compared to white males.

Entering Applicant Data for the Adverse Impact Report

You need to enter certain data for job applicants and employees before you run the Adverse Impact report. The system recognizes a person as both a new hire and an applicant for purposes of the Adverse Impact report if you hire the person through the Hire component in PeopleSoft Enterprise Human Resources Administer Workforce.

However, if you enter a person as an applicant through Human Resources Recruiting, the system only counts the applicant for the Adverse Impact report if you complete certain fields on the Applicant Personal Data page and the Application Data page. The following table shows the pages and fields in Human Resources Recruiting that you must complete for the Adverse Impact report to run properly.

Affected Page	Affected Fields	Comments
Add New Applicant - Contact Details page	Name	Must be completed.
Add New Applicant - Eligibility/Identity page Add New Applicant - Eligibility & Identity page	Gender Ethnic Group	Must be completed.

Meeting Job Group Movement Analysis Reporting Requirements

This section provides an overview of the Job Group Movement Analysis report and discusses how to enter applicant data.

Understanding the Job Group Movement Analysis Report

The AAP Job Group Movement Analysis report helps you analyze which gender and ethnic groups are moving in and out of your organization or which groups are offered opportunities to advance. It reports the number of people in protected classes that are affected by specific job action categories. Use this report to see how employees move through career progressions within your company, especially if you are initiating or complying with affirmative action plans. It shows the number of people by ethnic group and gender being affected by specific personnel actions, including applications, offers, hires, promotions, and terminations in each job group.

Entering Applicant Data

The system recognizes a person as both a hire and an applicant for purposes of the Job Group Movement Analysis report if you hire the individual through the Hire component in Administer Workforce.

However, if you enter a person as an applicant through Human Resources Recruiting, the system only counts the applicant for the Job Group Movement Analysis report if you complete certain fields on the Applicant Personal Data page and the Application Data page. The following table shows the pages and fields in Human Resources Recruiting that relate to the Job Group Movement Analysis report.

Affected Page	Affected Fields	Comments
Add New Applicant - Contact Details	Name	Must be completed.
Add New Applicant - Eligibility & Identity	Gender	Must be completed.
Applicant Data - Eligibility & Identity Page	Ethnic Group	Must be completed.

Meeting VETS-100 Reporting Requirements

Under the Veterans Employment Opportunity Act of 1998, certain employers must submit the VETS-100 report as part of the federal contractor program. If your organization is a nonexempt federal contractor or subcontractor with contracts or subcontracts totaling \$25,000 or more, you must submit the report to the Department of Labor every year.

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 employees, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.

This section discusses how to:

- Set up the VETS-100 report.
- Enter data for the VETS-100 report.

Setting Up the VETS-100 Report

If you are a federal contractor subject to VETS-100 reporting requirements, you must set up specific company, establishment, job code, and employee information in your system before you run the report. Run the VETS-100 Process to perform the calculations and load the values into a temporary table, and then run the VETS-100 Analysis process to create a report of the findings for internal use (optional) and the VETS-100 Submit process to create the digital file for submission.

Using Military Discharge Date

Use the Military Discharge Date to enter the discharge date for employees. This date is used to determine which veterans qualify for the Newly Separated Veteran designation. The Military Discharge Date provides accurate data for the following year's reporting cycle. Newly Separated Veterans are determined by verifying that a valid military status is selected and that the military discharge date is within 365 days of the reporting date.

Establishments in VETS-100 Reporting

VETS-100 reporting is organized by establishment. A company's headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer files a single completed form.

A multi-establishment employer (doing business at more than one hiring location), files separate forms for each of the following locations:

- The organization's principal or headquarters office.
- Each hiring location employing 50 or more persons.
- Each hiring location employing fewer than 50 persons.

The USF Vets-100 by POI (U.S. federal veterans-100 by personnel office identifier) report generates a Veterans employment report by POI.

The USF Vets-100 by Sub-Agency report generates a Veterans employment report by sub-agency.

VETS-100 Process

Because the VETS-100 report is complex and time consuming to run, PeopleSoft has separated the process from the report. Run the process on a high-powered server at a time when it is not heavily used. You can also run the process by establishment over the course of a few days, rather than running it for all employees at once.

The VETS-100 Process collects the data and stores it in a temporary table. The data stays in this table until you run the VETS-100 Submit process for it. Running the VETS-100 Process successive times does not delete or overwrite data unless you run it twice for the same establishment or fail to run the VETS-100 Submit process between reporting years.

VETS-100 Analysis

The VETS-100 Analysis process is an informational report that displays the data that you submit to the government when you create the VETS100.TXT file with the VETS-100 Submit process. Running this report does not affect the data in the temporary table. Run the VETS-100 Process before running this report. You can also use the VETS-100 Analysis process to report on VETS-100 history; you cannot report on years before 2000.

Vets-100 Submit

The VETS-100 Submit process creates a digital file that meets the VETS specifications using the data in the temporary table and transfers the data from the temporary table to a history table. The VETS-100 Submit process only removes data from the temporary table that should be written to the digital file. If the temporary table contains data for the entire organization and you run the VETS-100 Submit process for the headquarters only, data for establishments outside of headquarters remains in the temporary table until you run the VETS-100 Submit process to capture it. You can also use the VETS-100 Submit process to recreate a digital file based on VETS-100 history.

When calculating the minimum and maximum employee counts, PER027.SQR uses a method in which the first day of the selected reporting period is compared to the last day of the reporting period. The day with the most employees is considered the maximum count, while the day with the fewest is considered the minimum count. This method is very broad and VETS does not prefer this method. However, the preferred method according to VETS regulation is not required and the method used is subject to the discretion of the employer reporting the data.

Entering Data for the VETS-100 Report

Before you run the VETS-100 Process, complete the tables and fields required for the report.

Affected Page	Affected Fields	Comments
Company - Company Location		The company must be set up for the report to run properly.
Company - Default Settings	Federal EIN (federal employer's tax identification number)	This nine-digit number assigned by the Internal Revenue Service is required for VETS-100 reporting.
Establishment - Establishment Address	Establishment Description Address Headquarters Unit	Each company for which you perform VETS-100 reporting must identify an establishment as its headquarters unit. A company is a single-establishment company, if this establishment is also the headquarters unit. If the company is a multi-establishment company, you must designate an establishment as the headquarters unit. This setup is essential for the VETS-100 Federal Contractor Structured Query Report (SQR) to work properly.
Establishment - Establishment Address	NAICS code (North American industrial classification system code) VETS-100 Unit Number Dun and Bradstreet Number	This is a six-digit classification code that identifies the industrial classification of your company's primary economic activity. This information appears on the VETS-100 report. If the government requires you to provide a standard industrial classification (SIC) code instead of a NAICS code, enter it in the NAICS field. The government no longer uses the VETS-100 Unit Number for VETS-100 reporting. Use this field to enter the company number provided by the Department of Labor. The Dun and Bradstreet number is also referred to as the DUNS number or the Dun and Bradstreet Universal Numbering System.

Affected Page	Affected Fields	Comments
Job Code Table - Job Code Profile	Job code EEO-1 Job Category	If you are a federal contractor subject to VETS-100 reporting requirements, you must report on all employees within your company. All of the job codes must be linked to an EEO-1 job category, and all employees must be assigned a job code. When you assign a job code to an individual employee in the Job Data component, the employee is automatically linked to an EEO-1 job category. When you run the VETS-100 report SQR, the system processes the employee's veteran status information and combines it with other employees within the same EEO-1 job category. The system selects the EEO-1 job category information as of the report run date.
Add New Applicant - Eligibility/Identity	Military Status	If you select <i>Vietnam-Era Veteran</i> as an employee's military status, the system includes the employee in the count for the Vietnam Era Veterans column of the VETS-100 report.
Disability	All	If you select the Disabled Veteran check box, the system includes the employee in the Special Disabled Veterans column of the VETS-100 report.

See Also

Chapter 9, “(GBR, USA, and USF) Meeting Disability Regulatory Requirements,” (USA, USF) Understanding ADA Regulatory Requirements in the U.S., page 158

Running the U.S. Regulatory Reports

This section discusses how to run the EEO-1 Job Analysis report.

Pages Used to Run the U.S. Regulatory Reports

Page Name	Object Name	Navigation	Usage
Adverse Impact	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	Run the Adverse Impact report (HRS001) to provide information on recruitment and hiring practices.
Job Group Movement Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	Run the Job Group Movement Analysis report (HRS002) to provide gender and ethnic group movements in and out of an organization and track career patterns.
Terminations Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	Run the Terminations Analysis report (PER019) which analyzes terminations within your organization.
Job Group Analysis	RUN_CNTL_REG2	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	Run the Job Group Analysis report (PER024) to analyze the makeup of your workforce based on skills groups.
Job Group Analysis Summary	RUN_CNTL_REG2	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	Run the Job Group Analysis Summary report (PER024A) to analyze the makeup of your workforce based on job groups.
Workforce Analysis	RUN_CNTL_REG2	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	Run the Workforce Analysis report (PER025). This report tracks hiring practices by department based on job titles.
Job Group Roster	RUN_CNTL_REG2	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	Run the Job Group Roster report (PER030), which lists employees in job groups in job title order. It includes the ethnic background and the current salary information.
EEO-1 Employer Info	RUNCTL_PER016	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	Run the EEO-1 Employer Information report (PER016). Use EEO Report Run Type to distinguish between a formal Government run (<i>Govt Run</i>) or an Informational run (<i>Info Rpt</i>). Select <i>Govt Run</i> as the type only when preparing reports for the government. At any other time, select <i>Info Rpt</i> .

Page Name	Object Name	Navigation	Usage
EEO-1 Job Analysis	RUNCTL_PER017	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	Run the EEO-1 Job Analysis report (PER017). This report supplies standard job category counts instead of employee counts for the private sector.
EEO-4 State/Local	RUNCTL_PER031	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	Run the EEO-4 State and Local Government report (PER031). This report provides employment counts in the prescribed format for state and local governments.
EEO-5 Job Analysis	RUNCTL_PER022	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	Run the EEO-5 Job Analysis report (PER022). This report supplies standard job category counts for school-related categories.
OSHA-200 Log (Occupational Safety and Health Administration – 200 log)	RUNCTL_CALENDARYR	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA-200 Log	Run the OSHA-200 Log report (OHS001). This report lists the case numbers and details of each injury and illness that occurred during a particular calendar year.
OSHA 301 Incident Report - Report Data	OSHA_301_SELECT	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA 301 Incident Report	Create OSHA-301 incident reports. To create a new OSHA-301 incident, you must have an incident that has been specified as being OSHA reportable. The OSHA-301 data is kept distinct from your incident data, but uses the incident data as a starting point. This allows you to tailor the data in your OSHA-301 report to make sure it meets OSHA requirements without having to make changes to the original incident data.

Page Name	Object Name	Navigation	Usage
OSHA 300 Incident Log	RUN_CNTL_OSHA_REG1	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA 300 Incident Log	Generate the OSHA 300 log. The OSHA-300 Log is calculated from Incident and Injury data stored in your system, and not from the data entered in the OSHA-301 report. The report includes all incidents that resulted in injuries specified as OSHA Reportable. Reports are run by establishment, so the establishment value should be populated for all incidents with reportable injuries.
OSHA 300A Annual Summary	RUN_CNTL_OSHA_REG1	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA 300A Annual Summary	Generate the OSHA 300A Summary. This report provides an overview of the data contained in the OSHA-300 Incident Log. The values in this summary are determined using the same algorithms and the same source data as the OSHA-300 report. This report is run separately for each establishment.
Vets-100 Process	RUNCTL_PER027	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	Run the VETS-100 Process (PER027). This report lists federal job classifications and the number of employees and new hires in the last 12 months who are disabled veterans or Vietnam veterans.
Vets-100 Analysis	RUNCTL_PER027C	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	Run the VETS-100 Analysis report (PER027C). This reports on the VETS-100 data created by the VETS-100 process.
Vets-100 Submit	RUNCTL_PER027C	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	Run the Vets-100 Submit report (PER027C). This report creates the digital file for submission to the government.

Page Name	Object Name	Navigation	Usage
IPEDS-S Report (Integrated Postsecondary Education Data System-Full Staff Survey report)	RUNCTL_PER040	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	Run the IPEDS-S (Fall Staff Survey) report (PER040). This 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.

Running the EEO-1 Job Analysis Report

Access the EEO-1 Job Analysis page.

EEO-1 Job Analysis page

- | | |
|---|---|
| From Date and End Date | Use to set the date parameters of the report. Results are retrieved only for job categories filled between these dates. |
| Also output CSV file (also output to comma-separated value file) | Select to print the CSV file along with the EEO-1 Job Analysis report. |
| Include Column Headers | Select to include column headings in the CSV file. This check box becomes available when Also output CSV file is selected. |
| Establishments in Company | Enter a three character company code to run the EEO-1 report for a single company. The report will be run for all establishments associated with the company code and an electronic data file will be created for each company's report. The company code provided is appended to the data file name. |

Single Establishment

Enter an establishment code to run the EEO-1 report for a single, non-controlled establishment.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Meet Regulatory Requirements Reports

Generating the PRWORA New Hire Report and Electronic File

This section discusses:

- Running the New Hire report and electronic file.
- Reviewing the New Hire report log.

Running the New Hire Report and Electronic File Process

The Generate New Hire Report & Electronic File Application Engine process (HR_RFWPRW_AE) creates an electronic file based on the current State and Federal configuration data defined in the Electronic Configuration Definitions.

Your organization is responsible for physically getting this data file to the Department of Health & Human Services (DHHS) and/or to the respective state Welfare/New Hire Reporting agency.

Page Used to Generate the New Hire Report and Electronic File

Page Name	Object Name	Navigation	Usage
New Hire Report Generation	RUN_RFWPRW_HR	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA-Newhire	This page provides the criteria necessary to create the electronic report, along with a standard state (or Federal) PRWORA New Hire Report. This report is generated as an Adobe (PDF) file.
New Hire Report Log	HR_RFWPRW_LOG	Click View Log on the New Hire Report Generation page.	Provides basic information about the resulting electronic file (who ran it, run date, PID, State format used, From/Thru Dates and File name).

Generating the New Hire Report and Electronic File

Access the New Hire Report Generation page.

New Hire Report Generation

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

New Hire Report Parameters

Regulatory Region:	California		☐ Test Mode
	☐ Multi Company Organization	Company:	GBI
	☒ Multi-State Employer		
From Date:	03/01/2005	Thru Date:	03/15/2005
File Name:	CANH20050315.txt		

[View Log](#)

New Hire Report Generation page

Regulatory Region	Select the format of the electronic report you wish to generate.
Test Mode	Select this check box to insert an asterisk in place of a space. This is used when verifying the actual content of the electronic file. When the New Hire Report is created, not in test mode, spaces will exist where intended.
Multi Company Organization	Select this check box if your implementation applies for multiple companies. The system will then select all New Hires according to the Report Type Definition for all companies.
Company	Provide a company name if the New Hire process is for a single company.
Multi-State Employer	Select to indicate that your company has multiple locations, but reports all employees only to a single state in that state's specified format.
From Date and Thru Date	Select the date range of the New Hire Report.
File Name	Provide the name of the resulting output filename to be specified by the user. State file submission requirements provide guidelines for this naming convention. Organizations are responsible for providing a compliant file name. This field is unavailable for entry out if this is for a Federal report.
View Log	Click to access the New Hire Report Log page.
Run	Click to run the application engine program (HR_RFWPRW_AE). This process generates the electronic file along with a standard state or Federal New Hire listing (as an Adobe Acrobat file), depending on the reporting agency.

Viewing the New Hire Report Log

Access the New Hire Report Log page.

New Hire Report Log

New Hire Report Log Details							Customize Find 	First  1 of 1  Last
User ID	Run Date	Process Instance	State	From Date	End Date	File Name		
PS								

[Go back to New Hire](#)

New Hire Report Log page

When the New Hire Report & Electronic File process is run, the New Hire Report Log is updated with basic information about the electronic file, including output filename, reporting period, number of employee and employer records, date time stamp and what user ID ran the report.

It is up to the implementation team to purge the log files as necessary.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Meet Regulatory Requirements Reports

CHAPTER 8

(USF) Performing Regulatory Processing and Reporting

This chapter provides an overview of regulatory requirements for U.S. federal agencies and discusses how to:

- Set up control tables for regulatory reports.
- Process Central Personnel Data File (CPDF) files.
- Submit parent locator information.
- Run equal employment opportunity (EEO) reports.
- Run veterans (VETS) reports.
- Run Monthly Report of Federal Civilian Employment (SF113-A) and Full-time Equivalent/Work-Year Civilian Employment (SF113-G) reports.

Understanding Regulatory Requirements for U.S. Federal Agencies

The PeopleSoft system provides these U.S. federal agency regulatory reports and submissions:

- CPDF Error.
- CPDF Dynamics Submission.
- CPDF Status Submission.
- EEO Groups by PATCOB/POI.
- EEO Groups by PATCOB/SubAgency.
- EEO Groups by Series/POI.
- EEO Groups by Series/Sub-Agency.
- Monthly Report of Federal Civilian Employment (SF113-A).
- Full-time Equivalent/Work-Year Civilian Employment (SF113-G).
- VETS - 100 by POI.
- VETS - 100 by Sub-Agency.

See Also

Chapter 7, “(USA) Meeting Regulatory Requirements for the United States,” page 105

Setting Up Control Tables for Regulatory Reports

To set up the control tables to meet U.S. federal regulatory requirements, use the Regulatory Fields (GVT_CPDF_FIELDS), Prefixes & Fields (GVT_CPDF_PREFIX), Edits (GVT_CPDF_EDIT), and OPM CPDF Maint Details Page (GVT_OPM_EDITUPDT) components.

Set up information in the following tables to meet U.S. federal regulatory requirements.

This section discusses how to:

- Add regulatory fields.
- Specify regulatory edit prefixes and fields.
- Specify edit content.
- Enter edit details.

Pages Used to Set Up Control Tables for Regulatory Reports

Page Name	Object Name	Navigation	Usage
Regulatory Fields	GVT_CPDF_FIELDS	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Regulatory Fields USF	Verify or add fields for CPDF processing. Complete the Regulatory Fields page for every data element required in your agency's CPDF submissions.
Prefixes & Fields	GVT_CPDF_PREFIX	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Regulatory Edits USF, Prefixes & Fields	Specify the CPDF edit prefix, category and ID, and fields used in the edit. The three-digit edit prefix identifies the data element subject to the edit.
Edits	GVT_CPDF_EDIT	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Regulatory Edits USF, Edits	Specify the edit content.
OPM CPDF Maint Details Page (Office of Personnel Management CPDF Maintenance Details)	GVT_OPM_EDITUPDT	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Regulatory Edits USF, Edits Click the OPM Update Maintenance Details link.	Use to track Office of Personnel Management (OPM) update maintenance details and history.

Adding Regulatory Fields

Access the Regulatory Fields page.

Regulatory Fields	
Field Number:	25
Field Name:	GVT_CPDPF_BASIC_PAY
Field Type:	Char
Field Length:	6
Status Start Position:	
Dynamic Start Position:	
Default Field Value (File):	
Default Field Value (Table):	*
Pad Field:	No Padding
Pad Character:	
Truncate Field?:	No
Edit Mask:	099999
Comment:	

Regulatory Fields page

Field Number	Each CPDPF field is assigned a field number. The OPM specifies most of the field numbers, however, there are occasions where formatting information is included in the table for fields not specified by the OPM. These special fields are assigned decreasing numbers starting with 999 (for example., 999, 998, 997, and so forth) while the OPM-specified fields are assigned increasing numbers starting with 1.
Field Name	Enter the field name that corresponds to the field number as it is referenced in the CPDPF programs.
Field Type	Define the field type. Values are <i>Char</i> (character), <i>Date</i> , and <i>Number</i> . This field is for informational purposes only at this time.
Field Length	Enter the length of the field as it needs to be reported the OPM. The system uses this field to verify the length of the formatted data before writing to the Dynamics and Status working tables.
Status Start Position	This field is reserved for future use.
Dynamic Start Position	This field is reserved for future use.
Default Field Value (File)	Enter the value that you want this field to contain in the case of NULL data during flat file generation.
Default Field Value (Table)	Enter the value that you want this field to contain in the case of NULL data during Dynamics and Status working table creation.
Pad Field	Enter the type of field padding. Options are <i>Left</i> , <i>Right</i> , or <i>No Padding</i> . If you select <i>Left</i> or <i>Right</i> , provide a pad character.
Pad Character	If a field is to be padded, enter the character used for padding. For example, you might use <i>0</i> to left pad a numeric field.

- Truncate Field?** Specify whether a field should be truncated by selecting *Yes* or *No*. Data will be truncated if the content exceeds the field length.
- Edit Mask** Provide an edit mask for field formatting the CPDF tables. CPDF programs support all the standard edit masks available in Structured Query Reports.

Specifying Regulatory Edit Prefixes and Fields

Access the Prefixes & Fields page.

Prefixes & Fields **Edits**

Edit Prefix: 005

***Description:** Instructional Program

Edit Information Find | View All First 1 of 7 Last

Edit Category: 02 **Edit ID:** 3 Status and Dynamic

Error Default Overrides Customize | Find First 1 of 1 Last

Field Number	Field Name	Field Length	CPDF Table Default Value
1	GVT_CPDF_INST_PROG	6	*

Prefixes & Fields page

- Edit Category** Enter a two-digit edit category to identify the data element edit. This number corresponds to the OPM designated value.
- Edit ID** Select *Status*, *Dynamic*, *Status and Dynamic*, or *Pine*. The edit ID identifies the file to which this edit applies. The edit ID identifies the regulatory reporting source to which this edit applies (for example., OPM or NFC). These edits, including those with the status of *PINE*, will be run against on-line PAR (personnel action request) data when the Validate Edits process is initiated on the Data Control (GVT_JOB0) page.
- Enter additional combinations of edit category and edit ID for this edit prefix by using the arrows in the Edit Information group box to scroll among combinations.
- See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, “(USF) Adding an Employment Instance,” Creating a New Employment Instance.
- Field Number** Enter the number of the corresponding field affected by this edit.
- When you move out of the field, the system populates the Field Length field and Default Field Value field with the values that you entered in the CPDF Fields page. Enter additional fields for this edit by using the arrows in the Error Default Overrides group box.

Specifying Edit Content

Access the Edits page.

Edits page

Note. Not all page elements are visible on this page. See additional elements by scrolling horizontally.

The Edit Prefix, Description, Edit Category, and Edit ID appear by default from the Prefixes & Fields page. Use the arrows in the Edit Information group box to view edits with the same prefix.

Sub-edit Number

Enter a sub-edit number. Most edits have one sub-edit number: *1*. For complicated edits with multiple or nested If/Then statements, insert rows with higher sub-edit numbers. Keep the same effective date for multiple sub-edits.

Create an edit by concatenating If and Then statements. Scroll among If and Then statements using the arrows in the Status group box. Compose the body of the If/Then statement in the CPDF Relational Edit grid area.

Status

Add data rows and use the middle scroll arrow, the Effective Date field, and the Status field to maintain edit history data for information that changes over time. For example, to inactivate the edit based on OPM updates, insert an effective-dated row with a status of *Inactive*.

Error Message Definition

Click this link to create or customize an error message for this edit.

Comparison Value Legend

Click this link to view the legend of special characters used in the Compare Value fields.

CPDF Relational Edit

If/Then Code and Seq Nbr (sequence number)

Select either *If* or *Then*, and assign a sequence number for each separate condition to be edited. The *If* statements have sequence numbers *1*, *2*, and *3*; the reciprocal *Then* statements have sequence numbers *1* and *2*. The

pieces are connected by *or*. For this example, the equation reads "If 1 or 2 or 3, then 1 or 2."

Left Field Number

Select a field number for comparison from the list of valid values. You enter field numbers in the CPDF Fields page.

Comparison Code

Select from the list of translate values: *Between, Equal to, Greater Than or Equal To, Greater Than, Less Than or Equal To, Less Than, or Not Equal.*

Compared To, Compare Value 1, Compare Value 2, and Right Field Number

Select what the left field number is compared to: *Field, Table, or Value.* Depending on what you select, the system makes either the Right Field Number or Compare Value 1 and Compare Value 2 fields available for you to enter the appropriate values. Values may be alphanumeric.

To indicate an unspecified numeric value, enter #. You only need to enter a value in the Compare Value 2 field if the comparison code is *Between*.

For example, consider CPDF Edit 700.12.3. If pay plan is VN, then step or rate must be between 0 and 28 or asterisks.

This table shows how to set up Edit 560.02.2. If Nature of Action Code is 741, then Prior Pay Rate Determinant must be A, B, E, F, M, U, V, or asterisks.

If/Then Code	Seqnce Nbr	Left Field Number	Comparison Code	Compared to	Compare Value 1	Compare Value 2
If	1	56 Nature of Action Code	Equal to	Value	741	0
Then	1	71 Prior Pay Rate Determinant	Between	Value	A	B
Then	2	71 Prior Pay Rate Determinant	Between	Value	E	F
Then	3	71 Prior Pay Rate Determinant	Equal to	Value	M	0
Then	4	71 Prior Pay Rate Determinant	Between	Value	U	V
Then	5	71 Prior Pay Rate Determinant	Equal to	Value	*	0

Entering Edit Details

Access the OPM CPDF Maint Details page.

OPM CPDF Maint Details Page

OPM CPDF Maintenance Details

Update/Change Number:

PeopleSoft Edit Location:

Comment:

OPM CPDF Maint Details page

- Update/Change Number** Indicates the changes received from the CPDF Edit Manual Updates. For example, if you want to change 8 to CPDF Edit Manual Update 13, then enter it as 13.08.
- PeopleSoft Edit Location** Specify where this edit is enforced. Options are:
- *COBOL*: the edit is enforced in the COBOL program.
 - *Dynamic*: the edit is enforced in the Dynamics SQR.
 - *PeopleCode*: the edit is enforced by peoplecode.
 - *Prompt Tbl*(Prompt Table): the edit is enforced by a prompt table.
 - *Shared Pgm* (Shared Program): the edit is enforced by the FGHR019S.SQR program.
 - *Status*: the edit is enforced in the Status SQR.
 - *Table Edit*: the edit is enforced on this page.

Processing CPDF Files

This section provides an overview of CPDF reporting requirements and discusses how to:

- Define additional CPDF reporting controls.
- Produce the CPDF files.
- Process the CPDF edits.
- Generate the CPDF Edit Errors Report.
- Process the Dynamics table.
- Process the CPDF Status table.
- Generate the Dynamic/Status flat file submissions.

- Update CPDF edits.
- Process the CPDF Organizational Component Translations file submission.
- View CPDF process table contents with the Query Manager.

Understanding CPDF Reporting Requirements

Most agencies in the executive branch of the U.S. federal government—and selected agencies in the legislative branch—participate in the CPDF. CPDF edits provide the OPM with the means to standardize federal government personnel data, monitor quality of data provided by federal government agencies, and produce a series of government-wide reports.

Because you must comply with government requirements when filing CPDF reports, PeopleSoft Enterprise Human Resources Management contains reports with appropriate information in the standard federal reporting format.

The edit submissions are:

- CPDF Status submission.

This submission includes a single record for each active employee. It shows the current status of each employee as of the end date of the submission period. The OPM requires a quarterly status file submission in March, June, September, and December.

- CPDF Dynamics submission.

This submission consists of all personnel actions processed by the PeopleSoft system during the reporting period. The normal reporting period is the calendar month; however, the period may end as of the last full pay period of the month. Actions that are more than two years past the current effective date or more than six months ahead of the current effective date aren't reported.

- Organizational Component Translations (OCT) submission.

This submission consists of the organizational segments of the agency. The OPM requires that an agency submit this file semi-annually in March and September.

When executing the CPDF error processing, the system uses the CPDF edit processing rules as mandated by the OPM. Then, in the CPDF edit processing, it identifies the fields and records that don't meet the OPM's quality standards.

Note. For administering CPDF edits, understanding how they apply to your agency, and running the related reports, this discussion assumes that you are familiar with the *Federal Workforce Reporting Systems Operating Manual* and have a working knowledge of the CPDF edits and processes.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “(USF) Adding an Employment Instance,” Creating a New Employment Instance

U.S. Federal Government, *Federal Workforce Reporting Systems Operating Manual*

Pages Used to Process CPDF Files

Page Name	Object Name	Navigation	Usage
CPDF Edits Processing (Central Personnel Data File edits processing)	RUNCTL_FGCPDF	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Edit Validation, CPDF Edits Processing	Generate a table of the CPDF edit errors found in the CPDF Status and Dynamic tables.
Run CPDF Error Report (run Central Personnel Data File error report)	RUNCTL_FGHR019B	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Error Report, Run CPDF Error Report	Run the CPDF Error report (FGHR019B). This report lists the CPDF errors identified by the CPDF Validation process.
CPDF Dynamic Table (Central Personnel Data File dynamic table)	RUNCTL_FGHR019A	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Dynamic Table, CPDF Dynamic Table	Generate the Dynamics working table containing employee information. This is eventually used to create the Dynamics submission flat file.
CPDF Dynamic/Status File Generation (Central Personnel Data File dynamic/status file generation)	RUNCTL_FGHR019C	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Dynamic/Status File, CPDF Dynamic/Status File Generation	Generate the Dynamic file, Status file, or both, or the Status file for submission to the OPM.
CPDF Org. Comp. File (Central Personnel Data File organizational component file)	RUNCTL_FGHR019D	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Organizational Component File, CPDF Org. Comp. File	Report on codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period.
CPDF Status Table (Central Personnel Data File status table)	RUNCTL_FGHR019E	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Processing USF, Status Table, CPDF Status Table	Generate the Status working table containing employee information. This is eventually used to create the Status submission flat file.

Defining Additional CPDF Reporting Controls

Before you begin to run the CPDF reporting process, you will need to ensure that certain codes are correctly defined so that they are included with your submissions. This table describes the data and where you enter it in the system.

Data	Page
Indicate if earnings are reported to the CPDF.	Earnings Table 1
Indicate the CPDF earnings type to identify retention allowance, supervisory differential, or staffing differential code types.	Earnings Table 1

Data	Page
Indicate whether the subagency should report its employees to the CPDF.	Sub-Agency Table
Indicate whether or not the personnel action should be reported to the CPDF.	Nature of Action (NOA) Code Table

Producing the CPDF Files

To produce the CPDF files:

1. Generate the CPDF Dynamics table (monthly) or generate the CPDF Status table (quarterly).
2. Perform CPDF edit validation processing.
3. Produce the CPDF Error report.

Review and clean up the data errors identified in the error report. Repeat the processes in steps 1 through 3 until the data satisfactorily meets your organizational reporting standards.

4. Generate the CPDF Dynamics/Status flat file.
5. Generate the CPDF Organizational Component Translation submission.

Note. Processing CPDF edits deletes existing data in the CPDF Error table before adding new records. If you need to save existing CPDF Error table data, back up the table before running this process.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (USF) Meet Regulatory Requirements Reports for the US Federal Government

Processing the CPDF Edits

Access the CPDF Edits Processing page.

The screenshot shows the 'CPDF Edits Processing' page. At the top, there's a header 'CPDF Edits Processing'. Below this, on the left, is 'Run Control ID: GN2'. On the right, there are two links: 'Report Manager' and 'Process Monitor', followed by a yellow 'Run' button. Below these elements is a section titled 'Validate CPDF Data' which contains two checkboxes: 'Validate CPDF Status Data' and 'Validate CPDF Dynamic Data'.

CPDF Edits Processing page

Validate CPDF Data

Select Validate CPDF Status Data or Validate CPDF Dynamic Data to create the respective files.

Run Click this button to process CPDF edits.

Generating the CPDF Edit Errors Report

Access the Run CPDF Error Report page.

Note. After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See [Chapter 8, “\(USF\) Performing Regulatory Processing and Reporting,” Viewing CPDF Processing Results Using the Query Manager, page 152.](#)

Processing the Dynamics Table

Access the CPDF Dynamic Table page.

CPDF Dynamic Table page

Generating the CPDF Dynamics table enables you to run the CPDF Edits process against the table and generate the CPDF Dynamics submission. You must generate the CPDF Dynamics table in order to continue processing the CPDF Dynamics edits.

Note. The process deletes any existing data in the CPDF Dynamics table before adding any new records. To save existing CPDF Dynamics table data, you must back up the table before running this process.

After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See [Chapter 8, “\(USF\) Performing Regulatory Processing and Reporting,” Viewing CPDF Processing Results Using the Query Manager, page 152.](#)

As Of Date Select to define the transactions selected by the CPDF Dynamics Table process. The process selects all transactions with an effective date two years before and six months after the as of date.

Start Date	Enter the starting date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.
End Date	Enter the ending date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.
Work-in-Progress Status	Select any work-in-progress status for reporting on the CPDF Dynamics table. For a CPDF submission, select <i>PRO</i> (Processed by Human Resources).

Processing the CPDF Status Table

Access the CPDF Status Table page.

The screenshot shows the 'CPDF Status Table' page. At the top, there's a title bar. Below it, on the left, are 'Run Control ID: 123' and 'Language: English' with a dropdown arrow. On the right, there are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below this is a 'Request Parameters' section. It contains 'Company: DC' with a magnifying glass icon and 'Department of Communications', and 'As Of Date: 01/01/2006' with a calendar icon.

CPDF Status Table page

You must first generate the CPDF Status table in order to perform the CPDF status edits processing. Generation of the CPDF Status table enables you to run the CPDF edits process against the table and create the CPDF status submission.

Note. This process deletes existing data in the CPDF Status table before adding new records. If the organization needs to retain and save existing CPDF Status table data, you must back up the table before running this process.

After running the Edit Errors process, the working file contents can be viewed online using the Query Manager.

See [Chapter 8, “\(USF\) Performing Regulatory Processing and Reporting,” Viewing CPDF Processing Results Using the Query Manager, page 152.](#)

As Of Date Select to restrict your selection to those employees active on that date.

Generating the Dynamic/Status Flat File Submissions

Access the CPDF File Generation page.

CPDF File Generation page

The CPDF Dynamics/Status File Generation process builds the CPDF status and dynamic submissions. The process generates these flat files from the CPDF Status table and CPDF Dynamics table, respectively. If the process finds that field defaults are necessary, it uses the CPDF field default table to supply the values.

You must have already entered agency parameters before using this page.

CPDF Dynamic File and CPDF Status File Select one or both of these fields to generate the correct submission file.

Updating CPDF Edits

When you receive CPDF Edit Manual Updates from the OPM, you must maintain the edits in your system.

Processing the CPDF Organizational Component Translations File Submission

Access the CPDF Org. Comp. File page.

CPDF Org. Comp. File page

The CPDF OCT consists of codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period. The OCT is reported twice a year, in March and September, and must match the organizational component codes used in the employee records in status submissions for the agency.

You must have already set up agency and language parameters before using this page.

As Of Date Select so that the file contains organizational components that are effective for a given date.

Viewing CPDF Processing Results Using the Query Manager

The PeopleSoft system provides three query definitions designed to display online results of certain CPDF processes. The following predefined queries can be access through the Query Manager:

Query Name	Description	Usage
FGCPDFDYNAMICS	Federal CPDF Dynamics	Use to view the content of the Dynamics process run.
FGCPDFERRORTBL	Federal CPDF Error List	Use to view error results after running the CPDF edit validation process.
FGCPDFSTATUSTBL	Federal CPDF Status Table	Use to view results after running the CPDF Status program.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Submitting Parent Locator Information

Government agencies are required by law to send a biweekly and quarterly file containing data on new hires to the Federal Parent Locator Service, a part of the Social Security Administration. The Federal Parent Locator Service uses the data to track and enforce child support payments.

To submit parent locator information:

1. Create an interface file using the New Hire Reporting run control page.
2. Send the file to the Social Security Administration.
You will receive the file back from the Social Security Administration.
3. Process the file received from the Social Security Administration using the New Hire Error Reporting run control page.

The report created by this process lists errors that were sent previously so that they can be corrected for the next time you send the file.

At any point in the process, you can use the New Hire Reporting Stats page to view statistics about the new hire data exports.

Page Used to View New Hire Data Export Statistics

Page Name	Object Name	Navigation	Usage
New Hire Control	GVT_NH_CONTROL	Workforce Monitoring, Meet Regulatory Rqmts, Review New Hire Stats USF, New Hire Control	Display statistical information about new hire data exports generated by the New Hire Reporting report.

See Also

Chapter 7, “(USA) Meeting Regulatory Requirements for the United States,” Setting Up Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) Reporting, page 112

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Meet Regulatory Requirements Reports

Running EEO Reports

This section discusses how to run the EEO reports that are for U.S. federal government users only.

See Also

Chapter 7, “(USA) Meeting Regulatory Requirements for the United States,” Setting Up EEO Reporting Requirements, page 125

Pages Used to Run EEO Reports

Page Name	Object Name	Navigation	Usage
EEO Groups by PATCOB/POI	RUNCTL_FGHR012	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF, EEO Groups by PATCOB/POI	Run the EEO Groups by PATCOB/POI report (FGHR012A), which details the distribution of EEO groups and comparison by PATCOB and POI.
EEO Groups by PATCOB/SubAgency	RUNCTL_FGHR012	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF, EEO Groups by PATCOB/SubAgency	Run the EEO Groups by PATCOB/SubAgency report (FGHR012B) to see the distribution of EEO groups and comparison by PATCOB and sub-agency.
EEO Groups by Series/POI	RUNCTL_FGHR014	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF, EEO Groups by Series/POI	Run the EEO Groups by Series/POI report (FGHR014A). This report details the distribution of EEO groups and comparison by occupation and POI.
EEO Groups by Series/SubAgency	RUNCTL_FGHR014	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF, EEO Groups by Series/SubAgency	Run the EEO Groups by Series/SubAgency report (FGHR014B), which details the distribution of EEO groups and comparison by series and sub-agency.

Running VETS Reports

This section discusses how to run the VETS reports that are for U.S. federal government users only.

See Also

[Chapter 7, “\(USA\) Meeting Regulatory Requirements for the United States,” Meeting VETS-100 Reporting Requirements, page 127](#)

Page Used to Run VETS Reports

Page Name	Object Name	Navigation	Usage
VETS-100 by POI	RUNCTL_FGHR013	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by POI USF	Run the VETS-100 by POI report (FGHR013B), which generates a veterans employment report by POI.
VETS-100 by Sub Agency	RUNCTL_FGHR013	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by SubAgency	Run the VETS-100 by SubAgency report (FGHR013A), which generates a veterans employment report by sub-agency.

Running the Monthly Report of Federal Civilian Employment (SF113-A) and Full-time Equivalent/Work-Year Civilian Employment (SF113-G) Reports

This section discusses how to run the SF113–G report.

Pages Used to Run SF113-A and SF113-G Reports

Page Name	Object Name	Navigation	Usage
SF113-A Report	RUN_FGSF113A	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF, SF113-A Report	Run the SF113-A report (FGSF113A), which generates a monthly report of federal civilian employment.
SF113-G Report	RUN_FGSF113G	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF, SF113-G Report	Run the SF113-G report (FGSF113G), which generates a monthly report of full-time equivalent and work-year civilian employment.

Running the SF113-G Report

Access the SF113-G Report page.

SF113-G Report

User ID: PS

[Report List](#)
[Process Monitor](#)
Process Request

Run Control ID: 1

SF-113G Control Information

Company:	DC		Department of Communications
From Date:	01/01/2006		
Report Period Thru Date:	03/31/2006		
Fiscal Year From Date:	07/01/2005		
Fiscal Year Thru Date:	06/30/2006		
SF-113G Authorized Ceiling:			

SF113-G Report page

SF-113G Authorized Ceiling

If you enter a value here, it is included in the Ceiling column of the report. This field is optional but recommended if you want to report an employee on the SF-113G report.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (USF) Meet Regulatory Requirements Reports for the US Federal Government

CHAPTER 9

(GBR, USA, and USF) Meeting Disability Regulatory Requirements

This chapter provides overviews of Disability and Discrimination Act regulatory requirements in the U.K. and Americans with Disability Act (ADA) regulatory requirements in the U.S. and discusses how to manage accommodation data.

(GBR) Understanding Disability and Discrimination Act Regulatory Requirements in the U.K.

The Disability and Discrimination Act of 1995 makes it unlawful for any U.K. employer to discriminate in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal against individuals based on their disability. It requires companies of 20 or more workers to hire a specified percentage of disabled persons.

In addition, employers are required to make reasonable adjustments and accommodations for the disabled worker, such as adjusting the premises, altering working hours, allocating duties to another person, and acquiring or modifying equipment.

Use the Accommodation Data component in Report Regulations (UK) to track and document the company's efforts to make accommodations for disabled employees.

Prerequisites

Before using this component, set up codes in these tables:

- Accommodation Type table.
- Diagnosis table.
- Job Task table.
- Job Code Task table.

Disability Accommodations Tracking

You use three pages—the Accommodation Request page, the Accommodation Option page, and the Accommodation Job Task page—to track data showing that the company has no discriminatory practices against people with disabilities. When employees or applicants request that you make accommodations that enable them to perform job tasks, you can track the steps that bring those requests to resolution.

See Also

Chapter 9, “(GBR, USA, and USF) Meeting Disability Regulatory Requirements,” Pages Used to Manage Accommodation Data, page 159

(USA, USF) Understanding ADA Regulatory Requirements in the U.S.

Title I of the ADA prohibits employers with U.S. operations from discriminating against job applicants or employees with disabilities. Discrimination is forbidden in job applications, testing, hiring, assignments, evaluations, disciplinary actions, promotions, compensation, leave and benefits, and other employee concerns. The ADA, however, doesn't have specific reporting requirements, which makes it difficult to prove that the company doesn't discriminate against people with disabilities.

Prerequisites

Before you track accommodation requests made by employees and applicants, set up data in the Accommodation Type table, the Job Task table, the Job Code Task table, and the Diagnosis table.

After you create accommodation types and essential job functions, link job functions with job codes, and create diagnosis codes, use the Accommodation Data component to track requests that employees and applicants make for disability accommodations. Complete the pages in the order that they appear in the next section.

Managing Accommodation Data

This section discusses how to:

- Enter accommodation requests.
- Enter accommodation options.
- Enter accommodated job tasks.

Pages Used to Manage Accommodation Data

Page Name	Object Name	Navigation	Usage
Accommodation Request	ACCOMM_REQUEST	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Request	Enter accommodation requests that an employee or applicant makes of the organization, and enter diagnosis codes for employee disabilities.
Accommodation Option	ACCOMM_OPTION	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Option	Enter accommodation options that the organization or the person with a disability is considering in order to resolve each accommodation request.
Accommodation Job Task	ACCOMM_JOB_TASK	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Job Task	Enter the job tasks that you are accommodating, classified by job code and (if necessary) by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
Accommodation Type Table	ACCOM_TYPE_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Type Table	Identify the types of accommodations that the organization can make for employees or applicants with disabilities.

Entering Accommodation Requests

Access the Accommodation Request page.

Accommodation Request		Accommodation Option		Accommodation Job Task	
Issac Nichta		Person ID:		K0G002	
Request Details Find View All First 1 of 1 Last					
*Accommodation ID:	1	*Date of Request:	02/08/2006		
Business Unit:	GBIBU	Global Business Institute BU			
Department:	11000	Information Systems			
Job Code:	140020	Analyst-Business			
Location Code:	KCY01	Cayman Islands HQ			
Comment:					
*Responsible ID:	K0G001	Rebekah Jones			
☒ Pending ☐ Accepted ☐ Undue Hardship		*Request Status Date:		02/08/2006	
Disability Customize Find View All First 1 of 1 Last					
*Regulatory Region	USA	Diagnosis Code	K00002	Description	
1	USA	K00002	Lower Back Pain (Lumbar)		

Accommodation Request page

The system prompts you for an employee ID.

The system displays the business unit, department, job code, and location code associated with the employee on the Job Data pages.

Accommodation ID	Displays a system-generated sequential number, which you can override.
Date of Request	Enter the date of request for the accommodation.
Comment	Enter comments applicable to the request.
Responsible ID	Select the employee responsible ID.
Request Status Date	Enter the request status date.
Regulatory Region	Select from the list of Regulatory Region page prompt values.
Diagnosis Code	Select any that apply. You create diagnosis codes in the Diagnosis table.

Entering Accommodation Options

Access the Accommodation Option page.

Accommodation Request		Accommodation Option		Accommodation Job Task	
Issac Nichta			Person ID: K0G002		
Option Details Find View All First 1 of 1 Last					
Accommodation ID:	1	Date of Request:	02/08/2006		
Business Unit:	GBIBU	Global Business Institute BU			
Department:	11000	Information Systems			
Job Code:	140020	Analyst-Business			
Location Code:	KCY01	Cayman Islands HQ			
Accommodations/Alternatives Find View All First 1 of 1 Last					
*Option ID:	1	☐ Employer Suggested Option	*Currency Code:	USD	
*Type:			Cost:	0.00	
Description					
*Accommodation Status:	Consider	*Status Date:	02/08/2006		

Accommodation Option page

Option ID	Displays a system-generated sequential number for the option ID, which you can override. Click the Insert Row button to add new data rows for additional accommodation options or alternatives.
Employer Suggested Option	Select to indicate whether the information that you enter is an option suggested by the employer.
Currency Code	Select a currency code if you are tracking the costs of this accommodation option in a different currency. Values are located on the Currency Code page. If you did not define multiple currencies in the Installation table, the Currency Code field doesn't appear.
Type	Select an accommodation type, which you define on the Accommodation Type Table page.
Cost	Enter the estimated cost of the option.
Accommodation Status	Select the status from the list of values.
Status Date	Enter the accommodation status date. The default value is the accommodation request date.

Entering Accommodated Job Tasks

Access the Accommodation Job Task page.

Accommodation Request		Accommodation Option		Accommodation Job Task	
Issac Nichta			Person ID: K0G002		
Job Details Find View All First 1 of 1 Last					
Accommodation ID:	1	Date of Request:	02/08/2006		
Business Unit:	GBIBU	Global Business Institute BU			
Department:	11000	Information Systems			
Job Code:	140020	Analyst-Business			
Location Code:	KCY01	Cayman Islands HQ			
Job Task Accommodated Find View All First 1 of 1 Last					
Business Unit:	GBIBU	Global Business Institute BU			
Job Code:	140020	Analyst-Business			
Location:					
Job Task:					

Accommodation Job Task page

Business Unit Select from the Business Unit - Business Unit page list of prompt values.

Job Code Select the job code that you are accommodating. Create these codes on the Job Code Table - Job Code Profile page.

Location and Job Task Select a location and job task for the request that you are accommodating. Create these codes on the Location - Location Address page and the Job Task Table page.

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

	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

	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 <i>receivables specialist</i> . 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."

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 <i>detailed business process</i>.
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.

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 <i>course</i> .
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 <i>sub-classification</i> .
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 <i>copy</i> 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 <i>population</i> and <i>division</i> .

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 <i>communication key</i> .
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 <i>comm keys</i> or <i>speed keys</i>) 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

	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 <i>class</i> .
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.

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 <i>drop ship</i>).
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 <i>population</i> and <i>cohort</i>.
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 <i>Enterprise Incentive Management ledger</i> . 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.

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.

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 <i>donor pyramid</i> 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 <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . 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 <i>General Ledger Interface process</i> . 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.

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 <i>update access</i> .
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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
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.

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 <i>key performance indicator</i> . 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 <i>Known Value Item</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) 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.

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 <i>learning management system</i> . 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> 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.

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 <i>Non-Discountable Products</i> . 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 <i>need analysis</i> .
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 <i>compensation object</i> .
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.

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 <i>event</i> .
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

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
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.

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 <i>giveaways</i>).
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.

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 <i>record input value-added tax flag</i> . 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
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.

REN server	Abbreviation for <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . 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.

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.

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 <i>communication key</i> .
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.

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 <i>basis</i> 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.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies 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 <i>Communications, Checklists, and Comments engine</i> . 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 <i>Communications, Checklists, and Comments group</i> . 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 <i>locked</i>) 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.

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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . 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 <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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.

Index

Numerics/Symbols

- 2483 Group page
 - FRA 31
- 2483 Indicator page
 - FRA 31
- 2483 Indicators component
 - (GROUP_2483_TBL_GBL) 28
- 2483 Parameters component
 - (TRN_2483_PARM) 28

A

- AA, *See* Affirmative Action (AA) (USA)
- AAP_TBL component 106
- Accident Rehabilitation and Compensation Insurance (ARCI) (NZL) 103
- accommodation data, managing 158
- Accommodation Job Task page 159, 161
- Accommodation Option page 159, 160
- Accommodation Request page 159
- Accommodation Type Table page 159
- accommodations
 - job tasks 161
 - options 160
 - requests 159
- Action Group (FRA) page 29
- Action Group component
 - (ACTION_GRP_FRA) 28
- ACTION_GRP_FRA component 28
- ADA, *See* Americans with Disabilities Act (ADA)
- additional documentation xii
- Adverse Impact (USA) page 131
- Adverse Impact report (GBR) 100
- Adverse Impact report (USA) 125, 131
- Affirmative Action (AA) (USA)
 - defining job task outcomes 111
 - defining plans 107
 - reporting requirements 124
 - using establishment functionality 124
- Affirmative Action Plan component
 - (AAP_TBL) 106
- Affirmative Action Plan page 106, 107
- AGIRC, *See* Association Générale des Institutions de Retraite des Cadres

- Americans with Disabilities Act (ADA) 105, 158
 - See Also* disability regulations
- APE Table (FRA) page 26
- application fundamentals xi
- APS Employee Additional Data (AUS) page 4
- APS Movement Code (AUS) page 4
- APS Other Language Codes (AUS) page 4
- APS PSMPC Reporting (AUS) page 4, 5
- ARCI (NZL), *See* Accident Rehabilitation and Compensation Insurance (ARCI) (NZL)
- ARRCO, *See* Association des Régimes de Retraites Complémentaires
- ASCO, *See* Australian Standard Classification of Occupations (ASCO)
- ASCO Table (AUS) page 3
- Association des Régimes de Retraites Complémentaires
 - (FRA) pension funds 26
- Association Générale des Institutions de Retraite des Cadres
 - (FRA) pension funds 26
- Australia (AUS)
 - creating PSMPC reports 5
 - entering additional information for PSMPC reports 4
 - maintaining the ASCO table 3
- Australian Standard Classification of Occupations (ASCO) 3

B

- BIAF report, *See* Bordereau Individuel d'Accès à la Formation (BIAF) report
- BIAF Report (FRA) page 73, 75
- Bordereau Individuel d'Accès à la Formation (BIAF) report 75
- BSE_SCH_FRA_TBL component 28
- business processes 1

C

- Canada (CAN)
 - listing of regulatory reports 7

- quantifying job evaluation criteria 8
 - reviewing national occupational class codes 9
 - running employment equity report 10
 - running official languages report 16
 - Canadian Ntl Occ Class Table page 8, 9
 - Canadian Pay Equity Table page 8
 - Category Status (FRA) page 29
 - Category Status component (CTG_STS_FRA_TBL) 28
 - Central Personnel Data File (CPDF) (USF)
 - adding fields 140
 - building the dynamic/status file 150
 - entering edit details 144
 - generating the CPDF Edit Errors report 149
 - identifying codes 147
 - processing CPDF status edits 150
 - processing edits 148
 - processing the dynamic table 149
 - setting up edit IDs and field numbers 142
 - submitting the Organizational Component Translation (OCT) 151
 - understanding reporting requirements 146
 - using if/then statements 143
 - child support payments (USF) 152
 - Class Unit Table (NZL) page 103
 - classification units (NZL) 103
 - Clone Report Type As page 114, 122
 - CNTRCT_FUND_FRA component 28
 - CNTRCT_TYPE_GRP component 28
 - comments, submitting xvi
 - Commission Technique d'Orientation et de Reclassement Professionnel (COTOREP) (FRA) 40
 - common elements xvi
 - Compute 2483 (FRA) page 92
 - Compute Employee Survey (EMSURVEY)
 - process (FRA) 49
 - contact information xvi
 - contingency fund contracts
 - FRA 35
 - contingency funds
 - (FRA) overview 26
 - Contract Event (FRA) page 29
 - Contract Event component (CTC_KND_FRA_TBL) 28
 - Contract Type Group (FRA) page 28, 31
 - Contract Type Group component (CNTRCT_TYPE_GRP) 28
 - contract types (FRA) 31
 - Controlled Establishments
 - component 106
 - Controlled Establishments page 107
 - CONTROLLED_ESTABS
 - component 106
 - COTOREP, *See* Commission Technique d'Orientation et de Reclassement Professionnel (COTOREP) (FRA)
 - country functionality
 - (FRA) describing pension companies 34
 - (FRA) entering institutions 34
 - Country Group (FRA) page 29
 - Country Group component (COUNTRY_GRP) 28
 - COUNTRY_GRP component 28
 - Covered Population (FRA) page 30
 - Covered Population component (CVD_POP_FRA_TBL) 28
 - CPDF, *See* Central Personnel Data File (CPDF) (USF)
 - CPDF Dynamic Table (USF) page 147, 149
 - CPDF Dynamic/Status File Generation (USF) page 147
 - CPDF Edits Processing (USF) page 147, 148
 - CPDF Fields (USF) page 140
 - CPDF File Generation (USF) page 150
 - CPDF Org. Comp. File (USF) page 147, 151
 - CPDF Status Table (USF) page 147, 150
 - cross-references xv
 - CTC_KND_FRA_TBL component 28
 - CTG_STS_FRA_TBL component 28
 - Customer Connection website xii
 - CVD_POP_FRA_TBL component 28
- D**
- Daily Exceptions (GBR) page 95
 - Daily Exceptions page 97
 - Data Object Definition page 114, 118
 - Declaration 2483 report (FRA), *See* Training 2483 report (FRA)
 - Define Employee Survey Indicators
 - component (SOC_INDIC_TBL_FRA) 28

Disability and Discrimination Act of 1995 (GBR) 157

disability regulations

Americans with Disabilities Act (ADA) requirements (USA) (USF) 158

Disability report (FRA) 40

documenting disability accommodations (GBR) 157

entering accommodated job tasks 161

entering accommodation options 160

entering accommodation requests 159

Disability Report (FRA) page 42

documentation

printed xii

related xii

updates xii

E

Edit 2483 (FRA) page 92

Edit Employee Survey (FRA) page 49, 51

Edits (USF) page 140, 143

Edits component (GVT_CPDF_EDIT) 140

EECRS, *See* Employment Equity

Computerized Reporting System (EECRS)

EEO, *See* Equal Employment Opportunity (EEO) (USA), Equal Employment Opportunity (EEO) (USF)

EEO Groups by PATCOB/POI (USF) page 154

EEO Groups by PATCOB/SubAgency (USF) page 154

EEO Groups by Series/POI (USF) page 154

EEO Groups by Series/SubAgency (USF) page 154

EEO Job Group component (EEO_JOB_GROUP) 106

EEO Job Group page 107

EEO-1 Employer Info (USA) page 131

EEO-1 Job Analysis (USA) page 132, 134

EEO-1 Job Analysis report (USA) 134

EEO-1 Reports, defining establishment criteria 108

EEO-4 State/Local (USA) page 132

EEO-5 Job Analysis (USA) page 132

EEO_JOB_GROUP component 106

Election Group (FRA) page 29

Election Group component (ELECTION_GR_TBL) 28

Election report (FRA) 43

Election Roll (FRA) page 29

Election Roll component (ELECTION_RL_TBL) 28

ELECTION_GR_TBL component 28

ELECTION_RL_TBL component 28

elections

defining characteristics for French organizations 43

determining elected candidates (FRA) 47

entering voting results (FRA) 45

recording candidacies for French election groups 44

validating results (FRA) 46

Employee Survey Group (FRA) page 29, 32

employee survey groups (FRA) 32

Employee Survey Indicator (FRA) page 29, 33

employee survey indicators (FRA) updating 33

viewing for Employee Survey report 52

Employee Survey Parameters (FRA) page 49

Employee Survey Paygroups (FRA) page 49

Employee Survey report (FRA) 33, 48 setting up number of columns 32

Employee Survey Report (FRA) page 49

employee type, determining 13

Employment Equity (CAN) page 16

Employment Equity Computerized Reporting System (EECRS) 7, 10, 16

employment equity report (CAN) 10

determining employee type 13

running the report 16

understanding salary calculation 13

Equal Employment Opportunity (EEO) (USA)

meeting requirements 124

setting up reporting requirements 125

Equal Employment Opportunity (EEO) (USF)

running reports 153

ESTAB_TBL1_GBL component 106

Establishment Address page 106, 108

Establishment Table component
 (ESTAB_TBL1_GBL) 106
 establishments (USA) 124, 127
 External Variables (FRA) page 26

F

Fair Empl. Monitoring Return (GBR)
 page 100
 France (FRA)
 defining election characteristics 43
 defining pension/contingency fund
 contracts 35
 describing pension companies 34
 determining elected candidates 47
 entering institutions 34
 entering voting results 45
 generating the BIAF report 75
 generating the Employee Survey
 report 48
 generating the Single Hiring Statement
 report 74
 generating the Training 2483 report 76
 grouping contract types 31
 indicating predefined employee
 survey 52
 listing of regulatory reports 25
 managing professional elections 42
 overview pension and contingency
 data 26
 recording candidacies for election
 groups 44
 reviewing and modifying the Compute
 Employee Survey calculations 51
 reviewing employee pension/contingency
 contracts 38
 running the Compute Employee Survey
 (EMSURVEY) process 49
 running the Disability report 40
 setting up control tables for regulatory
 requirements 28
 setting up employee survey groups 32
 setting up employee survey
 indicators 33
 understanding pages with
 system-populated fields 28
 validating election results 46
 Fund Codes page
 FRA 30
 FUND_FRA_TBL component 28
 FUND_INST_FRA component 28

Funds Codes component
 (FUND_FRA_TBL) 28

G

glossary 163
 Group (FRA) page - Maintain Election
 Data 43
 GROUP_2483_TBL_GBL component 28
 GVT_CPDF_EDIT component 140
 GVT_CPDF_FIELDS component 140
 GVT_CPDF_PREFIX component 140
 GVT_OPM_EDITUPDT component 140

H

Hours Worked Per Reference Period
 (Department) (GBR) page 95, 98
 Hours Worked Per Reference Period
 (Employee) (GBR) page 95, 99
 Human Resources Development Canada
 (HRDC) 10

I

implementation 2
 INSEE Table FRA page 26
 Institution Address page
 FRA 31
 Institution Type page
 FRA 30, 34
 institutions
 (FRA) entering 34
 integrations 1
 IPEDS-S Report (USA) page 134

J

Job Category (FRA) page 30
 Job Category component
 (JOB_CTG_FRA_TBL) 28
 Job Code Task Table component
 (JOBCODE_TASK_TABLE) 106
 Job Code Task Table page 107, 111
 job evaluation criteria (CAN) 8
 Job Group Analysis (USA) page 131
 Job Group Analysis Summary (USA)
 page 131
 Job Group Movement Analysis (USA)
 page 131
 Job Group Movement Analysis report
 (USA) 126, 131
 Job Group Roster (USA) page 131

Job Group Roster report (GBR) 100
 Job Group Roster report (USA) 131
 Job Task Table component 106
 Job Task Table page 107
 JOB_CTG_FRA_TBL component 28
 JOB_TASK_TABLE component 106
 JOBCODE_TASK_TABLE
 component 106
 Joint Staffing (GBR) page 100

L

local functionality
 (FRA) describing pension
 companies 34
 (FRA) entering institutions 34
 Location Profile component
 (LOCATION_TBL2_GBL) 106
 Location Profile page 107
 LOCATION_TBL2_GBL
 component 106

M

Maintain Election Data
 Votes page 43
 Mandatory Base Scheme (FRA) page 29
 Mandatory Base Scheme component
 (BSE_SCH_FRA_TBL) 28
 MED_ORG_FRA_TBL component 28
 Medical Organization (FRA) page 30
 Medical Organization component
 (MED_ORG_FRA_TBL) 28
 Monthly Workforce Report (FRA)
 page 73

N

national occupation class (NOC) codes
 (CAN) 9
 New Hire Control (USF) page 153
 New Hire report, *See* PRWORA report
 New Hire Report Configuration page 115,
 123
 New Zealand (NZL) 103
 Northern Ireland report (GBR) 100
 notes xv

O

occupation category (CAN),
 participation 19

Occupational Classif. Codes component
 (US_OCC_TBL) 106
 Occupational Safety and Health
 Administration (OSHA) (USA) 124
 OCT, *See* Organizational Component
 Translation submission (OCT)
 Official Language Rqmts (CAN) page 24
 Official Languages Act (OLA) (CAN) 7,
 16
 Official Languages Information System
 (OLIS II) (CAN) 17
 official languages report (CAN)
 described 18
 running 16
 OLA, *See* Official Languages Act (OLA)
 (CAN)
 OLIS II, *See* Official Languages
 Information System (OLIS II) (CAN)
 OPM CPDF Maint Details (USF)
 page 140, 144
 OPM CPDF Maint Details Page component
 (GVT_OPM_EDITUPDT) 140
 Organizational Component Translation
 submission (OCT) 151
 OSHA (USA), *See* Occupational Safety and
 Health Administration (OSHA) (USA)
 OSHA 300 Incident Log page 133
 OSHA 300A Annual Summary page 133
 OSHA-200 Log (USA) page 132

P

Parameters (GBR) page - Adverse
 Impact 100
 Parameters (GBR) page - Terminations
 Analysis 100
 Parameters (GBR) page - Workforce
 Analysis 100
 parent locator information (USF) 152
 pension companies
 (FRA) entering 34
 pension data
 (FRA) overview 26
 Pension/Cont. Contracts Review (FRA)
 page 38
 Pension/Contingency Contracts component
 (CNTRCT_FUND_FRA) 28
 Pension/Contingency Contracts page
 FRA 31, 35
 Pension/Ctgcy Institutions component
 (FUND_INST_FRA) 28

- pensions
 - setting up French contracts 35
- PeopleBooks
 - ordering xii
- PeopleCode, typographical
 - conventions xiv
- PER102CN (CAN) 16
- Personal Register (FRA) page 73
- Personal Register Report (FRA) page 73
- POP_CTG_FRA_TBL component 28
- Population Category (FRA) page 30
- Population Category component
 - (POP_CTG_FRA_TBL) 28
- Prsrunctl (AUS) page - ASCO Report 3
- Prefixes & Fields (USF) page 140, 142
- Prefixes & Fields component
 - (GVT_CPDF_PREFIX) 140
- prerequisites xi
- Previous Employment Situation (FRA)
 - page 30
- Previous Employment Situation component
 - (WRK_EXP_FRA_TBL) 28
- PRF_STS_FRA_TBL component 28
- printed documentation xii
- Professional Status (FRA) page 30
- Professional Status component
 - (PRF_STS_FRA_TBL) 28
- PRWORA report 112
 - Clone Report Type As page 114
 - cloning 122
 - Data Object Definition page 114
 - data object definitions 118, 119
 - New Hire Report Configuration
 - page 115
 - overview 112
 - Record Definition page 114
 - record definitions 115
 - Relationships page 114
 - report columns 120
 - Report Columns - Variable page 114
 - Report Columns-Database Field
 - page 114
 - report layout 123
 - Report Type Definition page 114
 - report type definitions 120
 - setting up 113, 114
 - system variables 116
 - Variable page 114

PSMPC (AUS), *See* Public Service and Merit Protection Commission (PSMPC) (AUS)

Public Service and Merit Protection Commission (PSMPC) (AUS)

- creating reports 5
- entering additional employee data for reports 4

R

- Record Definition page 114, 115
- Regulatory Fields (USF) page 140
- Regulatory Fields component
 - (GVT_CPDF_FIELDS) 140
- related documentation xii
- Relationships page 114, 119
- Report Columns - Database Field
 - page 114, 120
- Report Columns - Variable page 114, 122
- Report Data page 132
- Report Type Definition page 114, 120
- reports
 - Adverse Impact (GBR) 100
 - Adverse Impact (USA) 125, 131
 - Bordereau Individuel d'Accès à la Formation (BIAF) (FRA) 75
 - Canadian Official Language Data File 17
 - Canadian Official Languages 18
 - Disability (FRA) 40
 - EEO Groups by PATCOB/POI (USF) 154
 - EEO Groups by PATCOB/SubAgency (USF) 154
 - EEO Groups by Series/POI (USF) 154
 - EEO Groups by Series/SubAgency (USF) 154
 - EEO reports (USA) 125
 - EEO-1 Employer Information (USA) 131
 - EEO-1 Job Analysis (USA) 132, 134
 - EEO-4 State and Local Government (USA) 132
 - EEO-5 Job Analysis (USA) 132
 - Election report (FRA) 43
 - Employee Survey report (FRA) 48
 - employment equity (CAN) 10
 - IPEDS-S (USA) 134
 - Job Group Analysis (USA) 131

Job Group Analysis Summary (USA) 131
 Job Group Movement Analysis (USA) 126, 131
 Job Group Roster (GBR) 100
 Job Group Roster (USA) 131
 Joint Staffing (GBR) 100
 Monthly Workforce (FRA) 73
 Northern Ireland (GBR) 100
 OSHA-200 Log (USA) 132
 OSHA-300 Log (USA) 133
 OSHA-300A Summary (USA) 133
 OSHA-301 Incident Report (USA) 132
 Personal Register (FRA) 73
 Public Service and Merit Protection Commission (PSMPC) (AUS) 5
 SF113-A reports (USF)
 Monthly Report of Federal Civilian Employment (SF113-A) 155
 SF113-G reports (USF)
 Full-time Equivalent/Work-Year Civilian Employment (SF113-G) 155
 Single Hiring Statement (FRA) 71, 74
 Terminations Analysis (GBR) 100
 Terminations Analysis (USA) 131
 Training 2483 (FRA) 76
 Veterans Employment and Training Service (VETS) (USA) 105
 VETS-100 Analysis (USA) 133
 VETS-100 by POI (USF) 155
 VETS-100 by SubAgency (USF) 155
 VETS-100 Process (USA) 133
 Vets-100 Submit (USA) 133
 Workforce Analysis (GBR) 100
 Workforce Analysis (USA) 131
 Workforce by Nationality (FRA) 73
 Results (FRA) page - Maintain Election Data 43, 46
 Roll (FRA) page - Maintain Election Data 43, 44
 Run Control page - National Occupation Codes 8
 Run Control page - Pay Equity 8
 Run CPDF Error Report (USF) page 147, 149
 Runctl Ele001 (FRA) page 43

S

salary calculation (CAN) 13

Seats (FRA) page - Maintain Election Data 43, 47
 service to public (CAN) 20
 SF113-A Report (USF) page 155
 SF113-G Report (USF) page 155
 Single Hiring Statement (FRA) page 73, 74
 Single Hiring Statement report (FRA) 71, 74
 SOC_INDIC_TBL_FRA component 28
 suggestions, submitting xvi

T

tables

Accident Rehabilitation and Compensation Insurance (ARCI) (NZL) 103
 Australian Standard Classification of Occupations (ASCO) 3
 control tables (CAN) 7
 control tables (FRA) 28
 control tables (USA) 106
 control tables (USF) 140
 Termination Analysis report (GBR) 100
 Terminations Analysis (USA) page 131
 terms 163
 Training 2483 report (FRA)
 understanding 76
 understanding calculation of the report indicators 86
 understanding classification of reporting indicators 77
 Trn 2483 Company Costs page FRA 31
 Trn 2483 Parameters (FRA) page 26
 Trn 2483 Parameters Setup page FRA 31
 TRN_2483_PARM component 28
 typographical conventions xiv

U

U.S. OCC Table page 107
 UK Job Group Roster page 100
 United Kingdom (GBR)
 documenting disability accommodations 157
 generating the Northern Ireland report 100
 listing of regulatory reports 93

- meeting working time directive requirements 94
 - See Also* working time directive requirements (GBR)
- understanding the Disability and Discrimination Act of 1995 157
- United States (USA)
 - Americans with Disabilities Act (ADA) requirements 158
 - See Also* disability regulations
 - defining affirmative action plans 107
 - defining job task outcomes 111
 - generating the EEO-1 Job Analysis report 134
 - meeting VETS-100 report requirements 127
 - Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) report, *See* PRWORA report
 - preparing the Adverse Impact report 125
 - preparing the Job Group Movement Analysis report 126
 - reporting Affirmative Action requirements 124
 - setting up control tables 106
 - setting up EEO reports 125
- United States Federal (USF)
 - adding CPDF fields 140
 - Americans with Disabilities Act (ADA) requirements 158
 - See Also* disability regulations
 - listing of regulatory reports 139
 - processing CPDF files 145
 - running Equal Employment Opportunities (EEO) reports 153
 - running Veterans Employment and Training Service (VETS) reports 154
 - setting up control tables 140
 - setting up CPDF edit IDs and field numbers 142
 - specifying CPDF edit content 143
 - submitting parent locator information 152
- URSSAF Code (FRA) page 26
- US_OCC_TBL component 106

- Veterans Employment and Training Service (VETS) (USF) 154
- Veterans Employment and Training Service (VETS) report (USA) 105
- Veterans Employment and Training Service-100 (VETS-100) report (USA) 127
- Vets-100 Analysis (USA) page 133
- VETS-100 by POI (USF) page 155
- VETS-100 by Sub Agency (USF) page 155
- Vets-100 Process (USA) page 133
- Vets-100 Submit (USA) page 133
- visual cues xv
- Votes (FRA) page - Maintain Election Data 45

W

- warnings xv
- Workforce Analysis (USA) page 131
- Workforce Analysis report (GBR) 100
- Workforce Analysis report (USA) 131
- Workforce By Nationality (FRA) page 73
- workforce reports (FRA) 71
- Working Hours Per Week (Employee) (GBR) page 95, 96
- Working Time Directive Parameters and Defaults (GBR) page 95
- working time directive requirements (GBR)
 - monitoring compliance 98, 99
 - setting hours per employee 96
 - setting up 95
- Working Time Directive UK component (WRK_TIME_PARAM_UK) 94
- WRK_EXP_FRA_TBL component 28
- WRK_TIME_PARAM_UK component 94

V

- Variable page 114, 116