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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration

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About This PeopleBook Preface

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

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Additional Resources

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

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

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Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

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

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

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PeopleSoft Enterprise Human Resources: Manage Labor Administration Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources: Manage Labor Administration.

PeopleSoft Enterprise HRMS Application Fundamentals

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.

Note. One or more pages in the PeopleSoft Enterprise HRMS operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

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.

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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.

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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.

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CHAPTER 1

Getting Started with Manage Labor Administration

This chapter provides an overview of Manage Labor Administration and discusses Manage Labor Administration:

- Business processes.
- Integrations.
- Implementation information.

Understanding Manage Labor Administration

In many countries, some, or maybe all, of your workers are organized under collective labor agreements. This makes labor management a critical element of legally employing your workforce.

Manage Labor Administration enables you to enter and track labor-related information for each worker. You can sort workers by seniority, manage layoffs and recalls, advance workers through wage progression, track disciplinary actions, and track grievances.

Manage Labor Administration Business Processes

Manage Labor Administration enables you to enter and track labor-related information for each worker in your organization. You can layoff or recall groups of workers, manage automatic wage progression in accordance with labor agreements, track disciplinary actions your organization takes against workers, as well as grievances filed by one or several people, including workers, applicants, and unions on behalf of several union members.

Manage Labor Administration provides these business processes:

- Manage labor agreements.
- Manage union data.
- Manage layoffs and recalls.
- Manage wage progression.
- Track disciplinary actions and grievances.
- Requesting works councils approval.

See Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 32.

See Chapter 3, "Setting Up Unions," Setting Up Unions, page 10.

See Chapter 6, "Managing Layoffs and Recalls," page 55.

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See Chapter 7, "Managing Wage Progression," page 83.

See Chapter 8, "Tracking Disciplinary Actions and Grievances," page 103.

See Chapter 9, "Requesting Works Councils Approval," page 117.

Manage Labor Administration Integrations

Manage Labor Administration integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Human Resources: Administer Workforce.
- PeopleSoft Enterprise Human Resources: Manage Base Compensation and Budgeting.
- PeopleSoft Enterprise Payroll for North America.

Manage Labor Administration Business Process 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.

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

Component	Component Interface	References
Disciplinary Step Table (DISCIP_STEP_TABLE)	DISCIP_STEP_TABLE	See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.
Grievance Step Table (GRIEV_STEP_TABLE)	GRIEV_STEP_TABLE	See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

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See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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CHAPTER 2

Navigating in Manage Labor Administration

This chapter discusses how to navigate in Manage Labor Administration.

Navigating in Manage Labor Administration

Manage Labor Administration provides a custom navigation page that contains groupings of folders that support a specific business process, task, or user role. This section describes a page intended for union workforce management.

Note. In addition to the Manage Labor Administration custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in Manage Labor Administration

This table lists the custom navigation pages that are used to navigate in Manage Labor Administration.

Page Name	Navigation	Usage
Seniority	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Seniority	Access the: • Job Data component • Seniority Dates component • Seniority Report component • Tie Breakers component
Labor Agreement	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Labor Agreement	Access the: • Labor Agreement component • Employment Categorization component • Labor Job Classes component • Labor Facilities component • Bargaining Unit component • Unions component

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Page Name	Navigation	Usage
Wage Progression	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Wage Progression	Access the: • Review Wage Progression component. • Update Wage Progression component. • Approve Employees to Advance component. • Wage Progression Exception Rpt component. • Process Wage Progression component. • Extract Payroll Data component. • Review Time Details component. • Wage Progression Run ID component. • Define Wage Plans component. • Define Wage Grades component.
Layoffs and Recalls	Workforce Administration, Labor Administration, Union Workforce Mgmt Centre, Layoffs and Recalls	Access the: • Layoff Roster component. • Recall Roster component. • Reinstatement Roster component. • Recall Rights component. • Process Recall Rights component.
Reports	Click Reports on the Layoffs and Recalls page.	Access the • Layoff Roster Report • Bumping Report • Seniority Report • Candidate List Report • Recall Roster Report
Set Up	Click Set Up on the Layoffs and Recalls page.	Access the: • Labor Group Definition component. • Layoff Exemption Reasons component. • Recall Reason component. • Recall Expiration Rules component. • Employee Roster Status component.

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CHAPTER 3

Setting Up Unions

This section discusses how to:

- Set up bargaining units.
- Set up unions.
- (USF) Set up unions.

Common Elements Used in This Chapter

Union Contact Number	The union contact number (the primary contact is number 1).
Contact Name	The union or bargaining unit's contact name.
Union Steward	Enter the name of the person who serves as the liaison between your company and the union.
Life Insurance	Indicate the amount of life insurance the union or bargaining unit offers for its members.
Vacation Plan	Enter the vacation plan that this union offers to its members.
Sick Leave Plan	Enter the sick leave plan that this union offers to its members.
Callback Minimum Hours	Enter the callback minimum hours per day for which bargaining unit members get paid if they are called in to a job.
Partnership Council	Select if this union is a member of a partnership council.
Partnership Council Date	If this union is or will be a member of a partnership council, enter the date this event took or will take place.
Partnership Agreement	Select if this union has entered into a partnership agreement.
Partnership Agreement Date	If this union is or will enter into a partnership agreement, enter the date this event took place or will take place.
Days To Complete	Use for establishing follow-up dates and other suspense items.

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Setting Up Bargaining Units

To set up bargaining units use the Bargaining Unit component (BARG_UNIT_TBL) or Bargaining Unit Table USF (GVT_BARG_UNIT_TBL).

This section discusses how to enter bargaining unit details.

Note. Bargaining units have a one to one relationship with labor agreements. You cannot use the same bargaining unit for multiple labor agreements.

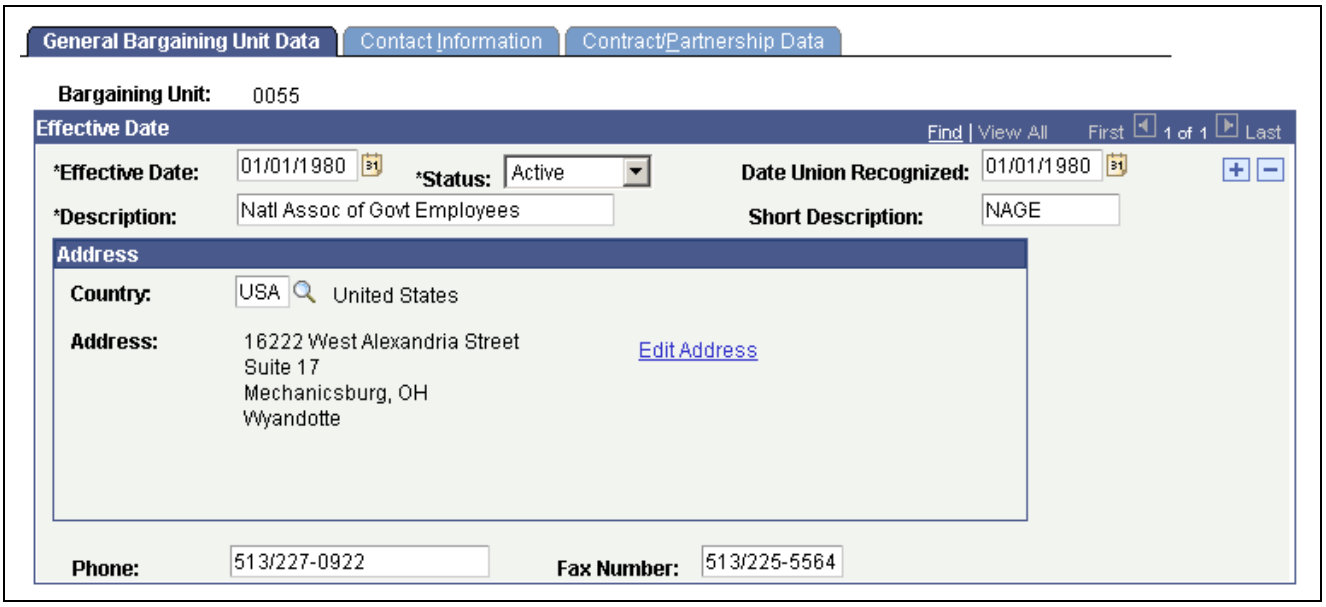
Pages Used to Set Up Bargaining Units

Page Name	Object Name	Navigation	Usage
General Bargaining Unit Data	GVT_BARG_UNIT1	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, General Bargaining Unit Data • Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit Table USF, General Bargaining Unit Data	Enter bargaining unit details.
Contact Information	GVT_BARG_UNIT2	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit, Contact Information • Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions/Unions, Bargaining Unit Table USF, Contact Information	Enter union contact information.
Contract/Partnership Data	GVT_BARG_UNIT3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Bargaining Unit Table USF, Contract/Partnership Data	Define contract and partnership information for a bargaining unit.

Entering Bargaining Unit Details

Access the Bargaining Unit Data page.

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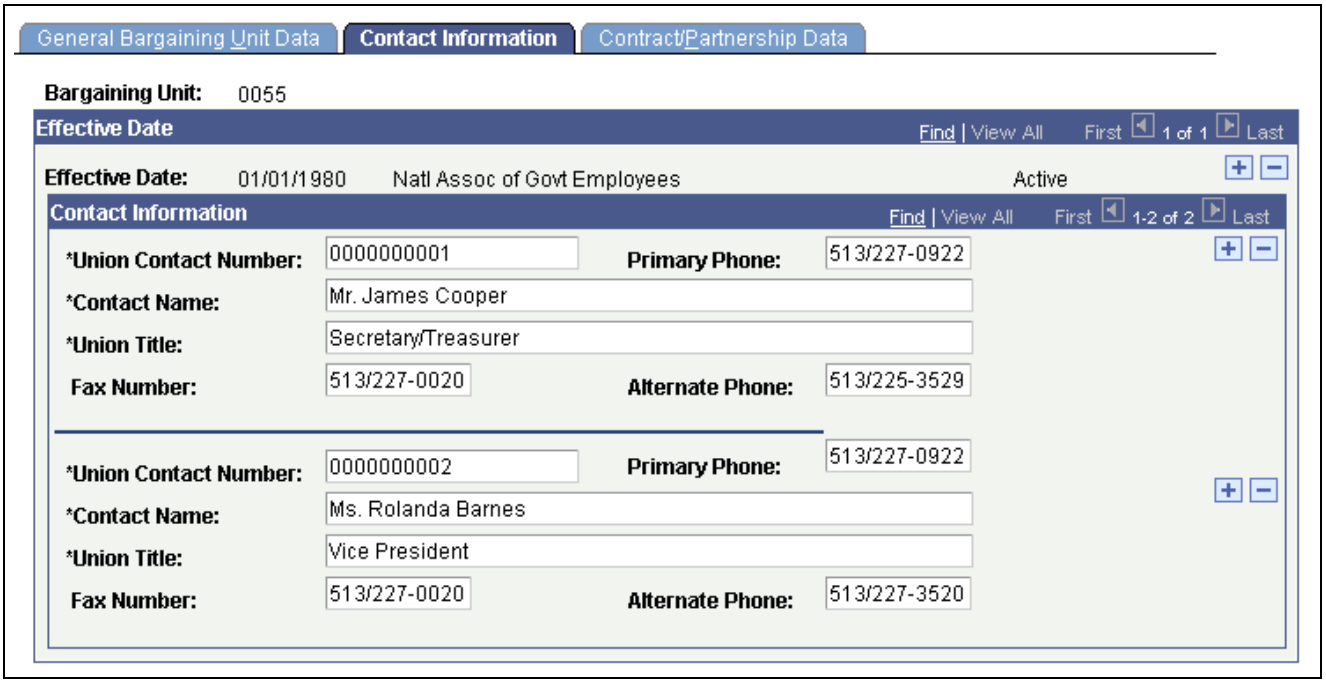


General Bargaining Unit Data page

Date Union Recognized Enter the date the union was recognized by your organization.

Entering Contact Information

Access the Contact Information page.



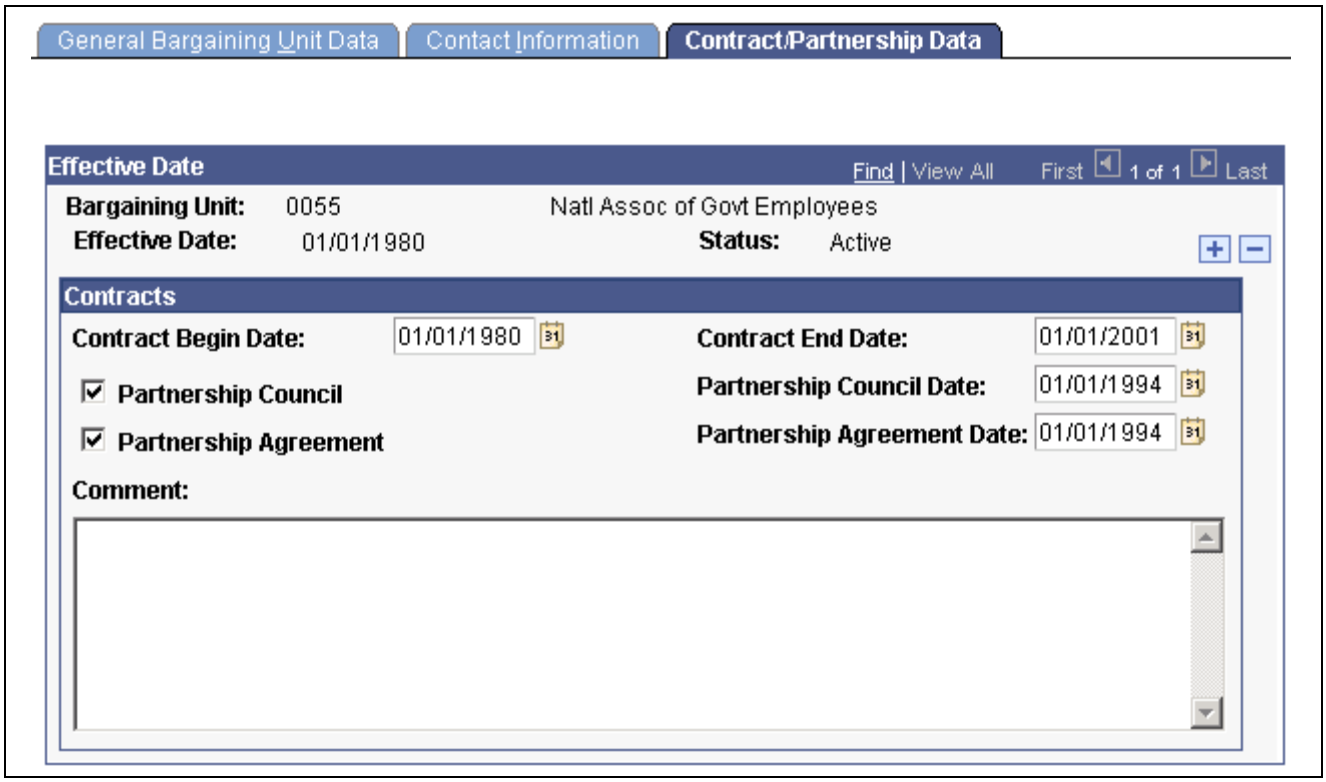
Contact Information page

Enter the contact information for this bargaining unit.

(USF) Entering Contract and Partnership Dates

Access the Contract/Partnership Data page.

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Contract/Partnership Data page

Contracts

Contract Begin Date and **Contract End Date** — Enter the begin and end date for this contract.

Partnership Council and **Partnership Council Date** — Select if there is a partnership council and enter the date of the partnership council.

Partnership Agreement and **Partnership Agreement Date** — Select if there is a partnership agreement and enter the date of the partnership agreement.

Setting Up Unions

To set up union data use the Unions component (UNION_TABLE).

This section provides an overview and discusses how to:

- Enter general union details.
- Enter information on union contract benefit terms.
- Enter additional contract terms.

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Understanding Union Data Setup

If you're administering a workforce, you or others in your company might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or salary step increases. Unions are alternative to labor agreements and do not have as much system processing behind them.

See Also

Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 32

Pages Used to Set Up Union Data

Page Name	Object Name	Navigation	Usage
Union Location	UNION_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions, Union Location	Enter general details for a union.
Contract Data	UNION_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Contract Data	Enter information on union contract benefit terms.
Union Earnings Distribution	UNION_TABLE3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions, Union Earnings Distribution	Enter additional contract terms, such as callback hours and allowable earnings codes.

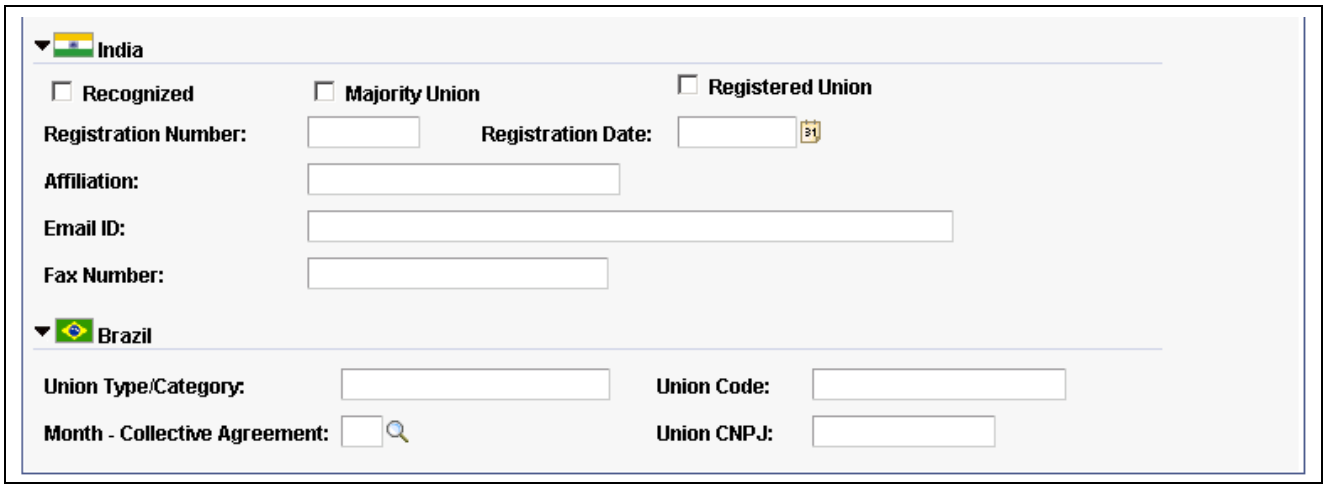
Entering General Union Details

Access the Union Location page.



Union Location page (1 of 2)

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Union Location page (2 of 2)

Certified Select if the union is certified. Certification means that a labor administration board in the country in question formally recognizes the union as the bargaining unit's exclusive representative. Certification typically occurs after the union wins a vote to form a union. A labor administration board's involvement in certifying the union ensures that all the appropriate laws and regulations have been followed in forming the union.

Closed Shop Select if the union is a closed shop. This usually means that individuals can't work for a company within the represented worker class unless they agree to pay the equivalent dues to the union.

Local Select if the union is represented by a local bargaining unit. The system makes the Bargaining Unit field available for entry.

Bargaining Unit Select the bargaining unit associated with this union. This field is only available when you select the Local check box.

(IND) India

Recognized Select if the union is a Recognized Union.

Majority Union Select if the majority of workers are members of the union.

Registered Union Select if the union is a trade union registered with the government. If this is selected, then you have to enter data in the Registration Number and Registration Date fields.

(BRA) Brazil

Union Type/Category Enter a category, such as Trade or Chemical Sector. This information is used to group unions for reporting purposes.

Union Code Enter the code that identifies the union in Brazil.

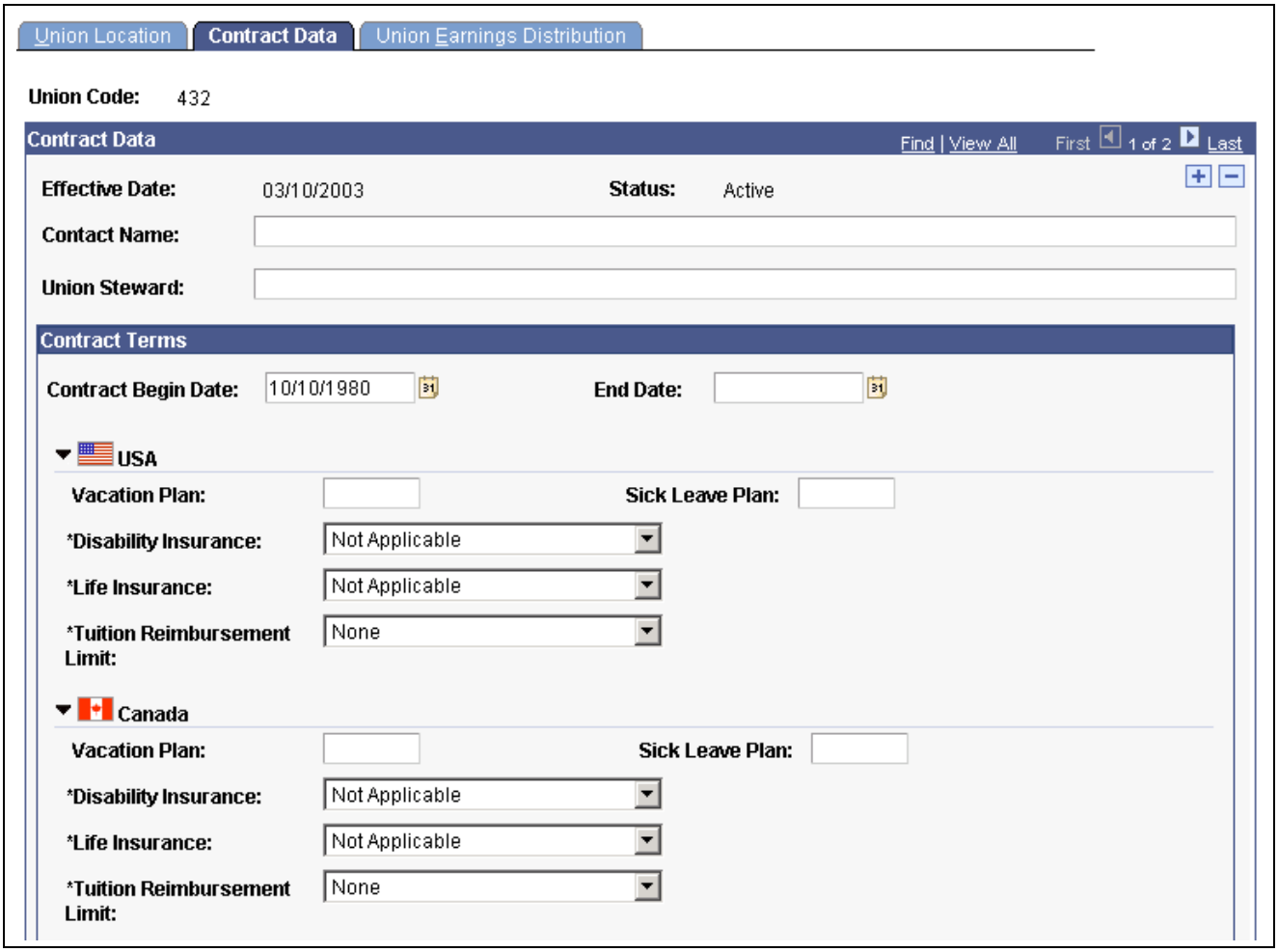
Month - Collective Agreement Enter the base month of the union category. This month is when you review employees and adjust salaries.

Union CNPJ Enter the union's CNPJ (*Cadastro Nacional de Pessoa Jurídica*) ID code.

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Entering Information on Union Contract Benefit Terms

Access the Union Table - Contract Data page.



Contract Data page

Contract Terms

Contract Begin Date and **End Date** — Enter the dates that the contract begins and ends.

(CAN) (USA)

Vacation Plan — Enter the code for the type of vacation plan administered.

Sick Leave Plan — Enter the code for the type of sick leave administered.

Disability Insurance — Indicate whether the union provides disability insurance for its members.

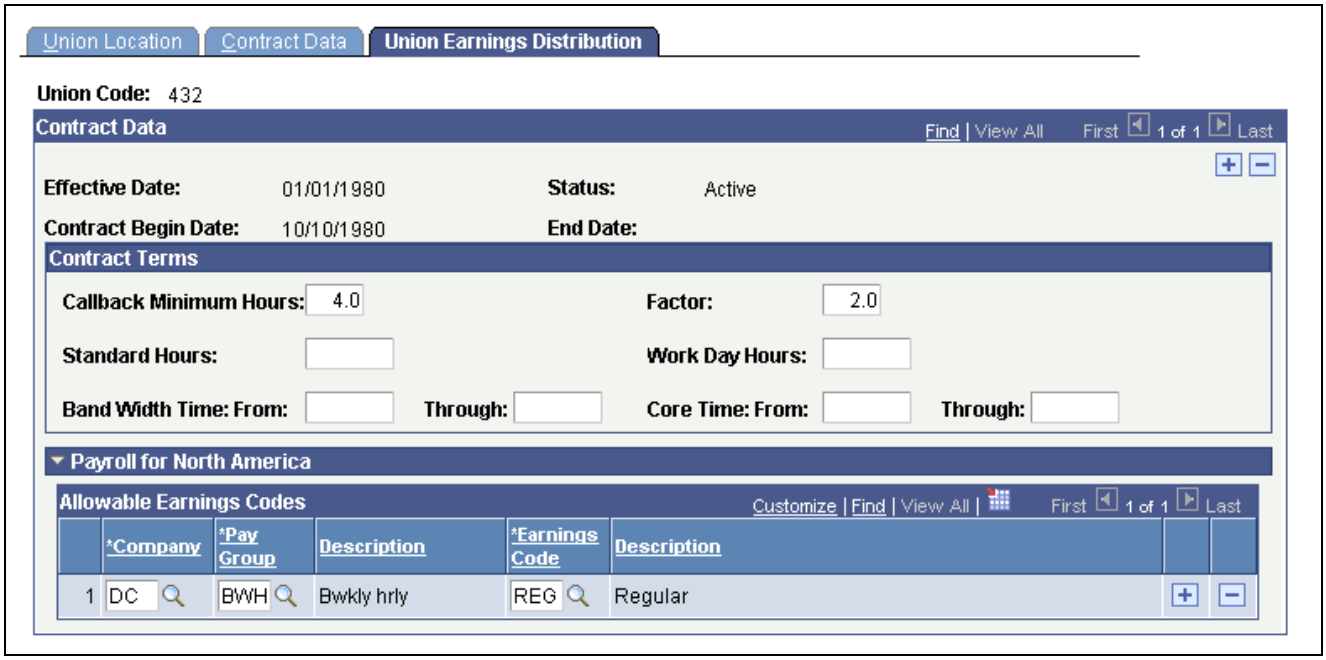
Life Insurance — Indicate whether the union provides life insurance.

Tuition Reimbursement Limit — Indicate whether the union provides tuition reimbursement and at what limit.

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Entering Additional Contract Terms

Access the Union Earnings Distribution page.



Union Earnings Distribution page

Contract Terms

Callback Minimum Hours Enter the minimum number of hours a worker would be paid for if they are called back to a job.

Factor Enter the rate at which union workers should be paid if they are called back to a job. For example, if the worker should receive the regular rate, enter *1*. If the worker should receive 1.5 times the regular rate, then enter *1.5*.

Payroll for North America

For each company and pay group combination, enter the earnings codes allowable for workers belonging to this union.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Jobs," Setting Up Pay Groups

(USF) Setting Up Unions

To set up U.S. Federal Government union and contract information use the Unions USF component (GVT_BU_UNION).

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Use the Unions USF to define codes and record data for unions to which agency workers belong. You or others in your agency might need information on union workers for collective bargaining agreement negotiations, grievance tracking, or pay step increases.

This section discusses how to:

- Set up general union details.
- Enter union contact and contract details.
- Enter union partnership and steward data.
- Enter additional agreement information.
- Specify allowable earnings codes for union members.

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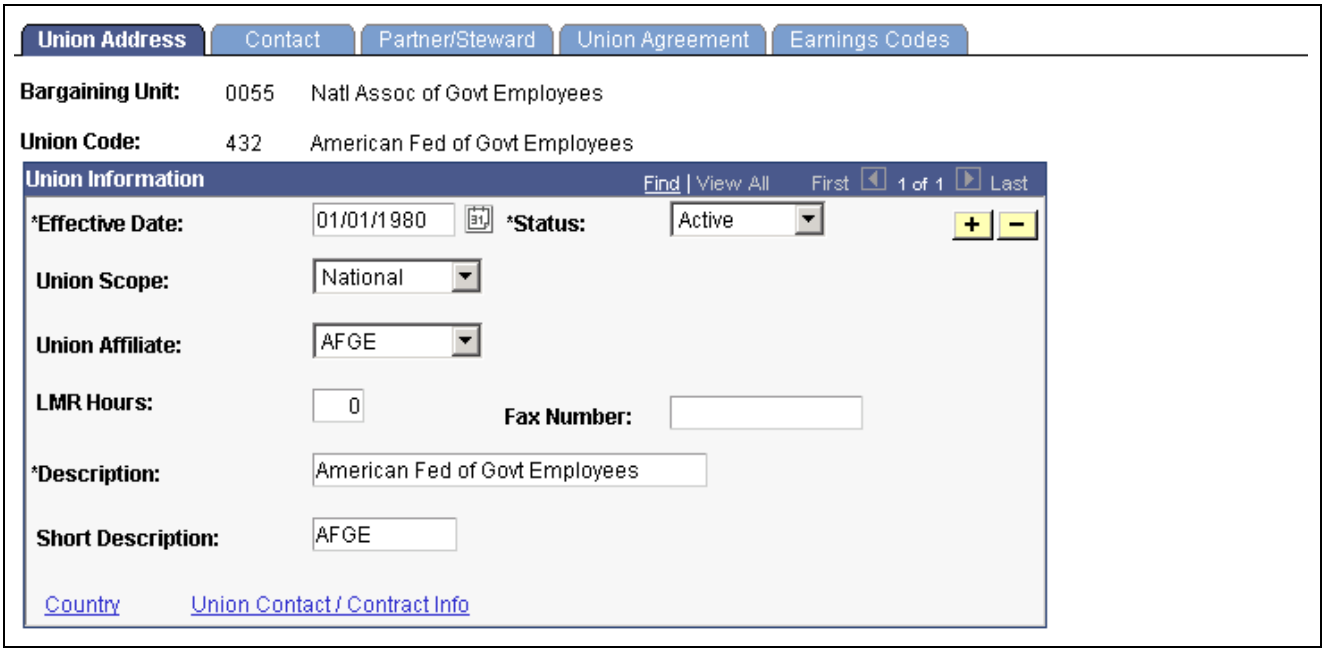
Pages Used to Set Up U.S. Federal Government Union and Contract Information

Page Name	Object Name	Navigation	Usage
Union Address	GVT_BU_UNION_TBL1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Unions, Unions USF, Union Address	Enter general details and address information for a union.
Union Address Information	GVT_BU_UNION_SEC1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Union Address Click the Country link to access the Union Address Information.	Enter the address information for this union.
Contact and Contract Info	GVT_BU_UNION_SEC2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Union Address Click the Union Contact/ Contract Info link to access the Contact and Contract Info page.	Enter contact and contract details for this bargaining unit. The contact information is specific to the contract.
Contact	GVT_BU_UNION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Contact	Enter contact information that is general for all contracts with this union.
Partner/Steward	GVT_BU_UNION_TBL3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Partner/Steward	Enter partnership and steward data for this bargaining unit.
Union Agreement	GVT_BU_UNION_TBL4	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Union Agreement	Enter additional contract terms for this bargaining unit.
Earnings Codes	GVT_BU_UNION_TBL5	Set Up HRMS, Product Related, Workforce Administration, Labor Administration , Unions, Unions USF, Earnings Codes	Enter allowable earnings codes data for bargaining unit members.

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Setting Up General Union Details

Access the Union Address page.



Union Address page

Assign union codes to workers on the Job Data - Job Labor page.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Union Scope Enter the union scope (local, national, worldwide).

Union Affiliate Enter the union affiliate type.

LMR Hours (labor management relations hours) Enter the labor management relations training hours required for union members or other personnel, if you want to track this information.

Country To enter the union's address information, click this link. The system displays the Union Address Information page.

Union Contact/Contract Info To enter the bargaining unit's contact and contract information, click this link. The Contact and Contract Info page appears.

Entering Country

Access the Union Address Information page.

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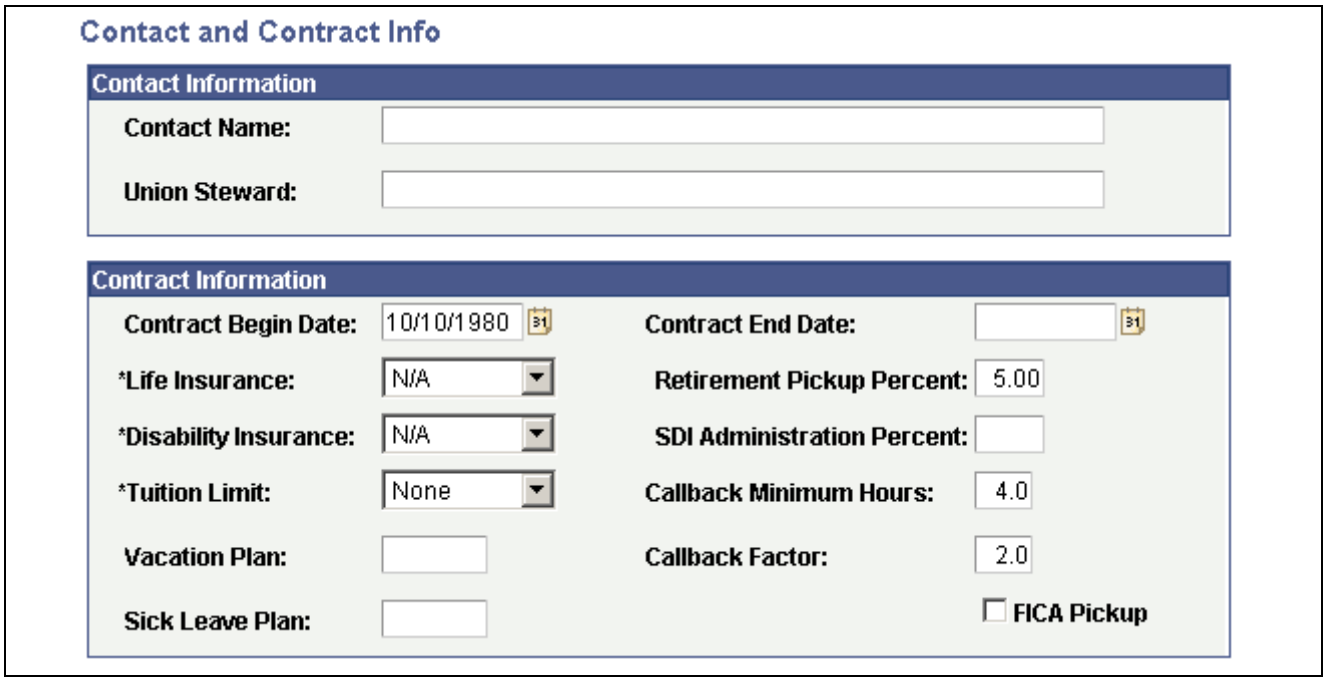


Union Address Information page

Select the appropriate country and enter the address information. If the address is already entered, click the Edit Address link to display the Edit Address Information page.

Entering Union Contact and Contract Information

Access the Contact and Contract Info page.



Contact and Contract Info page

Contact Information

Enter contact information that is specific for the contract.

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Contract Information

Disability Insurance Specify the amount the disability insurance offered bargaining unit members.

Retirement Pickup Percent Enter the retirement pickup percent for bargaining unit members' retirement plan under the contract.

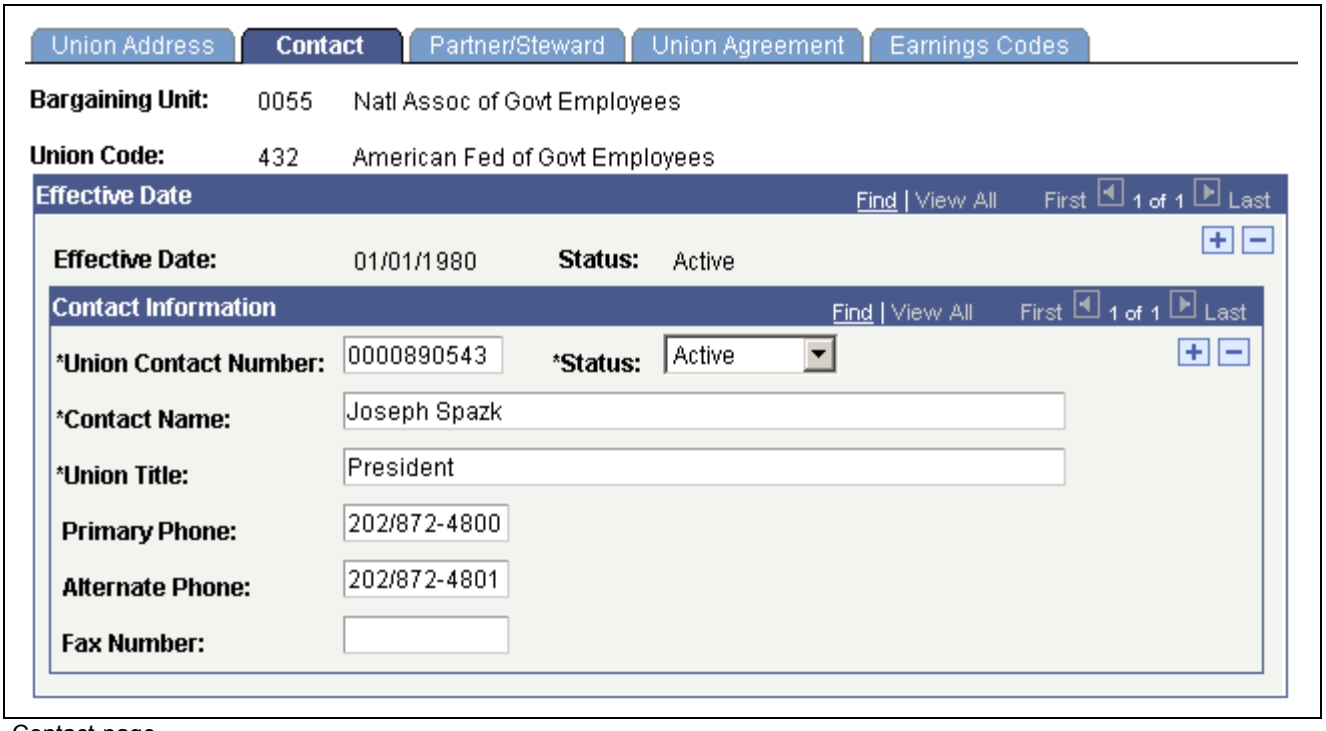
Tuition Limit Indicate the maximum amount of tuition provided each bargaining unit member, if any.

SDI Administration Percent (state disability insurance administration percent) Enter the percent amount paid to the state disability insurance.

Callback Factor Enter the rate at which bargaining unit members should be paid if they are called to a job. For example, if the worker should be paid at the regular rate, enter *1* as the factor. Or if the employee should be paid time and a half, enter *1.5*.

Entering Additional Contact Information

Access the Contact page.



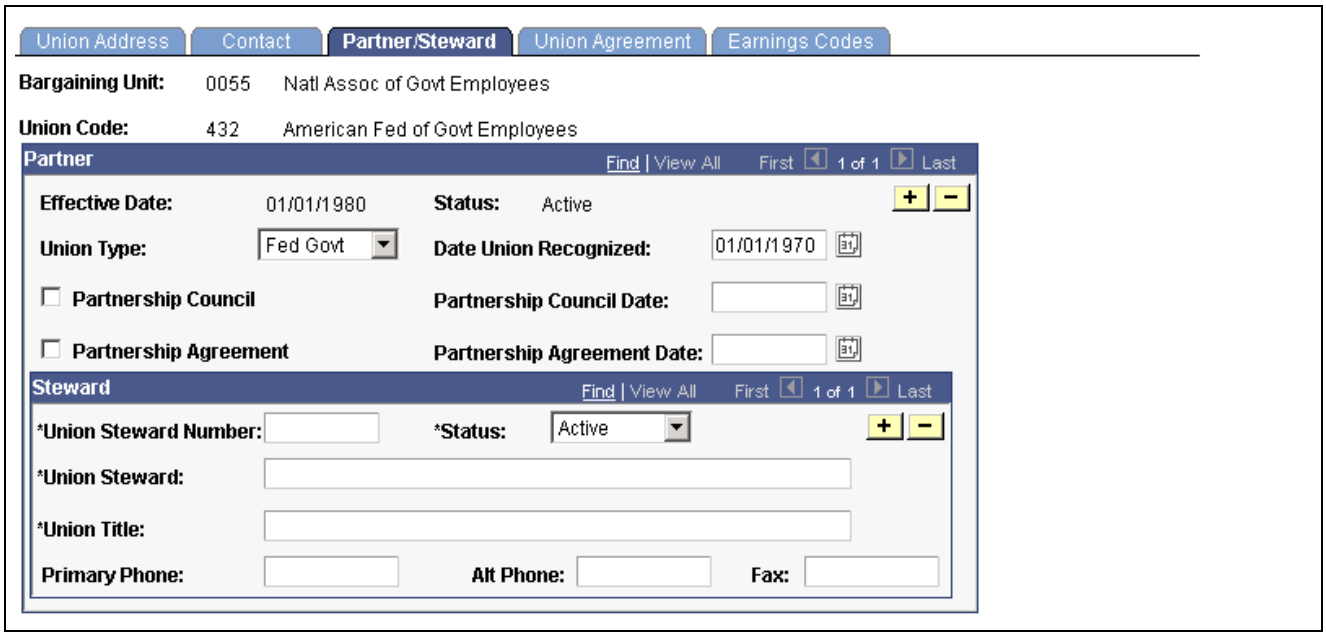
Contact page

Add contact information that is general for the union bargaining unit.

Entering Union Partnership and Steward Data

Access the Partner/Steward page.

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Partner/Steward page

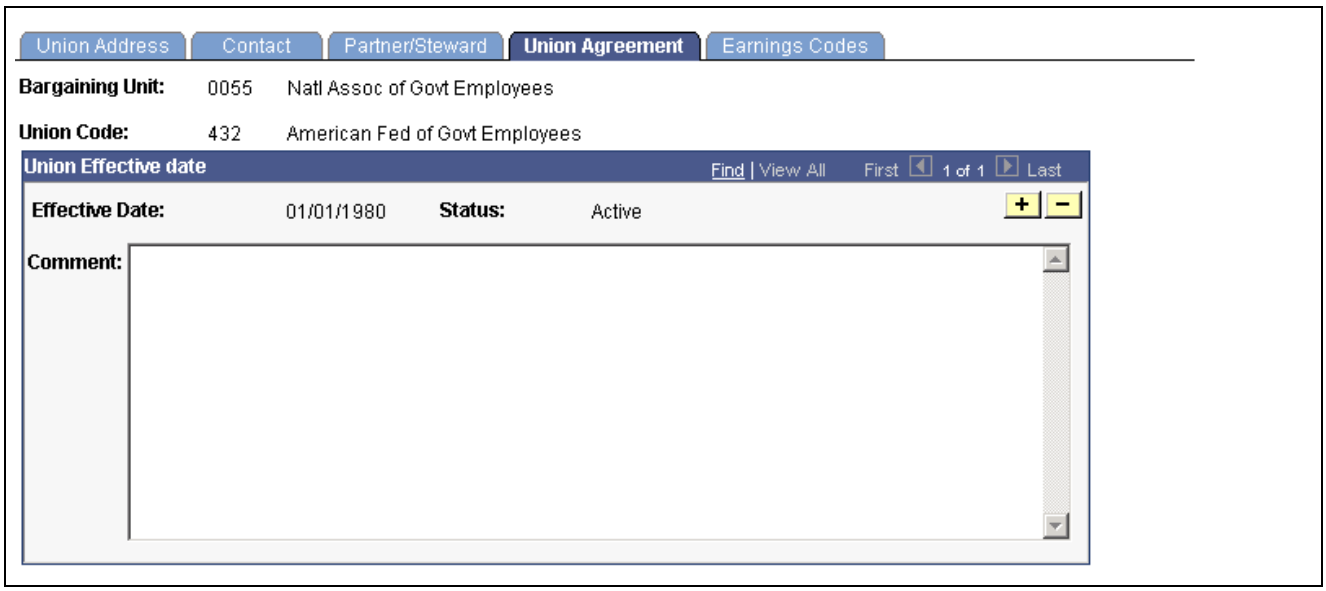
Partner

Union Type Indicate whether this bargaining unit is part of a private, public, or federal government union.

Date Union Recognized Enter the date the union was recognized by your agency.

Entering Additional Agreement Information

Access the Union Agreement page.



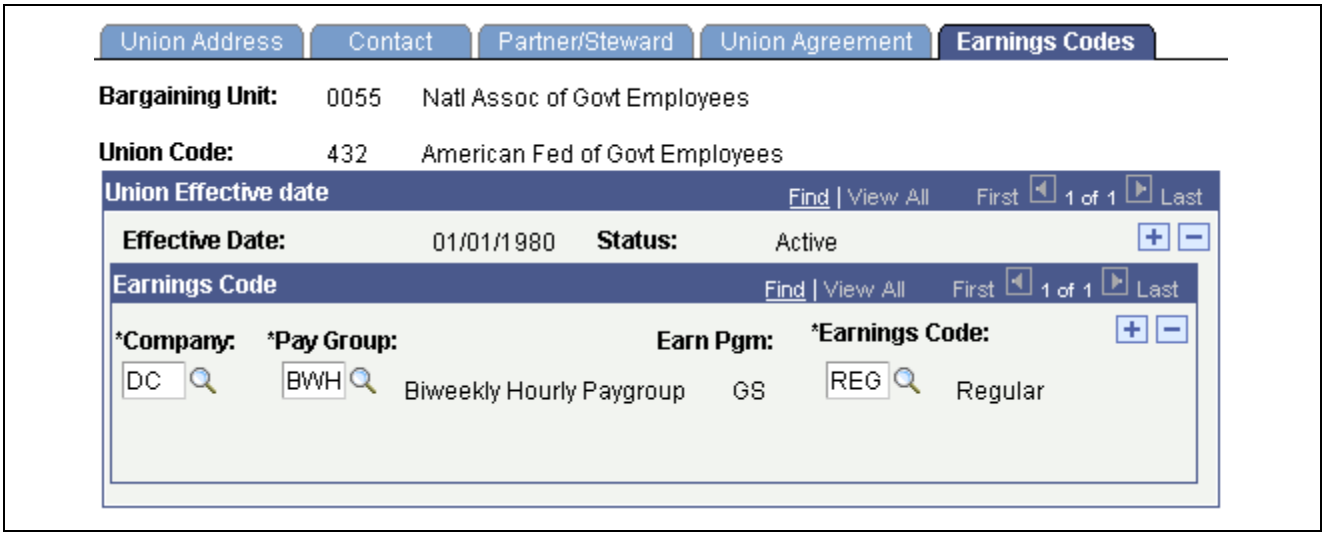
Union Agreement page

Type highlights of the union agreement in the space provided for bargaining unit/union agreement text. Enter more text than is visible in the group box, if needed. Use the inner scroll bar to navigate to text off of the screen.

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Recording Allowable Earnings Codes for Union Members

Access the Earnings Codes page.



Earnings Codes page

Note. The information on this page is for information only.

Company	Designate the company name.
Pay Group, Earn Pgm (pay group, earnings program)	Select the pay group. When you move out of this field, the system displays the associated earnings program.
Earnings Code	Select each earnings code that is valid for this union within each pay group.

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CHAPTER 4

Setting Up Labor Administration Data

This chapter lists common elements and discusses how to:

- Define seniority dates.
- Set up layoff and recall control tables.
- Set up labor agreement control tables.
- Define labor agreements.
- Set up Labor Administration disciplinary, grievance, and resolution classifications.

Defining Seniority Dates

To define seniority dates, use the Seniority Fields component (HR_SNRTY_FLDS_DEFN), Seniority Dates component (HR_SNR_DATE_TBL), and Tie Breakers component (HR_TIEBREAK_TBL).

This section provides an overview of seniority dates and discusses how to:

- Review the PeopleSoft system dates that are available for Manage Labor Administration seniority.
- Define seniority dates for Manage Labor Administration.
- Define tie breakers.

Understanding Seniority Dates

PeopleSoft calculates and displays a number of seniority dates on the Job Data - Employment Data page (EMPLOYMENT_DTA1). These fields are used throughout PeopleSoft Enterprise HRMS for various features (such as Benefits), but, since seniority rules can vary from labor agreement to labor agreement, they are not used for labor administration processing.

Instead, use the Seniority Dates page (HR_SNR_DATE_TBL) to define the seniority dates required to comply the labor agreements in effect at your organization. Associate the seniority dates with labor agreements on the Labor Agreements component (HR_LABOR_AGRMNT). The system displays the seniority dates associated with a person's labor agreement on the Job Data - Job Labor page (JOB_LABOR).

Examples of seniority dates you may want to create are:

- Seniority date for providing workers with employment rights.
- Seniority date providing workers with the ability to exercise preferences such as bidding on shifts and overtime.

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You can create seniority date types using existing system dates so that the system will insert the values from the existing fields into the seniority date you create. You can also create seniority dates to update and maintain manually. Maintain the dates for workers on the Job Data - Job Labor page.

Use seniority dates as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Tie Breakers

In the event that two workers are tied for seniority, you will need to apply a tie breaker that is in accordance with the workers' labor agreement. Define tie breaker types that are based on information in the system, such as birth date or national identification number, on the Tie Breakers page (HR_TIEBREAK_TBL) and associate them with labor agreements on the Labor Agreement component. Use tie breakers as sort criteria for the:

- Seniority List report
- Candidate List report
- Reinstatement roster
- Layoff roster
- Recall roster

Note. For lottery-style tie breakers, where the unions decide the seniority order, you can manually change people's ranking on the roster by changing their rank number accordingly.

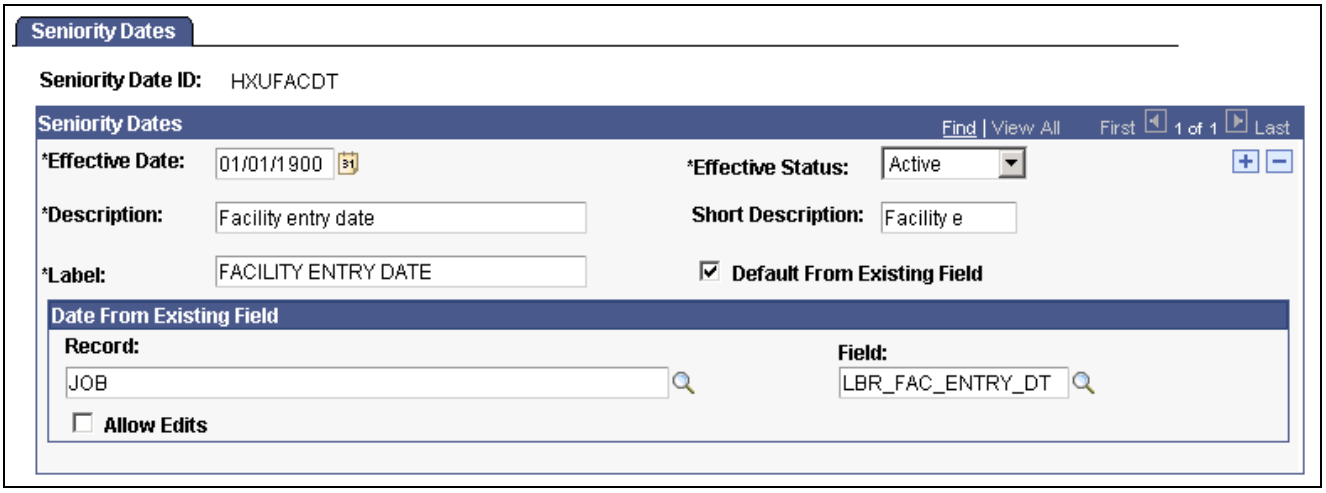
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Pages Used to Set Up Seniority Dates

Page Name	Object Name	Navigation	Usage
Seniority Fields	HR_SNRTY_FLDS_DEFN	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Seniority Date Fields, Seniority Fields	Review the PeopleSoft system dates that are available for Manage Labor Administration seniority
Seniority Dates	HR_SNR_DATE_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Seniority Dates, Seniority Dates	Set up seniority dates to track a worker's seniority for labor administration purposes. You can base the seniority dates on existing system values or create new dates. Attach the dates you create here to labor agreements.
Tie Breakers	HR_TIEBREAK_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Tie Breakers, Tie Breakers	Set up different types of ways to break ties between two workers who otherwise have equal seniority.

Setting Up Seniority Dates

Access the Seniority Dates page.



Seniority Dates page

Label Enter the label to appear next to this date field on the Job Data - Job Labor page.

Default From Existing Field Select if this field's value defaults from an existing PeopleSoft system field. When you select this check box, the system makes the Record and Field fields available for entry.

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Date From Existing Field

Record and **Field** — Select the record and field you want to use.

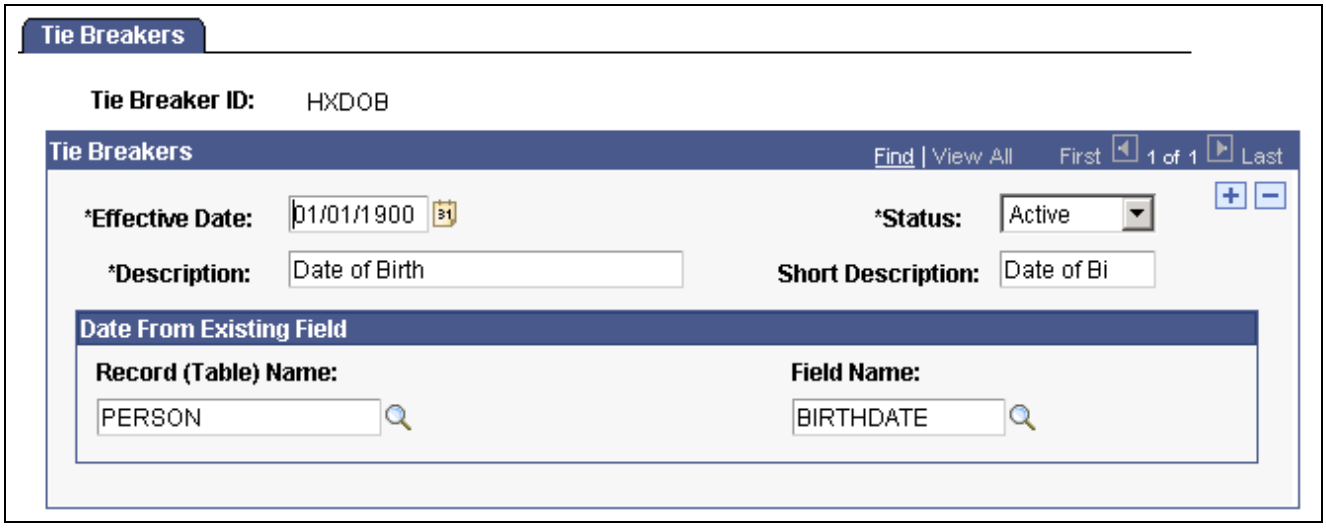
For example, to create a seniority date called Dept Entry that uses the Department Entry Date value from the Work Location page as a seniority date, select the JOB record and the DEPT_ENTRY_DT field. The system will display the Dept Entry seniority date on the Job Labor Workers page and automatically populate it with the date from the Department Entry Date field on the Work Location.

The system only makes those records and fields displayed on the Seniority Date Fields page available on this page.

Allow Edits — Select to make the field available for entry on the Job Labor page, enabling you to override the default value.

Setting Up Tie Breakers

Access the Tie Breakers page.



Tie Breakers page

Date From Existing Field

Record (Table) Name and **Field Name** — Select the record and field value you want to use as a tie breaker. Only select records are available.

Setting Up Layoff and Recall Control Tables

To set up layoff and recall control tables, use the Layoff Exemption Reasons component (HR_LAY_EXEM_TBL), Recall Expiration Rules component (HR_RCL_EXP_TBL), Employee Roster Status component (HR_LBR_EEST_TBL) and Recall Reason component (HR_RCL_RSN_TBL).

This section discusses how to set up:

- Layoff exemption reasons.

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- Recall expiration rules.
- Employee roster statuses.
- Recall reasons.

See Also

Chapter 6, “Managing Layoffs and Recalls,” page 55

Understanding Recall Rights

Workers that have been bumped to a lower level job or workers that were laid off can have rights for vacant positions. Labor agreements specify how long after being bumped or laid off a worker can have rights to reemployment and what circumstances might terminate their recall rights.

For example, workers under labor agreement ABC and who have been with the company for four or more years have first rights on any new vacancies in the organization for twelve months following a layoff while workers who have been with the company for less than four years have recall rights that expire after six months. Recall rights for workers may be terminated in the event that they refuse an offer of reemployment from the company.

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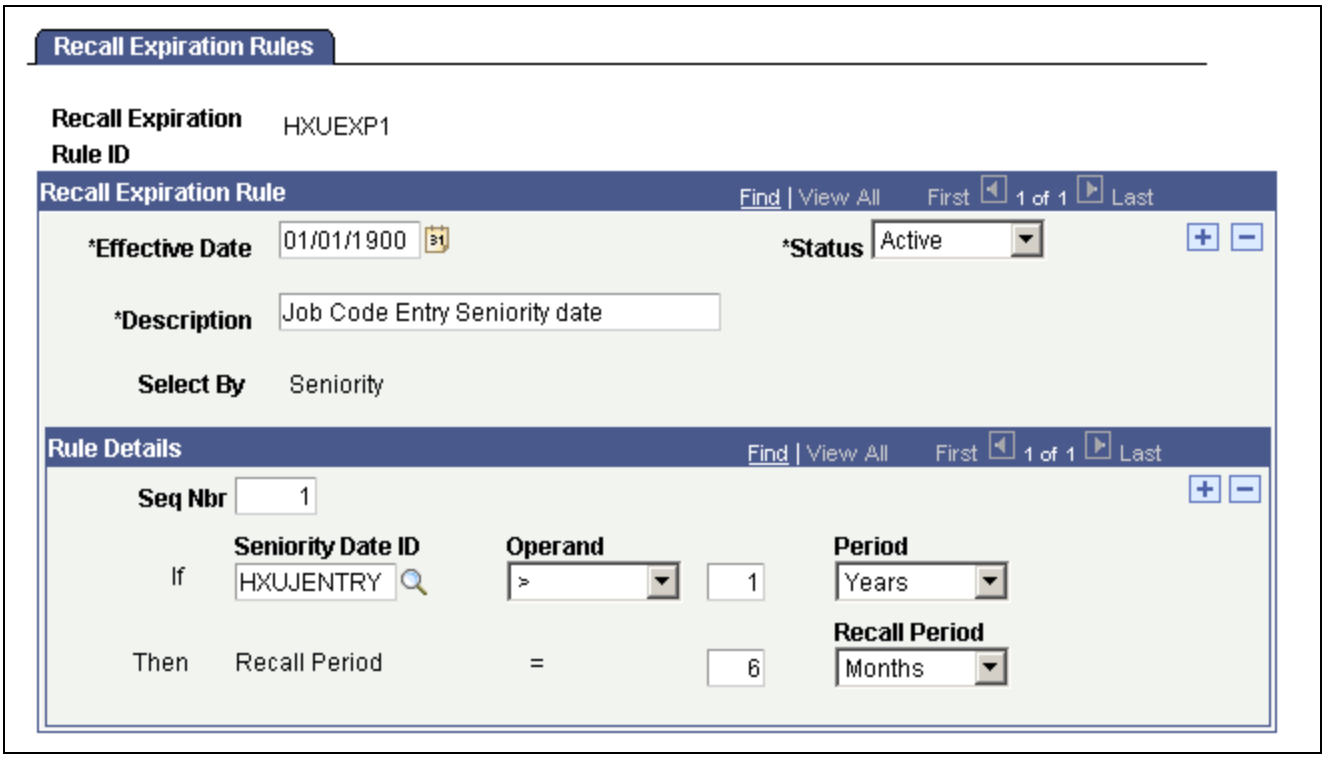
Pages Used to Set Up Layoff and Recall Control Tables

Page Name	Object Name	Navigation	Usage
Layoff Exemption Reasons	HR_LAY_EXEM_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Exemption Reasons, Layoff Exemption Reasons	Create reasons a worker could be exempt from layoff. Attach these reasons to workers on the Job Labor page. The system does not include workers who are exempt from layoffs in the group population when you generate a layoff.
Recall Expiration Rules	HR_RCL_EXP_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Expiration Rules, Recall Expiration Rules	Set up rules to govern the expiration of recall rights. Attach recall expiration rules to a labor agreement.
Employee Roster Status Table	HR_LBR_EEST_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Employee Roster Status, Employee Roster Status Table	Define the statuses you need to manage your roster during a layoff or recall. Assign people roster statuses on the Layoff, Recall or Reinstatement Roster List pages.
Recall Reason Table	HR_RCL_RSN_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Reason, Recall Reason Table	Define reasons for allocating workers with recall rights.

Setting Up Recall Expiration Rules

Access the Recall Expiration Rules page.

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Recall Expiration Rules page

Note. The system determines that a recall right has expired when the defined expiry date is less than current system date.

Recall Expiration Rule

Select By

Select one of the following options:

- *Seniority*

  Select if the recall expiration date is calculated using seniority as determined by a seniority date.

  Note. If a recall expiration rule is based on a seniority date and this date is blank for a person, then the system will not create automatic recall rights for the worker. You will have to enter rights manually on the Maintain Recall Rights page (HR_RCL_RIGHTS).

- *Layoff Date*

  Select if the recall expiration date is calculated from the layoff date.

- *No Recall*

  Select if there is no recall.

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Note. You must set up at least one recall expiration rule with no recall because the Recall Expiration Rule field on the Seniority Rules page (HR_LABOR_AGRDEFN3) is a required field. If a labor agreement has no predetermined rules around recall rights processing then attach a No Recall type rule to the labor agreement. When a layoff is processed for workers in covered by a labor agreement with a No Recall rule, the system will not create automatic recall rights those candidates being laid off. The Recall/ Reinstatement process will also not process recall rights for candidates covered by a labor agreement with a No Recall recall expiration rule.

Rule Details for Seniority Based Recall Expiration Rules

Enter multiple Rule Details rows to create different recall expiry periods for different seniority categories.

Seq Nbr Enter the sequence in which the system should process this rule detail.

Seniority Date ID Select the ID of the seniority date you want the rule to use to calculate seniority for the purpose of recall for this rule detail line.

Operand Select the operation symbol.

Period Enter a number in the preceding field and then select the period of time it refers to. For example, enter *1* in the preceding field and *Years* in this field to indicate that the period of seniority is one year.

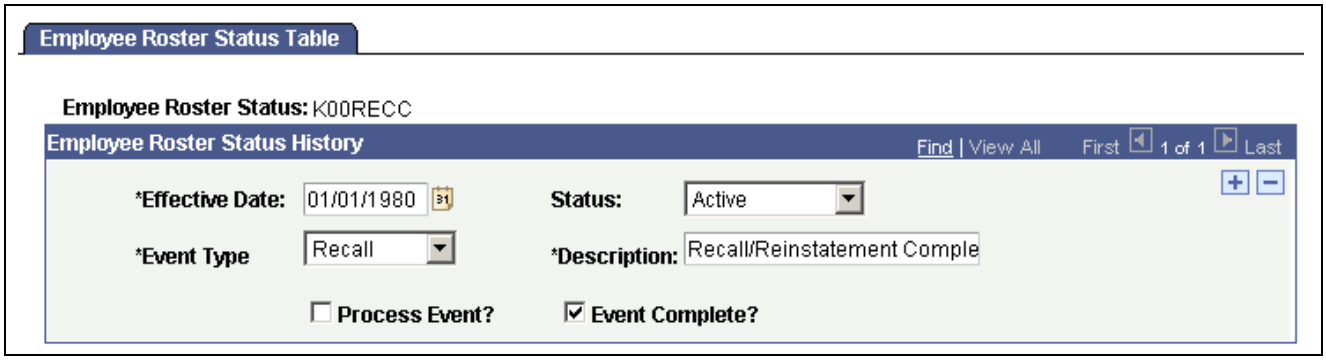
Recall Period Enter a number in the preceding field and then select the period of time it refers to. For example, enter *6* in the preceding field and *Months* in this field to indicate that recall rights expire after six months for workers with this seniority range.

Rule Details for Layoff Date Based Recall Expiration Rules

Period Enter a number in the preceding field and then select the period of time it refers to. For example, enter *6* in the preceding field and *Months* in this field to indicate that recall rights expire six months after layoff.

Setting Up Employee Roster Statuses

Access the Employee Roster Status Table page.



Employee Roster Status Table page

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Event Type Select whether the status is for a *Layoff* or *Recall* event. *Recall* events also apply to Reinstatements.

Process Event? Select so that when you process the layoff, recall, or reinstatement processes the system will process people with this status and insert a new job data record for the event.

For example, create a status called *Layoff Accepted* and select the Process Event? check box for the status. When you assign *Layoff Accepted* to a person on a layoff roster and then process the layoff, the system will insert a new job data record for the person processing their layoff.

Event Complete? Select if this status indicates the completion of the event on the roster. You should only select this check box for two Employee Roster Statuses: one for an event type of *Layoff* and one for an event type of *Recall*.

When workers are successfully processed using the Layoff (HR_LAY_EXEC) or Recall or Reinstatement processes (HR_REIN_EXEC), the system reads the relevant Event Complete? value from this page and sets all processed workers to this status to prevent them from being reprocessed.

Setting Up Labor Agreement Control Tables

To set up labor agreement control tables use the Labor Job Classes component (HR_LBR_JOB_CLS_TBL) and Labor Facilities component (HR_LBR_FAC_TBL).

Before you can set up labor agreements you need to define labor job classes and labor facilities. This section discusses how to set up:

- Labor job classes.
- Labor facilities.

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Pages Used to Set Up Labor Agreement Control Tables

Page Name	Object Name	Navigation	Usage
Labor Job Class	HR_LBR_JOB_CLS_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Job Classes, Labor Job Class	Set up job labor classes to use in labor agreements. Labor classes are required to group and rank job codes to create a bumping hierarchy.
Labor Facilities	HR_LBR_FAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Facilities, Labor Facilities	Set up labor facilities as required to administer the labor agreement. They are used to identify worker sites. Facilities can be used when defining Layoff or Recall events as well as a selection parameter on the Seniority Report. They are not related to the Work Location values.

Defining Labor Agreements

To define labor agreements use the Labor Agreement component (HR_LABOR_AGRMNT) and Employee Categorization component (EMPL_CTG_L1). To clone an existing labor agreement use the Clone Labor Agreement component (HR_CLONE_LBR_AGRMT).

This section discusses how to:

- Define general labor agreement terms.
- Assign job codes to labor agreements.
- Assign seniority rules and tie breakers.
- Assign facilities to labor agreements.
- Define labor agreement employee categories.
- Clone labor agreements.

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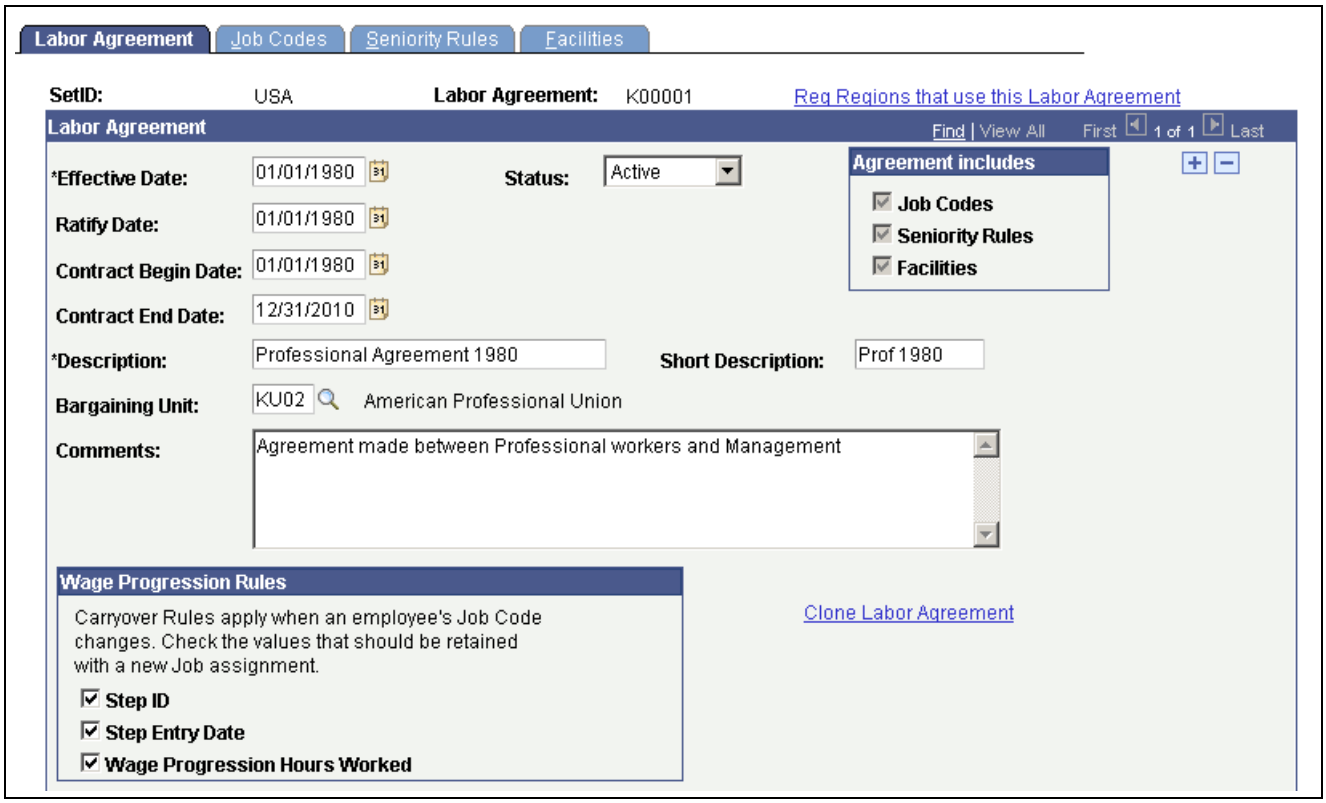
Pages Used to Define Labor Agreements

Page Name	Object Name	Navigation	Usage
Labor Agreement	HR_LABOR_AGR_DEFN1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Labor Agreement	Define general information about labor agreements.
Job Codes	HR_LABOR_AGR_DEFN2	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Job Codes	If you want the system to validate the job code assigned to a worker Job Data - Job Information page (JOB_DATA_JOBCODE), enter job codes and associated information here.
Seniority Rules	HR_LABOR_AGR_DEFN3	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Seniority Rules	If the agreement includes rules regarding seniority, layoffs, and recalls, assign the recall expiration rule, seniority dates and tie breakers.
Facilities	HR_LABOR_AGR_DEFN4	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Labor Agreement, Facilities	If you are using facilities to manage layoff and recall events, assign the labor facilities that are tied to this agreement.
Labor Agreement Categories	EMPL_CTG_L1	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement, Employee Categorization , Labor Agreement Categories	If you use tiered pay plans, define labor agreement categories and associate them with labor agreements.
Clone Labor Agreement	HR_CLONE_LBR_AGRMT	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Clone Labor Agreement, Clone Labor Agreement	Clone an existing labor agreement.

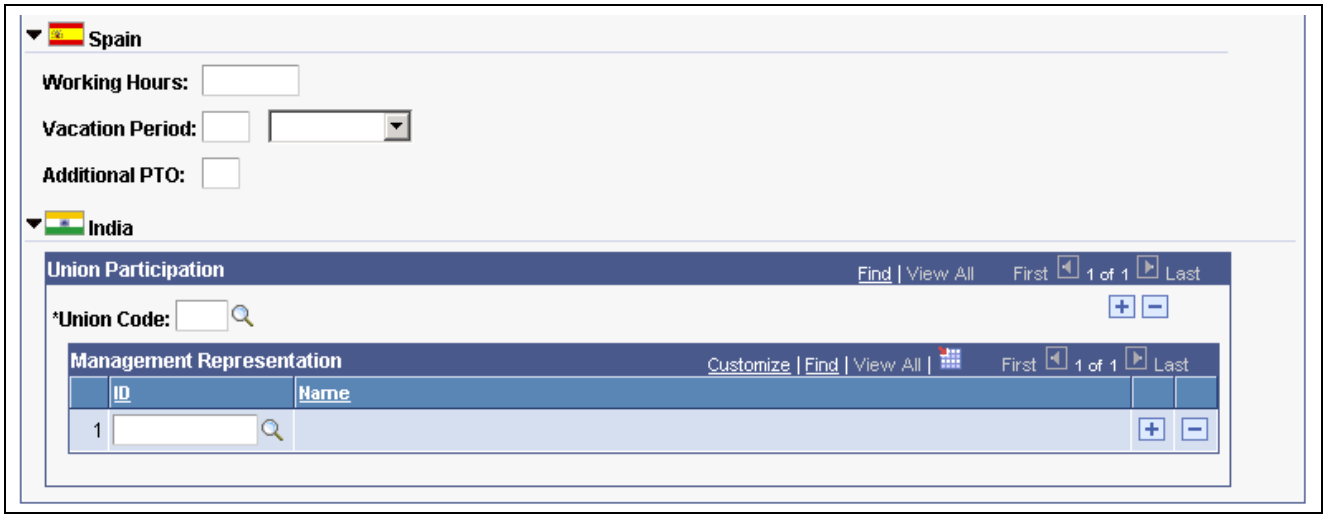
Defining General Labor Agreement Terms

Access the Labor Agreement page.

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Labor Agreement page (1 of 2)



Labor Agreement page (2 of 2)

Assign labor agreements to workers on the Job Data - Job Labor page (JOB_LABOR).

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Click the Reg Regions that use this Labor Agreement to review the regulatory regions that can use this labor agreement. Only workers assigned to one of these regulatory regions can be assigned to this labor agreement. Available regulatory regions are determined by the SetID assigned to the labor agreement.

Effective Date The system will only make labor agreements that are effective as of the Job Data row effective date available on the Job Labor page.

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Ratify Date Enter the date the labor agreement was ratified. This field is information only.

Contract Begin Date and **Contract End Date** Enter the begin and end dates of the labor agreement. The begin date defaults from the Effective Date but can be changed. These fields are for information only.

Bargaining Unit Select the bargaining unit for this agreement.

Note. Bargaining units have a one to one relationship with labor agreements. You cannot assign a bargaining unit to more than one labor agreement.

The system will only display those bargaining units that are not already assigned to another labor agreement in the search window.

Clone Labor Agreement Displays the Clone Labor Agreement page.

See Chapter 4, "Setting Up Labor Administration Data," Cloning Labor Agreements, page 43.

Agreement Includes

Job Codes The system selects this check box when you set up information on the Job Codes page.

See Chapter 4, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements, page 36.

Seniority Rules The system selects this check box when you set up information on the Seniority Rules page.

See Chapter 4, "Setting Up Labor Administration Data," Assigning Seniority Rules and Tie Breakers, page 39.

Facilities The system selects this check box when you set up information on the Facilities page.

See Chapter 4, "Setting Up Labor Administration Data," Assigning Facilities, page 40.

(CAN) (USA) Wage Progression

Select if any of the following wage progression carry over options apply to the workers covered by this labor agreement when they change job codes in the Job Data pages:

Step ID Select to have the system carry the worker's salary plan step to their newly assigned job code's pay plan. You can override the default value, if required.

Leave this check box clear if you want to always manually assign the step with a job code change.

Step Entry Date Select to have the system carry the worker's salary step entry date to their newly assigned job code's step entry date. You can override the default value, if required.

Leave this check box clear to have the system insert the effective date of the new Job Data row as the new step entry date.

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Wage Progression Hours Worked

Select to have the Update Wage Progression process carry over the worker's time worked towards a wage progression in their new job code.

Leave this check box clear to have the system reset workers' accumulated time to zero with the new job assignment.

(ESP) Spain

Working Hours

Enter the annual number of working hours as agreed upon by the labor agreement.

Vacation Period

Define the vacation period as agreed upon by the labor agreement. You have the option of defining the vacation period in *Months, Natrl Days* (natural days), *Weeks,* or *Work Days.*

Natural days are like calendar days. They include weekends and holidays.

Work days are like regular working days. They do not include weekends and holidays. For example, let's say that an employee's regular work days are Monday through Friday, and the employee is entitled to 23 work days of vacation, as defined in the employee's labor agreement. The employee can take a vacation from July 1 to July 31, using 23 work days. This is calculated as 4 weeks x 5 work days plus 3 more work days.

Additional PTO (additional paid time off)

Enter the amount of additional PTO *(dias moscosos),* if it applies to the labor agreement. Depending on the conditions of the labor agreement, an employee may or may not carry an additional PTO balance from one year to the next. Sometimes, if an employee does not use additional PTO within the current year, the employee will lose those days. Other times, it is possible to carry additional PTO balances to the next year.

(IND) India

Union Code

Select the appropriate Union Code. This is defined in the Unions component.

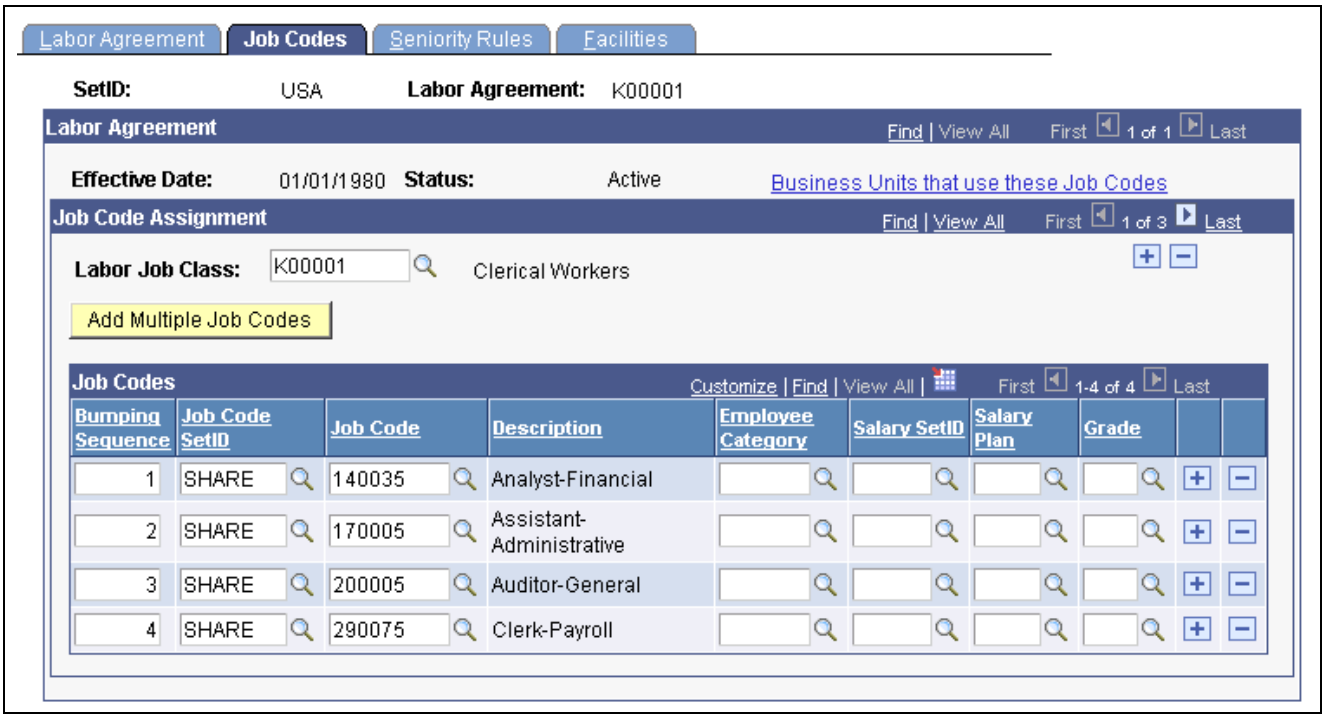
Management Representation ID

Enter the employee ID of the management representative to the union. This field should not be left empty if a Union Code is entered.

Assigning Job Codes to Labor Agreements

Access the Job Codes page.

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Job Codes page

The system uses the information you enter on this page to:

- Validate the assigned job code with the assigned labor agreement on the Job Data pages.

  Select a Labor Job Class and then choose the job codes that fall under that class for this labor agreement.

  Note. If you enter job codes for this labor agreement on this page, you can only assign workers in this labor agreement (assigned on the Job Labor page) to one of those job codes. The system will not let you save the Job Data record if the job code is not valid with the labor agreement.

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

- Rank job codes in this labor agreement to manage bumping rights in the event of a layoff.

  Note. The management of bumping rights is a manual process. Use the Bumping report, which provides the details from the Job Code Assignment page as well as a history of a worker's job information, to help you manage bumping.

  See Chapter 6, "Managing Layoffs and Recalls," Running the Bumping Report, page 81.

- Assign employee categories to the job codes in this labor agreement to create wage tiers.
- Assign the salary plan and grade you want to assign to people on the Job Data - Salary Plan page (JOB_DATA_SALPLAN).

  The system will use these default values for people with this job code and labor agreement combination instead of the default values from the Location (LOCATION_TABLE) or Job Code components (JOB_CODE_TBL).

  See Chapter 7, "Managing Wage Progression," page 83.

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See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Salary Plan Information.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation".

Note. You can take advantage of none, one, or any combination of these features.

Labor Job Class Select a class of jobs to identify the job codes selected in the Job Codes group box. Use this value to manage layoff bumping hierarchies.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Agreement Control Tables, page 31.



Click to display the Add by Job Code page. Search for job codes by Job Code SetID and Job Family and select those job codes you want to add to the Job Codes grid for this Labor Job Class.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Jobs".

Job Codes

Click the Business Units that use these Job Codes to view the business units that use the job codes you've selected in the Job Codes grid. When you create a Job Data record for a worker covered by this labor agreement, ensure that you select the appropriate business unit to enable you to assign them to one of these job codes.

Bumping Sequence Enter the job code's position in the bumping sequence. The sequence defines a worker's place in the bumping hierarchy. Bumping is the practice of allowing a worker with more seniority to replace a junior worker in another department or job as long as the senior worker is qualified.

Job Code SetID and **Job Code** Select the SetID and job code.

Note. You can only add a job code to a labor agreement once for a selected Labor Job Class unless you select an Employee Category as an additional qualifier.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Jobs," Classifying Jobs.

Employee Category If you are using tiered wage assignment, select the employee category for this job code.

This enables you to list a job code more than once and to assign different salary plans for different classes of workers. For example, if pilots hired prior to 1990 are on one pay plan while all those hired later are on another, create two employee categories to distinguish between these two groups on the Labor Agreement Categories page. Enter two rows with the pilot job code, assign one the pre-1990 employee category and the other the post-1990 category and then assign the appropriate salary plan for each row.

See Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreement Categories, page 40.

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Salary SetID, Salary Plan, and Grade

Select a salary plan (with SetID) and grade to associate with this job code and labor agreement.

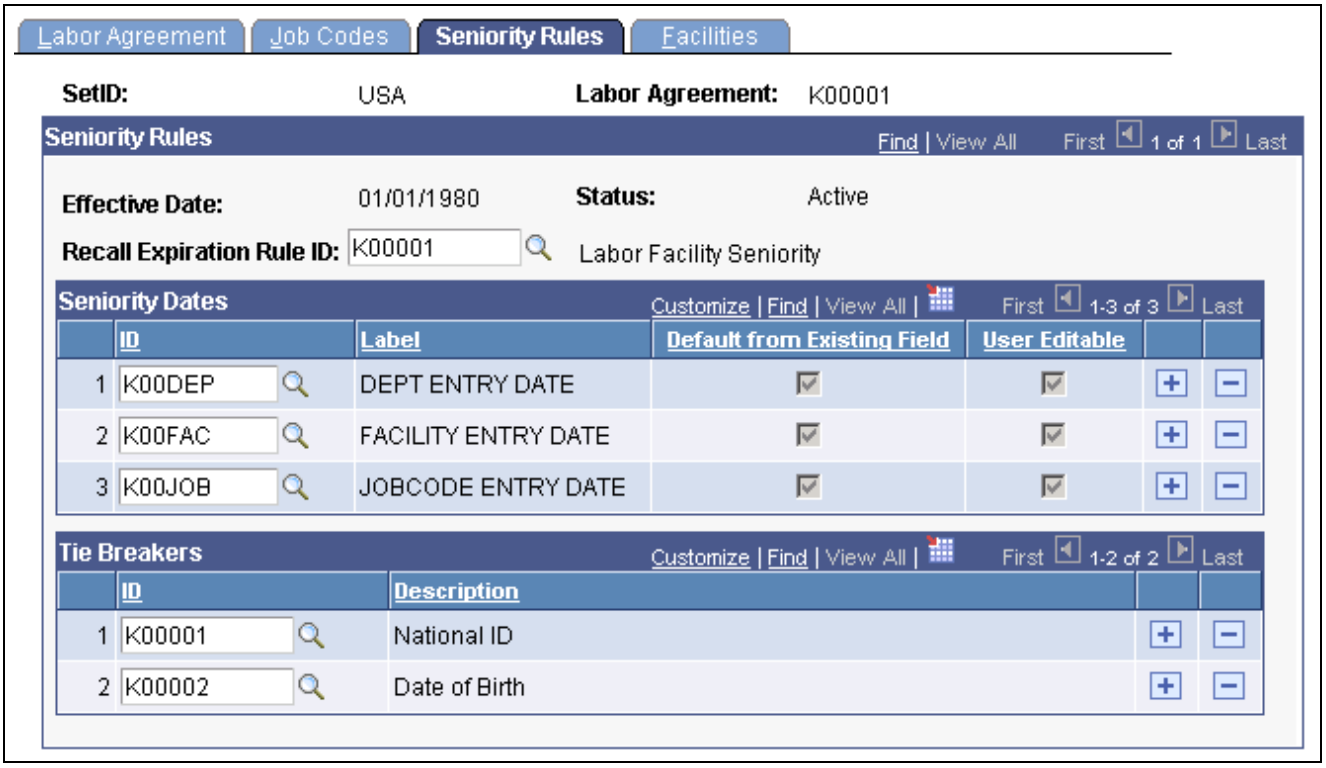
The system will assign this salary plan and grade on the Job Data - Salary Plan page when you assign a worker to this job labor agreement and job code.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Salary Plan Information.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation".

Assigning Seniority Rules and Tie Breakers

Access the Seniority Rules page.



Seniority Rules page

Recall Expiration Rule ID

Select the recall expiration rule to associate with this labor agreement. The system will determine recall rights of workers assigned to this labor agreement using this rule.

If the labor agreement does not have any predetermined rules about the expiration of recall rights, select a No Recall recall expiration rule. The layoff, reinstatement, and recall processes do not create recall rights for workers in a labor agreement with a No Recall recall expiration rule.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Recall Expiration Rules, page 28.

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Seniority Dates

Select the seniority dates associated with this labor agreement. When you assign a worker to this labor agreement, the system will display the seniority date fields you select here on the Job Labor page. On the Job Labor page, if the dates default from an existing field, the system will populate them with the value from the existing field. Only the seniority dates that you associate with this labor agreement are available for selection in the layoff and recall rosters, and seniority or candidate list reports for this labor agreement.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Seniority Dates, page 25.

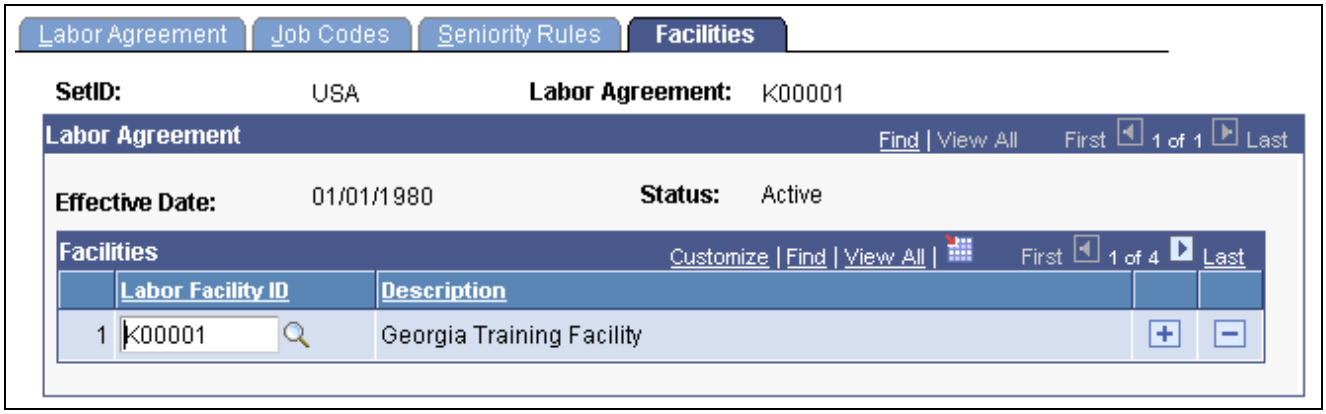
Tie Breakers

Select the tie breakers associated with this labor agreement. In cases where more than one worker has the same length of seniority, you can use one of the selected tie breakers to determine priority. The tie breakers you associate with this labor agreement are the only ones available on layoff or recall roster, or when running a seniority or candidate list report for this labor agreement.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Tie Breakers, page 26.

Assigning Facilities

Access the Facilities page.



Facilities page

Facilities

Assign facilities to this labor agreement to enable you to categorize workers by facilities, in addition to other methods of grouping, such as by job code, department, and location. Facilities enable you to define groups for layoff and recalls or on the seniority or candidate list reports.

Note. If you enter labor facility IDs for this labor agreement on this page, you can only select from those facilities when you assign a worker to this labor agreement on the Job Labor page.

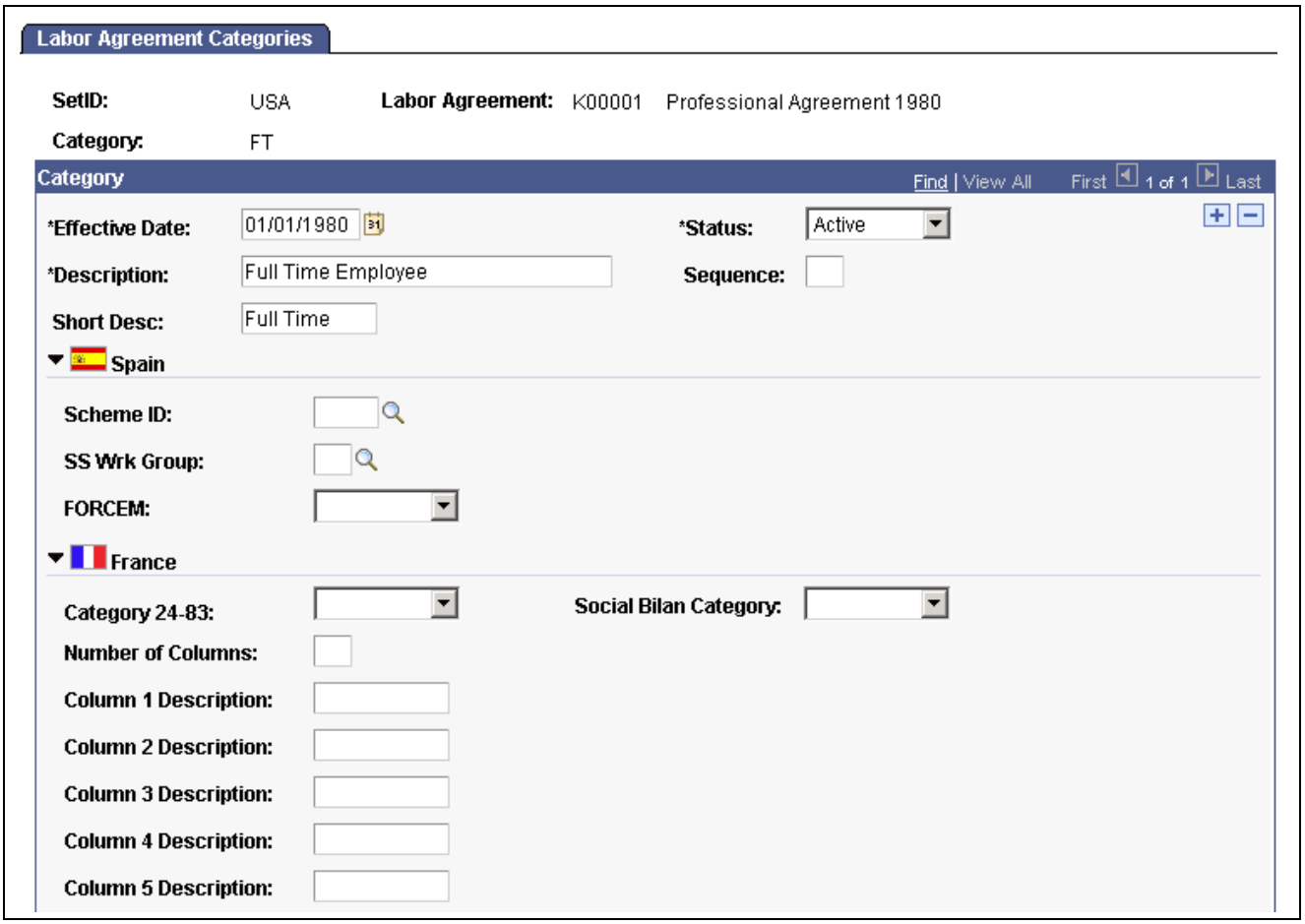
See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Agreement Control Tables, page 31.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

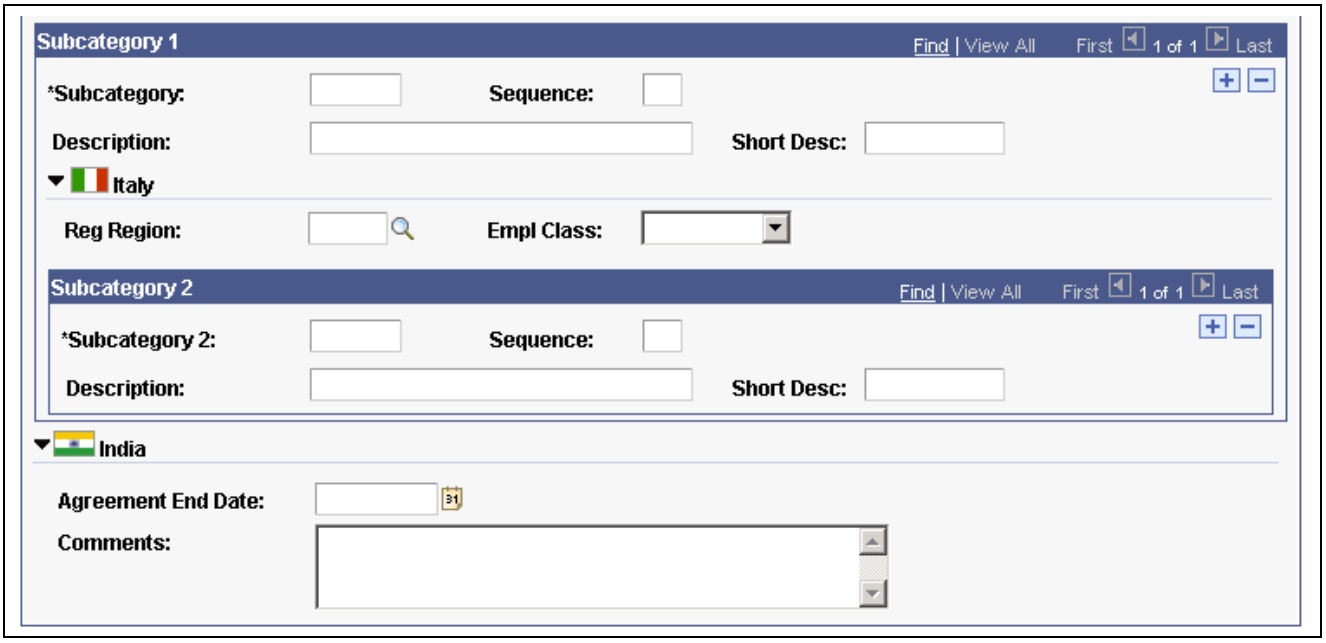
Defining Labor Agreement Categories

Access the Labor Agreement Categories page.

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Labor Agreement Categories page (1 or 2)



Labor Agreement Categories page (2 of 2)

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Labor agreement categories are used on the Labor Agreement - Job Codes page for administering tiered wage assignments for a job code. You must have set up a labor agreement before you can create a labor agreement category. Create and save the labor agreement, create the labor agreement categorizations, and then return to the Labor Agreement component to update the Job Code page. Employee categories are assigned to workers on the Job Data - Job Labor page.

Note. You do not need to set up labor categories if your organization does not use tiered pay plans.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering National Labor Agreement Data.

Category Enter the category name. Categories can be used to create tiered pay rate on the Labor Agreement - Job Codes page.

Each labor agreement has its own categories, subcategories, and naming conventions. For example, the French Collective Labor Agreement *KFO1* (which is for *Civil Engineering)* classifies employees in three categories: *CAD* (for *Executive), ETAM* (for *Manager),* and *OUV* (for *Workman)*. In Germany, use categories, such as *Blue Collar Worker* or *White Collar Worker*.

Note. When you set up new employee categories, remember that PeopleSoft Enterprise Human Resources reserves categories starting with zero for use as system data.

Sequence Use to number the categories in the order the system should process them.

(ESP) Spain

Scheme ID Enter the social security scheme ID to tie employee categories with social security.

Note. You must enter a scheme ID before selecting the social security work group.

SS Wrk Group (social security work group) Every Spanish employee must belong to a work group defined by the Spanish government. Select a group from available options.

FORCEM *(Fundacion para la Formacion Continua)* The Spanish government requires employers to report on their employees' FORCEM*(Fundacion para la Formacion Continua)* categories. Values are:

- *None*
- *Executive*
- *Manager*
- *No Qualifi* (No Qualified Worker)
- *Office Wor* (Office Worker)
- *Qualified* (Qualified Worker)

(FRA) France

Category 24-83 Select the applicable code to link an employee category to a regulatory 2483 category. The Category 24-83 code is used for the 2483 Training Report.

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Social Bilan Category Select the applicable code to link an employee category to a regulatory Employee Survey category. The code is also used for the 2483 Training Report.

Number of Columns Specify how the category is organized. When you enter a number of columns, the system dynamically changes the number of description fields that appear on the page when you move out of this field. For example, if you enter *2* in this field, the system adapts the number of description fields accordingly. For example, category *CAD* is organized with three column description criteria: *Number, Grade,* and *Step.*

Subcategory 1

Subcategory and Subcategory 2 Identify employee subcategories, such as *Technical Trainees* or *Day Laborers.* See the field description for the Category field for instructions on completing these fields.

(IND) India

Agreement End Date Enter the end date of the labor agreement. Agreement End Date should always be greater than the labor agreement effective date.

Comments Enter comments about the labor agreement. This might be a description of the labor agreement details.

Cloning Labor Agreements

Access the Clone Labor Agreement page.



Clone Labor Agreement page

After selecting the labor agreement you want to clone, enter a name and an effective date for this new labor agreement. The effective date must be greater than or equal to the labor agreement that is being cloned. You cannot clone labor agreements across different set IDs.

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After you click the Save button, the Labor Agreement page displays. The system automatically populates the pages of the Labor Agreement component with the data of the originating labor agreement. This includes wage progression rules, job codes, salary plans, labor job classes, seniority dates, tie breakers, labor facilities, employee categories, and country specific data. You can verify or modify the labor agreement data.

Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

To set up labor administration disciplinary, grievance, and resolution classifications use the Disciplinary Steps or Disciplinary Steps USF component (DISCIP_STEP_TABLE), Disciplinary Type or Disciplinary Type USF component (DISCIP_TYPE_TABLE), Disciplinary Events USF component (GVT_DIS_EVENTS_TBL), Grievance Type Table component (GRIEV_TYPE_TABLE), Grievance Step Table component (GRIEV_STEP_TABLE), and Resolution Type component (RESLTN_TYPE_TBL). Use the DISCIP_STEP_TABLE component interface to load data into the tables for the Disciplinary Steps component and the GRIEV_STEP_TABLE component interface to load data into the tables for the Grievance Step Table component.

This section discusses how to:

- Define disciplinary steps.
- (USF) Define the first penalty matrix for indicating offense level penalties.
- (USF) Define the recommended disciplinary actions for each offense level and type.
- Set up disciplinary events.
- Set up grievance types.
- Set up grievance steps.
- Define resolution types.

See Also

Chapter 8, “Tracking Disciplinary Actions and Grievances,” page 103

Pages Used to Set Up Labor Administration Classifications

Page Name	Object Name	Navigation	Usage
Disciplinary Step Table	DISCIP_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps, Disciplinary Step Table	Enter steps to be taken in the disciplinary process.
Disciplinary Step Table	GVT_DISCIP_STEP	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Steps USF, Disciplinary Step Table	Enter steps to be taken in the disciplinary process.

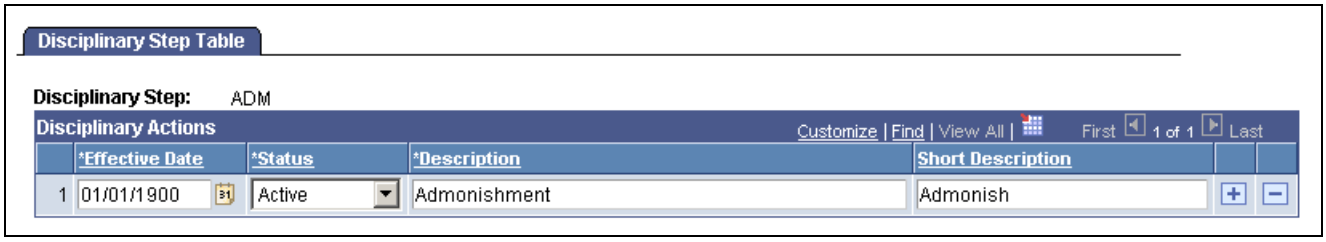
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Page Name	Object Name	Navigation	Usage
Disciplinary Type Table , Disciplinary Offenses Table	DISCIP_TYPE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type, Disciplinary Offenses Table • Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Offenses Table	Set up types of actions that may require managers to impose disciplinary actions on workers.
Disciplinary Penalty Matrix 1	GVT_DISCIP_OFFNSES	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 1	(USF) Set up the first penalty matrix indicating the offense levels for the discipline type.
Disciplinary Penalty Matrix 2	GVT_RECMND_ACTIONS	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Type USF, Disciplinary Penalty Matrix 2	(USF) Set up the second penalty matrix indicating the recommended disciplinary step for each offense levels.
Disciplinary Events Table	GVT_DIS_EVENTS_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Disciplinary Events USF, Disciplinary Events Table	Set up disciplinary events that can be assigned to a worker in the event of disciplinary action.
Grievance Type Table	GRIEV_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Grievance Type Table	Set up the different types of grievances that workers, applicants, or unions might file.
Grievance Step Table	GRIEV_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Grievance Step Table	Set up steps that can be taken to resolve grievances.
Resolution Type	RESLTN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Resolution Types	Set up resolutions to track disciplinary or grievance outcomes.

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Defining Disciplinary Steps

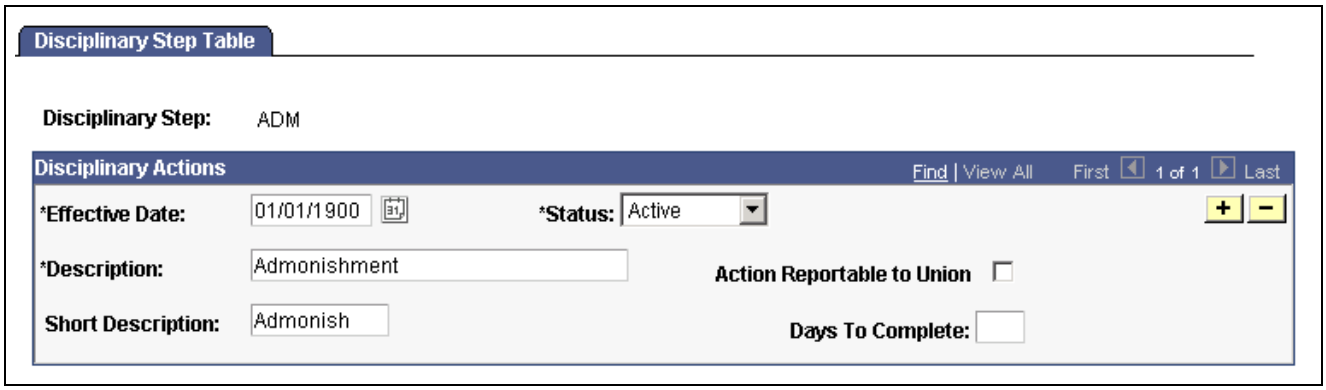
Access the Disciplinary Step Table page.



Disciplinary Step Table page

(USF) Defining Disciplinary Steps

Access the Disciplinary Step Table page.



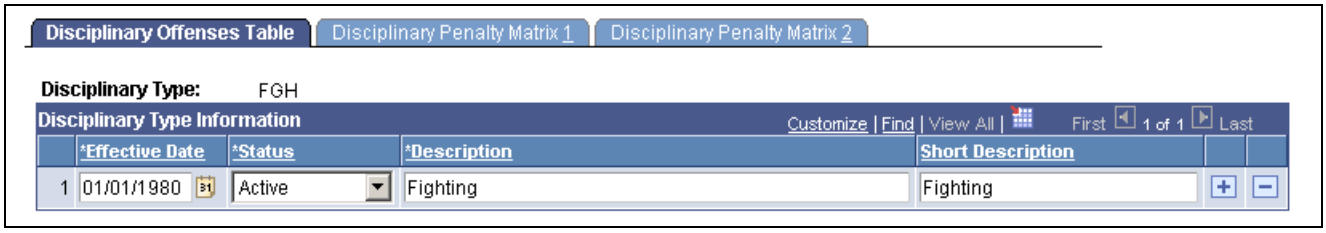
Disciplinary Step Table page

Action Reportable to Union Select if the action disciplinary action should be reported to the union.

Days to Complete Enter the number of days it takes the person to complete the disciplinary action.

Defining Disciplinary Types

Access the Disciplinary Type Table or Disciplinary Offenses Table page.

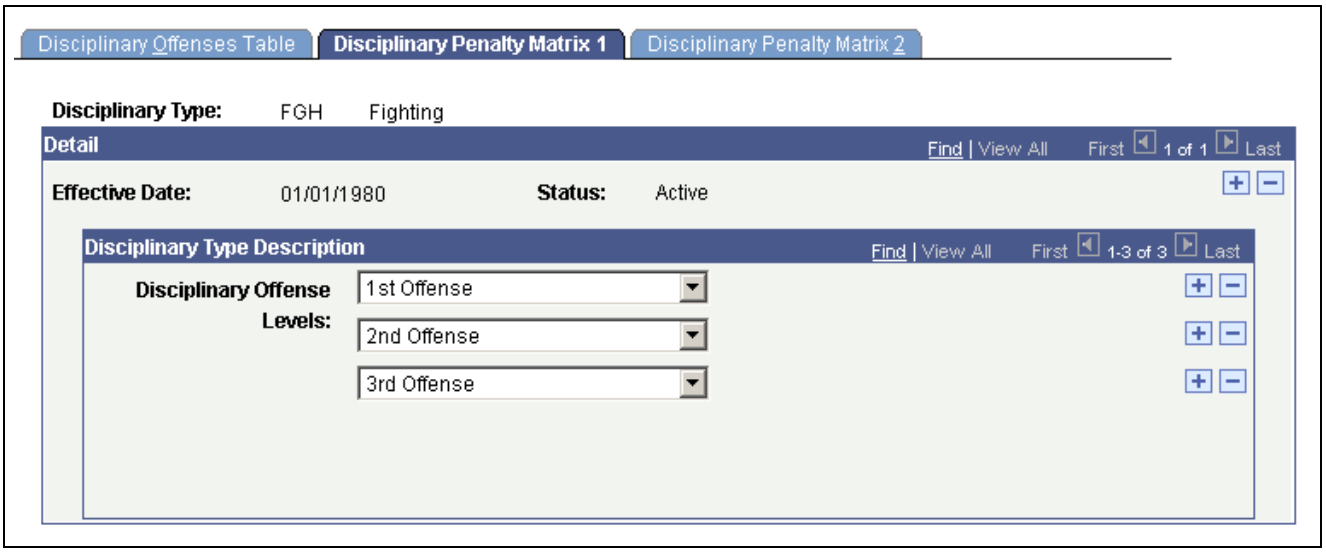


Disciplinary Type or Disciplinary Offenses Table page

(USF) Defining the First Penalty Matrix for Indicating the Offense Level Penalties

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page.

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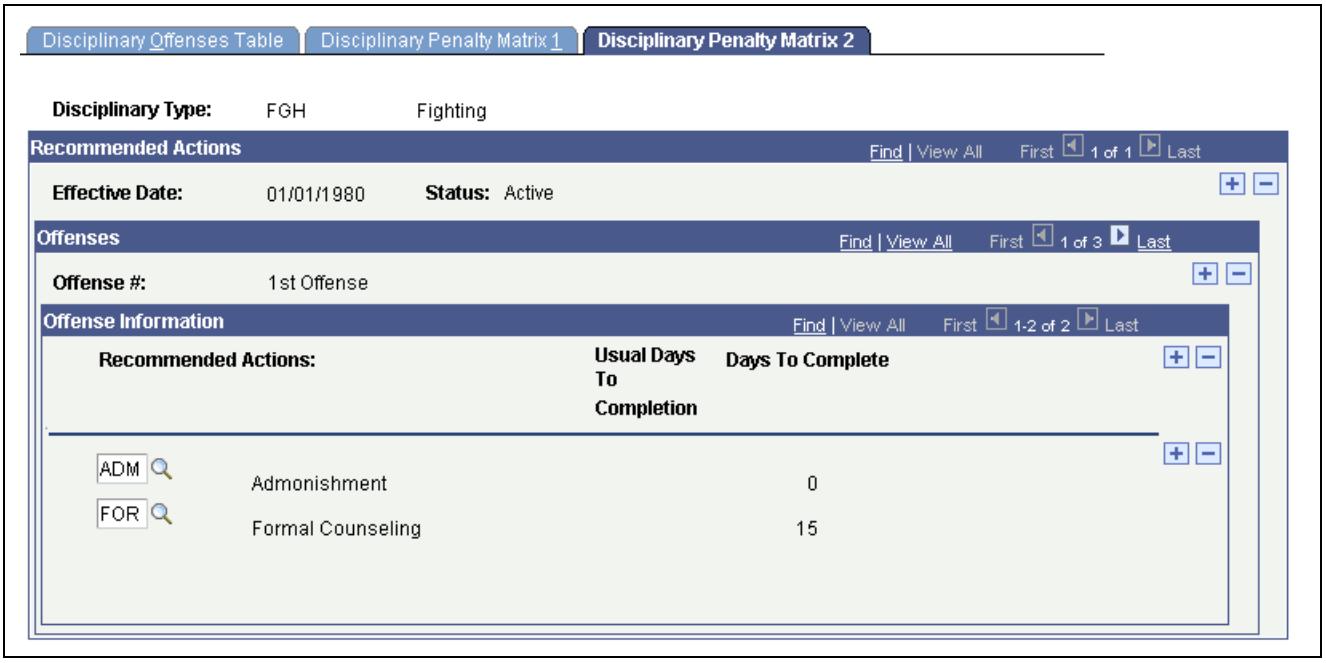


Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page

Enter a row for each Disciplinary Offense Level.

(USF) Defining the Recommended Disciplinary Actions for Each Offense Level and Type

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page.



Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page

Recommended Actions Enter the recommended actions. The system automatically displays the Usual Days To Complete, as defined on the Disciplinary Events Table page.

This display helps managers approximate how long it will take to complete this action so they can plan how to fit each course of action into their workloads. Your labor administration specialists can establish these as experience dictates.

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However, government and agency policies or union agreements may affect these recommendations.

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CHAPTER 5

Setting Up Works Councils

This chapter discusses how to:

- Set up works councils.
- (DEU) Set up the German works councils business process.

Setting Up Works Councils

To set up works councils, use the Works Council component (WC_COUNCIL_TBL_GBL), the Works Council Decision component (WC_DECISION_TBL_GBL), the Works Council Decision Group component (WC_DECSIONGRP_TBL_GBL), the Job Change by Reg Region component (WC_ACTN_REASON_TBL_GBL), and the JCR Workflow Parameters component (WC_USER_NOTIFY_GBL).

This section provides an overview of the works councils business process and discusses how to:

- Define works councils.
- Define job changes per regulatory region.

Understanding the Works Councils Business Process

If your organization does business in countries where workers can belong to works councils, define the works councils that your workers can join.

The works councils for your company are internal committees elected by the non-management workers to represent their interests. If your organization does business in countries where workers can belong to works councils, every work location in your company may have a local works council. The company as a whole may have a central works council. The works council's duties may include:

- Watching the implementation of collective bargaining agreements.
- Promoting integration of minorities, young, older, and handicapped workers.
- Monitoring fair compensation and working hours.
- Providing codetermination concerning layoffs, short-time work, and other labor issues.

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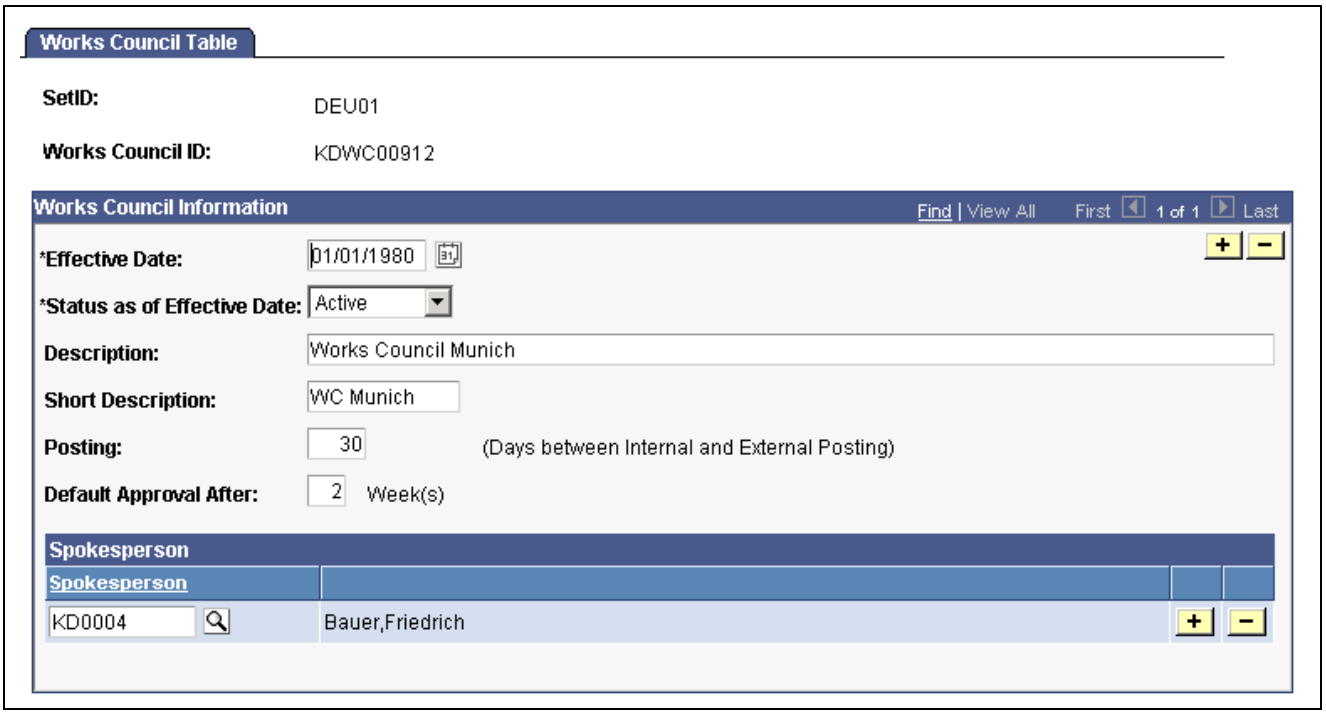
Pages Used to Set Up Works Councils

Page Name	Object Name	Navigation	Usage
Works Council Table	WC_COUNCIL_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council, Works Council Table	Specify the works councils to which your workers may belong.
Decision Table	WC_DECISION_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council Decision, Decision Table	Maintain works council decisions.
Decision Group Table	WC_DECISIONGRP_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Works Council Decision Group, Decision Group Table	Define works council decision groups.
Job Change by Reg Region	WC_ACTN_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Job Change by Reg Region, Job Change by Reg Region	Define Job Change actions and reasons per regulatory region. This is the main setup page for configuring works council transactions for job changes that require works council approval.
JCR Workflow Parameters	WC_USER_NOTIFY	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Workflow Parameters, JCR Workflow Parameters	Define Job Change request workflow parameters.

Defining Works Councils

Access the Works Council Table page.

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Works Council Table page

Works Council ID The ID you entered to access this page. This is the ID you'll define.

Posting Enter the number of days between internal and external posting.

Default Approval After The Default Approval After date will automatically approve works council relevant job change requests if the works council doesn't react by the date specified. Any worker Job Change approval requests that have not been approved or denied after the specified date will automatically set to *Approved by Works Council* via an automatic update process and will trigger all workflow associated with Works Council approval.

Spokesperson Select the ID for the person (or persons) to whom you want to route works council approvals. Any job change request that has been configured for works council approval in the Job Change by Reg Region page can be assigned. The spokesperson(s) will receive any works council hire approval requests for job requisitions that have a works council ID. Enter as many spokesperson IDs as needed.

Linking Works Councils to the Company Location Table

The Company Location page (COMPANY_TABLE1) is used to assign the works council ID to a company location to route works council relevant job change requests to the appropriate works council spokesperson. During approval processing for job actions which require works council approval, the system first checks which works council ID is relevant for the worker's company and location and then check the Works Council Table to see which spokesperson(s) should be notified.

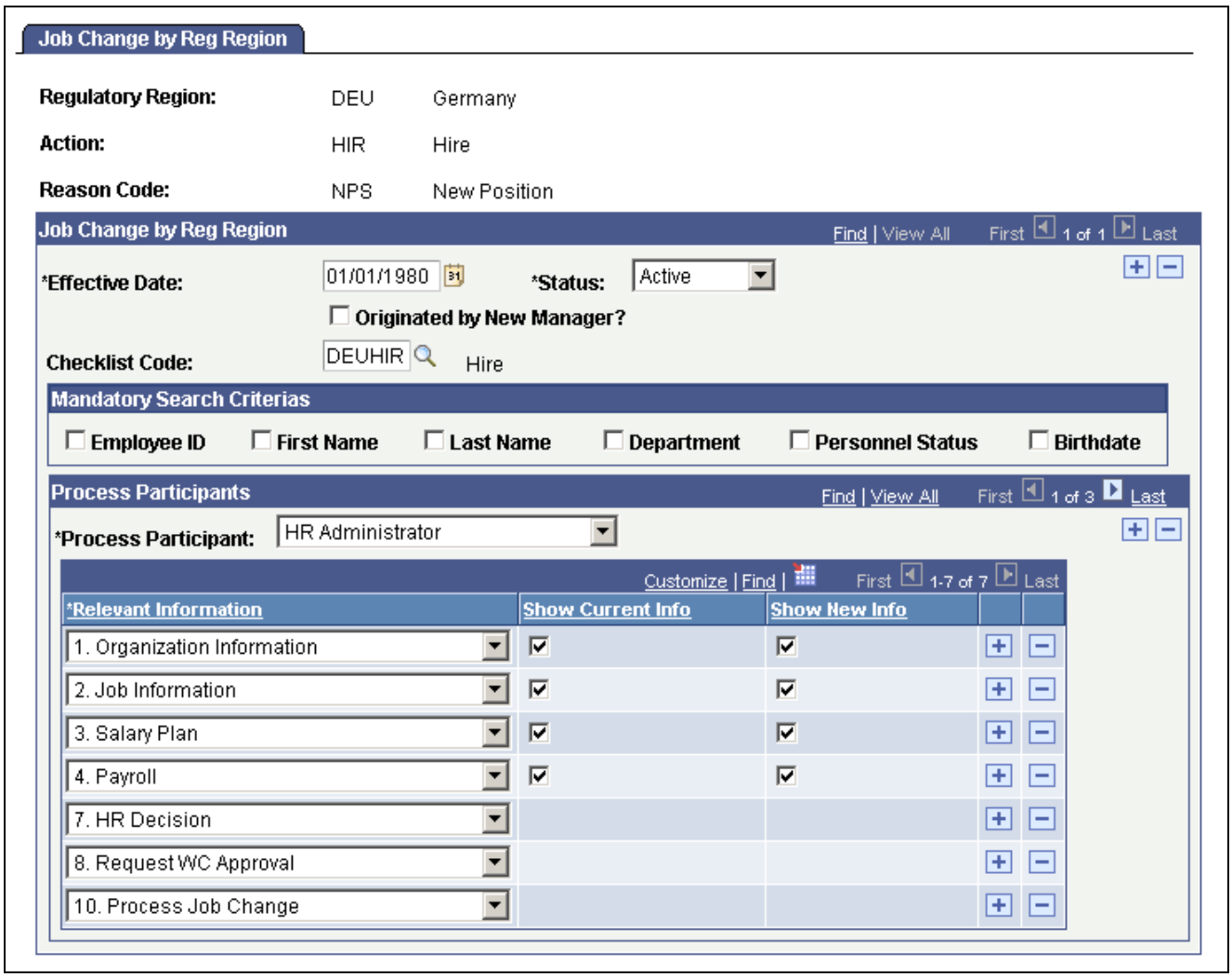
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Company Locations

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Defining Job Changes per Regulatory Region

Access the Job Change by Reg Region page.



Job Change by Reg Region page

The Job Change by Reg Region page identifies which combination or regulatory region, action, and action reason may be selected from the Request Job Change - Works Council page. All of the setup information required for a Works Council relevant job change request may be defined here, including which page areas are relevant for which roles, whether a given role may also view current information, and so on. Define which job changes require works council approval before they take place, by regulatory region, action, and action reason.

Note. If you are processing a worker transfer request, you can define whether the current or new manager requests the job change.

Originated by New Manager? Select this check box to indicate that transfer job change requests will be initiated by the worker's new manager.

Checklist Code Select a Checklist Code. The Checklist Code refers to a checklist that consists of all to-do items maintained for a single worker or applicant with the specified status and date. You can associate the checklist with a job change here.

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During the business process the HR person can generate the relevant checklist from the job change request page.

Mandatory Search Criterias

Employee ID, First Name, Last Name, Department, Personnel Status and **Birthdate**

Select each associated check box for the search criterion that you want to appear on the Job Change Request search page.

Process Participants

Process Participant

Select a Process Participant from the drop down list. Select *Current Manager, HR Administrator, New Manager,* or *Works Council.*

***Relevant Information**

For each process participant selected, define the relevant information that participant will be able to view in the job change process.

Show Current Info and **Show New Info**

For each Relevant Information selected, choose whether the process participant will be able to view only the current information, only the new information or both current and new information.

(DEU) Setting Up German Works Councils Business Process

To set up German works councils business process, use the Tariff Area component (TARIFF_AREA_GBL) and Speaker Committee DEU component (SPK_COMM_GER_GBL).

In addition to the core functionality setup tables, if you're administering a German workforce, you can use several German setup tables to define codes for labor administration matters that affect your company, such as tariff areas and spokesmen committees.

Rules defining worker labor administration for your German workforce are negotiated between the trade unions and the employers' associations. Additional rules are defined between the workers and their employers through two groups of elected representatives. The works councils represent non-management workers. The spokesmen committee represents management workers. Although the works councils and spokesmen committees are groups of people elected to represent the interests of workers, they aren't union representation.

Use the codes and information that you set up in these tables to track information about decisions made by the works councils at your operating locations.

Understanding Tariff Areas

A tariff is a contract between the workers' unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as banking or metal). Tariffs are already in the system.

Additional labor agreement terms, such as salary plans or workforce reviews, can also be applied based upon the tariff area. Region or location (such as Bavaria or Berlin) often define the tariff area.

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Understanding Spokesperson Committees

The spokesmen committee (*sprecherausschuss*) represents the interest of the management personnel in your company before the ownership or executive management. The spokesmen committee mainly consults; however, it also helps determine individual employment contracts, hiring, and dismissals. The committee also helps monitor employment fairness, equity, and nondiscrimination in terms of nationality, race, religion, sex, and age.

See Also

Chapter 5, "Setting Up Works Councils," Setting Up Works Councils, page 49

Pages Used to Define German Labor Administration Codes

Page Name	Object Name	Navigation	Usage
Tariff Area Ger (German tariff area)	TARIFF_AREA_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Tariff Area, Tariff Area Ger	Enter tariff areas for later use on the Job Labor - Germany page (JOB_LABOR). In PeopleSoft Enterprise Human Resources, the tariff areas for the metal tariff are included as system data.
Spokesmen Comm (spokesmen committee)	SPK_COMM_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Speaker Committee DEU, Spokesmen Comm.	Describe the spokesmen committee for your work locations.

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CHAPTER 6

Managing Layoffs and Recalls

This section provides an overview of the layoff and recall process and describes how to:

- Define groups of workers to layoff or recall.
- Manage layoffs.
- Manage recall rights.
- Manage recalls and reinstatements.
- Processing layoffs and recalls using PeopleSoft Mass Update.
- Run layoff, recall, and reinstatement reports.

Common Elements Used in this Chapter

Effective Date

You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.

You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process them for layoff, reinstatement, or recalls.

Mass Update to be used

Select to use mass update to update workers' Job Data records with their layoff or recall status instead of the Run Layoff Process or Run Recall Process processes. When you select the Mass Update to be used check box the system makes the Run Layoff Process or Run Recall Process buttons unavailable.

Use the Process Recall Rights process to update candidates' Recall Rights records.

See Chapter 6, "Managing Layoffs and Recalls," Processing Layoffs and Recalls Using PeopleSoft Mass Update, page 78.

Group ID

Select the ID of the group containing the candidates used for this roster. The system displays the Labor Agreement associated with the group ID.

The system displays the groups you created in the Labor Group Definition component (HR_LBR_GRP_DEFN) and groups created in the Group Build - Group Definition component (GB_GRP_DEFN_TABLE). You can only select groups with a valid labor agreement.

Note. You must select a Group ID to create a layoff roster. To create a recall roster, you can select a Group ID or a Layoff Roster ID.

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See Chapter 6, "Managing Layoffs and Recalls," Defining Groups of Workers to Layoff or Recall, page 58.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions".

Labor Agreement Collective labor agreement managing the labor administration between a group of workers and the organization.

Seniority Dates or **Seniority Date ID** Select the seniority dates the system should use to sort the candidates in the roster. Only those seniority dates assigned to the specified Labor Agreement are available for selection.

The sequence number of each seniority date entered specifies the sequence the system should use to sort the candidates in the roster. You cannot select a seniority date more than once.

Tie Breakers or **Tie Breaker ID** Select the tie breakers the system should use to rank the candidates in the roster in the event that people share seniority dates and indicate if the system should apply the tie breaker in ascending or descending order. Only those tie breakers assigned to the specified Labor Agreement are available for selection.

The sequence number of each tie breaker entered specifies the order in which the system should implement them. You cannot select a tie breaker more than once.

For example, if you select a tie breaker based on the national identification number and select the Descending Order? check box, the system identifies those people with a higher national identification number as having more seniority in the event that there is a tie for seniority.



When you've defined the extraction criteria for the roster, save the page. The system will make the Generate List button available. Click to generate a roster list. The system will set the roster status to *In Progress* and move you to the next page in the component.

When you generate a:

- Layoff roster, the system selects all workers defined by the selected group ID, removes those who are exempt from layoff (as indicated on the Job Labor page), and sorts them by the seniority dates and tie breakers you selected.
- Recall roster, the system selects the workers defined by the selected group ID or who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.
- Reinstatement roster, the system selects the workers who were laid off on the selected layoff roster, removes those whose recall rights have expired, and sorts them by the seniority dates and tie breakers you selected.



Click to update the roster. The system will insert a new, effective-dated row and generate a new roster list for that row. The system will include candidates that you had manually added to the previous roster. The system retains the previous roster but makes it display-only.

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Note. If you have processed anyone on the roster, you cannot refresh it. This is enables you to maintain history and data integrity.

Regenerate Roster List

If you make some changes to the roster setup, for example change a seniority date or Group ID, click to generate a new roster list. The system completely overwrites the previous roster withe the regenerated one.

Note. If you have processed anyone on the roster, you cannot regenerate it. This is enables you to maintain history and data integrity.

Roster Status

Insert a new row and update the roster status as needed. When you create a roster, the system assigns the status to *Open*. When you generate the roster, the system sets the status to *In Progress*. When you select a roster of *Closed*, the system makes the roster component unavailable for entry. Use the other statuses to manage the roster process.

Default Rehire Date

Enter the default hire date. The system will populate the roster Rehire Date field with this value.

Nbr in Group to Consider (number in group to consider)

Enter the number of candidates in the group you are considering for layoff or recall. The system will populate the list with this number of candidates, taking from the top of the list as determined by the seniority date(s).

For example, if there are a total of thirty people in the group and you want to consider ten of them for layoff, the system will populate the roster with the ten most junior people, as determined by the selected seniority date, from that group of thirty.

View Roster

Click after you've selected how many candidates you want to consider and the system will populate the roster list.

Total in Group

Displays the total number of people defined by the selected group ID, including candidates that you have added manually.

Apply To

Choose whether to apply a status to all candidates, just those displayed on the page, or on an individual basis (select those candidates for the selected status using the Select check box in the grid).

Status

Select a status to apply to multiple candidates in the roster.

Apply

Click to apply the status you selected in the Status field to the candidates.



This icon indicates that a candidate was added to the roster manually. The only candidates you can remove from a roster are those that are added manually.

Tie

Selected if the system had to use a tie breaker to determine the candidate's ranking because more than one person shared seniority.



Click to add comments to a candidate. You can add multiple, effective-dated comments.

The system creates a note for those candidates who were affected by a tie breaker, indicating that a tie breaker was used and what it determined the candidate's ranking to be.

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See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the HR Notepad.

Rank The system lists the candidates by seniority and tie breaker. To modify the list order, enter a new ranking number.

Note. Candidates you've added to the roster manually have a permanent rank of zero (0).

Select Click to select individuals people to apply roster status to as a group. For example, to apply the roster status of Layoff Accepted to the four candidates who have accepted to date, select the candidates, select the *Individual* Apply To value, select the status in the Status field, and click Apply.

Status Select the candidates roster status.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.

Defining Groups of Workers to Layoff or Recall

To define groups of workers to layoff or recall, use the Labor Group Definition component (HR_LBR_GRP_DEFN).

This section discusses how to:

- Define groups.
- Select group members.
- Maintain group security.

Note. You can also access the Labor Group Definition component from a link on the Layoff Roster Setup page or Recall Roster Setup page.

Note. You can also create groups using the Group Build - Group Definition component but the groups must include a single, valid labor agreement as a part of the definition for them to be valid selections on the Layoff Roster component (HR_LAYOFF_ROSTER) and the Recall Roster component (HR_RECALL_ROSTER). Groups are not used with the Reinstatement Roster component (HR_REINST_ROSTER).

See Also

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

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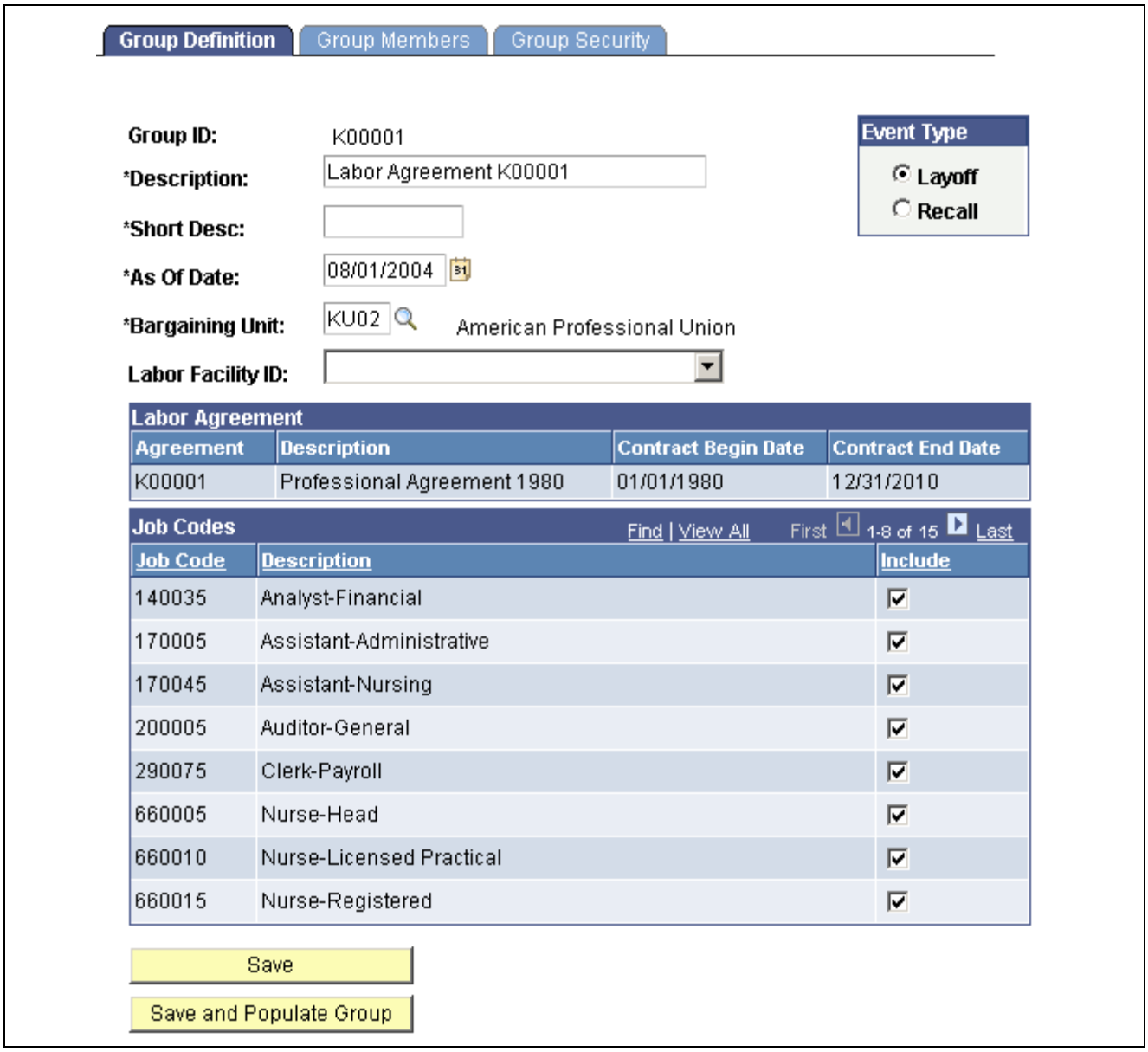
Pages Used to Define Groups

Page Name	Object Name	Navigation	Usage
Group Definition	HR_LBR_GRP_DEFN	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Labor Group Definition	Use the group definition page to define the parameters of the labor management group.
Group Members	HR_LBR_GRP_MEMBERS	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Group Members	Review group members.
Group Security	HR_LBR_GRP_SCTY	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Layoffs and Recalls, Group Security	Grant or remove security access to the group.

Defining Groups

Access the Group Definition page.

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Group Definition page

Event Type Select the type of event in which this group will be used:

- Select *Layoff* to include only workers with an HR status of *Active* in your group definition.
- Select *Recall* to include workers with an HR status of either *Active* or *Inactive*. This enables you to include workers who have been laid off (HR status of *Active*) or terminated (HR status of *Inactive*) in your recall group.

As of Date Only bargaining units, labor agreements, labor facilities, and job codes active as of this date are available on this page.

Bargaining Unit Select the bargaining unit that you are using to define this group. The system will display the labor agreement, and its contract dates, associated with this unit in the Labor Agreement grid.

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Note. You must select a bargaining unit associated with a labor agreement since the layoff, recall, and reinstatement processes use the information you set up on the labor agreement.

See Chapter 3, "Setting Up Unions," Setting Up Bargaining Units, page 8.

Labor Facility ID Select the ID of the labor facility you are using to define this group. Leave this field blank to include people in all the facilities.

The system will populate the options with the labor facilities assigned to the labor agreements associated with the selected bargaining unit.

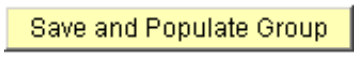
See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Agreement Control Tables, page 31.

Job Code and **Include** The system displays the job codes associated with the labor agreements. Select the Include check box next to those job codes you want to include in this group definition.

See Chapter 4, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements, page 36.



Click to save the group definition without populating the Group Members page.



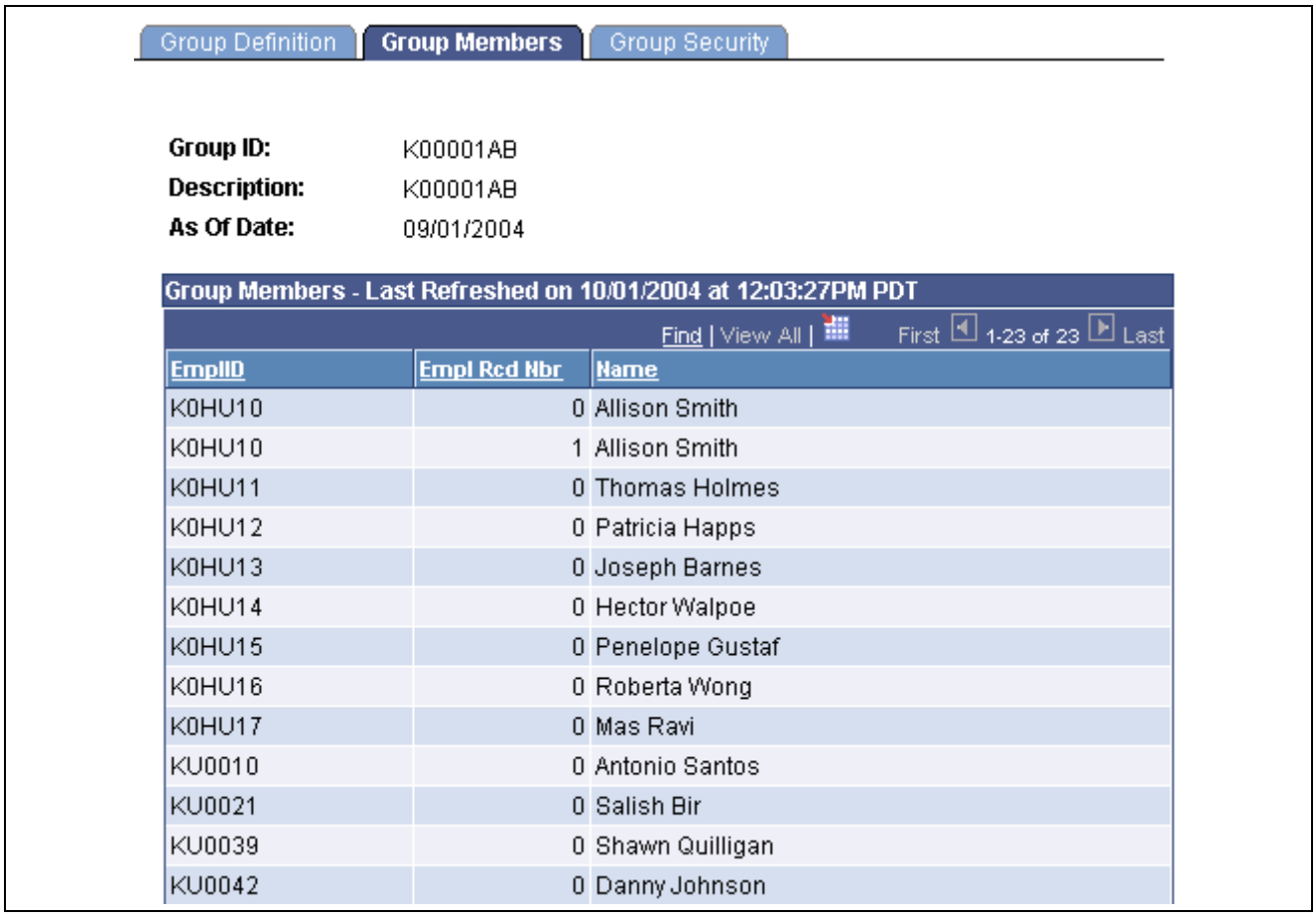
Click to save the group definition and populate the group members page with the people assigned to the labor agreements, labor facilities, and job codes selected on this page.

See Chapter 4, "Setting Up Labor Administration Data," Defining Labor Agreements, page 32.

Reviewing Group Members

Access the Group Members page.

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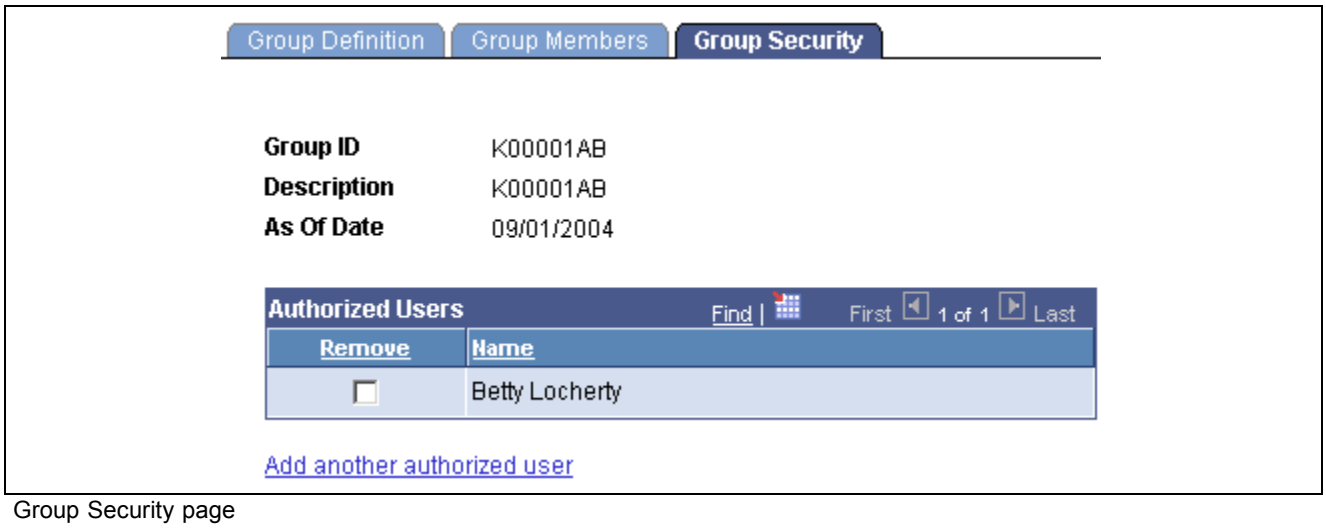


Group Members page

The Group Members page lists the people who meet the criteria you defined on the Group Definition page.

Maintaining Group Security

Access the Group Security page.



Group Security page

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Only people who have security access to this group can create layoff, recall, or reinstatement rosters for this group. The system automatically adds the name of the user who creates the group.

The group security access you grant on this page overrides the data permission security associated with a user's Row Security Permission List. For example, a user who does not have row security access to Department 604CAN but that is added to this list for a group that contains people in Department 604CAN will be able to view the data of those people in the layoff, recall, and reinstatement rosters.

Remove Select to remove the user's security access to this group when you save the component.

Add another authorized user Click to access the Labor Group Security - Add User page and grant another user security access to this group.

Managing Layoffs

To manage layoffs, use the Layoff Roster component (HR_LAYOFF_ROSTER) and the Process Layoff component (HR_RUNCTL_LAY).

This section discusses how to:

- Set up a layoff roster.
- Manage the layoff roster list.
- Run the layoff process.

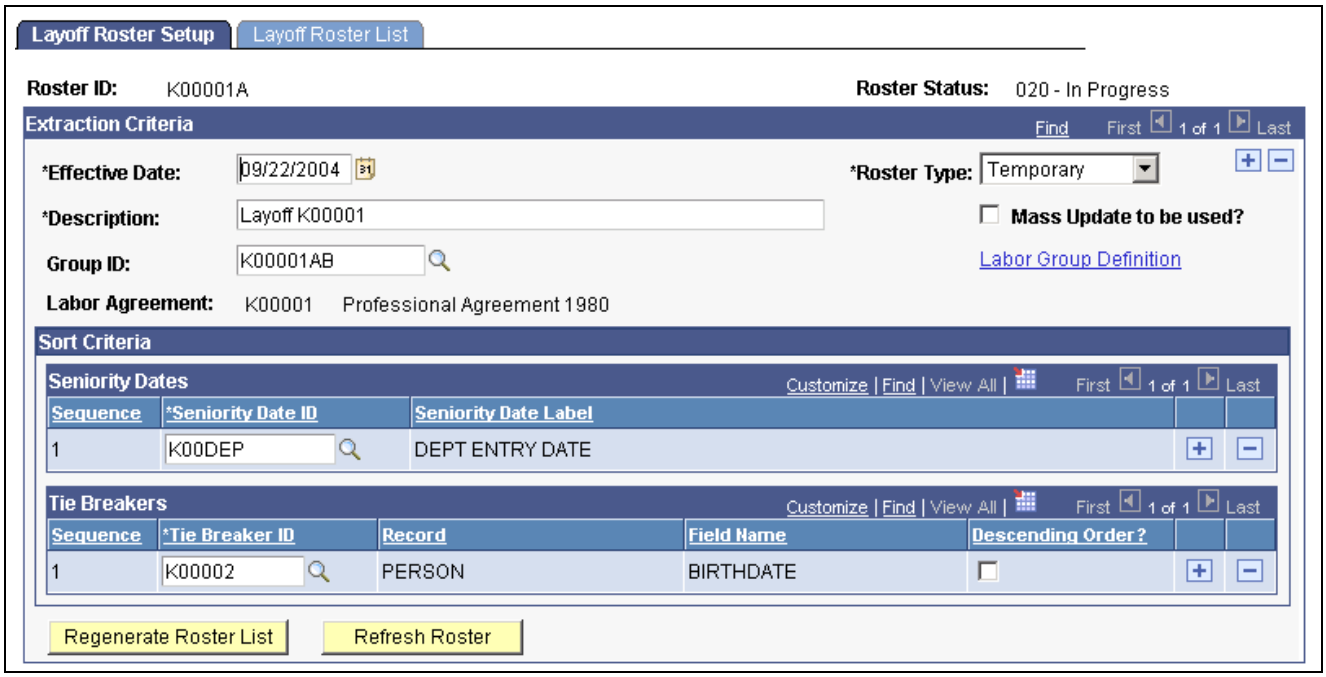
Pages Used to Manage Layoffs

Page Name	Object Name	Navigation	Usage
Layoff Roster Setup	HR_LAYOFF_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster Setup	Define the layoff roster parameters.
Layoff Roster List	HR_LAYOFF_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List	Manage the layoff roster.
Layoff Process	HR_RUNCTL_LAY	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Process Layoff button on the Layoff Roster List page.	Process layoffs.

Setting Up the Layoff Roster

Access the Layoff Roster Setup page.

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Layoff Roster Setup page

You can enter any number of effective-dated rows into a roster, but only one row per calendar day. When you insert a new row, the system makes the previous rows unavailable for entry.

You can create future-dated rosters and insert future-dated rows into a roster. You can generate and maintain future-dated rosters, but you cannot process the layoff.

Roster Type Select if the layoff is one of the following:

- *Temporary*

  The system makes workers laid off in a temporary layoff available for reinstatement and recall.

- *Permanent*

  The system makes workers laid off in a permanent layoff available for recall only.

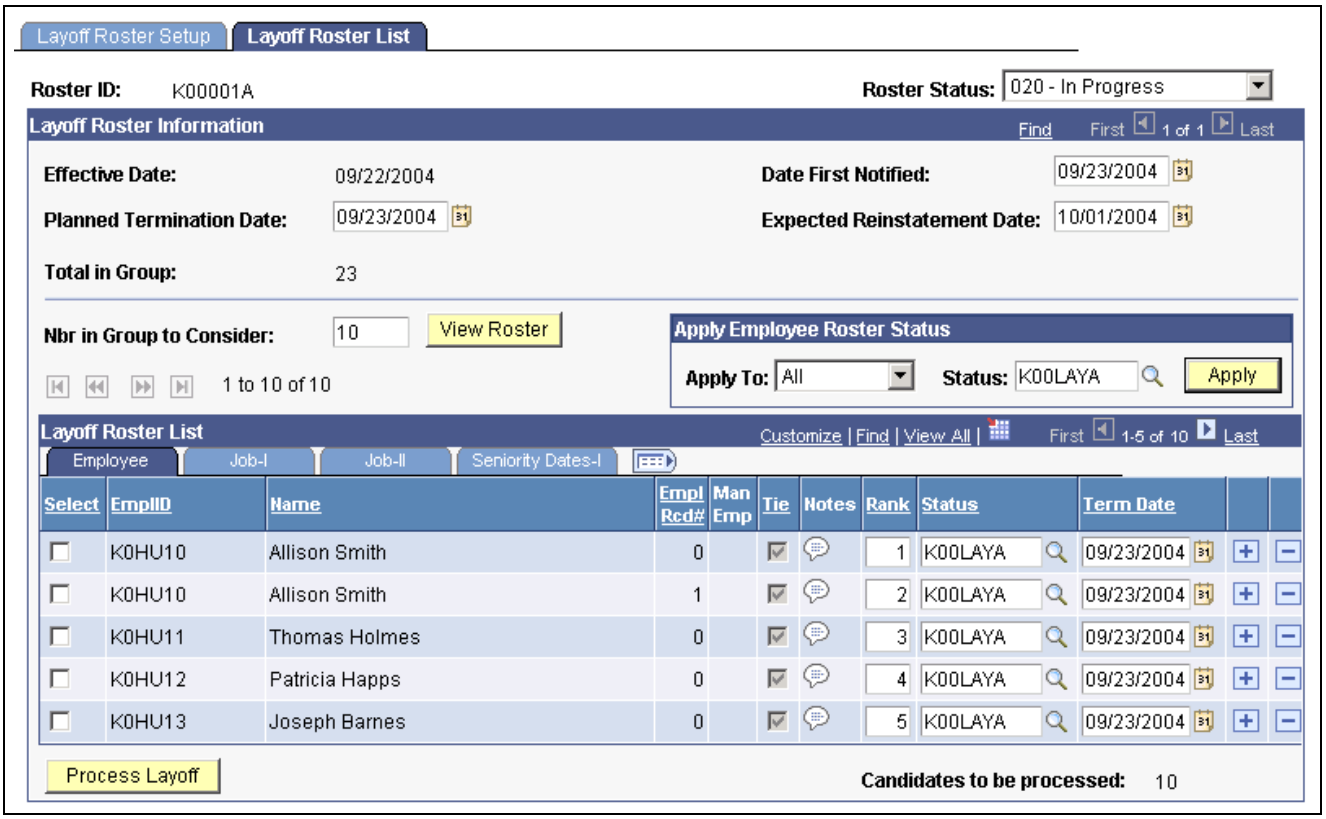
Mass Update to be used? Select to use Mass Update to update worker Job Data records with the layoff or recall status instead of using the Layoff process

Labor Group Definition Click this link to add a new group definition using the Group Definition page.

Maintaining the Layoff Candidate List

Access the Layoff Roster List page.

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Layoff Roster List page

Note. The system will not include as candidates those workers who are identified as being exempt from layoff on the Job Labor page.

Planned Termination Date

Select a termination date. The system will enter this date in the Term Date column of the Layoff Roster list, but you can override it if necessary to terminate candidates on different days. The system will process the layoffs as of this date.

The system uses this date as the termination date when you layoff a candidate so you must select a date if there are any candidates in your roster to be laid off.

Date First Notified

Select the date the workers were or will be notified of the layoff for informational purposes.

Expected Reinstatement Date

If you've selected a roster type of *Temporary*, the system displays this field. Enter the date you expect to reinstate the workers.



Click to run the Layoff process. The system will move you to the Layoff Process search component.

You can process candidates in batches. The layoff process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the layoff process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The layoff process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the layoff process again.

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This button is not available when you use Mass Update to update workers Job Data records.

Candidates to be processed: Displays the number of candidates the Layoff Process will process.

Note. The Layoff Process will process those candidates with a status that has the Process Event? check box selected.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.

Note. You cannot remove candidates who were included in the roster because they were a part of the selected group.

Adding Candidates Manually

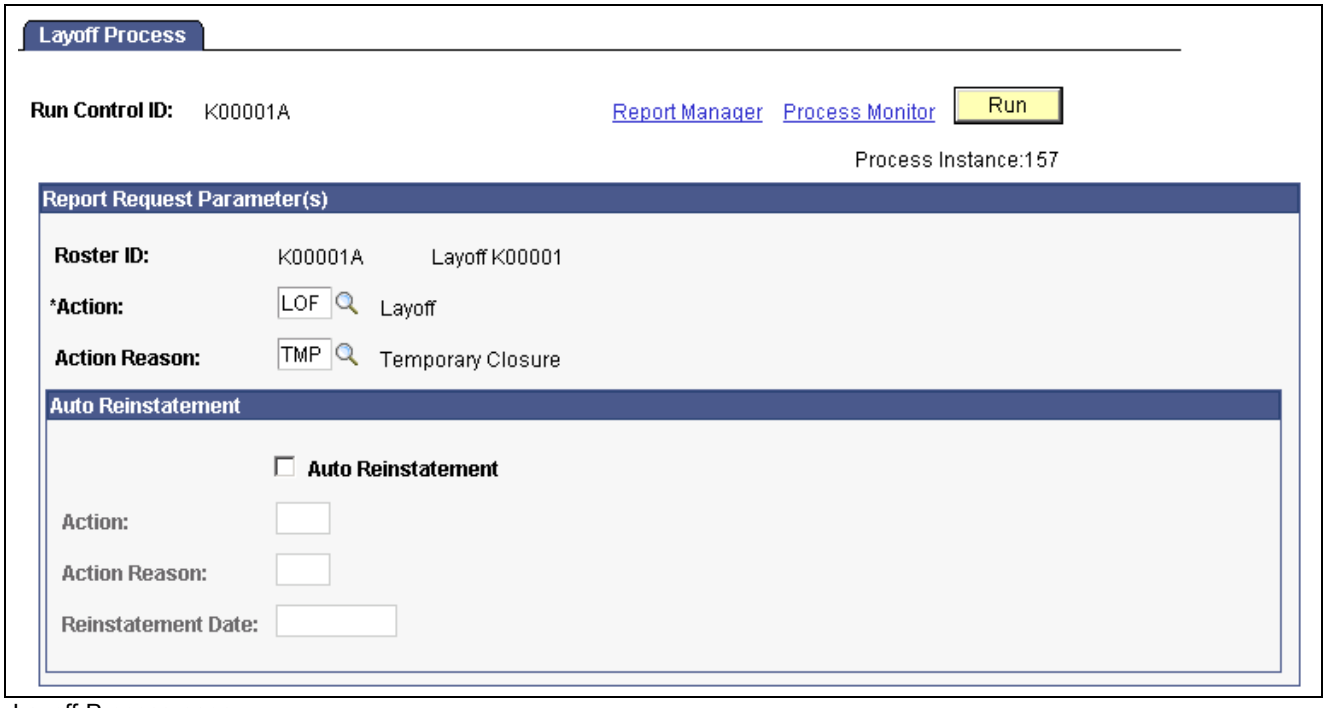
You can manually add candidates to the roster (for example, workers who were bumped from their position). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. When the person's details have been retrieved the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

Note. You can remove candidates who were manually added to the roster.

Running the Layoff Process

Access the Layoff Process page.



Layoff Process page

The layoff process:

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- Inserts a new row in the Job Data pages with the effective date of the layoff.

  The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here. If the system is unable to enter a job row for an employee due to an error on their job record a message will be entered for that employee number in the log.

- Inserts a new row into the Recall Rights page with the effective date of the layoff.

  The system enters the value of *Layoff* in the Reason field.

  The system calculates the Expiration Date using the recall expiration rule attached to the labor agreement being processed.

  The system will not insert a record into the Recall Rights page:

  - If you select the Auto Reinstatement check box on the Layoff Process page.
  - If the candidate does not have a value for the seniority date used by the recall expiration rule to calculate recall rights.
  - If the Recall Expiration rule attached to the Labor Agreement is a No Recall rule.

  See Chapter 4, "Setting Up Labor Administration Data," Understanding Recall Rights, page 27.

  See Chapter 6, "Managing Layoffs and Recalls," Managing Recall Rights, page 68.

- Updates the status of the processed candidates in the layoff roster with an event complete status.

  See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.

Note. If the system encounters any errors when processing a candidate's layoff, the system will skip the person and enter a note into the process logged. The Layoff process includes the candidate on post processing reports, but their job data information is blank.

Roster ID Displays the ID of the roster from which the process was launched.

Action and **Action Reason** Select the action the layoff process is executing and the reason for the action. The system will insert these values into the Job Data row it creates for the people it is processing for lay off.

Auto Reinstatement

The auto reinstatement fields are available for temporary layoffs only.

Auto Reinstatement Select if all of the people being laid off are to be reinstated at the same time. If you use the Auto Reinstatement field, the system will not insert a record into the Recall Rights page for the candidates being laid off.

Note. When you select an action, ensure that this action corresponds to the layoff Action. For example, if you process the layoff with the action of LOF (layoff), you can only reinstatement the candidates using the REC (recall) action. Candidates laid off with the action TER (termination) can only be reinstated with the action of REH (rehire).

See Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 69.

Action and **Action Reason** Select the action and the action reason for the reinstatement

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Reinstatement Date The system populates this with the expected reinstatement date from the layoff roster when you select the Auto Reinstatement check box, but you can edit it if necessary.

Layoff Reports

The Layoff Process produces two reports:

- Layoff Roster Post Processing (HRLAY006).

  This report displays a list of those workers laid off.

  The Layoff Roster Post Processing report lists candidates that were not processed for layoff successfully without job data. Review this report to identify candidates that were not processed by looking for those without job data on this report.

- Recall Rights Post Processing (HRLAY007).

  This report lists those workers who have received recall rights.

  Note. The system does not generate this report if you select the Auto Reinstatement check box.

Managing Recall Rights

To manage recall rights, use the Process Recall Rights component (HR_RUNCTL_RGT) and the Recall Rights component (HR_RCL_RIGHTS) .

This section discusses how to:

- Process recall rights.
- Maintain recall rights.

Note. Recall rights are the rights a laid off worker has to accept a lower level job (bumping) or to be recalled back to work when a position becomes available. Each labor agreement has a recall expiration rule that calculates how long a worker has recall rights following a layoff and under what circumstances those rights would expire.

Pages Used to Manage Recall Rights

Page Name	Object Name	Navigation	Usage
Process Recall Rights	HR_RUNCTL_RGT	Workforce Administration, Labor Administration, Layoffs and Recalls, Process Recall Rights, Process Recall Rights	Use to update the Recall Rights component with information from the Job Data records of those candidates who have a process event status on the roster and who were processed using PeopleSoft Mass Update.
Maintain Recall Rights	HR_RCL_RIGHTS	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Rights	View and maintain a worker's reemployment rights.

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Processing Recall Rights

Access the Process Recall Rights page.



Process Recall Rights page

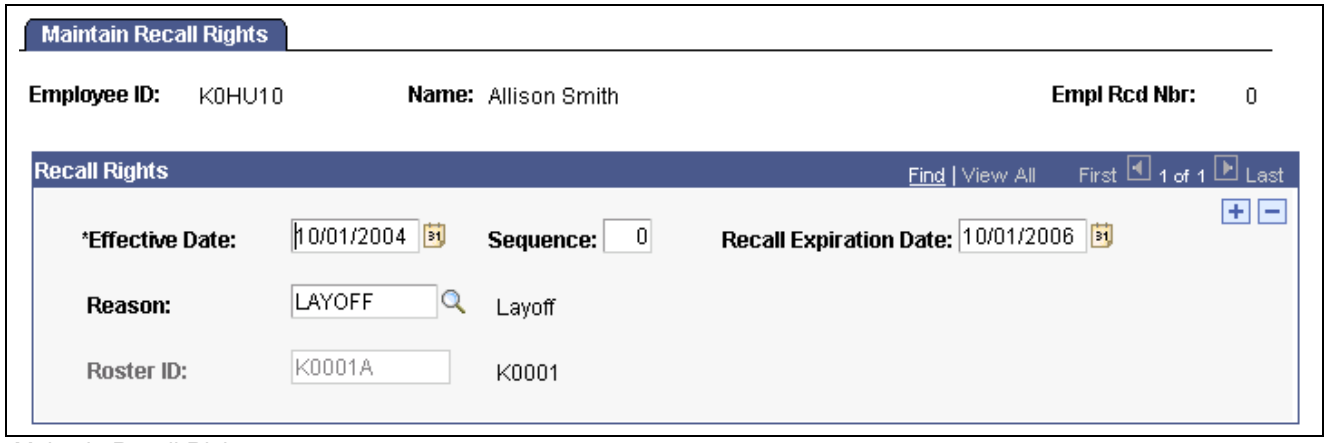
Note. Use this process only when using PeopleSoft Mass Update to update candidates' job information. The layoff, recall, and reinstatement processes create recall rights automatically.

Roster ID Select the ID of the layoff or recall roster whose candidates' recall rights you want to update. The system will create a record in the Recall Rights component for those candidates who have a process event status on the roster. When an employee's recall rights have been processed for a particular Roster ID they cannot be processed a second time for the same Roster ID.

Reason Select the reason for the new recall rights record. The system will insert this value in the Reason field on the Recall Rights page.

Maintaining Recall Rights

Access the Maintain Recall Rights page.



Maintain Recall Rights page

You can manually enter and maintain recall rights for a person but the system will create and populate a row on this page for each person being processed when you run the:

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- Process Layoff process.
- Process Recall or Process Reinst (Reinstatement) processes.

Note. The system will create rows for those who accept a recall. Employees who reject recalls may lose their Recall Rights depending on the recall rights expiration rule assigned to their labor agreement. If a person rejects a recall, update the Recall Rights manually.

- Process Recall Rights process.

This table shows the values that the system enters depending on which process you run:

Process	Effective Date	Recall Expiry Date:	Reason ID:	Roster ID:
Run Layoff Process	The date the layoff takes effect, as entered in the Termination Date field on the Layoff Process component.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	*LAYOFF*	The system populates this field with the ID of the layoff roster that prompted the layoff action.
Recall or Reinstatement processes	The date the recall or reinstatement takes effect as entered in the Rehire Date column on the Recall Roster List or Reinstatement Roster List pages.	The system populates this date using the recall expiration rule associated with the person's labor agreement.	*RECALL*	The system populates this field with the ID of the recall or reinstatement roster that prompted the recall or reinstatement action.
Process Recall Rights On the Process Recall Rights page, you can select a: • Layoff roster. • Recall roster.	• The system uses layoff roster termination date. • The system uses recall roster rehire date.	• The system populates this date using the recall expiration rule associated with the person's labor agreement. • The system populates this field with the rehire date from the recall roster.	*LAYOFF* *RECALL*	The system populates this field with the ID of the roster that was selected on the Process Recall Rights page.

Recall Expiration Date Enter the date the person's recall rights expire.

The system does not include candidates whose recall rights have expired when creating recall or reinstatement rosters.

Reason Select the reason the person obtained the recall right.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Layoff and Recall Control Tables, page 26.

Roster ID The system populates this with the layoff or recall roster ID.

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Managing Recalls and Reinstatements

To manage recalls and reinstatements, use the Recall Roster component (HR_RECALL_ROSTER), the Reinstatement Roster component (HR_REINST_ROSTER), and the Recall/Reinstatement Process component (HR_RUNCTL_REINSTAT).

This section provides an overview of reinstatements and recalls and discusses how to:

- Set up a recall roster.
- Manage a recall roster.
- Set up a reinstatement roster.
- Manage a reinstatement roster.
- Process recalls and reinstatements.

Understanding Reinstatements and Recalls

You have two methods of rehiring employees laid off using the Layoff process. The Reinstatement process is intended to enable you to rehire laid off workers quickly while the Recall process gives you some more flexibility in who you rehire and how, but takes a bit more time. This table lists some of the key differences between the two processes:

Recalls	Reinstatements
Populate the roster with rehire candidates from a group or from a layoff roster.	Populate the roster with reinstatement candidates from a layoff roster only.
Candidates are sorted by seniority and tie breakers.	Candidates are sorted by EmplID number
You can use PeopleSoft Mass Update, instead of the recall process, to update the system with the candidates' recall information.	You can only update the system with the Reinstatement process.
Processes permanent and temporary layoff rosters.	Processes temporary layoff rosters only

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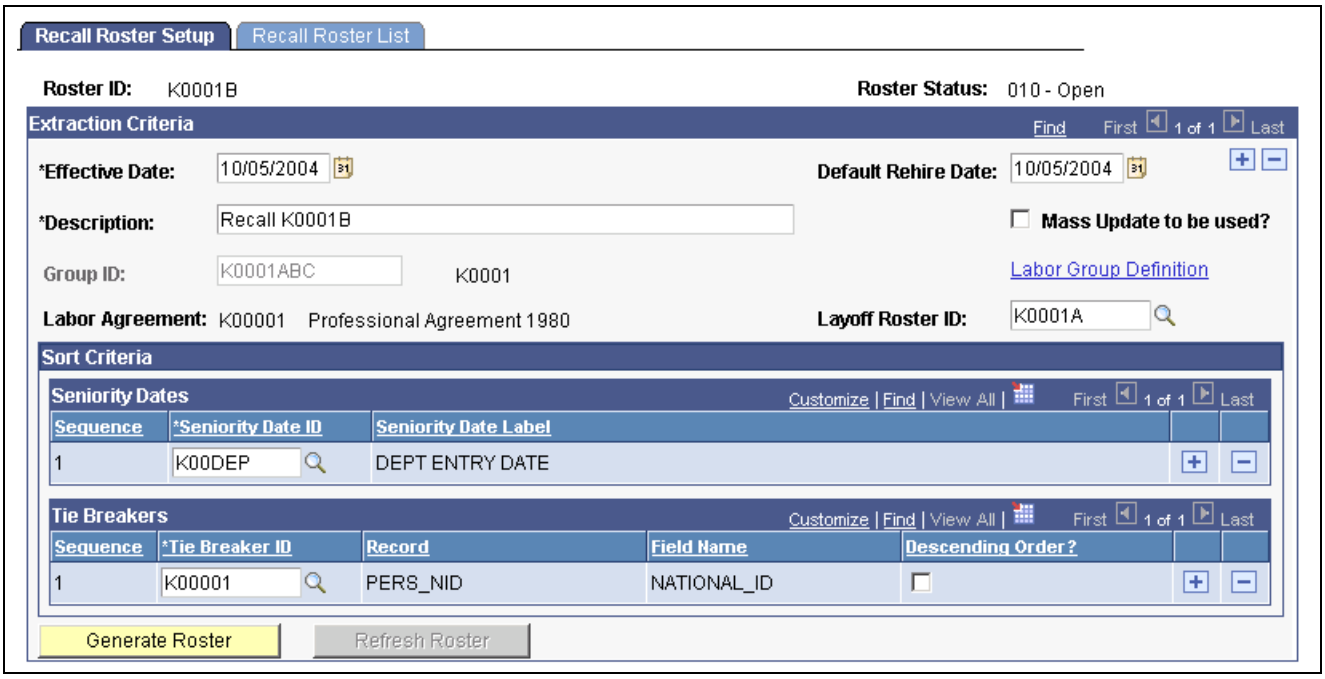
Pages Used to Manage Recalls and Reinstatements

Page Name	Object Name	Navigation	Usage
Recall Roster Setup	HR_RECALL_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster Setup	Define the recall roster parameters.
Recall Roster List	HR_RECALL_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Roster List	Manage the recall roster.
Reinstatement Roster Setup	HR_REINST_SETUP	Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Setup	Define the reinstatement roster parameters.
Reinstatement Roster List	HR_REINST_CAND_LST	Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster List	Manage the reinstatement roster.
Process Recall/Reinstatement	HR_RUNCTL_REINSTAT	• Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. • Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Roster List Click the Run Reinst Process button.	Use the HR_REIN_EXEC process to recall or reinstatement workers.

Setting Up a Recall Roster

Access the Recall Roster Setup page.

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Recall Roster Setup page

The system only includes candidates whose recall rights are still valid or those candidates who have a No Recall recall rights rule attached to their labor agreement in the recall roster.

Group ID To populate the recall roster with members in a group, select a group ID.

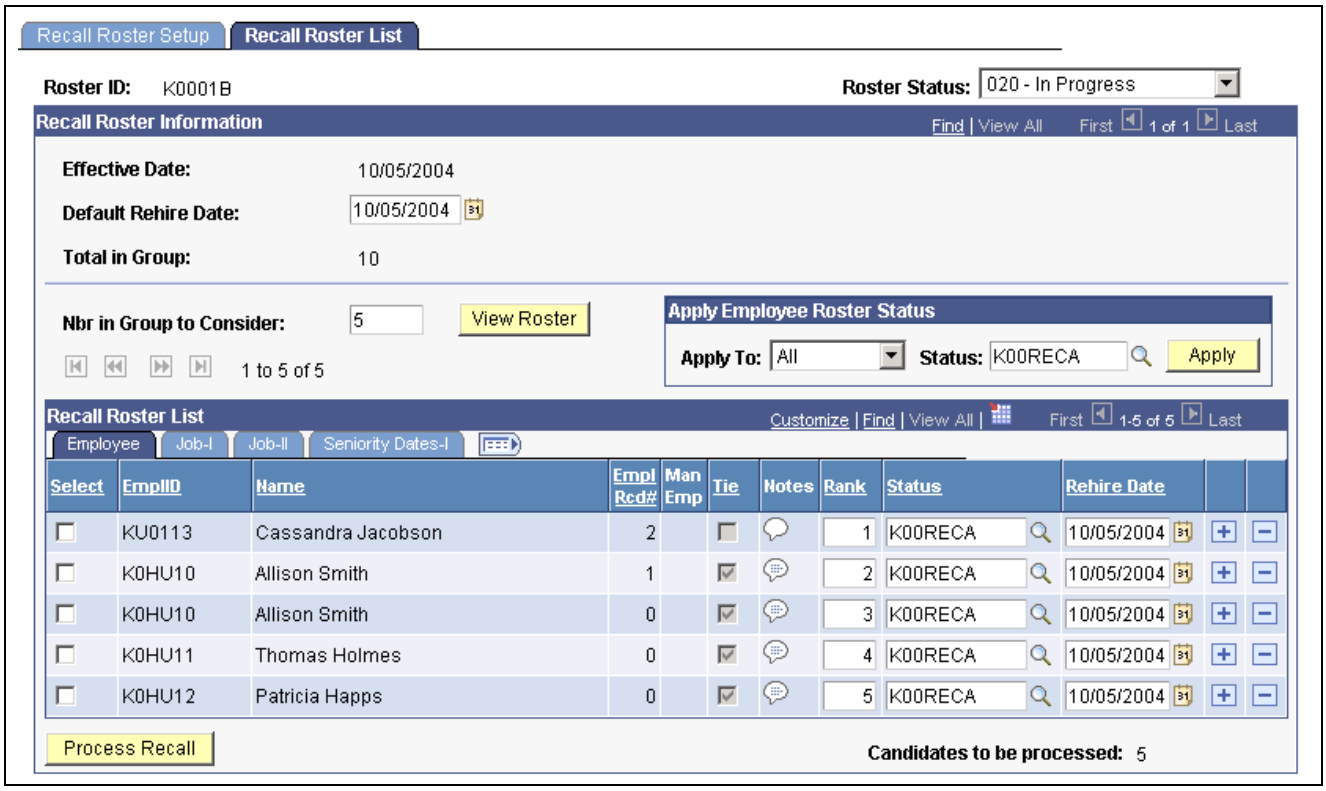
If you select a group ID, confirm that it includes candidates with the HR status you want for this roster (either *Active* or *Active* and *Inactive*).

Layoff Roster ID To populate the recall roster with workers laid off from a roster, select the ID of the layoff roster. When generating the roster, the system first checks that the layoff for those candidates was successful and excluded those candidates that weren't successfully laid off.

Maintaining a Recall Candidate List

Access the Recall Roster List.

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Recall Roster List page

The system will populate the Recall/Reinstatement Roster in one of two different ways:

- If the labor agreement has a no recall expiration rule, the system populates the roster with candidates that were previously laid off.
- If the labor agreement has recall expiration rule that gives workers recall rights, the system populates the roster with candidates who have been previously laid off and who have valid recall rights.

  Those workers whose recall rights have expired (as determined by the recall rights expiration rule attached to their labor agreement) are not eligible for recall.

You can process candidates in batches. The recall process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the recall process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The recall process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the recall process again.

Click Process Recall to access the Recall/Reinstatement Process page and process the candidates for recall.

Adding Candidates Manually

You can manually add candidates to the roster (for example, only six former workers still have recall rights but you need to recall eight). To add a candidate manually, add a row and select an EmplID and employee record number. Click the Man Emp (Manual Employee) button to retrieve the person's job details. Once the worker's details have been retrieved, the button becomes display only. The system assigns all manually-added candidates the permanent rank of zero.

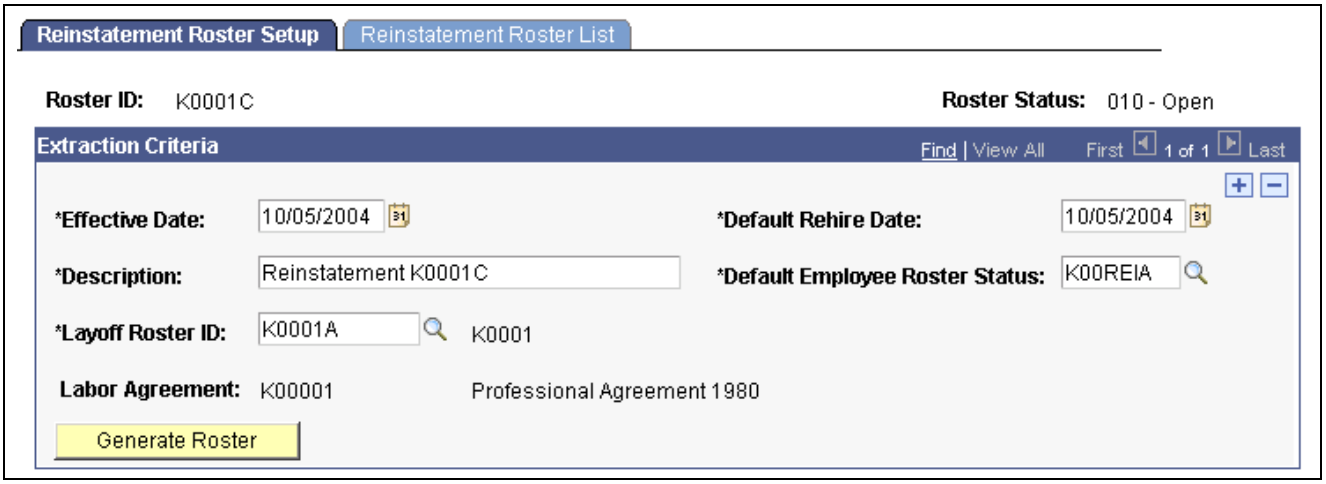
The system updates the Nbr in Group to Consider and Total in Group values to reflect the additional candidates.

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Note. You can remove candidates who were manually added to the roster.

Setting Up a Reinstatement Roster

Access the Reinstatement Roster Setup page.



Reinstatement Roster Setup page

Layoff Roster ID Select the ID of the temporary layoff roster that you are reinstating.

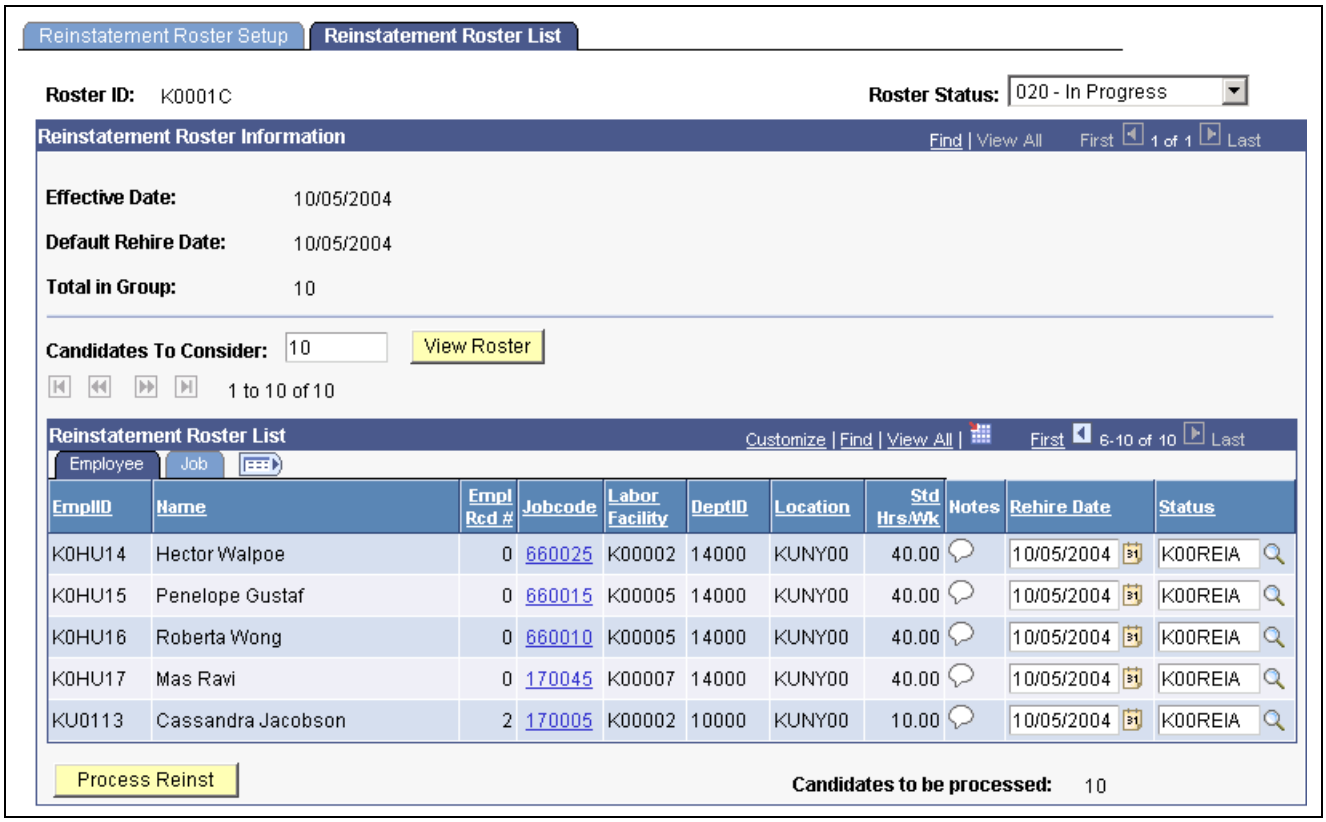
People laid off using a permanent layoff roster need to be recalled using the Recall Roster component and process.

Default Employee Roster Status Select the default roster status of the recall candidates. The system will populate the roster Status field with this value and you can modify it as necessary.

Maintaining a Reinstatement Roster List

Access the Reinstatement Roster List page.

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Reinstatement Roster List page

You can process candidates in batches. The reinstatement process processes those candidates who have a status with the Process Event? check box selected as part of its definition. After the reinstatement process processes candidates with a process event status, the system resets the candidates' status to one with the Event Complete? check box selected as part of its definition. The reinstatement process will not reprocess candidates with an event complete status.

To process another group of candidates, set the status of a new group of candidates to a process event status and run the reinstatement process again.

Processing Recalls and Reinstatements

Access the Process Recall/Reinstatement page.

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Process Recall/Reinstatement page

Running the Recall/Reinstatement Process for a Recall Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a recall roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the recall roster.

  The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

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

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the recall roster.

  The system enters the value of *Recall* in the Reason field.

  The system enters the recall roster's rehire date as the Expiration Date.

  See Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 69.

- Updates the status of the processed candidates in the recall roster with an event complete status.

  See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.

Running the Recall/Reinstatement Process for a Reinstatement Roster

When you run the recall/reinstatement process (HR_REIN_EXEC) for a reinstatement roster, the process:

- Inserts a new row in the Job Data pages with the effective date equaling the rehire date entered on the reinstatement roster.

  The system copies all of the data from the previous Job Data row to the new row and includes the Action and Action Reason values you select here.

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

- Inserts a new row into the Recall Rights page expiring their recall rights, with the effective date equaling the rehire date entered on the reinstatement roster.

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The system enters the value of *Recall* in the Reason field.

The system enters the reinstatement roster's rehire date as the Expiration Date.

See Chapter 6, "Managing Layoffs and Recalls," Maintaining Recall Rights, page 69.

- Updates the status of the processed candidates in the reinstatement roster with an event complete status.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.

Recall/Reinstatement Report

The recall and reinstatement process creates the Recall/Reinstatement Roster Post Processing report (HRLAY008) after it completes the recall process. This report lists those workers rehired. It also creates the Recall Rights Post Processing report (HRLAY007) which list the recall rights created for the rehired workers.

These reports list candidates that were not processed successfully without job data. Review the reports to identify candidates that were not processed by looking for those without job data on this report.

Processing Layoffs and Recalls Using PeopleSoft Mass Update

To process a layoff or a recall using PeopleSoft Mass Update:

1. Select the Use Mass Update? check box on the Layoff Roster Setup or Recall Roster Setup page.
2. Set the status of the candidates you want to process to a process event status on the Layoff Roster List or Recall Candidate List page.

   See Chapter 4, "Setting Up Labor Administration Data," Setting Up Employee Roster Statuses, page 30.
3. In the Query Manager component (QUERY_MANAGER), define a query that selects the roster and the candidates to be processed for layoff or recall.

   Note. We have included two sample queries, HR_UNION_LAYOFF and HR_UNION_RECALL, that you can modify to meet your needs.

   See *Enterprise PeopleTools PeopleBook: PeopleSoft Query*
4. Create a group in the Group Build - Group Definition component.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions".
5. Attach the query to the group.

   Note. We have included two sample groups, K0LAYOFF and K0RECALL, that you can use if you use the sample queries.
6. Set up a Mass Update ID on the Define Mass Update component (MU_SETUP). Enter the following information:
   - In the Population Selection Criteria grid on the Common Changes (MU_SETUP_CHANGES) page, select *Group Build* in the Select By field and the name of the group you are processing in the Group field.

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- Select the job data that you want to update for the candidates that you are processing for layoff or recall.

  For example, in addition to selecting to update the Action and Action Reason fields with the value of *Recall*, you may also want to update the Standard Hours field with a value of *30*.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Processing Mass Updates," Setting Up Mass Update Definitions.

7. Prepare the Mass Update ID on the Create Mass Updates page.
8. Preview the Mass Update ID on the Report Mass Updates or Manage Mass Updates pages.
9. Process the Mass Update ID on the Execute Mass Updates (RUNCTL_MU_EXECUTE) page.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Processing Mass Updates".

Running Layoff and Recall Reports

To run layoff and recall reports, use the Seniority Report component (HR_RUNCTL_LAY003), Layoff Roster Report component (HR_RUNCTL_LAY001), Bumping Report component (HR_RUNCTL_LAY002), Candidate List Report component (HR_RUNCTL_LAY004), and the Recall Roster Report component (HR_RUNCTL_LAY005).

This section discusses how to:

- Run the Seniority report.
- Run the Layoff Roster report.
- Run the Bumping report.

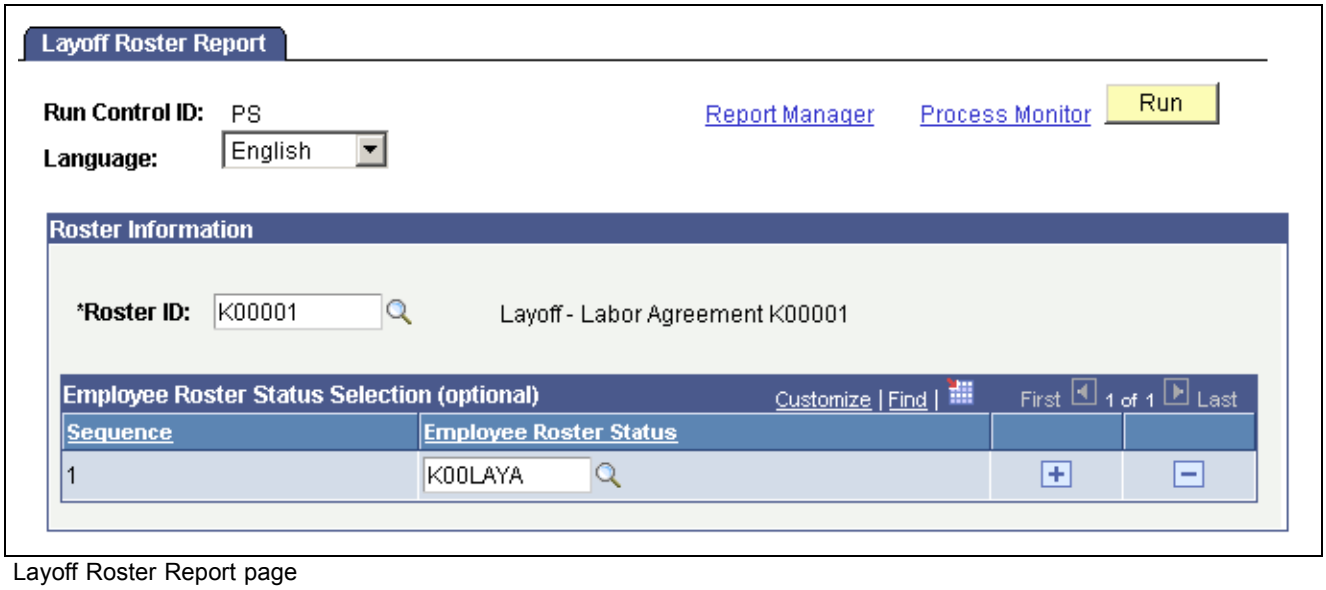
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Pages Used to Run Layoff and Recall Reports

Page Name	Object Name	Navigation	Usage
Layoff Roster Report	HR_RUNCTL_LAY001	Workforce Administration, Labor Administration, Reports, Layoff Roster Report	Use to run a report on the setup and roster list information of a layoff roster (HRLAY001).
Bumping Report	HR_RUNCTL_LAY002	Workforce Administration, Labor Administration, Reports, Bumping Report	Use to run the Bumping report (HRLAY002). This report displays worker job data history and bumping sequence as set up on the labor agreement.
Seniority Report	HR_RUNCTL_LAY003	Workforce Administration, Labor Administration, Reports, Seniority Report	Use to run the Seniority report (HRLAY003). The report lists workers, their seniority dates, and the values for those dates.
Candidate List Report	HR_RUNCTL_LAY004	Workforce Administration, Labor Administration, Reports, Candidate List Report	Use to run the Candidate List Report (HRLAY004). This report lists the workers with recall rights that have not expired.
Recall Roster Report	HR_RUNCTL_LAY005	Workforce Administration, Labor Administration, Report, Recall Roster Report	Use to run a report (HRLAY005) on the setup and roster list information of a recall roster.

Running the Layoff Roster Report

Access the Layoff Roster Report run control page.



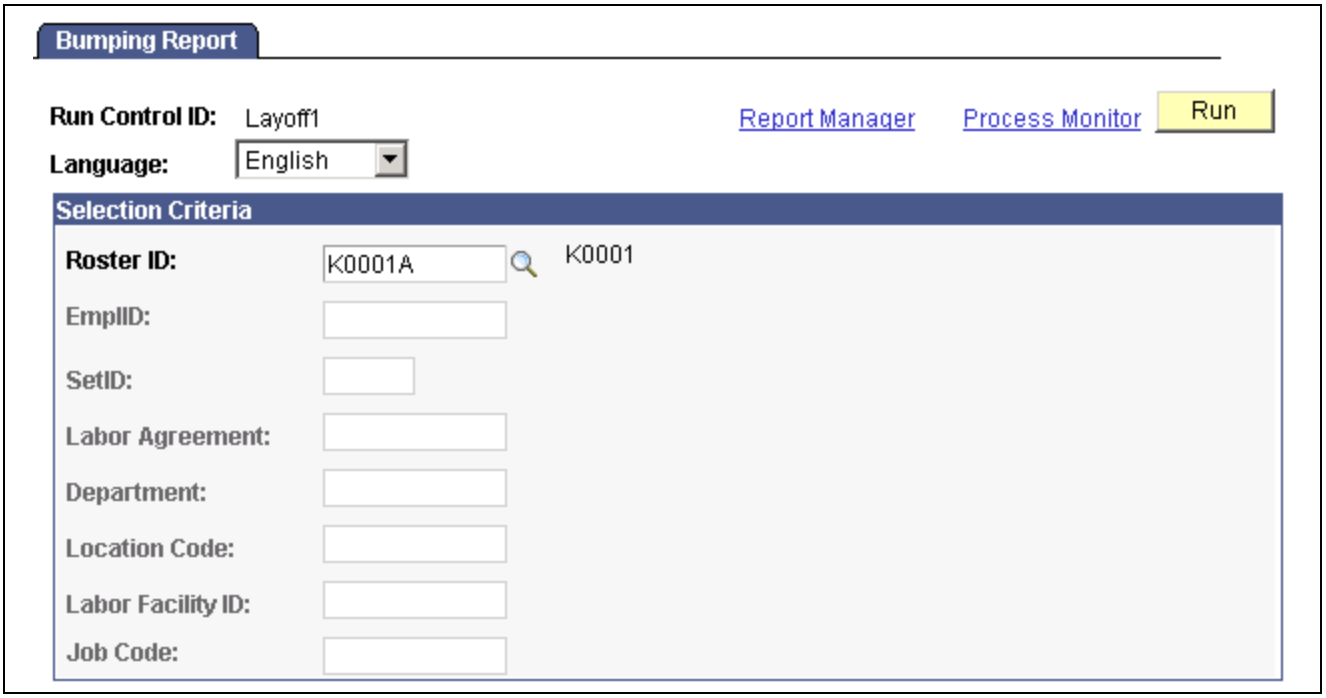
Layoff Roster Report page

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Select the Roster ID you want to report on. To further categorize, select one or more employee roster status in the order in which you want the report to list the people with those statuses.

Running the Bumping Report

Access the Bumping Report run control page.



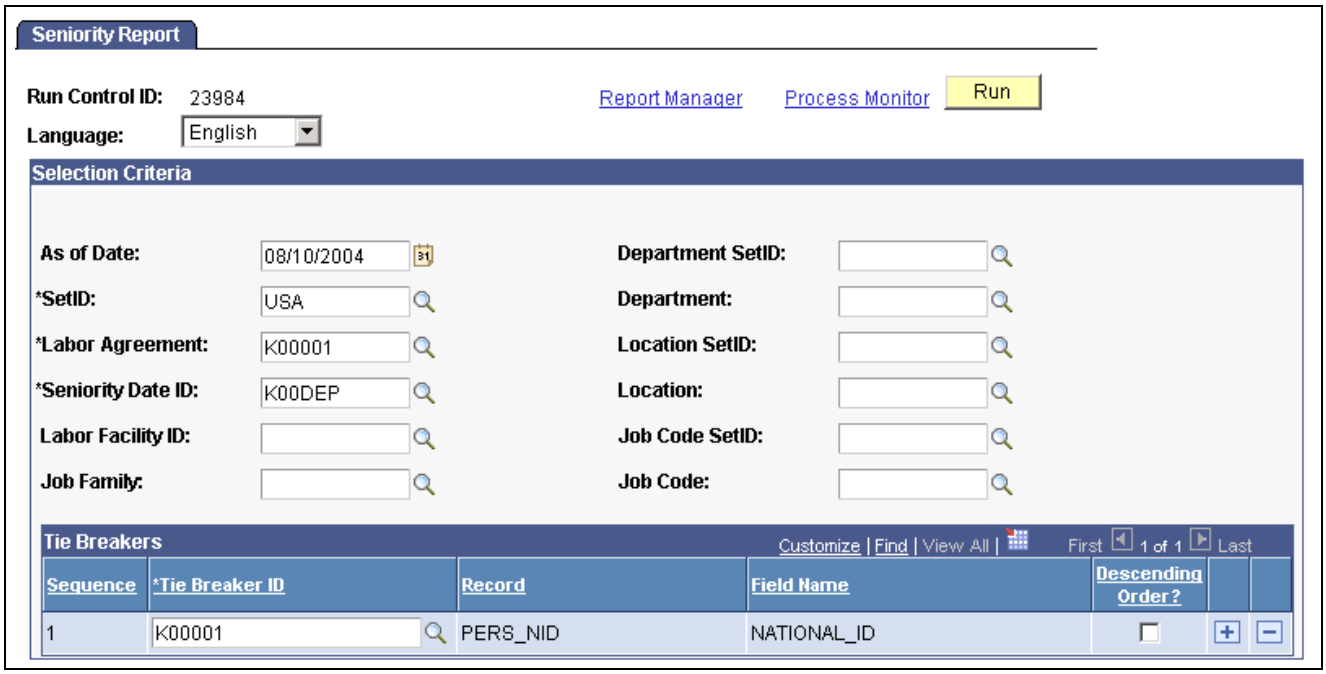
Bumping Report page

Select the roster ID you want to report on. To further limit your search, select values in the other fields. The system will only return the information for those workers that meet the criteria you specify.

Running the Seniority Report

Access the Seniority Report page.

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Seniority Report page

Select values in the fields to limit your search. The system will only return the seniority information for those workers that meet the criteria you specify.

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CHAPTER 7

Managing Wage Progression

This section provides an overview of wage progression and discusses how to:

- Set up wage progression run IDs.
- Extract information from PeopleSoft Payroll for North America.
- Maintain worker wage progression information.
- Approve and process wage advancement.

Understanding Wage Progression

When you assign a worker to a labor agreement and bargaining unit on the Job Data - Job Labor page (JOB_LABOR) and a salary plan with wage progression rules on the Job Data - Salary Plan page (JOB_DATA_SALPLAN), you can manage their wage plan's step progression using the wage progression processes.

Wage progression is the step-by-step advancement of a worker's compensation rate from a beginning rate to one of full parity. The progression is based on a wage progression rule associated with the worker's salary plan. The rule includes step progression requirements and a rate calculation formula.

The Update Wage Progression processes gather the data required to make a decision about the worker's eligibility to advance and stores that information in the Review Wage Progression component (HR_WP_MAINT_ACTVTY). Once all of the necessary data is accumulated , the system can flag qualified workers for advancement. The system inserts a new Job Data row for the qualified workers with their new step and related wage rate. The system processes the new compensation rate in the next payroll.

If, during the calculation of a worker's new rate, they reach or exceed the maximum rate for the salary grade, the system considers them at parity for their job wage rate. In these circumstances, the system increments the worker to the next highest step for the grade and no longer includes them in the wage progression processes.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation".

Wage Progression Business Process

To insure timely reflection of the increased pay rate in a worker's paycheck, evaluate workers on wage progression for step increases prior to each payroll.

To manage wage progression:

1. Set up wage progression run IDs on the Wage Progression Run ID page (HR_WP_ID_DEFN).

   Wage progression run IDs determine the population of workers considered for processing. The run ID is the key value in progression processes.

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See Chapter 7, "Managing Wage Progression," Understanding Wage Progression Run IDs, page 85.

2. To process wage progression rules based on time worked , you must import time data into the wage progression staging table.

   Use the Extract Payroll Data process (HR_EXTRT_NAP) to extract the last pay period's confirmed time data from Payroll for North America. Write additional processes to extract data from other time sources. The Update Wage Progression - Update Activity with Time Data process retrieves the time data from this table.

   See Chapter 7, "Managing Wage Progression," Understanding the Extract Payroll Data Process, page 86.

3. Run the Update Wage Progression processes from the Update Wage Progression page (RUN_UPD_WP_ACTVTY).

   To be included in wage progression processing, a worker must have the following:

   - A labor agreement.
   - A bargaining unit.
   - The Stop Wage Progression check box on the Job Data - Job Labor and Review Wage Progression page is not checked.

   See Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 87.

4. Use the Approve Employees to Advance page (HR_WP_ADVANCE) to approve workers for wage progression if approval is required by the salary plan's wage progression rule.

   See Chapter 7, "Managing Wage Progression," Approving and Processing Wage Advancements, page 99.

   Note. To set up a salary plan requiring advancement approval, select the Advancement Approval Required check box on the Salary Plan Table - Define Wage Progression Rule page (SALARY_PLAN_TABLE2).

   The system will automatically approve workers for advancement if their job and time data meets the advancement criteria and if their plan's wage progression does not require approval for advancement.

   See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation*, "Using Wage Progression with Administer Compensation".

5. Process workers approved for advancement using the Advance Employees to next Step process (HR_WP_ADV) from the Process Wage Progression page (RUN_UPD_WP_ADVC).

   See Chapter 7, "Managing Wage Progression," Processing Wage Progression, page 101.

At any point in the process, you can review or modify a worker's wage progression activity details on the Review Wage Progression page (HR_WP_MAINT_HIST).

See Chapter 7, "Managing Wage Progression," Reviewing and Manually Adjusting Wage Progression Details, page 93.

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Setting Up Wage Progression Run IDs

To set up wage progression run IDs use the Wage Progression Run ID component (HR_WP_ID_DEFN).

This section provides an overview of wage progression run IDs and describes how to set up wage progression run IDs.

Understanding Wage Progression Run IDs

Wage progression run IDs enable you to create discrete populations of workers and manage their wage progression consistently throughout the process. The run ID is a key on the process run control pages and the Approve Employees to Advance page.

Determine the best way to define your population (for example, by salary plan), and then use that method for all your wage progression run IDs.

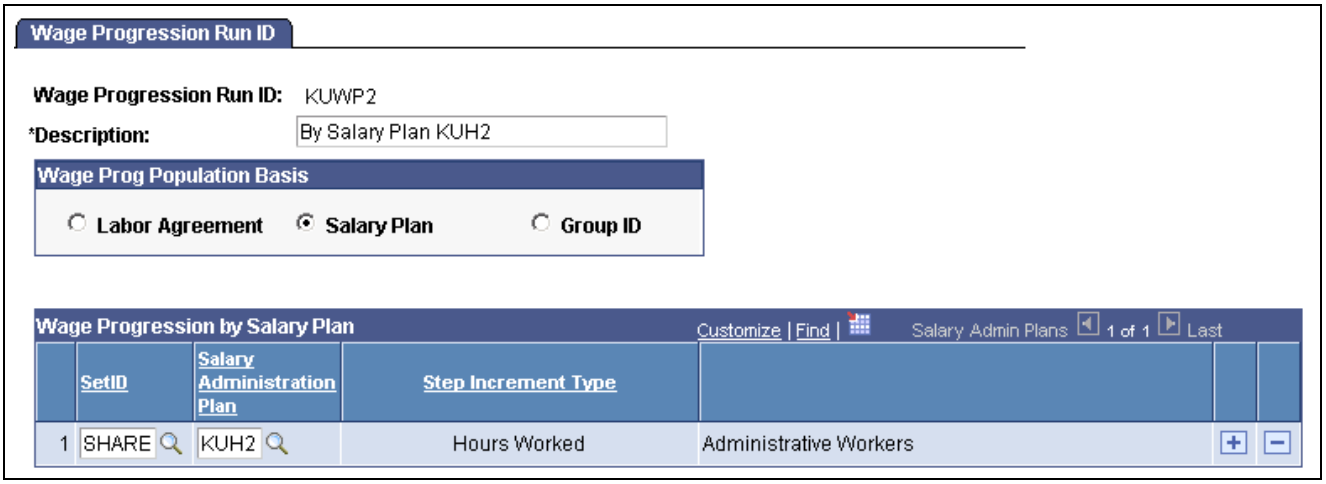
Note. Be sure to configure run ID populations in such a way that you will be including a worker's Job Data record in only one population.

Page Used to Set Up Wage Progression Run IDs

Page Name	Object Name	Navigation	Usage
Wage Progr Run ID (wage progression run ID)	HR_WP_ID_DEFN	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Run ID, Wage Progression Run ID	Define groups of workers to manage throughout the wage progression process.

Setting Up Wage Progression IDs

Access the Wage Progression Run ID page.



Wage Progression Run ID page.

Wage Progression Population Basis

Choose the method by which to determine the population for the wage progression run ID:

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- Labor Agreement
- Salary Plan
- Group ID

Wage Progression by Bargaining Unit

When you select Labor Agreement as your run ID population basis, enter one or more labor agreements in the grid and the workers associated with the selected labor agreements will make up the run ID population.

Wage Progression by Salary Plan

When you select Salary Plan as your run ID population basis, enter one or more salary plans in the grid and the workers associated with the selected plans will make up the run ID population.

Wage Progression by Group ID

When you select Group ID as your run ID population basis, enter one group ID and the workers associated with the selected group ID will make up the run ID population.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Group Definitions".

Extracting Information from PeopleSoft Enterprise Payroll for North America

To obtain time-worked information from PeopleSoft Enterprise Payroll for North America, use the Extract Payroll Data component (HR_WP_NA_PY_EXTRCT).

This section provides an overview of the Extract Payroll Data process and discusses how to extract information from Payroll for North America.

Understanding the Extract Payroll Data Process

If you are using Payroll for North America to process your workers' payroll and if you have workers in a salary plan with wage progression rules that use special accumulators for hours worked or leave hour limits, use the Extract NA Payroll Data process (HR_EXTRT_NAP) to extract time data of your workers.

Run the process once per pay cycle. The Extract NA Payroll Data process:

- For the selected company, extracts all the previous payroll's confirmed time data specified in the wage progression rule's accumulator ID and places it in an HR staging tables HR_PAY_STG and HR_PAY_STG_ERNS.
- Sets the HR_WP_PROCESS_FLG on the PAY_CHECK record to indicate that the time data has been processed and to prevent the system from gathering the same data multiple times.

The Update Wage Progression - Payroll Update process retrieves the time data from the staging table and updates the Review Wage Progression page with the information to enable you to manage wage progression and process workers for advancement. After you run the Update Wage Progression process you can review the detailed time data using the Review Time Details page.

See Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 98.

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See Chapter 7, "Managing Wage Progression," Understanding the Extract Payroll Data Process, page 86.

See Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 87.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*.

Extracting Off-Cycle Runs

The Extract Payroll Data process will not extract off-cycle payrolls for a Pay Run ID until an on-cycle payroll has been run first for the same Pay Run ID.

If the year-ending month is opened up for an off-cycle payroll after the next period on-cycle payroll has already been run, make sure to accommodate the payroll time entries in wage progression while the off-cycle payroll is open. The extraction process will not recognize the additional entries for the Pay Run ID once the off-cycle payroll has been closed again.

Pages Used to Extract Time Information

Page Name	Object Name	Navigation	Usage
Extract Payroll Data	HR_WP_NA_PY_EXTRCT	Workforce Administration, Labor Administration, Wage Progression, Extract Payroll Data, Extract Payroll Data	Run the Extract Payroll Data process. Select the company whose payroll data you want to extract.

Maintaining Worker Wage Progression Information

To maintain worker wage progression information use the Update Wage Progression component (RUN_UPD_WP_ACTVTY) and Review Wage Progression component (HR_WP_MAINT_ACTVTY).

This section provides an overview of the Update Wage Progression process and discusses how to:

- Update wage progression details systematically.
- Review and manually adjust wage progression details.
- Review time details.
- View and acknowledge exception conditions.

Understanding the Update Wage Progression Process

The Update Wage Progression process is made up of three processes that gather the job and payroll time information related to wage progression for workers included in the Wage Progression Run ID, and determine when a worker is qualified to advance based on their wage progression rule. Each process updates the Review Wage Progression page.

The three processes are:

1. The Update Activity with Job Data process (HR_WP_UPD_JC).

   Run to update workers' wage progression records with relevant updates from their job data records.
2. The Update Activity with Time Data process (HR_WP_UPD_PY0).

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Run to update workers' wage progression records with time worked information extracted from the payroll system.

3. The Qualify Employees process (HR_WP_UPD_QL).

   Run to evaluate and qualify if workers are ready for advancement.

Note. You must run these processes in sequence.

Update Activity with Job Data Process

If a worker is assigned to a bargaining unit, labor agreement, and salary plan that includes a wage progression rule, the Update Activity with Job Data process:

- Detects changes to the following fields on the current Job Data record:
  - Bargaining unit.
  - Labor agreement.
  - SETID_JOBCODE, if the change is the result of a change in the worker's business unit.
  - JOBCODE, if the new value is manually entered.
  - SETID_SALARY, if the change is the result of a change in the worker's business unit.
  - SAL_ADMIN_PLAN, if the new value is manually entered or changed as a result of a system rule.
  - GRADE, if the new value is manually entered or changed as a result of a system rule.
  - STEP, if the new value is manually entered.
  - STEP_ENTRY_DT , if the value is updated
  - WPP_STOP_FLAG, if the new value is manually entered.

  Note. The system processes the Job Data record that is current on the process' As of Date.

- When a Job Code change occurs, checks and applies the carryover rules selected for the worker's labor agreement on the Labor Agreement page (HR_LABOR_AGR_DEFN1).

  See Chapter 4, "Setting Up Labor Administration Data," Defining General Labor Agreement Terms, page 33.

- Inserts a new row into the Review Wage Progression page with the updated information.

  The system identifies this row by populating the Type field with the value of *Job Change*.

- Updates the Last Process Dates date and time stamps.

Note. After the process initially records a selected Stop Wage Progression check box for a worker, it will no longer gather job data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab.

Update Activity with Time Data Process

Run this process when the wage progression rule is based on hours worked or when an elapsed-time wage progression rule has leave limits in effect. The process processes all staged time data, processed by the Extract Time Data process, for workers active in wage progression. The staging tables (HR_PAY_STG and HR_PAY_STG_ERNS) must first be populated with data extracted from Payroll for North America or another external subsystem.

If the process detects previously extracted and staged time data, it:

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- Inserts a new row into the Review Wage Progression page with the updated information.

  The system identifies this row by populating the Type field with the value of *Payroll Update*.

- Inserts a new row into the Review Time Detail page.

  See Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 98.

- Deletes the row from the staging table after processing.

  Updates the Last Process Dates date and time stamps.

Note. The process will not gather time data for workers who have the Stop Wage Progression check box selected on the Job Labor page or Review Wage Progression - Activity tab but it will deleted the row in the staging table so that the time will not be processed once you clear the Stop Wage Progression check box for the worker.

Note. You do not need to enter an As of Date to run this process as all rows in the staging tables will be processed. The system will create a separate Review Wage Progression entry for each pay period.

See Chapter 7, "Managing Wage Progression," Extracting Information from PeopleSoft Enterprise Payroll for North America, page 86.

Qualify Employees Process

The Qualify Employees process determines if a worker is ready for step advancement. The process should be the last update run prior to Process Wage Progression which will perform the actual wage advancement.

The process qualifies workers under an elapsed-time wage progression rule by looking at the adjusted step entry date in the most recent job change or manual row in the Review Wage Progression page comparing it to the as of date entered on the run control page.

The process qualifies workers under hours-worked rules by looking at the first payroll update row in the Review Wage Progression page with hours that qualify. Whenever there is a manual row with the same date as a job change or payroll update row, the process gives the manual row's data precedence. The process:

- Calculates and populates the Estimated Advancement Date value.

  This calculation is based on the wage progression rule's advancement parameters, the worker's adjusted step entry date, as of date, hours worked, on the Review Wage Progression page and, for hours worked rules, the standard hours on the Job Data - Job Information page.

- The process will set the worker's wage progression status depending on the type of wage progression rule:
  - For hours-worked wage progression rules, the process determines if the worker has accumulated enough hours since the step's original entry date.

    If the Accumulated Hours Worked is greater than the step's Required Hours and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved*; or if Approval is required, *Qualified-Approval Required* or *Almost Qualified*, if the wage progression approval rule allows for an hours within tolerance.

  - For elapsed-time rules, the process determines if the calendar time between the worker's adjusted step entry date and the process As of Date exceeds the time required in the salary step.

    If the time has been met and the wage progression rule does not indicate that approval is required, the system sets the worker's status to *Approved.* If the rule does require approval, the system sets the status to *Qualified - Approval Required*. If the wage progression approval rule allows for an hours within tolerance, the system may set the status to *Almost Qualified*.

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In all other circumstances, the process sets the status to *Not Qualified.*

- Updates the qualifying row on the Review Wage Progression page with the Status field accordingly.

  Updates the Last Process Dates date and time stamps.

Process Exceptions

All Update Wage Progression processes identify circumstances that fall outside the basic wage progression definition and flags the workers' Review Wage Progression records with an exception condition. The system will not process for advancement workers with a row in an exception state but all other wage progression processes will continue.

During any of the Update Wage Progression processes, the system will mark a worker for exception when it encounters an exception condition. The system inserts a red alert icon (!) on the worker's Review Wage Progression page. Additionally, you can generate a list of workers with exceptions using the Wage Progression Exception report. The table below lists the various exceptions, what triggered the exception, and the action you might take before acknowledging the exception.

Exception Condition	What it Means	Action Required
Job Data Correction	A user has made a correction to a Job Data row, effecting job data that impacts wage progression.	Review the worker's Job Data record and make modifications to the job data record or the worker's wage progression record, if necessary.
Manual Step Advance	A user has manually changed a worker's grade step level on the Job Data - Salary Plan page.	Review the change for accuracy.
Exceeded Leave Hours	The worker's leave hours have exceeded the leave limit prior to meeting the elapsed time required for step advancement.	Review the worker's wage progression record and modify the Orig Step Entry Date value if appropriate.
Exceeded Time Limit	The worker has worked the required number of hours in the required calendar period.	Review the worker's wage progression record and modify the Orig Step Entry Date or Hours Worked value if appropriate.
Approved but Stop Wage Progression	A user has selected one of the Stop Wage Progression check boxes of a worker who was approved for advancement.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Released Stop Wage Progression	A user has cleared one of the Stop Wage Progression check boxes.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.
Two Earnings Periods	The Update Activity with Time Data process includes time from two or more earnings periods.	Review the worker's Job Data record and wage progression record and make modifications to the job data record or the worker's wage progression record, if necessary.

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Exception Condition	What it Means	Action Required
Special Accumulator ID Changed	A user has changed the wage progression rule's accumulator ID on the Salary Plan Table – Define Wage Progression Rule page.	Review the worker's wage progression record and modify if appropriate.
New Time < Old Time	The Update Activity with Time Data process has caused the worker's new Hours Worked total to be less than the previous Hours Worked value.	Review the worker's wage progression record and modify if appropriate.

Pages Used to Maintain Worker Wage Progression Information

Page Name	Object Name	Navigation	Usage
Update Wage Progression	RUN_UPD_WP_ACTVTY	Workforce Administration, Labor Administration, Wage Progression, Update Wage Progression, Update Wage Progression	To update a worker's wage progression activity record, run the following wage progression processes in sequence: 1. Update Activity with Job Data process. 2. Update Activity with Time Data process. 3. Qualify Employees process.
Review Wage Progression	HR_WP_MAINT_HIST	Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression	Review a worker's wage progression activity rows and add new rows to make manual adjustments to the activity record.
Review Time Details	HR_WP_EARN_INQUIRY	• Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression Click the Time Detail button on the Review Wage Progression - Elapsed Time tab (leave hours) and Review Wage Progression - Reported Time tab (hours worked). • Workforce Administration, Labor Administration, Wage Progression, Review Time Details, Review Time Details	Review earning period details per pay period about a worker's leave and worked hours.

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Page Name	Object Name	Navigation	Usage
Exception Messages	HR_WP_MSG_SEC	Workforce Administration, Labor Administration, Wage Progression, Review Wage Progression, Review Wage Progression Click the Exception Detail button on the Review Wage Progression - Exception tab.	Review system messages about why a worker was excepted from advancement. Acknowledge exception to resume wage advancement eligibility.
Exceptions Report	RUN_WP002	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Exception Rpt, Exceptions Report	Run the Exceptions Report (WP002). It lists all employees within a Wage Progression Run ID group that have unacknowledged Exceptions and indicates the exception type.

Updating Wage Progression Details Systematically

Access the Update Wage Progression page.



Update Wage Progression page

You must run the three update process one at a time, in this order:

1. Update Activity with Job Data process (HR_WP_UPD_JC)
2. Update Activity with Time Data process (HR_WP_UPD_PY0)
3. Qualify Employees process (HR_WP_UPD_QL)

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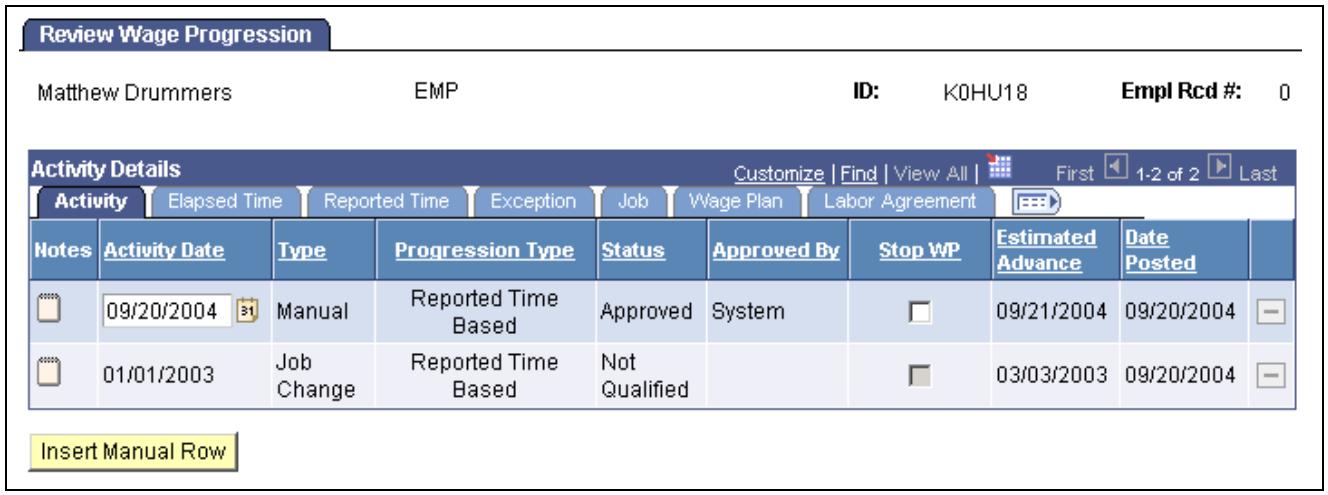
Wage Progression Run ID Select the run ID representing the information group on which you want to collect activity data.

As of Date Select the date as of which you want to incorporate changes to the Job Data pages or qualify an Elapsed Rule based worker for advancement.

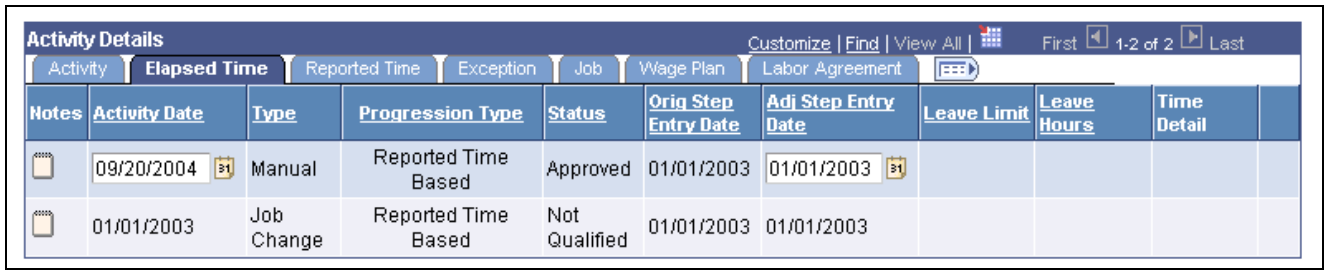
Last Process Dates There are five wage progression programs. This group box lists the last time each of the processes were run and which process was run most recently.

Reviewing and Manually Adjusting Wage Progression Details

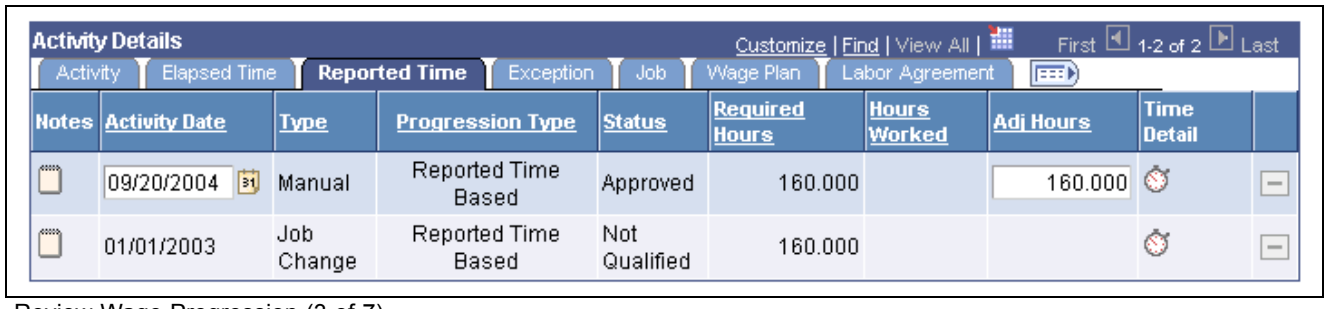
Access the Review Wage Progression page.



Review Wage Progression (1 of 7)

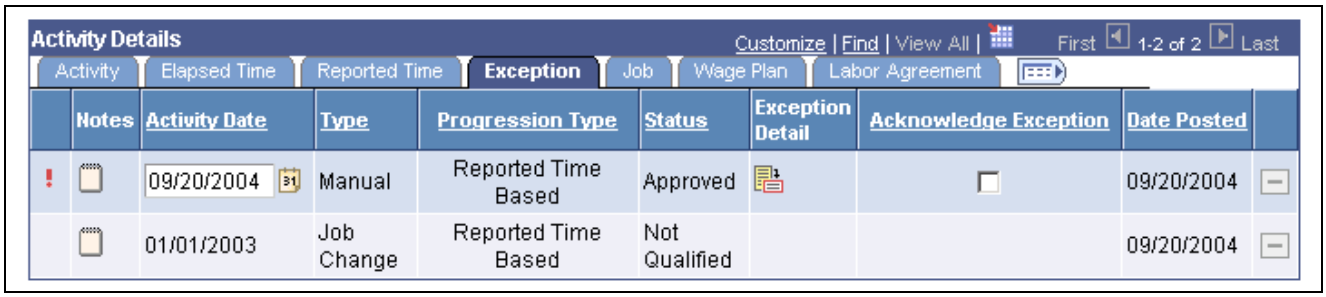


Review Wage Progression (2 of 7)



Review Wage Progression (3 of 7)

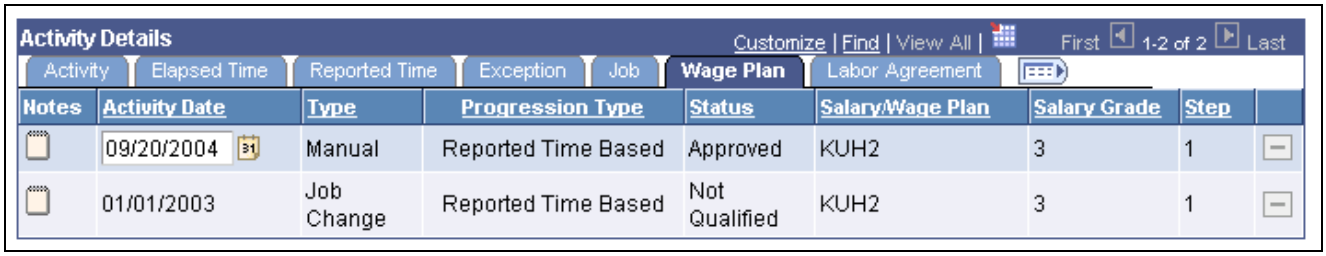
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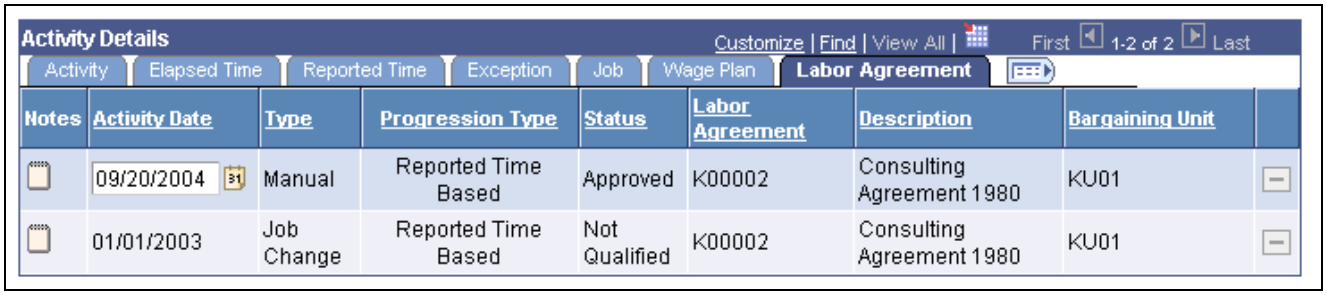
Review Wage Progression (4 of 7)



Review Wage Progression (5 of 7)



Review Wage Progression (6 of 7)



Review Wage Progression (7 of 7)

Static Columns

These columns appear on each tab.

! For workers with unacknowledged exceptions, the system marks the rows with a red alert icon.

See Chapter 7, "Managing Wage Progression," Viewing and Acknowledging Exception Conditions, page 98.

Notes Click to access the Notepad feature to enter or review notes about a row of wage progression activity. You should add a note of explanation for all manual adjustments.

Activity Date The date the wage progression activity took place. The activity date for rows with a type of:

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- *Job Change* equals to the effective date of the Job Data record.
- *Payroll Update* equals to the pay period end date.
- *Manual* defaults to the system date, but can be overridden. The date must be greater than or equal to the last activity date.

Type

The system populates this field with one of the following values to indicate what type of update has been made to the worker's wage progression history:

- *Job Change*

  The Job Data subprocess from the Update Wage Progression process page processed changes on the Job Data pages that impacted wage progression.

- *Payroll Update*

  The worker is assigned to a wage progression rule that requires time data and the Time Data subprocess from the Update Wage Progression process page has processed the time data.

- *Wage Advancement*

  The Process Wage Progression process has advanced this worker to a new step ID.

- *Manual*

  You manually updated the worker's wage progression activity on this page.

Note. You should include a note explaining the manual updates you make.

Progression Type

Displays the progression rule's increment type, either *Elapsed Time Based* on *Reported Time Based*.

Status

The Qualification subprocess from the Update Wage Progression process page or an individual manual row entry may trigger a status change if the data supports it. When there is a manual row on the same date as another type of row, the system gives the manual row precedence. The system will evaluate this row for proper status and adjust the other rows accordingly. The system updates the Status field with the following values:

- *Not Qualified:*Not ready for advancement. This status is applied when a worker first enters a step.
- *Almost Qualified:*This status is only applied to workers with salary plan whose wage progression rules require approval and have a time within tolerance.
- *Qualified - Approval Required:* Worker has met advancement criteria but the wage progression rule requires manual approval. Approve workers for advancement on the Approve Employees to Advance page.

  See Chapter 7, "Managing Wage Progression," Approving Workers for Advancement, page 100.

- *Approved:* Worker has met advancement criteria and has been approved automatically (wage progression rule does not require manual approval).
- *Not Approved:* The worker previously had the status of *Qualified - Approval Required* or *Almost Qualified* but you did not manually approve them prior to running the Process Wage Progression process. The system

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will reset the worker's status to *Qualified - Approval Required* or *Almost Qualified* the next time you run the Qualify Employees process from the Update Wage Progression page.

- *Advanced:* Assigned to the last row with the old salary step to indicate that the worker has advanced to a new step.
- *Completed Wage Progression:* Assigned to workers who have reached the top step of the plan's wage progression rule.

Activity

Approved By

- If the system automatically approved the worker for advancement, the system sets the value to *System*.
- If the worker requires manual approval, for advancement, the system sets the value to *Manual* once you approve them on the Approve Employees to Advance page.

Stop WP (stop wage progression)

Select this check box here or on the Job Labor page to suspend a worker's participation in the wage progression process. When you select this check box here the system inserts a new Job Data row and selects the Stop Wage Progression check box on the Job Data - Job Labor page.

When you select the Stop Wage Progression on the Job Labor page, the system updates the wage progression activity when you next run the Update Activity with Job Data process.

When you select the check box, the system:

- Makes the salary plan and grade fields available for entry on the Job Data - Salary Plan page.
- No longer includes the worker in the Update Wage Progression processes (except for the first Update Activity with Job Data process that updates this field with the value from the Job Labor page, if that's where you first selected the check box).

The system also selects this check box when a worker completes the wage progression.

Estimated Advance

Displays the system-calculated estimated date the worker will be eligible to advance based on the wage progression rule of their salary plan.

For rules based on hours worked, the system bases this calculation on the standard hours on the worker's Job Data record. The date will always be the first day of the next pay period after the worker qualifies.

This is only an estimate since various other factors could impact the actual advancement date.

See Chapter 7, "Managing Wage Progression," Understanding the Update Wage Progression Process, page 87.

Date Posted

Displays the system date the row was generated or created.

Elapsed Time

These fields are applicable for elapsed time-based wage progression rules only.

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Orig Step Entry Date (original step entry date) — Displays the date the worker *originally* entered their current salary step. The system draws this value from the Step Entry Date field on the Job Data - Salary Plan page.

Adj Step Entry Date (adjusted step entry date) — Manually adjust the step entry date here to maintain wage progression accuracy.

Leave Limit — (Optional) Displays the maximum number of leave hours a worker can accumulate while in the step, as defined in the salary plan's progression rule.

Leave Hours — (Optional) Displays the leave hours the worker has accumulated since the original step entry date. The Update Activity with Time Data process updates this value.

Time Detail — (Optional) Click to view the Review Time Details page.

See Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 98.

Reported Time

These fields are applicable for hours-based wage progression rules only.

Required Hours — Displays the number of hours the worker needs to accumulate to advance to the next grade step defined in the salary plan's progression rule.

Hours Worked — Displays the qualifying hours the worker has worked since the original step entry date. The Update Activity with Time Data process updates this value and also adds in any adjusted hours from a previous manual row.

Adj Hours (adjusted hours) — Manually enter hours here to establish a new total for hours worked. Adjust the hours as necessary to maintain wage progression accuracy. The next Update Wage Progression with Time Data will incorporate manual adjustments. The system uses this adjusted value to qualify if the worker is ready to progress to the next step by comparing it to the Required Hours.

Time Detail — (Optional) Click to view the Review Time Details page.

See Chapter 7, "Managing Wage Progression," Reviewing Time Details, page 98.

Exception

Exception Detail — These columns only appear if there is a row with an exception. Click to view the details about the worker's exception from advancement.

See Chapter 7, "Managing Wage Progression," Viewing and Acknowledging Exception Conditions, page 98.

Acknowledge Exception — Select to indicate that you acknowledge the exception message and return the worker to advancement eligibility.

Job

Job Code and **Description** — Displays the job code and a description of the worker's job.

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Wage Plan

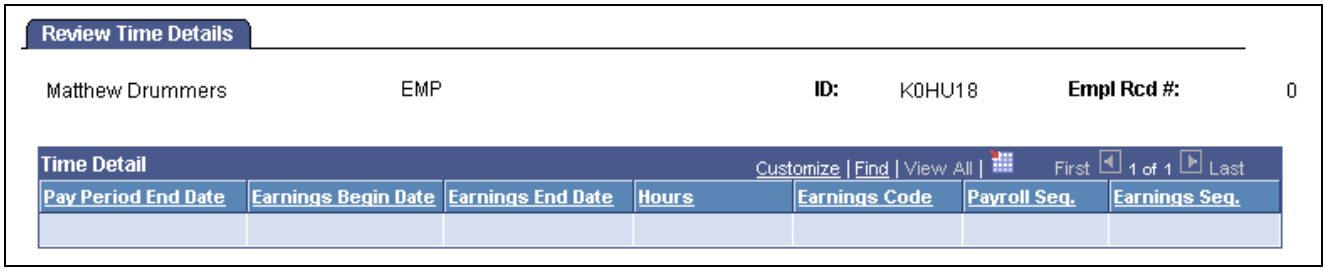
Salary/Wage Plan, Salary Grade and **Step** — Displays the wage progression salary plan, grade, and step currently held by the worker.

Labor Agreement

Labor Agreement . **Description** , and **Bargaining Unit** — Displays the worker's labor agreement and bargaining unit.

Reviewing Time Details

Access the Review Time Details page.

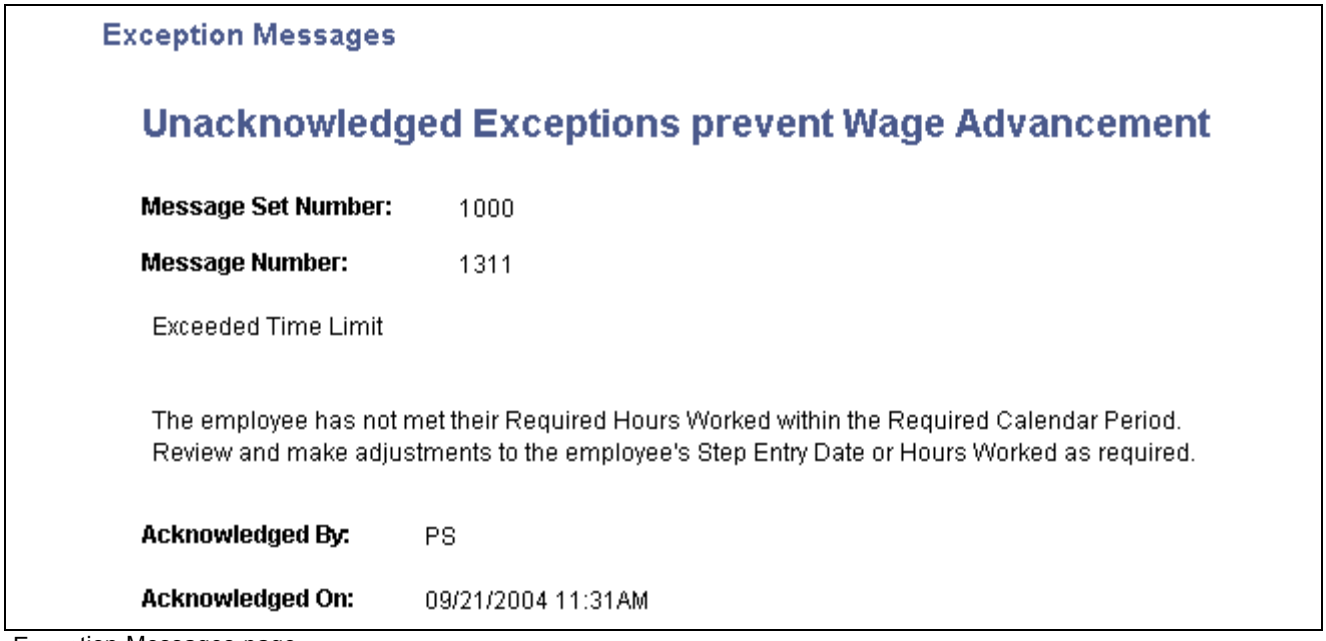


Review Time Details page.

Note. The data populated on this page depends on the source of the data and process by which you populate this page. The Extract Payroll Data process populates the page with Payroll for North America pay period and earning period time data for the special accumulator identified in the worker's wage progression rule.

Viewing and Acknowledging Exception Conditions

Access the Exception Messages page.



Exception Messages page

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When a worker's wage progression conditions warrant manual review and a possible manual adjustment, the Update Wage Progression process will flag their Review Wage Progression record. When a worker is excepted, you cannot advance the person until you have acknowledged the exception by selecting the Acknowledge Exception check box on the Review Wage Progression - Exception tab. However, the system will continue to update the worker's Review Wage Progression record when you run the Update Activity with Job Data and the Update Activity with Time Data processes.

When you select the Acknowledge Exception check box and save the Review Wage Progression page, the system updates the Acknowledged By and Acknowledged On fields with your user ID and the date and time you acknowledged the exception. Click the Notepad button to enter comments. You should add a note of explanation for all exception acknowledgements.

Approving and Processing Wage Advancements

To approve and process wage advancements, use the Approve Employees to Advance component (HR_WP_ADVANCE) and the Process Wage Progression component (RUN_UPD_WP_ADVANCE).

This section provides an overview of the Advance Employees to the Next Step process and discusses how to:

- Approve workers for advancement.
- Process wage progression.

Understanding the Process Wage Progression Process

The Process Wage Progression process (HR_WP_ADV) advances employees to their next wage step, inserting a new Job Data row for each worker being processed.

If workers have a status of *Approved* on the Review Wage Progression page or you have manually approved them for advancement on the Approve Employees to Advance page, the process:

- Updates the Job Data - Salary Plan page with the new step information and executes a Default Pay Components action to enter the new pay rates on the Compensation page (JOB_DATA3). Only rate codes with a Source of Sal Step will be updated. The process will not modify rate codes with a source of Manual.
- Updates the qualifying row on the Review Wage Progression page for the completed salary step, setting the status to *Advanced.*.
- Inserts a new row into the Review Wage Progression page for the new salary step and sets the status to *Not Qualified.*.

Note. If the worker has a status of *Completed Wage Progression* on the Review Wage Progression page, indicating that they have already reached the top of the wage progression, the process selects the Stop Wage Progression check box on the Job Data - Job Labor page.

You can also launch a preview report, Employees Due Advancement (WP001.SQR), from the Process Wage Progression page to create a list of all of the workers that the Process Wage Progression process will advance. The system will not include workers who have already been processed for advancement.

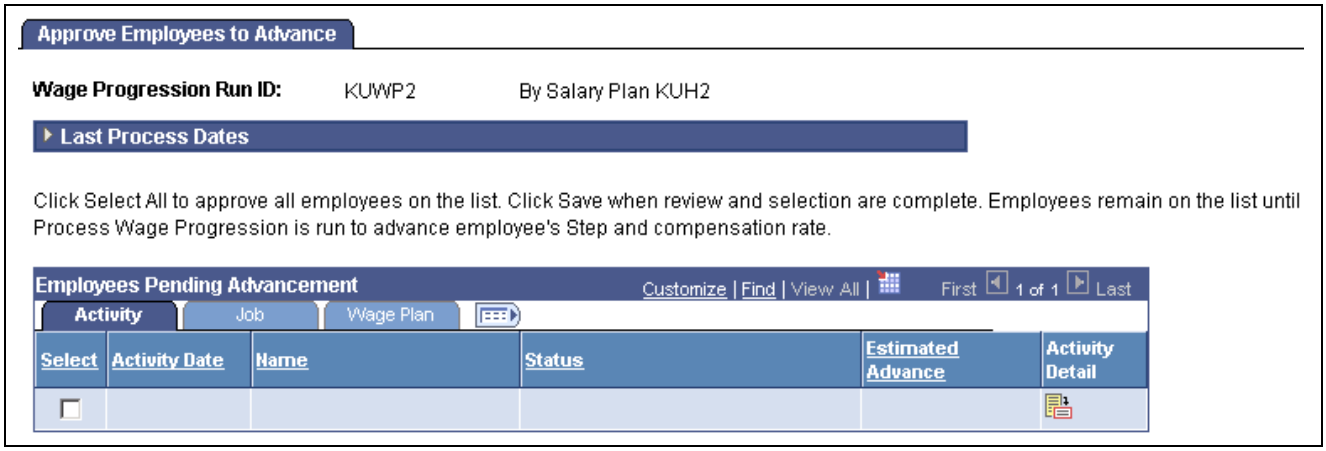
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Pages Used to Approve and Processing Wage Advancements

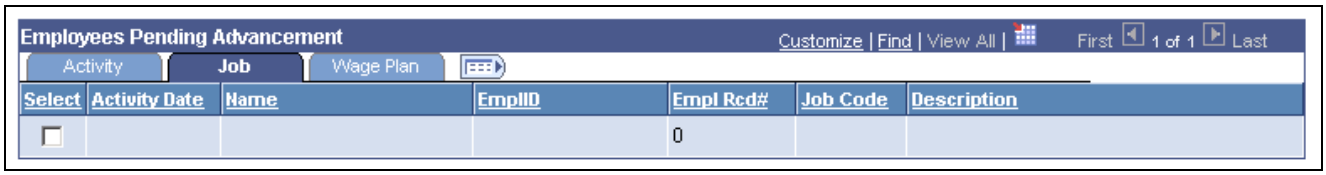
Page Name	Object Name	Navigation	Usage
Approve Employees to Advance	HR_WP_ADVANCE	Workforce Administration, Labor Administration, Wage Progression, Approve Employees to Advance, Approve Employees to Advance	If the worker's wage progression rule requires approval, approve workers for wage progression from the online list displayed by a Wage Progression Run ID.
Process Wage Progression	RUN_UPD_WP_ADVC	Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression	• Run a preview report of all advancement candidates in a Wage Progression Run ID. • Process advancements, inserting new steps and wage rates, for all qualified candidates in a Wage Progression Run ID.

Approving Workers for Advancement

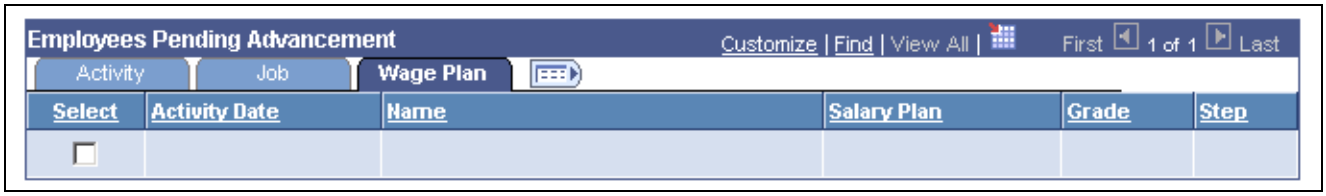
Access the Approve Employees to Advance page.



Approve Employees to Advance page (1 of 3)



Approve Employees to Advance page (2 of 3)



Approve Employees to Advance page (3 of 3)

To approve a worker for wage progression, select the Select check box.

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The system only displays those workers who have a status of *Qualified - Approval Required* or *Almost Qualified* on the Review Wage Progression page. Click the Activity Detail button to review a worker's wage progression information on the Review Wage Progression page.

If a worker has an unacknowledged exception, the system marks their row with a red alert icon (!) and makes the Select check box next to their name unavailable. Click the Exception Detail button to review the Exception Messages page.

Workers remain on the Employees Pending Advancement list until you process the wage advancement using the Process Wage Progression process. If you do not approve a worker on this list prior to running the Process Wage Progression process, the system changes their status on the Review Wage Progression page to *Not Approved.* You need to run the Update Wage Progression - Qualify Employees process to reset their status to *Qualified - Approval Required* or *Almost Qualified* and make them appear on this page for approval again.

Processing Wage Progression

Access the Process Wage Progression page.



Process Wage Progression page

Wage Progression Run ID Select the wage progression run ID representing the population of workers you want to process for advancement.

Update Future Rows Select whether to update future-dated Job Data rows.

If a worker has future-dated Job Data rows (rows whose effective dates are greater than the date the of the Job Data row the Advance Employees to next Step process will insert), the system will update the step and compensation data in the future Job Data rows in addition to adding the new current row. The process will only update future-dated Job Data rows with salary plan, grade, and step values identical to the new row.

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Last Process Dates This collapsible group box contains a log of the five wage progression programs. It indicates the last time each of the processes were run and which of the processes was run most recently.

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CHAPTER 8

Tracking Disciplinary Actions and Grievances

This chapter discusses how to:

- Track disciplinary actions.
- Track grievances.
- Track union negotiability appeals.

Tracking Disciplinary Actions

This section discusses how to:

- Enter disciplinary incidents.
- (USF) Enter disciplinary offences.
- Document disciplinary action details.
- (USF) Document disciplinary action details.
- Record disciplinary incident resolutions.
- (USF) Record disciplinary incident resolutions.

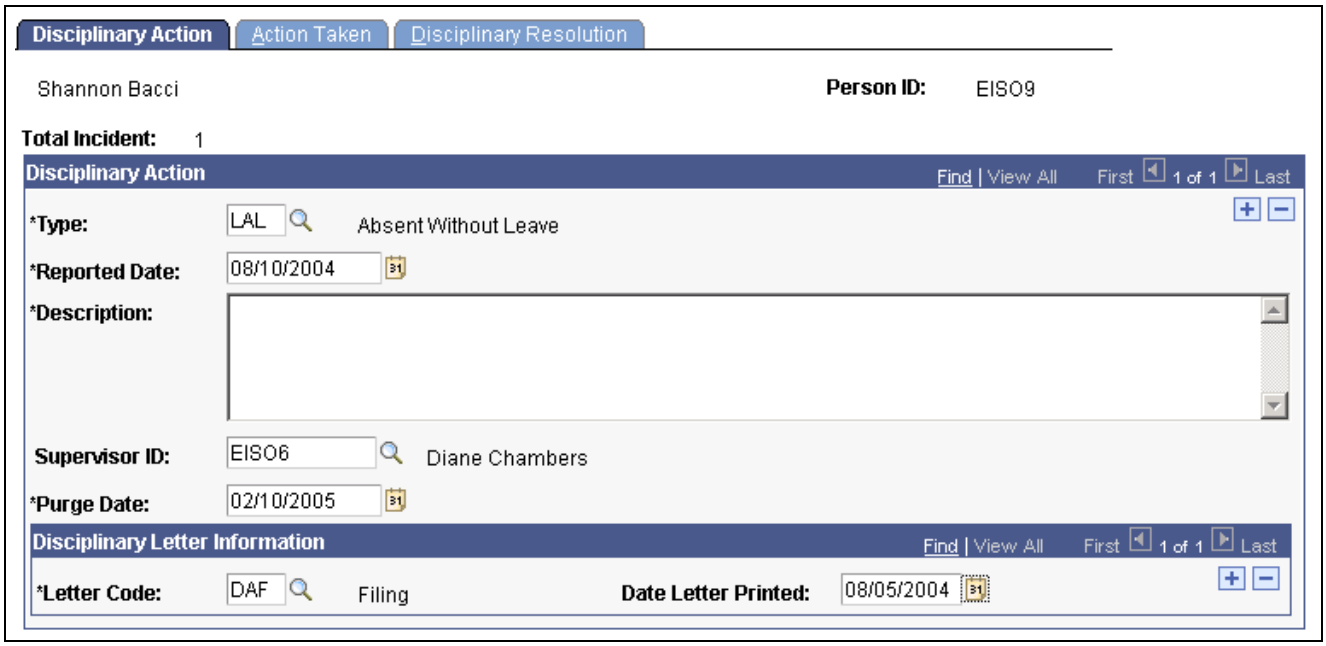
Pages Used to Track Disciplinary Actions

Page Name	Object Name	Navigation	Usage
Disciplinary Action	DISCIPLINARY_ACTN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Action	Describe the incident that led to a disciplinary action against a worker.
Action Taken	ACTION_TAKEN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Action Taken	Document details of disciplinary actions taken against a worker.
Disciplinary Resolution	DISCIP_ACTN_RESLTN	Workforce Administration, Labor Administration, Record Disciplinary Actions, Disciplinary Resolution	Record the final resolution of an incident that required disciplinary action.

Entering Disciplinary Incidents

Access the Disciplinary Action page.

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Disciplinary Action page

Total Incident Each time you enter a new disciplinary offense for this worker, the system calculates and displays the total number of incidents.

Type Select a disciplinary action type.

Reported Date Select the date the disciplinary action is reported.

Supervisor ID Select the worker's supervisor ID if the default supervisor ID selected from the worker's Work Location page isn't accurate.

Purge Date The system automatically inserts a purge date of six months from the Reported Date.

Note. This field is informational only and the system does not purge data automatically based upon this date. You may use this field to write an SQR to purge old disciplinary incidents, but the system will not do this automatically.

Letter Code Select the type of letter you want to issue the worker.

Date Letter Printed The system generates this date when you run the standard letter process.

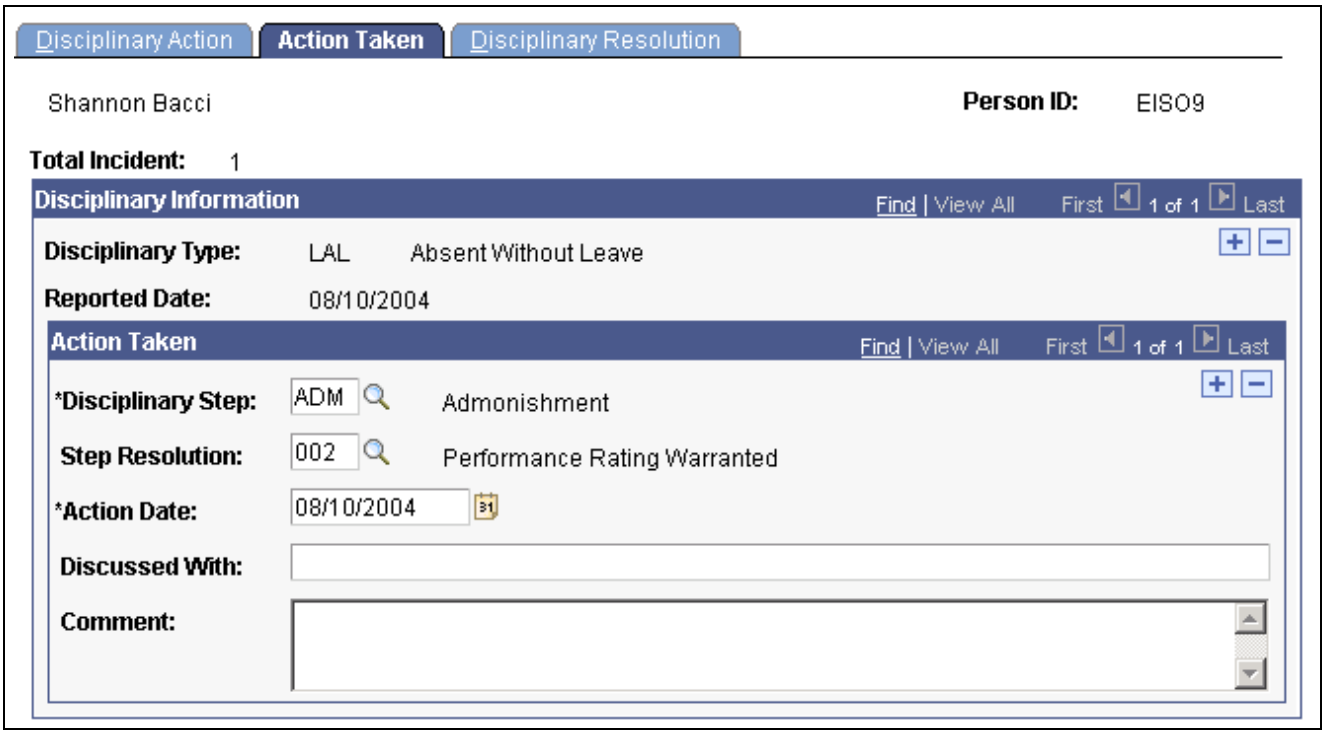
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters"

Documenting Disciplinary Action Details

Access the Action Taken page.

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Action Taken page

Action Taken

Enter as many rows as necessary to resolve the disciplinary issue.

Disciplinary Step Select a disciplinary step for the disciplinary type.

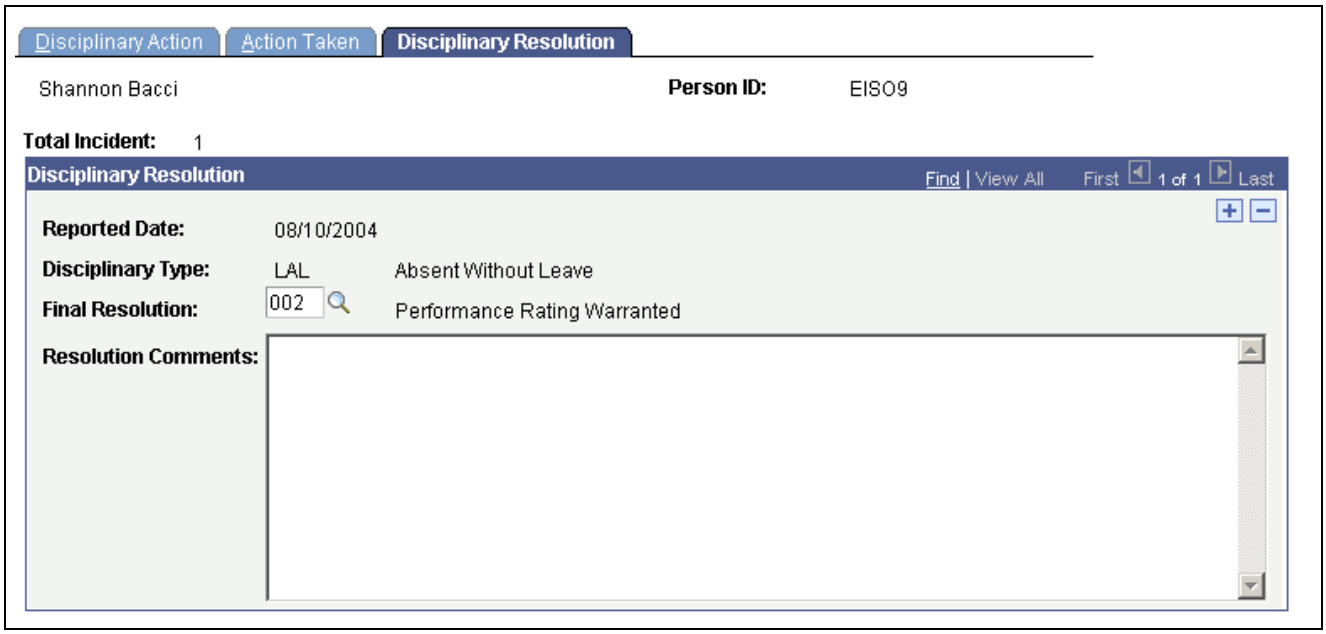
Step Resolution and **Action Date** Select the resolution type that occurred for this step and the date when the disciplinary step took place.

Discussed With Enter the name of the person with whom you discussed the step.

Recording Incident Resolutions

Access the Disciplinary Resolution page.

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Disciplinary Resolution page

Final Resolution Select the resolution type that indicates how the incident was finally resolved.

(USF) Tracking Disciplinary Actions

This section provides an overview of the disciplinary tracking system and discusses how to:

- Enter disciplinary offences.
- Document disciplinary action details.
- Record disciplinary incident resolutions.

See Also

Chapter 3, “Setting Up Unions,” (USF) Setting Up Unions, page 14

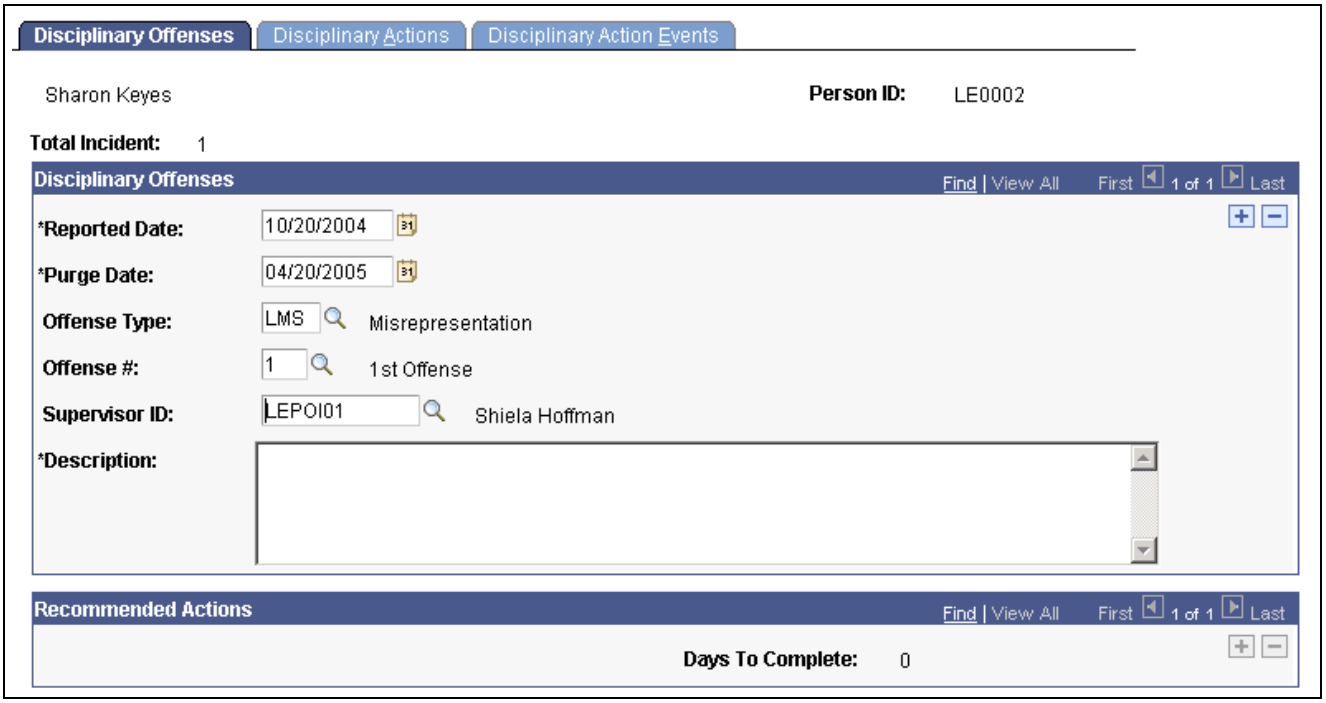
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Pages Used to Track Disciplinary Actions

Page Name	Object Name	Navigation	Usage
Disciplinary Offenses	GVT_DISCIPLIN_ACT1	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Offenses	Describe the incident that led to a disciplinary action against a worker.
Disciplinary Actions	GVT_DISCIPLIN_ACT2	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Actions	Record what actions took place in response to the offense. First enter data on the Disciplinary Offenses page.
Disciplinary Action Events	GVT_DISP_ACTN_EVNT	Workforce Administration, Labor Administration, Record Disciplinary Actions USF, Disciplinary Action Events	Enter an event that discusses the steps of the disciplinary action that have taken place thus far. First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

(USF) Describing Disciplinary Offenses

Access the Disciplinary Offenses page.



Disciplinary Offenses page

Note. Most of the fields on this page are shared by the Disciplinary Action page.

See Chapter 8, "Tracking Disciplinary Actions and Grievances," Entering Disciplinary Incidents, page 103.

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Offense Type and **Offense Number**

Select an offense type and number.

Once you have selected an offense type and number, the system automatically displays a list of all disciplinary actions recommended for this particular offense. The system also displays the recommended number of Days To Complete each action. These recommendations were created on the Disciplinary Penalties Matrix 1 page (GVT_DISCIP_OFFNSES) and Disciplinary Penalties Matrix 2 page (GVT_RCMND_ACTIONS).

See Chapter 4, "Setting Up Labor Administration Data," (USF) Defining the First Penalty Matrix for Indicating the Offense Level Penalties, page 46.

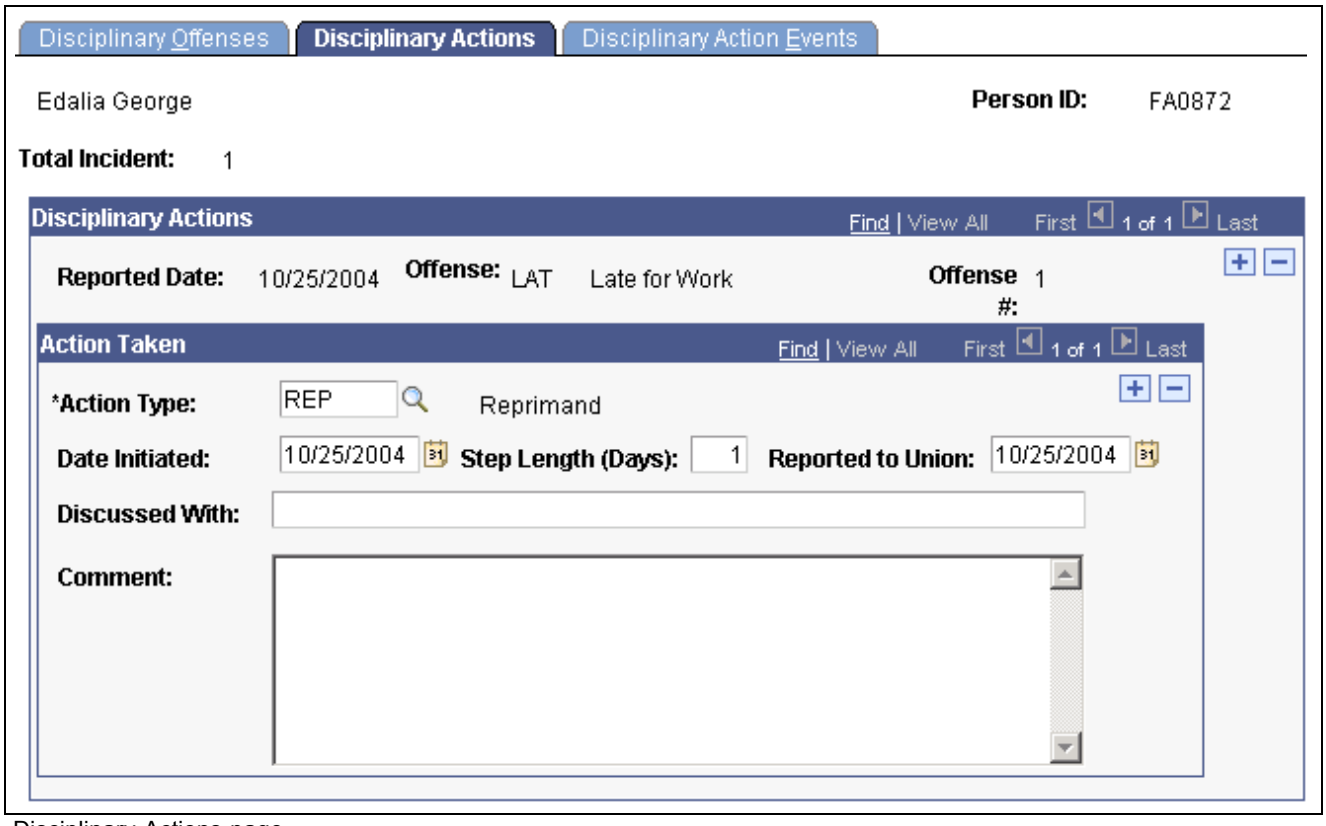
See Chapter 4, "Setting Up Labor Administration Data," (USF) Defining the Recommended Disciplinary Actions for Each Offense Level and Type, page 47.

See Also

Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44

Recording Related Disciplinary Actions

Access the Disciplinary Actions page.



Disciplinary Actions page

Action Type

Select a discipline step to record the action taken to resolve the problem.

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See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

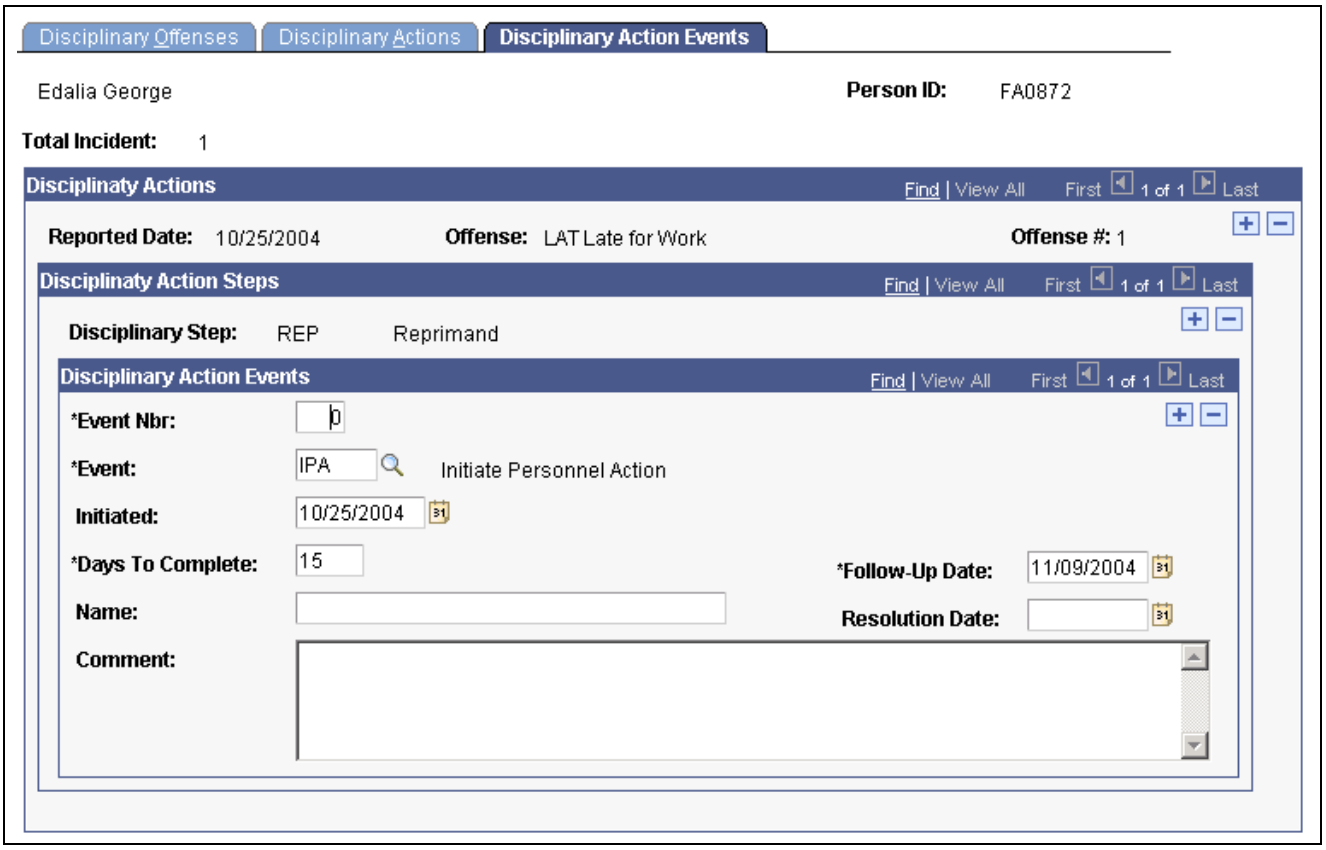
Date Initiated Defaults to today's date. Change unless the action taken was initiated today.

Step Length (Days) If the action has a limited time frame, enter the duration, in days.

Reported To Union If your agency identified this type of action as reportable to the union(s), enter the date it was reported to the union(s).

Entering Disciplinary Events to Support Disciplinary Actions

Access the Disciplinary Action Events page.



Disciplinary Actions Events page

Event Nbr (event number) These disciplinary action events are stored and presented in numerical order based on the event number you assign. PeopleSoft recommends that you assign event numbers chronologically to give yourself a picture of the events as they happened. For events initiated on the same day, the event number can play a critical role when trying to avoid or settle litigation.

Event Select an event that discusses what took place at this point.

Initiated The date the event was initiated defaults to today's date. Change the date unless it was actually initiated today.

Days To Complete (Optional) Estimate a number of days to complete this event if you want or let it default from the Disciplinary Events table.

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Name Include the name (if any) of the person who initiated this event or was primarily responsible for resolving it.

Tracking Grievances

This section provides an overview of grievance tracking and discusses how to:

- Enter new grievances.
- Track steps in the grievance process.
- Record grievance resolutions.

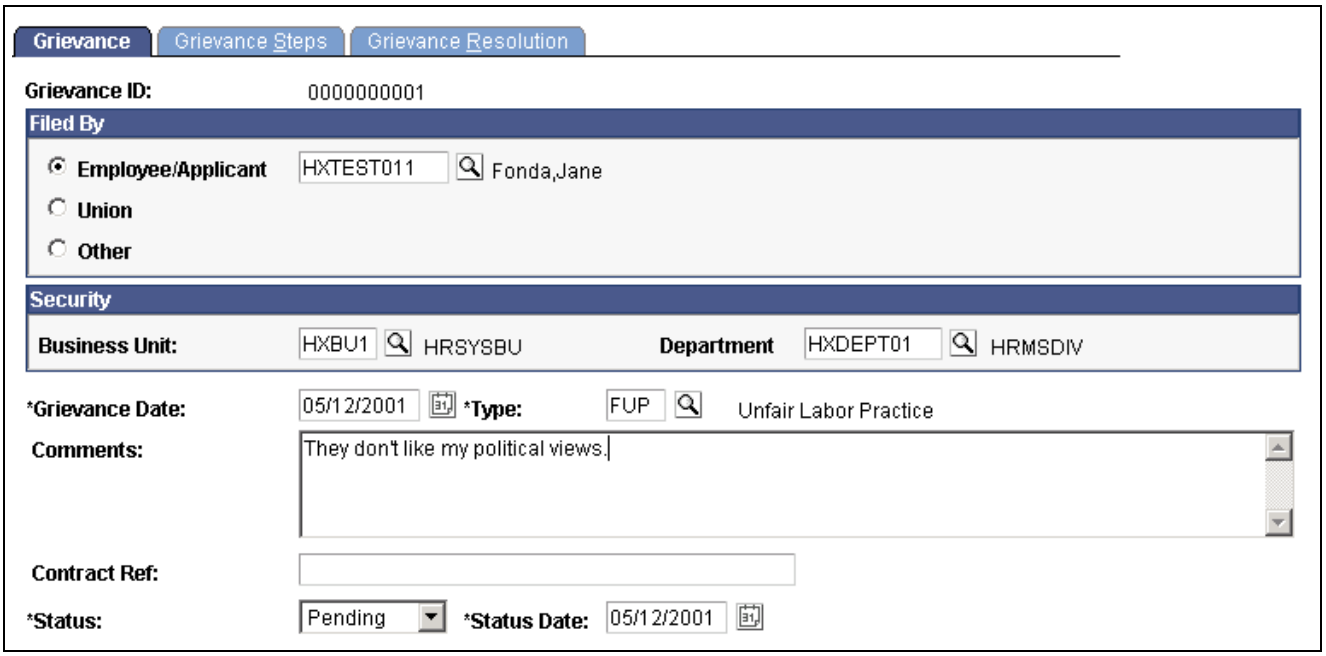
Pages Used to Track Grievances

Page Name	Object Name	Navigation	Usage
Grievance	GRIEVANCES1	Workforce Administration, Labor Administration, Record Grievances, Grievance	Add a new grievance into the system. You can create grievances for workers, applicants, unions, or another group or person.
Grievance Steps	GRIEVANCES2	Workforce Administration, Labor Administration, Record Grievances, Grievance Steps	Record the steps taken to resolve the grievances. A grievance may require a number of steps before it is resolved.
Grievance Resolution	GRIEVANCE_RESLTN	Workforce Administration, Labor Administration, Record Grievances, Grievance Resolution	Document the final resolution of a grievance.

Entering New Grievances

Access the Grievance page.

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Grievance page

Assigning Grievance IDs

When you open the Grievances component, the system prompts you for a grievance ID. Use the grievance ID to track a grievance through the entire resolution process. There are two ways to assign grievance IDs:

- Automatically

  If you use automatic ID assignment, the system adds IDs sequentially as you add new grievances.

  If you let the system assign the number automatically, it first appears as *0000000000*. The actual number assigned to the grievance appears after you save the information you enter in the Record Grievances component (GRIEVANCES).

- Manually:

  Enter grievance IDs yourself, using whatever system you choose for your organization. If you choose manual entry, you don't need to assign IDs sequentially.

Note. To avoid maintaining two different sets of grievance IDs, PeopleSoft recommends that you choose only one way of assigning them. *Either* always assign IDs manually *or* always let the system assign them—not both.

Filed By

Employee/Applicant If you are adding a grievance filed by a worker or applicant, click this button and enter the person or applicant ID in the adjacent field.

Union Select if you are entering a grievance filed by a union on behalf of union members and enter a union code in the adjacent field.

Other Select if you are entering a grievance that doesn't fall into either of the previous categories. In the adjacent field, enter free-form text up to 40 characters to describe who filed the grievance.

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Security

Business Unit and **Department**

If you enter a business unit and department here, then only those users with security access to that department can access the grievance record when you save the information for this grievance. For example, if you select Department *10200* for Grievance ID *0000000001,* then when you save the page only users with security access to Department *10200* can access this record.

Note. If you don't enter a value in the Department field, then you won't set department level security for this record and the system defaults to no department security for grievance records.

Note. These system does not default a worker's business unit and department into these fields.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security".

Grievance Details

Type

(Required) Select a grievance type.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

Contract Ref (contract reference)

Enter the contract reference for this grievance, if applicable.

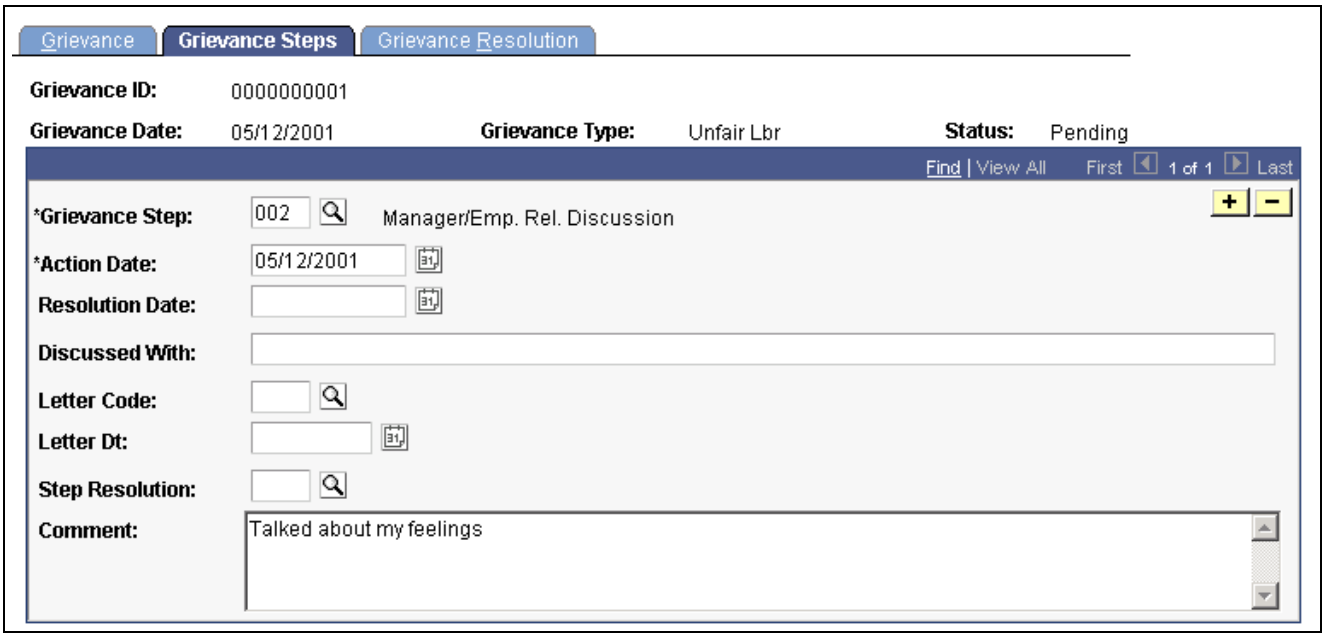
Status and **Status Date**

Select the status of the grievance — *Settled, Pending,* or *Appealed* — and the date that status was reached.

Tracking Steps in the Grievance Process

Access the Grievance Steps page.

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Grievance Steps page

Note. Grievances are sorted in descending order—you'll see the most recent one first.

Grievance Step and **Action Date** Select the grievance step and the date it was taken.

Note. You can enter multiple grievance steps as you process this grievance.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

Resolution Date When the step is resolved, update this page by entering a resolution date, if applicable.

Discussed With Enter the name of the person with whom you discussed the step.

Letter Code If you want to send a standard letter about the grievance, select the appropriate letter code.

Letter Date Enter the date when the letter was sent.

Step Resolution Select the action you took to resolve this step.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

Comment You can enter comments longer than the three lines shown.

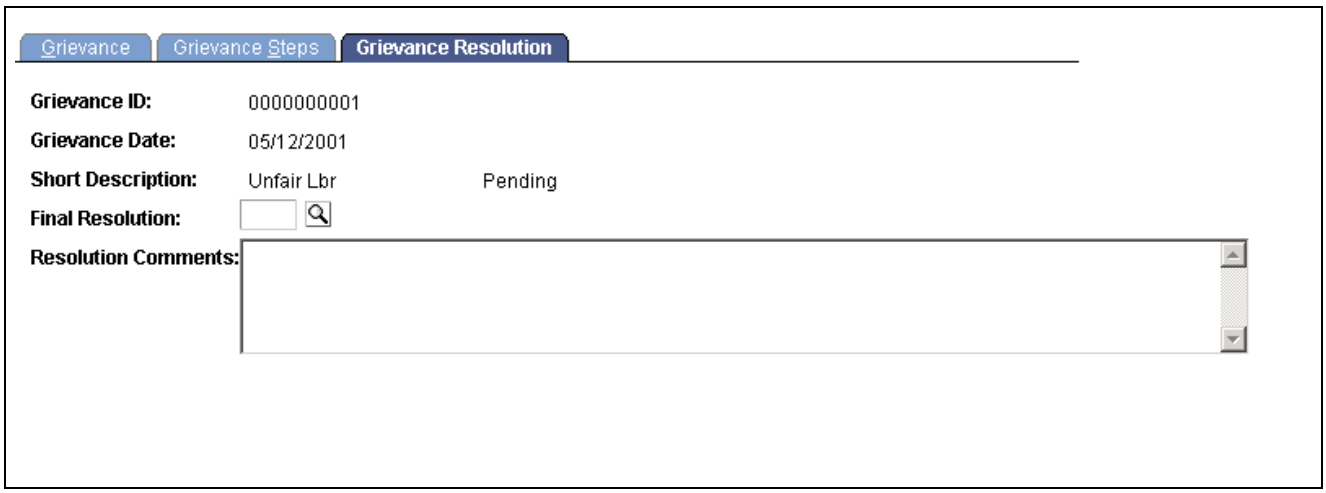
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters"

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Recording Grievance Resolutions

Access the Grievance Resolution page.



Grievance Resolution page

Final Resolution Select the resolution type that indicates how the incident was finally resolved.

See Chapter 4, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications, page 44.

Resolution Comments Enter any comments you have about the final resolution.

(USF) Entering Union Negotiability Appeals

This section discusses how to track union negotiability appeals.

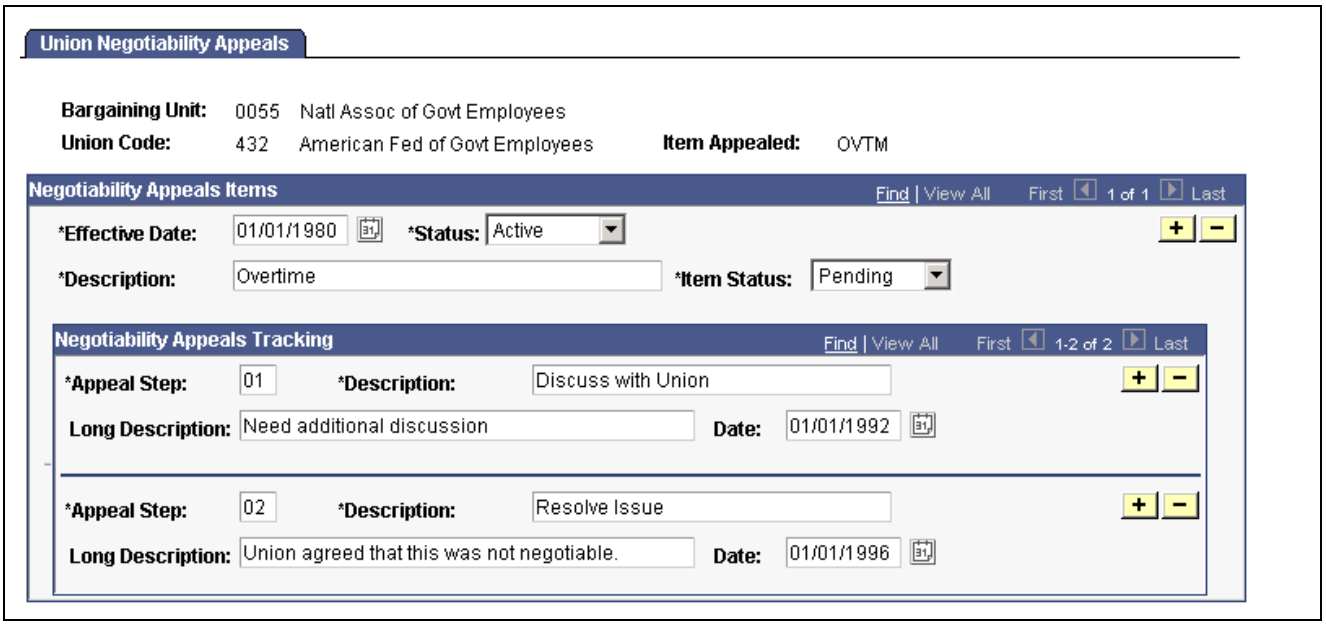
Page Used to Enter Union Negotiability Appeals

Page Name	Object Name	Navigation	Usage
Union Negotiability Appeals	GVT_NEGBLTY_ITEMS	Workforce Administration, Labor Administration, Record Negotiability Appeal USF, Union Negotiability Appeals	Track union negotiability appeal items and the steps taken to resolve them.

Tracking Union Negotiability Appeals

Access the Union Negotiability Appeals page.

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Union Negotiability Appeals page

Item Status Indicate the status of the appeal of this item. If the resolution affects the status of the item being appealed, update the Item Status field at the same time.

Appeal Step Use only for sequencing the events or steps. Enter steps in the order in which they happened, if known.

Description and **Long Description** When that step is resolved, describe the resolution.

Date Enter the date on which the step was or will be resolved.

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CHAPTER 9

Requesting Works Councils Approval

This chapter provides an overview of the works councils approval business process and discusses how to enter a job change request.

Understanding the Works Councils Approval Business Process

This section discusses how to set up the Works Council business process.

To set up and run the Works Council business process:

1. Set up codes and values on the Job Change by Reg Region page (WC_ACTN_REASON_TBL).
2. Human Resources Administrator or Manager requests a Job Change for an worker.

   If a manager submits the request, the HR Administrator is notified and reviews the request. If the HR Administrator approves the request, the Works Council is notified.

   For job change requests such as transfers that involve a change in reporting managers, the new manager enters the job change request and the current manager approves or denies the job change request.
3. Works Council reviews and approves or denies the worker job change request.

   The processing for the works council review and approval is automated. The works council member reviews the job change request, uses the Job Change Request pages (WC_JOB_CHG_REQ) to look at the information about the worker and the action, and enters a response (or decision). Once a decision is entered, the human resources administrator is notified with an email and worklist.
4. Review works council's decisions.

   The human resources administrator uses the Review My Job Change Requests page (WC_JCR_STATUS2_INQ) to review the works council's decision and chooses to accept or override the works council's decision. If the human resources administrator overrides the works council decision, the works council is notified with an email and worklist.
5. Load changes to job data.

   Changes can be loaded manually or automatically.

Important! Managers can only enter job change requests using the self service pages as delivered with PeopleSoft Enterprise eProfile. The request as part of Manage Labor Administration must be entered by the HR Administrator.

The following tables discuss the delivered processes by role and business process.

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Hire Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Termination Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Transfer Process

Business Process	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	New Manager	Manager, Works Council

See Also

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

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information"

PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook, "Managing Direct Reports," Understanding the Management of Direct Reports

Prerequisites

Works councils members should use the Job Change Request pages to record works councils decisions about personnel actions affecting workers. HR managers should use them to request changes. Before using these pages, however, you must define job changes and reasons by regulatory region on the Job Change by Reg Region page.

All job change requests can be represented by a single process flow, with the exception of an Employee Transfer. Employee Transfers are an exception because they involve both a new requesting manager and the current manager who must approve the transfer. Once the current manager approves the transfer, the Employee Transfer business process is identical to the standard Request Job Change - Works Councils process.

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See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

Entering a Job Change Request

This section provides an overview of job change request processing and discusses how to:

Understanding the Job Change Request Process

The Job Change Request pages enable you to easily notify the works councils of an worker job change before the change takes place so the change may be approved.

The Works Councils Notification process requires the following dynamic roles to be defined before generating a job change request. These dynamic roles will be used to route all workflows and email notifications:

Works Councils Member

Define the Works Council Member on the Works Council Table page as you define the works council. The Works Council ID is associated with the company on the Company Location page (COMPANY_TABLE1). When you select a worker, the system uses the associated company data contact the works council for that worker.

The Works Councils ID will be used to route job change requests for a worker to the appropriate works councils spokesperson. If no works councils spokesperson is found for the worker, or if the works councils has no associated spokesperson, the HR Administrator will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

HR Administrator

The HR Administrator who works on the job change request owns the request until the job change is complete. The system determines this according to department security setup—anyone with the role of HR administrator who has access the worker's department is notified with change request—the first HR administrator who takes action in the page is responsible for following the process from that point on.

Note. In the case of a worker transfer or any job change resulting in a department change, the HR Administrator of the worker's *new* department will be notified rather than the HR Administrator of the worker's current department. If no HR Administrator is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

Manager

Manager self service security setup is used to route Works Councils related workflows to the correct manager. If no Manager is found for the worker, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change - Works Councils page.

Employee

Workers will be automatically notified via email once a job change request is complete.

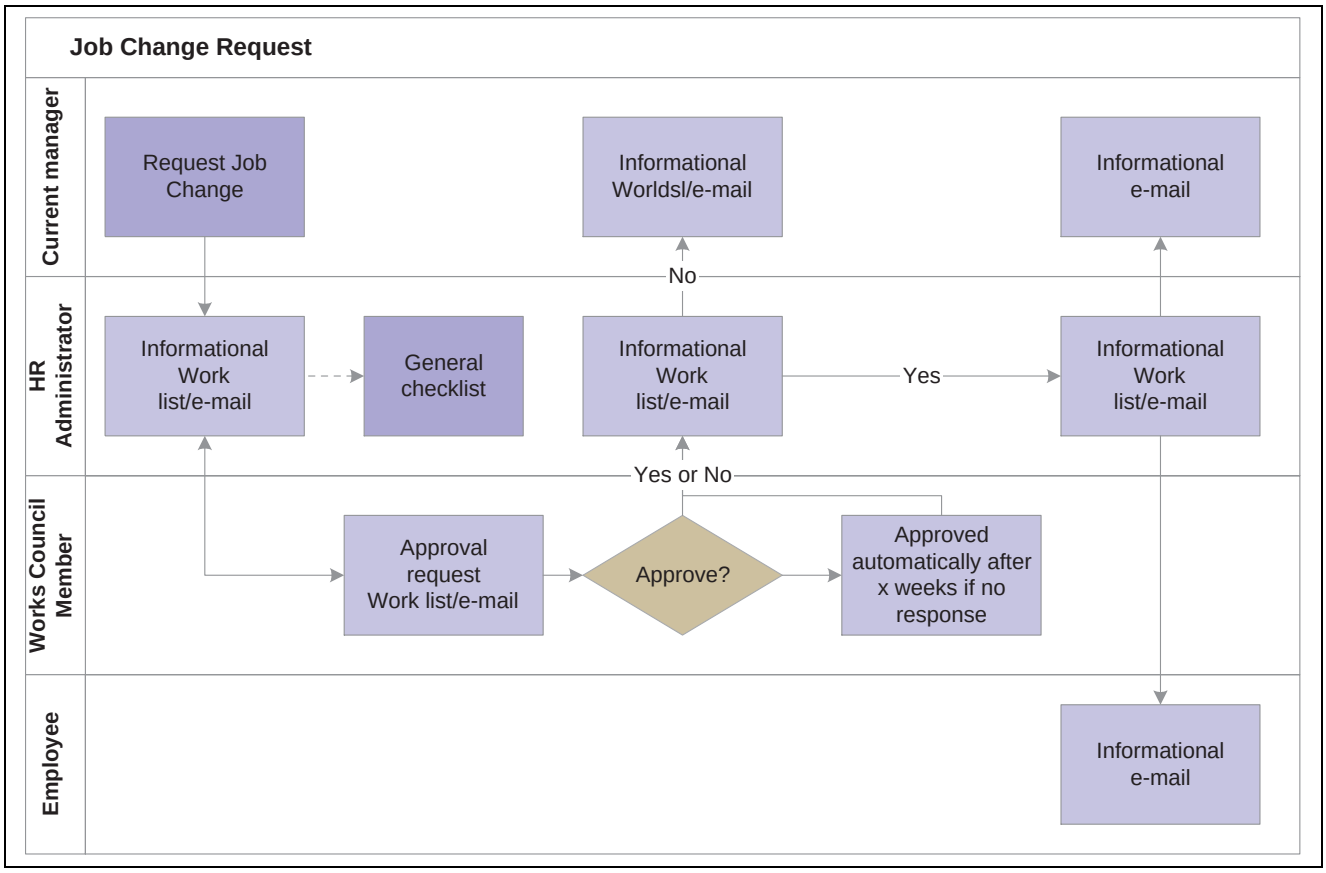
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Security

A transaction requiring Works Councils approval may be initiated by the new manager, the current manager, or the HR Administrator. If the current manager initiates the job change request, they can then select the direct reports. If the new manager makes the request, they may select all workers. You must know the exact mandatory search criteria, which you configured on the Job Change by Reg Region page, to find the right worker.

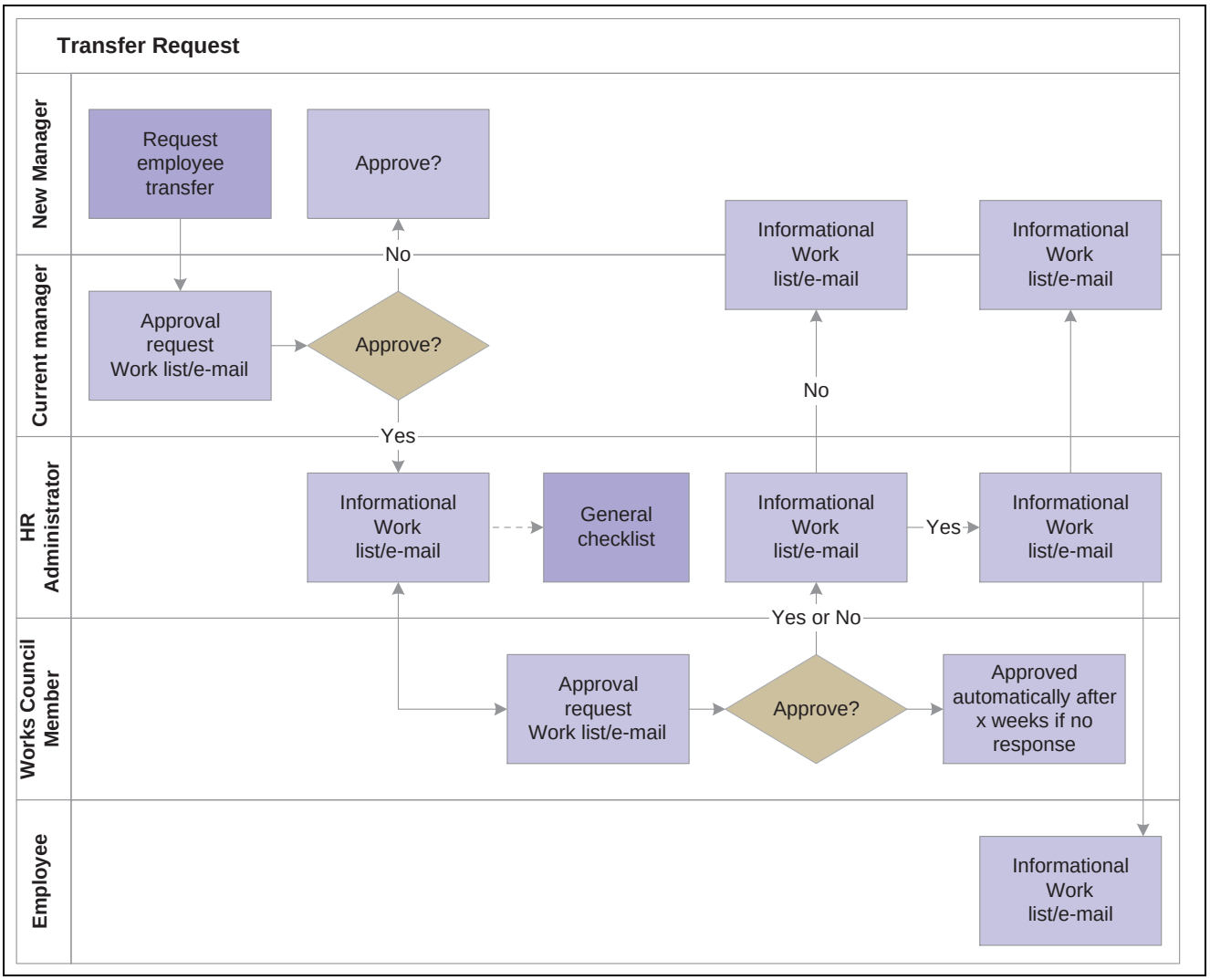
If the HR Administrator initiates the request, they may select all workers in the departments for which they are responsible as defined in the standard department security.

Note. In the case of a transfer, the new HR representative can select from all workers based on specific criteria.



Employee Job Change approval process

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Employee Transfer approval process

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Company Locations

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

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Pages Used to Enter Job Change Requests

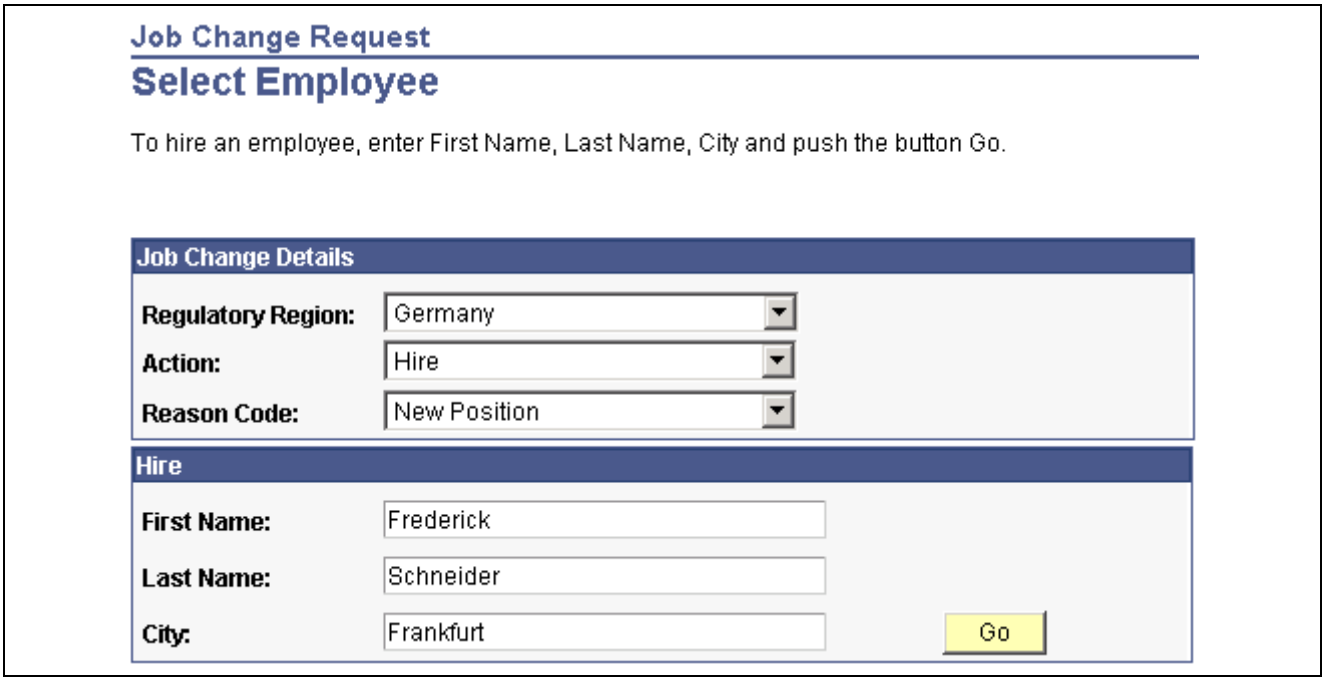
Page Name	Object Name	Navigation	Usage
Request Job Change - Select Employee	WC_JCR_SEARCH	• Workforce Administration, Job Information, Request Job Change • Manager Self Service, Job and Personal Information, Request Job Change • Manager Home Page, Job and Personal Information, Request Job Change	Enter the required data and initiate the job change request. The Job Change Request page requires different data entry depending on the type of request—either hire, transfer or termination.
Job Change Request , Review All Job Change Requests	WC_JOB_CHG_REQ	Enter Job Change Details and click Search. • Workforce Administration, Job Information, Request Job Change • Workforce Administration, Job Information, Review All Job Change Request	Enter job change details and request information. The Review My Job Change Requests page shows job change requests that the user is or has been involved with. **Note.** Some Reason Codes require additional mandatory search criteria as defined on the Job Change by Reg Region page.
Job Change Request Status	WC_JCR_STATUS_INQ	Manager Self-Service, Job And Personal Information, Review Job Change Request	Search for job change requests to review the status. This page is available to all roles in the job change approval process though only to the specific users involved in each particular job change request. This page is display only.
Review My Job Change Request	WC_JCR_STATUS2_INQ	Workforce Administration, Job Information, Review My Job Change Request	Review the status of a job change request requiring Works Councils approval.
Decision Details	WC_JCR_USER_SEC	Enter Job Change Details and click Search. • Workforce Administration, Job Information, Request Job Change • Workforce Administration, Job Information, Review All Job Change Request	Click Comments in the Process Participants group box. Enter comments or view general information and related comments for this job change request.
Job Change Request Approval	WC_JCR_APPR_INQ	Workforce Administration, Labor Administration, Job Change Request Approval	Mass-approve job change requests.

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Entering Job Change Request Details for Hiring

Access the Job Change Request - Select Employee page.

Note. The Job Change Request - Select Employee page behaves differently depending on the requested action and the user role. The following sections discuss each action option—Hire, Transfer, and Termination—separately.



Job Change Request - Select Employee—Hire page

Job Change Details

Begin the Works Council hiring approval process by completing all fields on the Job Change Request–Select Employee page, using the action of *Hire*.

Hire

All fields in this group box are mandatory

Go Click to access the Job Change Request page to initiate the job change request process.

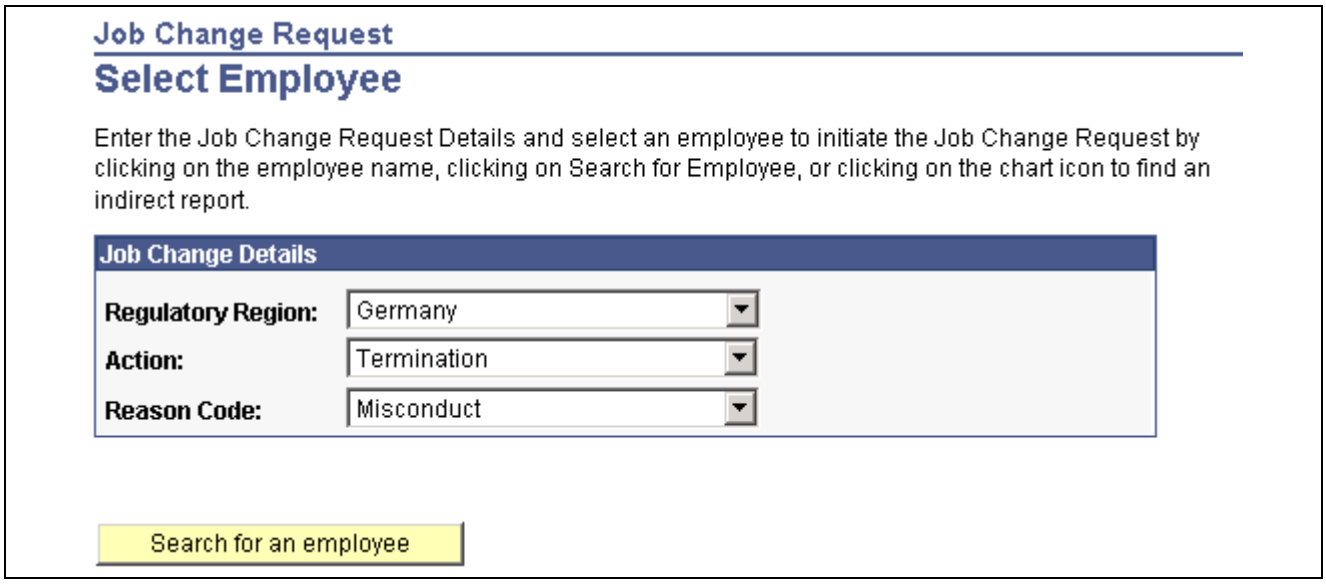
See Also

Chapter 9, "Requesting Works Councils Approval," Submitting a Job Change Request, page 125

Entering Job Change Request Details for Termination

Access the Job Change Request – Select Employee page.

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Job Change Request - Select Employee—Termination page

Job Change Details

Search for an employee Complete the fields in the Job Change Details group box and click this button. Select a worker from the list.

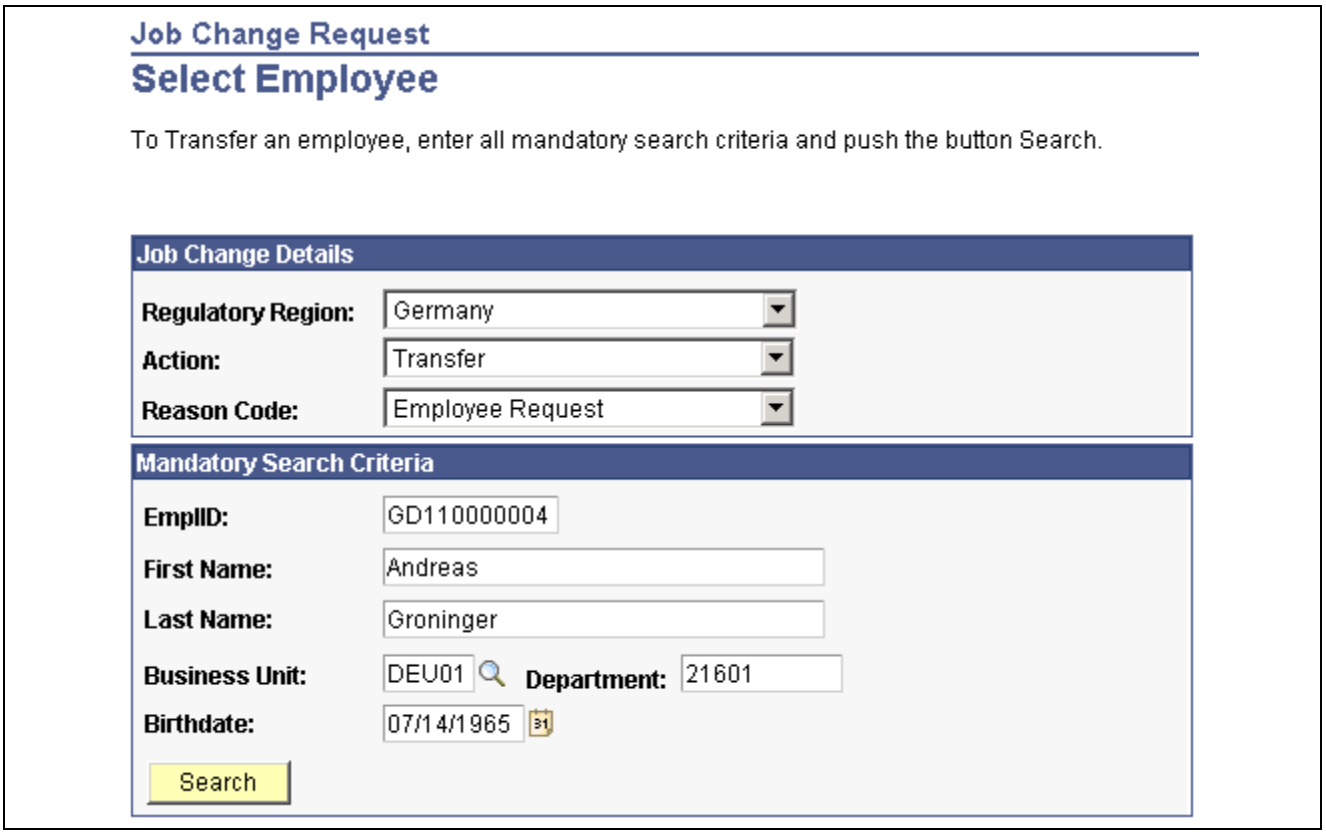
For HR Administrators, the page displays a list of all workers with row level access as defined in the department security tree.

For managers, the page displays a list of direct reports as defined in the self-service setup.

Entering Job Change Request Details for Transfer

Access the Job Change Request – Select Employee page.

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Job Change Request - Select Employee—Transfer page

Mandatory Search Criteria

Mandatory search criteria fields are defined on the Job Change by Reg Region page. The fields that display here depend on the Job Change by Reg Region page setup. As these are mandatory search criteria, any field in this group box is a required field.

Note. The worker's new manager enters the transfer request. The worker's current manager and the works council must approve the request.

See Also

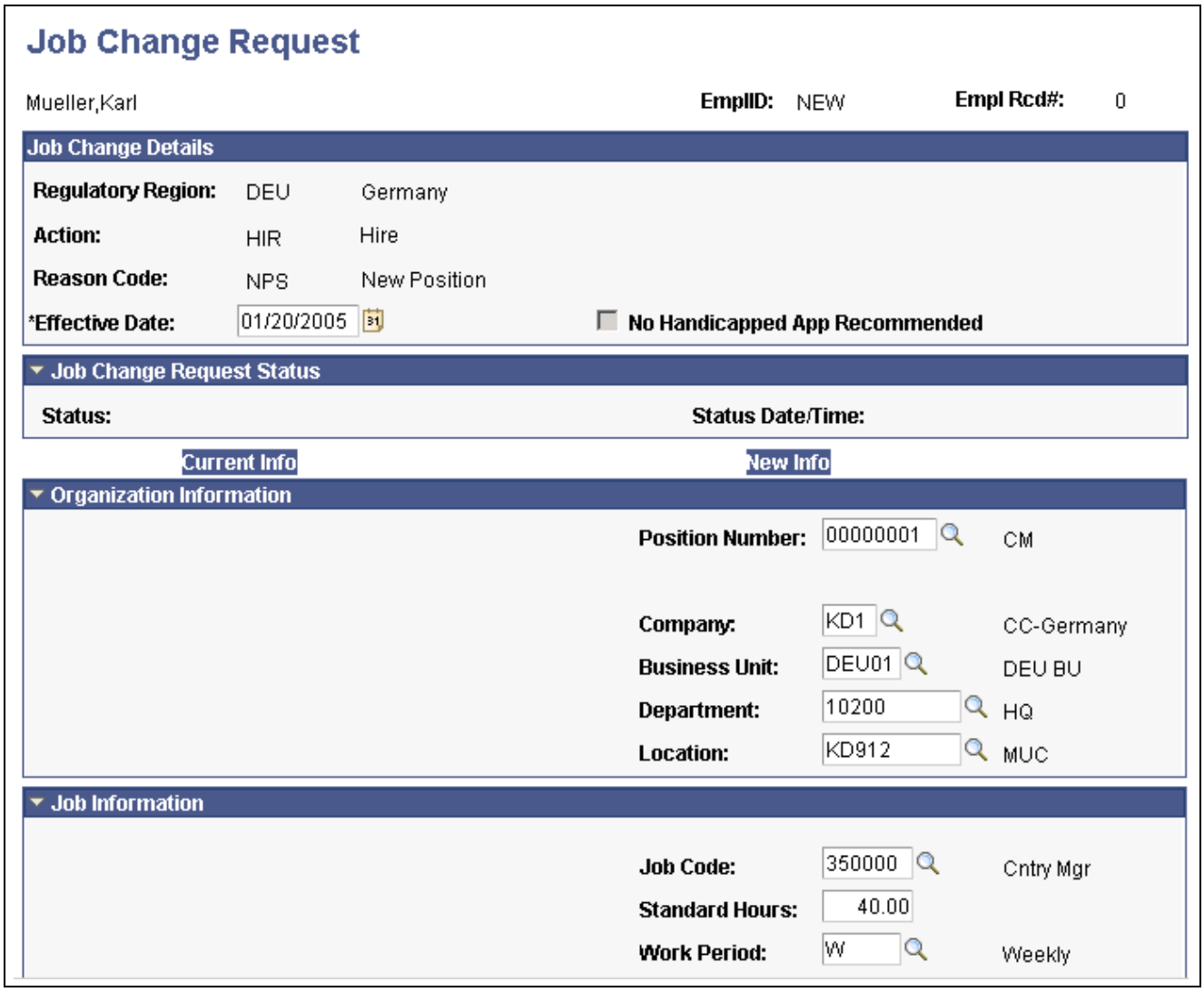
Chapter 9, "Requesting Works Councils Approval," Approving Job Change Requests, page 132

Submitting a Job Change Request

Access the Job Change Request page.

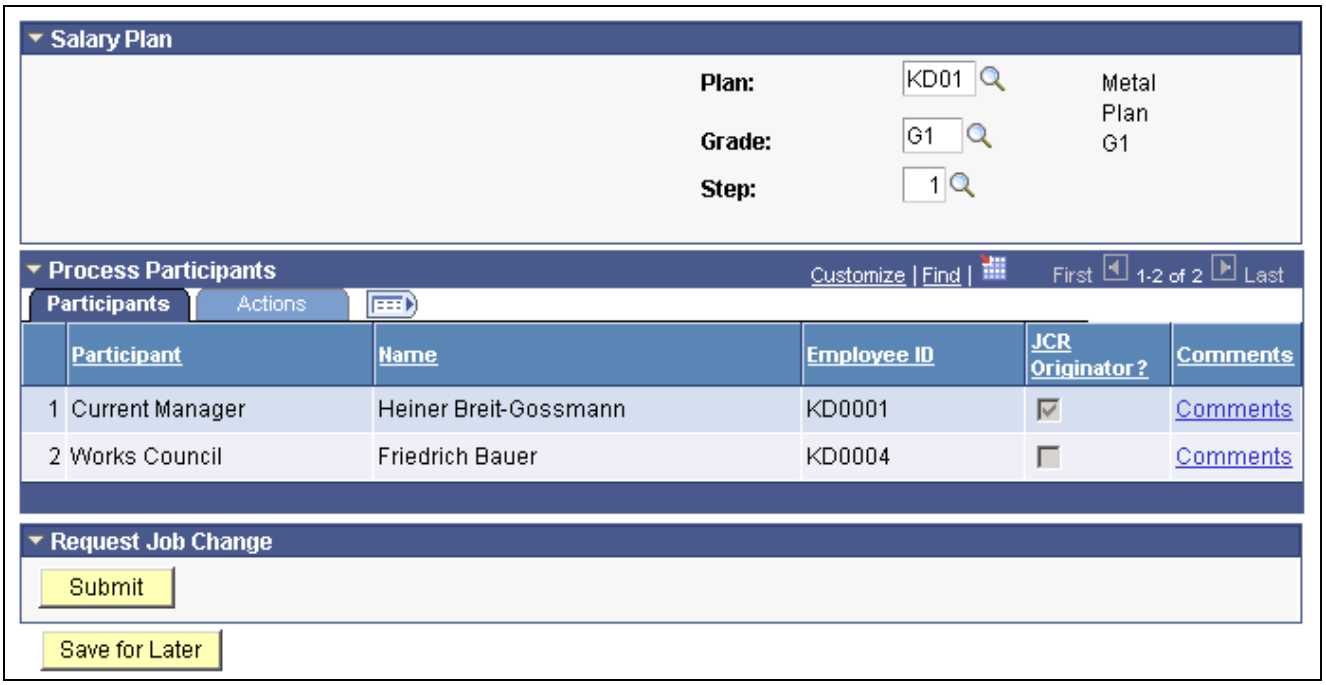
The following screen shots show the Job Change Request page for the current manager submitting a hire request.

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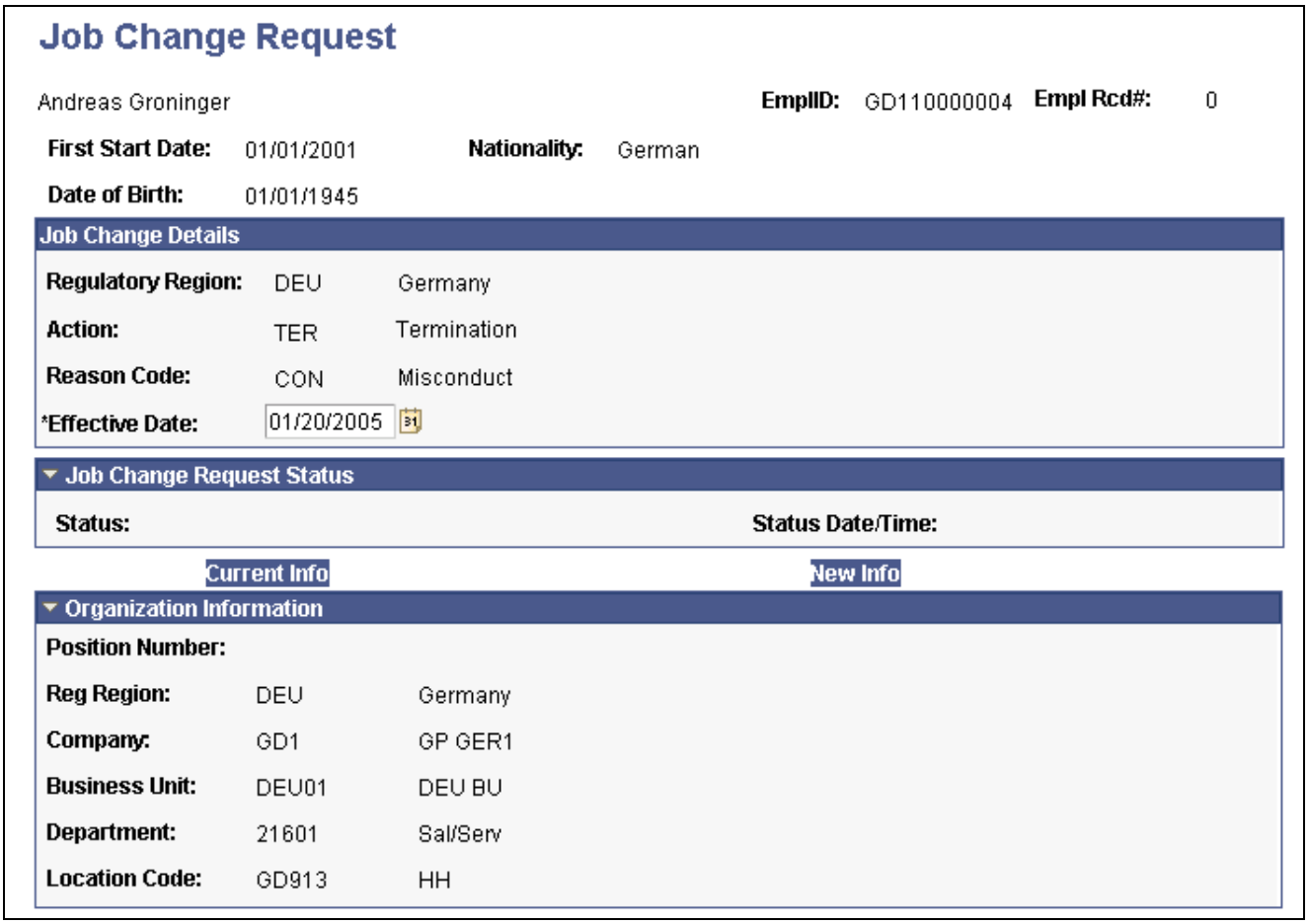
Job Change Request page (hire, 1 of 2)

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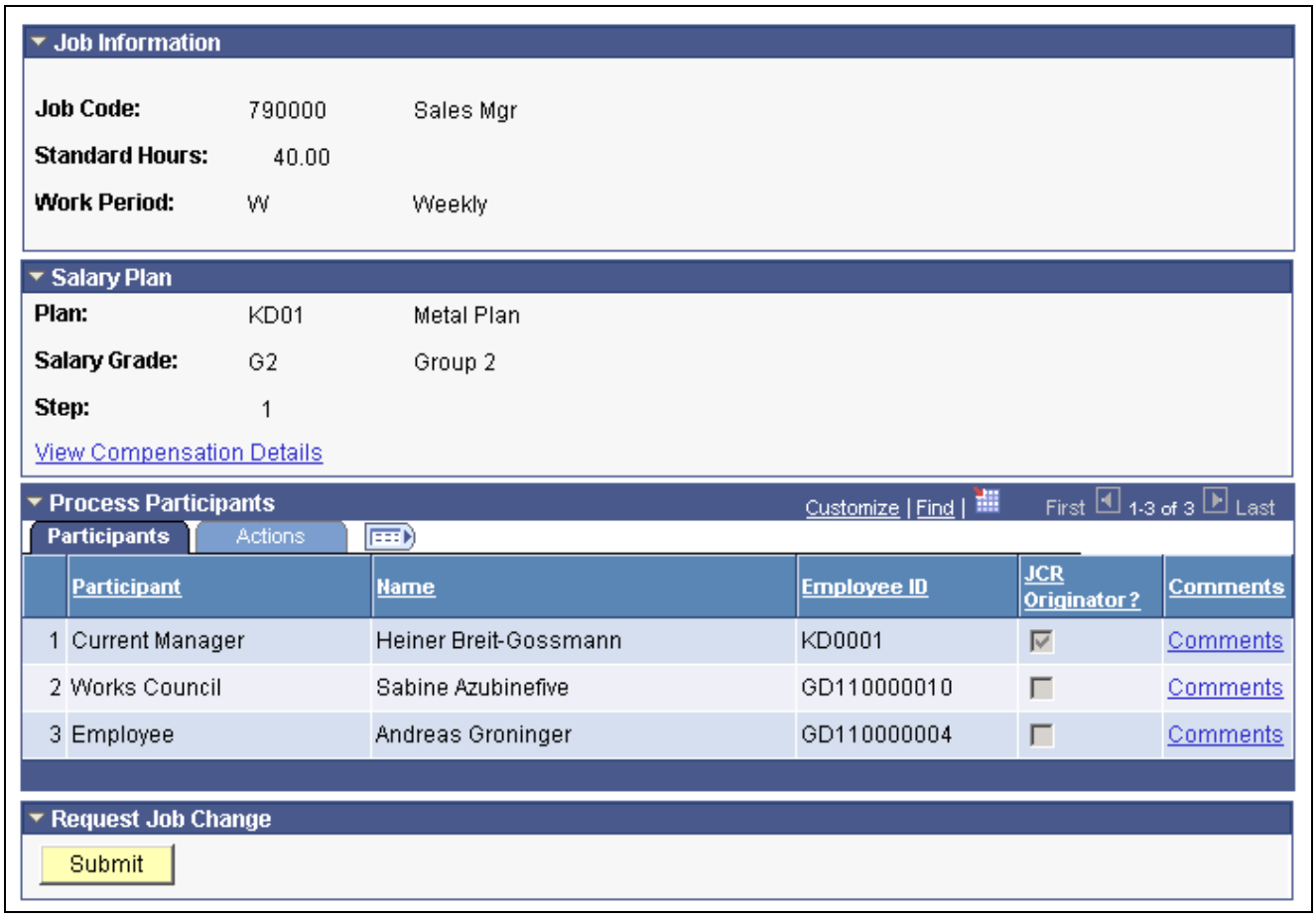
Job Change Request page (hire, 2 of 2)

The following screen shots show the Job Change Request page for manager submitting a termination request.



Job Change Request page (terminations, 1 of 2)

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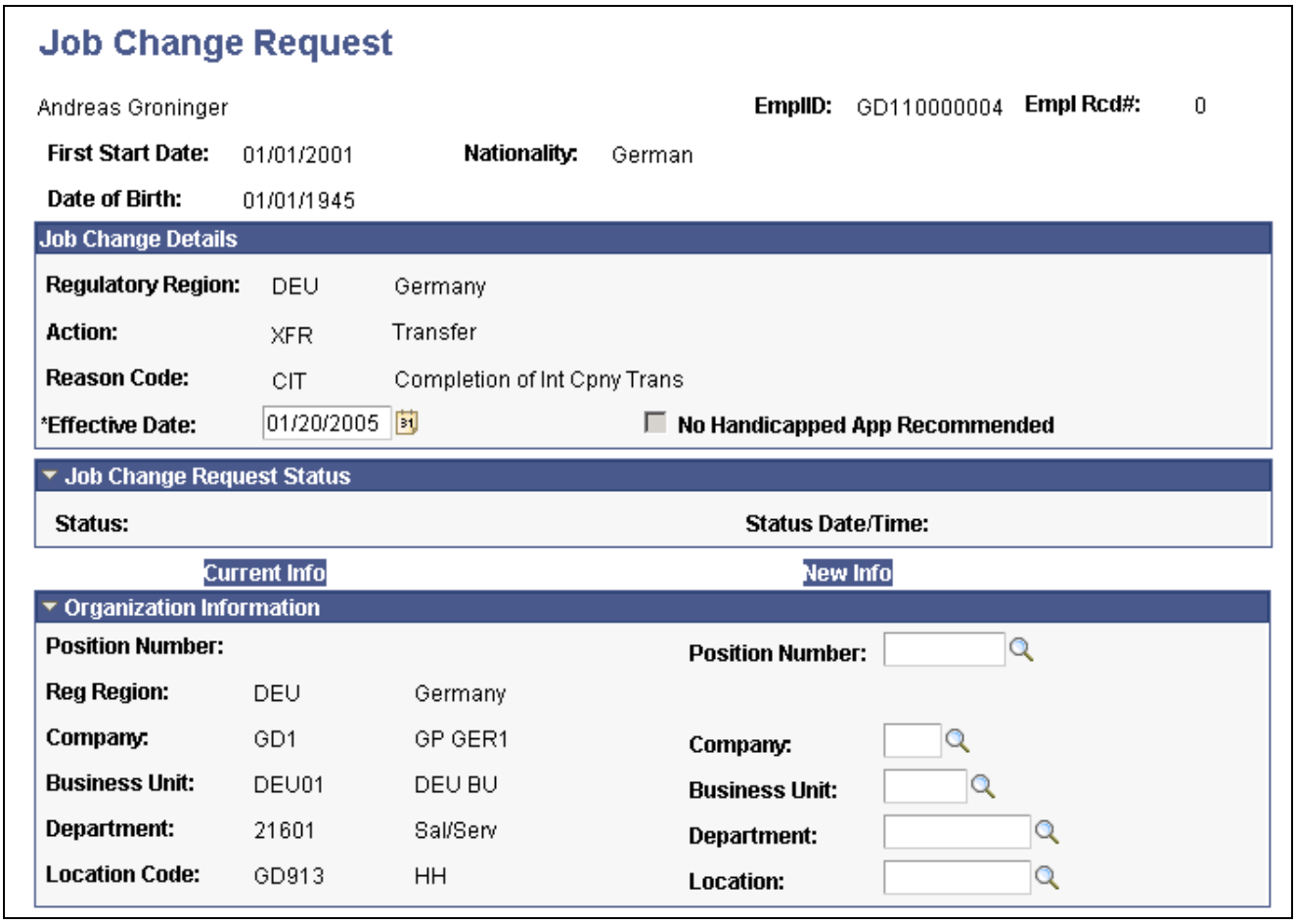


Job Change Request page (terminations, 2 of 2)

Note. When entering termination requests, this page is display only. The Comments link remains active to access the Decision Details page to add comments to this request.

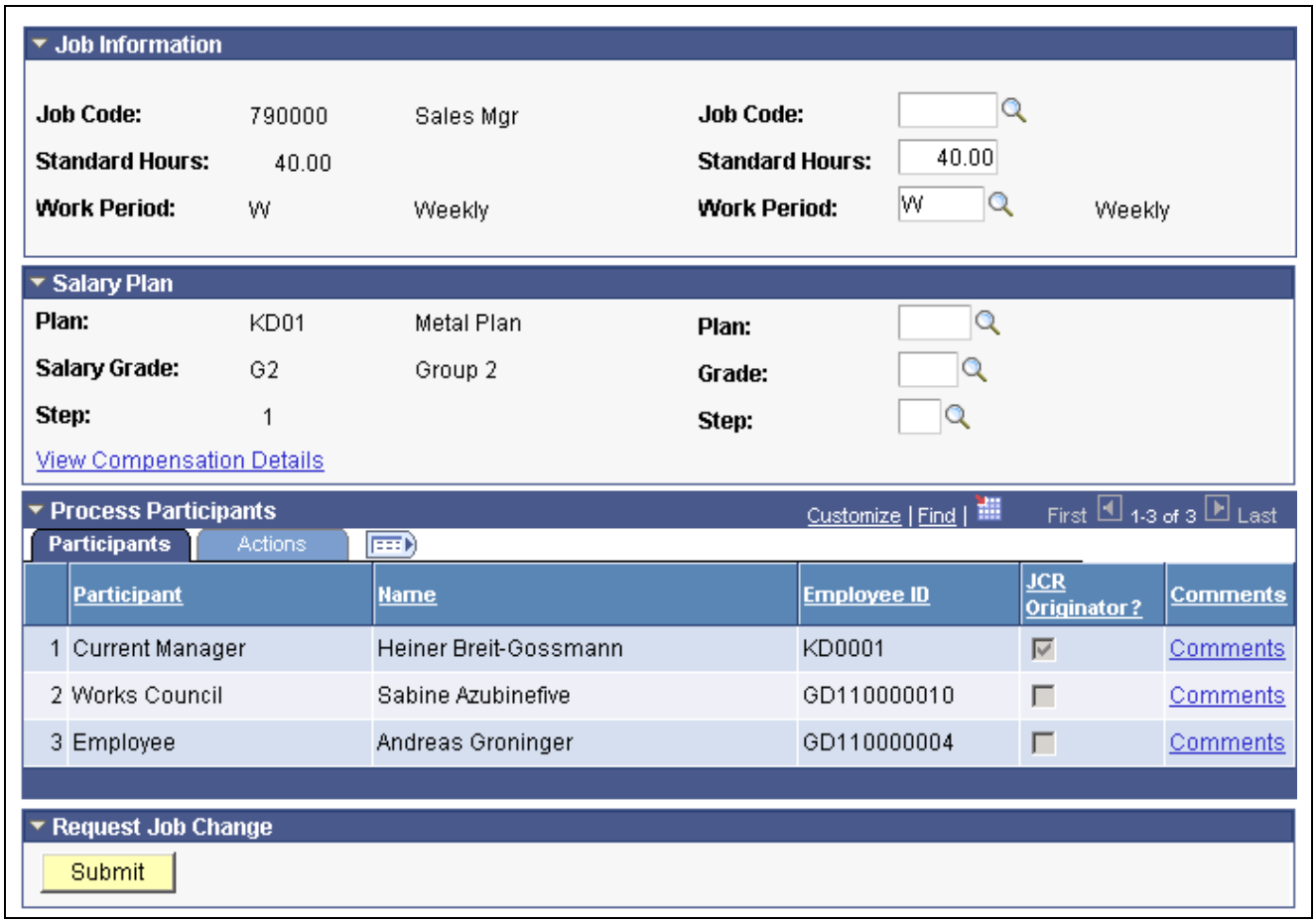
The following screen shots show the Job Change Request page for the new manager entering a transfer request.

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Job Change Request page (transfer, 1 of 2)

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Job Change Request page (transfer, 2 of 2)

Current Info (current information) This column displays the current information for this worker. Current information will not be displayed if the role is a new manager performing a job change request of a transfer. Additional new manager transactions can also be configured on the Job Change by Reg Region page.

New Info (new information) Use the fields in this column to enter new job details for this job change request.

Job Change Details

No Handicapped App Recommended (no handicapped applicants recommended) The HR Administrator is the only role that may select No Handicapped App Recommended before submitting, approving or denying a request . Some works councils want to ensure that the Labor Bureau had no qualified handicapped applicants to recommend prior to hiring other external candidates.

Job Change Request Status

After submitting a job change request, this group box displays the status as the request proceeds through the workflow.

Organization Information

If you select a position number, the organization, job and salary plan data will default from the position data. You can edit the defaulted information. If you do not select a position number, complete the fields in the group box.

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Job Information

Complete the fields in this group box if the information does not default from the position data. Defaulted information can be edited here.

Salary Plan

Complete the fields for salary plan, grade, and step data.

View Compensation Details Click to access the current compensation details of an existing worker. This link is not visible for job change requests with Action *Hire*.

Process Participants

This group box displays everyone involved with requesting or approving job change requests. On the Job Change by Reg Region page you define who is involved with a request and what information they can view.

JCR Originator? The selected check box indicates which process participant initiated this job change request.

Comments Access the Decision Details page to provide additional information about this request.

Request Job Change

Once the request has been submitted, this group becomes Request WC Approval.

The buttons that appear in this group box will depend on which action has been selected or where the job change request stands in the approval process.

Submit Click to submit a new job change request after completing all of the fields on the page.

Generate Checklist Click to generate a checklist for this job change request.

Save for Later Click to save this job change request to complete later. To access this after saving it, use the Review All Job Change Requests page.

Approve and **Deny** Click approve or deny a job change request routed to you.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Employee Job Location and Position Information

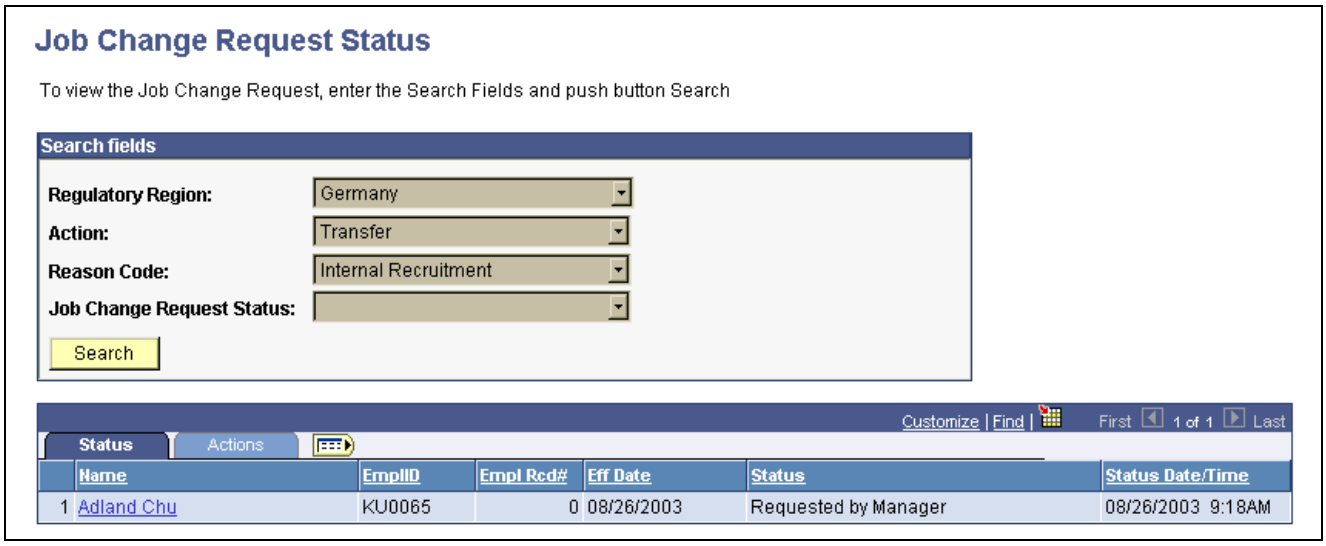
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Job Information

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Salary Plan Information

Viewing the Job Change Request Status

Access the Job Change Request Status page.

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Job Change Request Status page

Enter the search data and click Search. The system displays job change requests matching the search criteria.

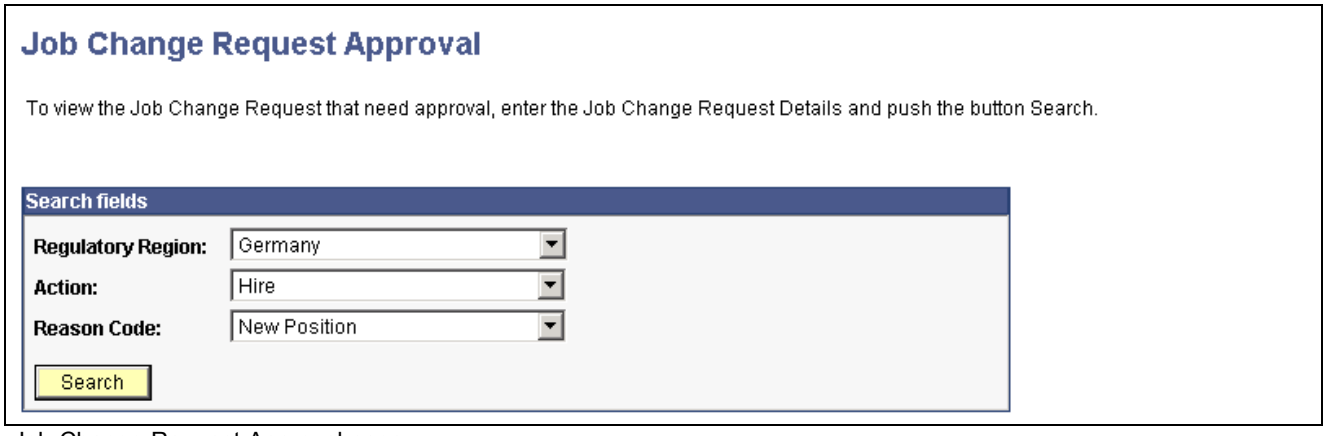
Status and Actions

The Status tab displays the current status of the request. The Action tab displays the Action and Reason for this request.

Click the worker name to view the Job Change Request page. The Job Change Request page displays the job change request details and current status of the request in the Job Change Request Status group box. The Job Change Request page also contains links to view the status history and comments from the process participants.

Approving Job Change Requests

Access the Job Change Request Approval page.



Job Change Request Approval page

Search for all job change requests and approve all selected requests at once.

When you select a job change request to approve, the system accesses the Job Change Request page for this job change request.

The following table discusses approval access by role.

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Manager	HR Administrator	Works Council
Enters job change requests. For job change requests such as transfers that involve a change in reporting manager, the new manager enters the transfer request and the current manager approves or denies the transfer request.	Approves or deny job change requests either before or after Works Council review and decision.	Approves or denies a job change request.

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Glossary of PeopleSoft Enterprise Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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