JD EDWARDS WORLD

JD Edwards World
Human Resources Guide

Version A9.1

Revised - July 18, 2008

JD Edwards World
Human Resources Guide

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JD Edwards World Release A9.1 Documentation, Revised - July 18, 2008

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1 Overview

Overview to Human Resources

JD Edwards World understands that there is no such thing as a standard Human Resources department. Management depends on you to respond to workforce changes, increasing government regulations, and continually updating industry standards, as well as your organization's policies and procedures. The information you need is unique and often complex.

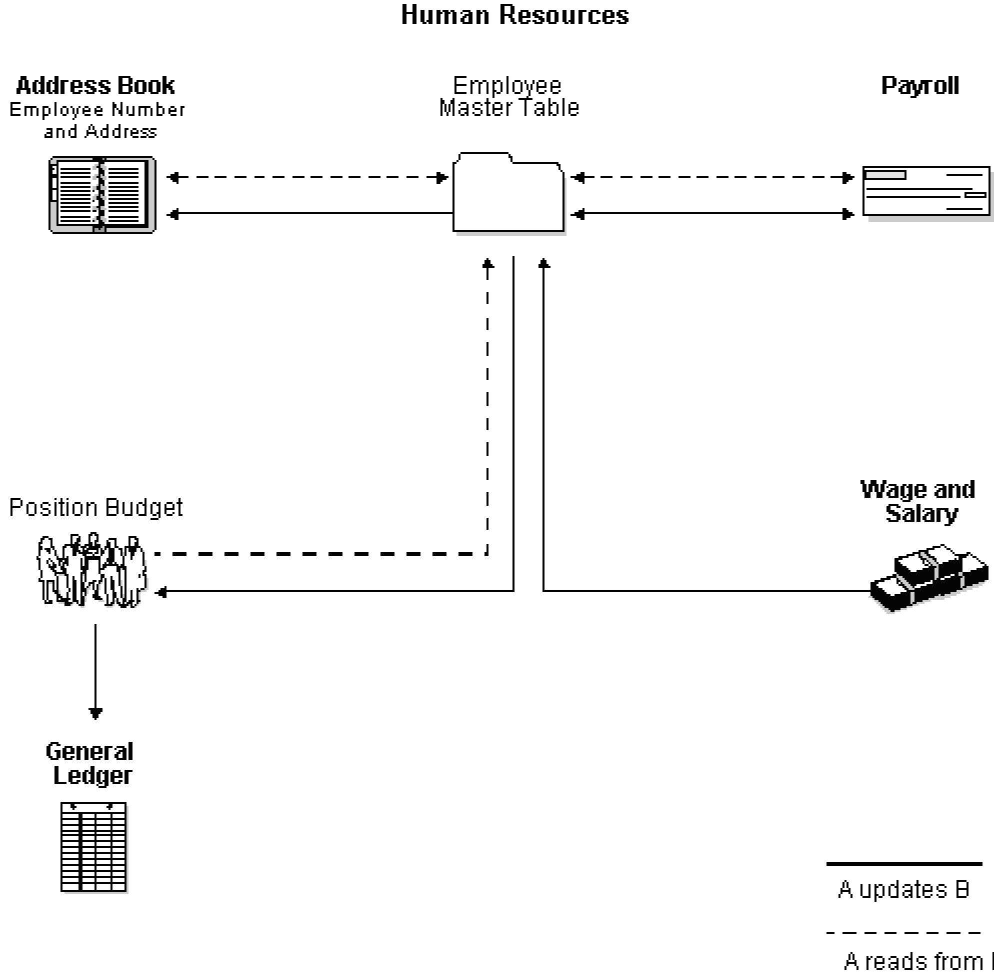
The JD Edwards World Human Resources system makes it easy to track the information that you need to meet both your immediate and your long-range goals, as well as the demands of change and growth within your company and industry. You can access and compile the information quickly, so that you can provide quick answers to questions. Because the system handles many of your previously mundane and repetitive tasks, you have time to play a more strategic role on your organization's management team.

System Integration

The Human Resources system fully integrates with the following JD Edwards World systems:

System	Description
Payroll	The Human Resources and Payroll systems share a common database of employee information. You can use either system to enter employee information, which is available to users of both systems.
Address Book	The Address Book system contains the employees' names and addresses, and tax IDs.
General Accounting	You can use the Human Resources system to create salary budgets by business unit and update them in the general ledger.

The following graphic shows the other JD Edwards World systems that use the information in the Human Resources system:



Human Resources Features

The Human Resources system provides the following features:

- Budget management
- Requisition management
- Applicant tracking
- Comprehensive employee information
- Integrated employee history and turnover analysis
- Complete job information
- Wage and salary forecasting
- Safety and health reporting
- Organizational structure reporting

Budget Management

Your Human Resources system provides comprehensive tools for position budget management, so you can improve how you manage employee costs. By managing your position budget within the Human Resources system, your department can become more proactive at managing costs.

As part of managing your budget, you can:

- Review the approved head-count for a position before you create a requisition
- Track position effective dates and the resulting budget calculations
- Automatically update position activity when you change an employee's record
- Compare projected salaries through year-end to the approved budget for each position
- Determine year-end costs by developing projections based on hours, salary amounts, head-count, or FTEs
- Track positions and head-count by company and department

Requisition Management

You can create online requisitions that include:

- Approved status
- Job description
- Responsible recruiter
- Person requested by

By identifying open requisitions, you can create internal job postings, which you can make available to your entire organization. Further, you can track the status of the requisitions at any time during the recruitment process.

Because recruiting is expensive, you need to know where your efforts have been most effective. You can track how long a requisition is open before it is filled. You can also track the costs associated with filling the requisition, such as advertising, travel, and recruiter fees.

The system tracks requisition status, data, head-count, and full-time equivalent (FTE) requirements. The flexibility of the system lets you associate multiple requisitions with a single applicant, or multiple applicants with a single requisition. Using the requisition features, you can analyze data to evaluate your recruiting process.

Applicant Tracking

In today's job market, one opening in your company can generate hundreds of resumes. You need to be able to quickly identify the key applicants who meet the requirements of an open requisition. With the JD Edwards World Human Resources system, you can maintain extensive information on each applicant, such as education, prior experience, and foreign language proficiency.

You can then search for applicants that meet specific criteria. The system's extensive search capabilities make it simple to reduce a list of applicants to those you want to seriously consider. You can then provide your managers with a list of qualified candidates.

When you hire an applicant, the system automatically:

- Transfers the applicant's information into the employee information table
- Closes the requisition, filling in the new employee's name and date of hire
- Updates the position activity with the new employee's salary and date of hire

Comprehensive Employee Information

You can use your Human Resources system to track comprehensive employee information including:

- Employee pay status
- Equal Employment Opportunity (EEO) job category
- Department
- Tax area
- Benefit group

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

- Job skills
- Education
- Work experience
- Foreign language competency
- Professional licenses

Because the Human Resources and Payroll systems share a central employee database, when you update an employee's information, you know that the employee's payroll information is also updated. This common database makes information accessible throughout your organization.

A centralized database:

- Eliminates redundant data entry
- Improves the accuracy of the payroll information
- Improves communication and teamwork among departments

To control how information is distributed within your organization, you can secure salary and other confidential information so that only authorized users can view it.

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

Integrated Employee History and Turnover Analysis

Each time you add or change employee information, the system automatically creates a historical record of the old information.

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

You can use history and turnover information to:

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

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

Complete Job Information

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

You can use job information to:

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

Wage and Salary Forecasting

With wage and salary forecasting, you generate a "what if" wage and salary workfile to make hypothetical salary adjustments by amounts or percentages, as well as by group or by individual. You can continue to test until you are satisfied with the distribution of the available money. You can also add specific amounts using a combination of merit increases, promotions, cost-of-living increases, and bonuses. After the new wages are approved, you can activate the payroll changes automatically.

Safety and Health Reporting

You can maintain and report on the details of all work-related accidents, injuries, and illnesses. You can also analyze your safety record to track cost and lost time.

You can design virtually any report that you need for regulatory reporting. The Occupational Safety and Health Administration (OSHA) 200 and 300 Log and Summary are standard reports in the system. These reports print in the approved format for posting and for direct submission to OSHA.

Organizational Structure Reporting

Use your Human Resources system to document the structure of your organization. You can document organizational structure by employee, business unit, or position, and print reports that show various levels of detail in your organizational structure. For example, a report for top management might show a broad organizational structure, such as branch offices that report to the main headquarters. Individual departments might need a report that shows each employee who reports to a single manager.

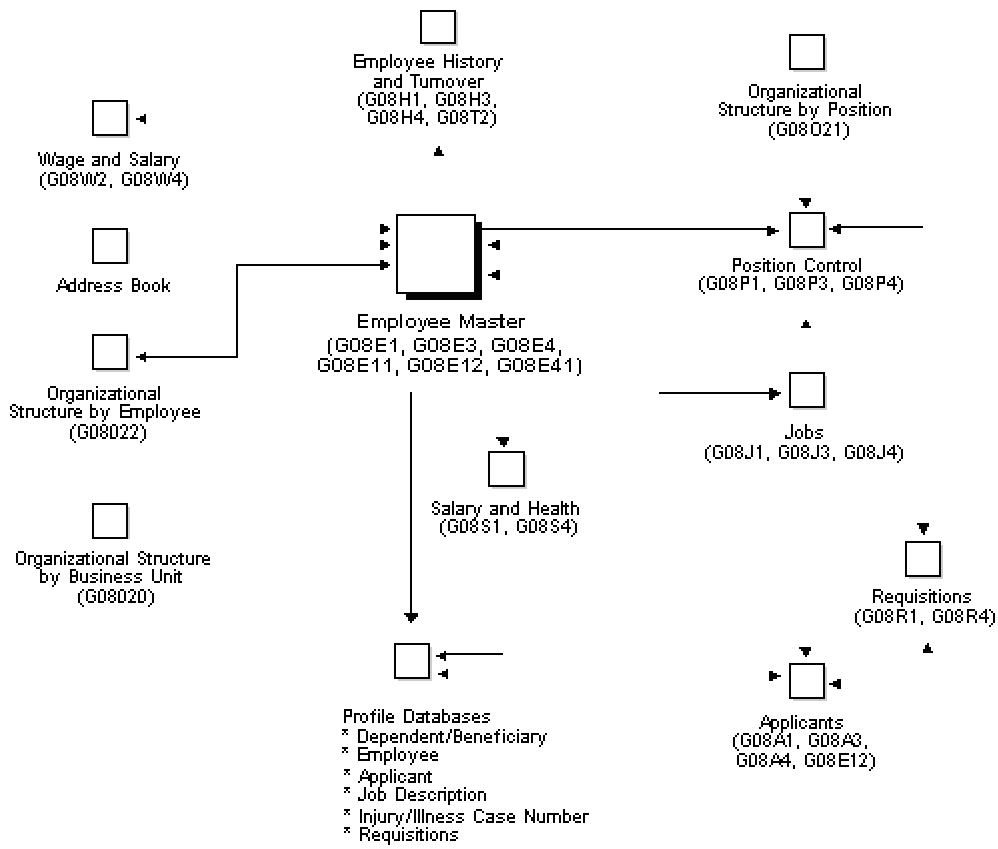
Terms and Concepts

The following terms and concepts are important to your understanding of the Human Resources system:

Item	Description
Job type	Job types are the classifications your organization uses to identify employees who perform identical (or similar) tasks and functions. For example, your organization might define job types such as administrative assistant, accountant, foreman, and vice president of finance. You can associate pay rates and benefit plans to job types.
Pay frequency	You must enter a pay frequency for each employee. The pay frequency indicates how often the employee receives payments and determines how the system calculates salaries or hourly rates. Typical pay frequencies include weekly, biweekly, semi-monthly, and monthly.
Position	A position is an employee’s assignment for a fiscal year. You use positions to budget for employee salaries. You do not need to create positions to use your Human Resources system. However, to use positions, you must have a position budget.
Position budget	You use a position budget to allocate employees (FTEs) to positions. Position budgets help you monitor employee head-count and hours, and control the costs associated with filling positions.

Human Resources System Flow

The following graphic shows the relationship between the tables in the Human Resources system:



Tables Used by Human Resources

Table	Description
Address Book Master (F0101)	Contains name and address information for all employees.
Employee Master (F060116)	Contains employee information for the Payroll and Human Resources system. The system stores name and address information in the Address Book Master table. This information has a search type of E (Employee).
Employee Multiple Job (F060118)	Contains employee multiple job information for the Payroll and Human Resources systems.
Employee Multiple Job History (F060119)	Contains employee multiple job history records.

Table	Description
Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is the combination of the job type and job step.
Business Unit / Job ID Cross-Reference (F08005)	Contains business-unit-specific codes that are used in the Employee Master table for benefit group, union code, and workers compensation insurance. These codes are specific to an employee's home business unit, job type, and job step. This table is optional.
Compensable Factors Table (F08011)	Contains evaluation methods and their assigned points or degrees for up to 10 factors. You use this information when you define job data and evaluation points.
History Constants (F08040)	Contains the parameters that are used by the HR Employee Monitor program to create history records and integration updates from the Employee Master table.
HR History (F08042)	Contains employee history records for each employee master field.
Employee Turnover Analysis (F08045)	Contains employee turnover records.
Turnover Column Consolidation (F08046)	Contains column headings by group code for turnover reports.
Profile Database Types of Data (F08090)	Contains data types along with their respective column headings. You use these data types to specify the types of profile information you want to track for jobs, employees, applicants, participants, dependents, beneficiaries, requisitions, or occupational injury or illness cases.
Profile Database User Defined Codes (F08092)	Contains multiple values with a specific type of data for individual applicant, employee, job, requisition, dependent or beneficiary, or occupational injury or illness case.
Profile Narrative (F08093)	Contains narrative information for specific types of data for an individual applicant, employee, job, requisition, dependent or beneficiary, or occupational injury or illness case.
Profile Database Cross-Reference (F08094)	Contains a cross-reference table for transferring profile data. You must define the following cross-reference types: H Transfer applicant profile data to employee profile data upon hiring T Transfer employee profile data to applicant profile data upon termination
Position Master Information (F08101)	Contains the position definition, with budget information at the position level.
Position Budget Detail (F08111)	Contains position detail at the employee activity level.

Table	Description
Position Account Information (F081012)	Contains accounting information, split by account, for a position.
Requisition Information (F08102)	Contains the definition of the requisition.
Requisition Activity (F08105)	Contains applicant or employee information as it relates to specific job requisition activity.
Pay Grade / Salary Range Table (F082001)	Contains pay grade information by pay class.
Salary Review Workfile (F08201)	Contains the mechanism for reviewing and updating employee information regarding salaries, appraisals, job types, pay grades, and so forth.
Pay Range Formulas (F08290)	Contains job type and job step pay ranges for jobs using evaluation points.
Applicant Master (F08401)	Contains applicant information. The system stores name and address information in the Address Book Master table. This information has a search type of A (Applicant).
Injury / Illness Case Master (F08601)	Contains occupational injury and illness cases that are used for OSHA reporting. This table contains the following information for each case: ▪ The name and address book number of the employee involved in the injury or illness ▪ A detailed description of the injury or illness ▪ The extent or outcome of the incident
Participant File (F08901)	Contains dependent / beneficiary information for spousal life insurance premium calculation purposes.

Menu Overview

The Human Resources menus are listed below. This list does not show navigation among the menus.

Menu Overview - Human Resources System

Human Resources System G08

Employee Information

* Employee Information G08E1
* Employee Advanced/Technical Operations G08E3
* Employee Information Setup G08E4
* Employee Reports G08E11
* Employee Category Code Setup G08E41
* International Information/Procedures G08E13
* EEO/Affirmative Action Reports G08E12

Employee History

* Employee History G08H1
* History and Turnover Advanced/Technical Operations G08H3
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* Wage and Salary Administration G08W2
* Wage and Salary Administration Setup G08W4

Safety and Health Administration

* Safety and Health Administration G08S1
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Organizational Structure

* Organizational Structure G0802
* Organizational Structure by Business Unit G08O20
* Organizational Structure by Position G0821
* Organizational Structure by Employee G08O22

2 Employee Information

Overview to Employee Information

Objectives

- To create, change, and update an employee's master record
- To create, change, and update employee profile information
- To enter an employee into the Address Book system
- To terminate and rehire employees
- To run reports

About Employee Information

You can use your Human Resources system to track detailed information about your employees. Use this information to analyze and report on your employees, and to meet government reporting requirements.

Standard types of information that you can track include:

- Personal information, such as name, address, and tax identification number
- Job information
- Pay information
- Governmental reporting information, such as that required to meet Equal Employment Opportunity (EEO) and Canadian Employment Equity requirements
- International information, such as country of origin and native language

Your Human Resources system also gives you the flexibility to track any type of information that your organization needs. You can use the profile data feature to track entire categories of auxiliary information for your employees, such as job skills, or professional licenses. The system makes it easy to search on this information to locate employees who meet specific criteria.

You can also define fields and codes for tracking employee information that is unique to your organization or your industry. For example, you might set up a field to track the date on which employees' drivers licenses expire.

In addition to tracking virtually any kind of employee information, the Human Resources system simplifies the processing of terminating employees. You can also rehire a terminated employee without re-entering all of the employee's information.

After you create a record of employee information, you can:

- Make changes, corrections, or updates

- Review the information as necessary
- Terminate employment
- Reactivate employment

The system includes several types of reports that you can use to review and analyze employee information. For example, the system provides reports that you can use to:

- Meet the requirements of the Equal Employment Opportunity Commission (EEOC)
- Identify employees who meet specific criteria or who have specific skills
- Print mailing labels that contain employees' names and addresses

Processing employee information includes:

- Entering employee information
- Understanding salary and hourly rate calculations
- Revising employee information
- Working with profile data
- Terminating employees
- Rehiring employees
- Working with Canadian Federal Employment Equity
- Reviewing employee reports

Enter Employee Information

Entering Employee Information

You can use your Human Resources system to track detailed information about your employees. Use this information to analyze and report on your employees, and to meet government reporting requirements.

Before you can analyze and report on employee information, you must add a record for each employee. This record contains personal, company, job, and pay information for the employee.

For employees who have more than one job or position within your organization, such as an English teacher who is also the basketball coach, you can track separate job and pay information for each job.

If you are using the JD Edwards World Payroll system, you must enter certain pay and tax information, such as work and residence tax areas, so that employees can receive their payments. You can also specify the annual salary and age on which an employee's life insurance premium is based.

You must also enter pay and tax information, which is the information that the system needs to calculate an employee's annual salary or hourly rate.

Employee information can also consist of user defined information, including information that is unique to your organization or your industry. You can use this information for reporting and analysis purposes.

If your company has international employees, you can record information required by other countries, such as:

- Immigrant registration number
- Country of origin
- Native language
- Canadian employment equity information

Entering employee information consists of the following tasks:

- Adding New Employee Records
- Entering Multiple Job Information
- Attaching a Contract Calendar to an Employee Record
- Entering Pay Basis Information
- Entering User Defined Information for Employees
- Entering International Employee Information

Adding New Employee Records

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **HR Employee Entry**

Before you can analyze and report on employee information, you must add a record for each employee. This record contains personal, company, job, and pay information for the employee.

After you add a new employee record to the database, that record is immediately available for reporting and payroll processing.

When you add an employee record, the system updates the following tables:

- Employee Master (F060116)
- Employee Additional Information (F060120)
- Employee International Data (F060117)
- Employee Multiple Job (F060118)
- Employee Multiple Job History (F060119)

Adding a new employee consists of the following tasks:

- Entering basic employee information
- Entering address book information
- Entering history and turnover information
- Entering government and benefit information

Basic employee information includes general identification information about the employee. You need this information to include the employee in payroll processing.

Address book information includes information such as the employee's name, address and phone number. Entering address book information automatically enters the employee into the address book system. After you enter address book information for an employee, you can use that information to locate the employee in the database when you do not know the employee number.

System constants enable you to track employee history and turnover information when you enter a record for a new employee or change existing employee information. You specify the data items for which you want to track history. Then, each time you change the information in those data items, the system updates the Employee History table (F08042). When you enter change reasons for turnover, the system updates the Employee Turnover table (F08045). For example, you can enter a code to denote that an employee has been promoted.

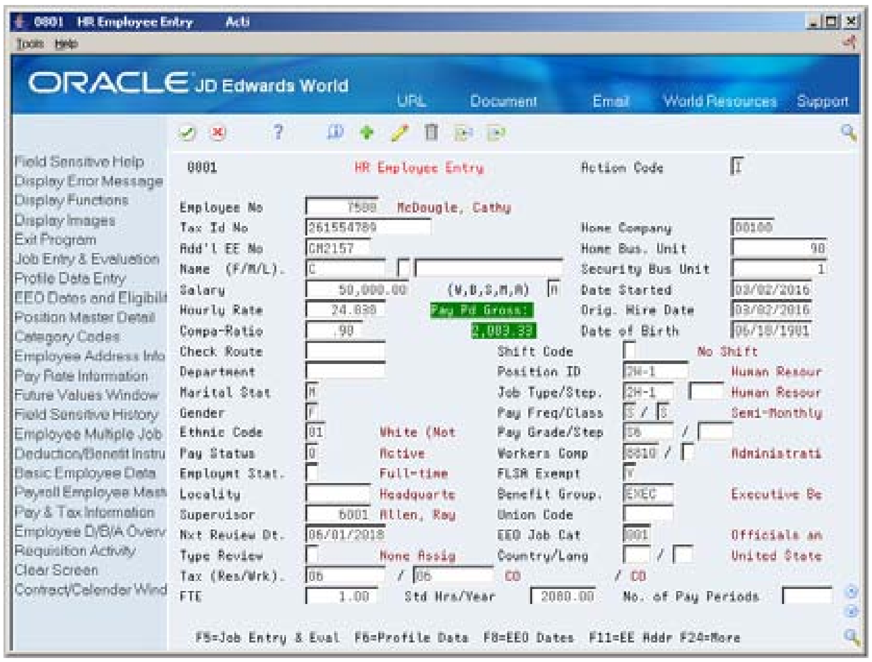
Government information includes information such as EEO job category, I9 status (an employees' I9 status shows their eligibility to work in the United States), and other types of information that you need to prove that your organization follows government regulations. Benefit information includes information that you need to enroll an employee in your organization's benefits plans. For example, you can enter the amount of life insurance for which an employee is eligible.

Before You Begin

- Review the constants settings for your system. Constants affect much of the employee information you enter. For example, a constant can prevent you from entering a pay rate for an employee that is not within the pay range for the employee's pay grade.
- Review the related processing options. They determine how much information you must enter when you enter employee information. For example, processing options determine whether the Job Information table automatically supplies default job information when you add or change employee information.

To enter basic employee information

On HR Employee Entry



1. To assign a specific employee number, complete the following field:
   - Employee Number
2. To enter employee identification information, complete the following fields:
   - Tax ID Number
   - Home Company
   - Home Business Unit
   - Name
   - Security Business Unit
   - Date Started
   - Original Hire Date

- Marital Status
- Gender
- Ethnic Code
- Pay Status
- Employment Status

3. To include additional employee identification information, complete the following optional fields:
   - Additional Employee Number
   - Date of Birth
4. For employees in companies outside of the United States, complete the following fields:
   - Country
   - Language
5. To specify job-related information, complete the following fields:
   - Position ID
   - Job Type
   - Job Step
   - Locality
   - Supervisor
   - FTE
   - Standard Hours / Year

   If your processing option is set to use default job information, when you enter a job type and job step (if applicable), the system automatically enters the following job information in the employee's record:

   - Pay Frequency
   - Pay Class
   - Pay Grade
   - Pay Grade Step
   - Workers Compensation
   - FLSA Exempt
   - Benefit Group
   - Union Code
   - EEO Job Cat
6. To enter pay rate information, complete one of the following fields:
   - Salary / Salary Frequency
   - Hourly rate

7. To enter payroll-specific information, complete the following fields:
   - Shift Code
   - Check Route
   - Tax (Residence)
   - Tax (Work)
   - Number of Pay Periods
8. To identify the employee's benefits, complete the following fields and press Enter:
   - Benefit Group

   After you complete these steps, follow the steps to enter address book information.

Field	Explanation
Employee No	A number that uniquely identifies an entry in the Address Book system. You can use this number to identify employees and applicants. This field accepts the identification in one of three forms: ▪ A 1- to 8- digit employee (address book) number. ▪ A 9-digit Social Security (tax ID) number with leading zeros. ▪ A 1- to 8- digit "other" (alternate, old, third employee) number preceded by a slash (/). *Form-specific information* If you leave this field blank, the system automatically assigns the next available employee number.
Tax Id No	The employee's tax identification number. Enter this number without dashes. In the United States, this is the Social Security number. In Canada, this is the Social Insurance number. The system does not let you enter duplicate tax IDs. If your default company is not Canadian or United States, and the international code is set to Y, you can enter a 16-character identification in the tax ID field. The number you enter in this field can also be used as the employee number.
Home Company	The company number in which the employee generally resides.
Home Bus. Unit	The number of the business unit in which the employee generally resides. *Form-specific information* The business unit number in which the employee generally resides.

Field	Explanation
Name - Last	The individual's last name. When adding names to the address book, this field is used in conjunction with the First Name and Middle Initial fields to create the alpha name and the first line of the mailing address. To change an individual's last name, you must access the Address Window.
Initial - Middle Name (Govt Rpts)	The first letter of the individual's middle name. This is used to facilitate certain statutory reporting requirements.
Name - First	The individual's first name. When you enter employees to the address book, this field is used in conjunction with the Middle Initial and Last Name fields to create the alpha name and the first line of the mailing address. For names that are already in the address book, this field is used to access the individual's first initial, which is used on various government reports. To change a name, you must access the Address Book Window from an employee entry form.
Security Bus Unit	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch / plant. You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table. *Form-specific information* A business unit number that secures the employee's record from unauthorized access. Any user not authorized to access this business unit cannot access this employee's record.
Marital Status	A user defined code (07 / MS) that specifies the employee's federal marital status code as retrieved from the W-4 form. This code is used in the computation of all federal income tax. You can add codes if needed.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Ethnic Code</td><td>A user defined code (07/M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity standards. The predefined codes that JD Edwards World provides are hard coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these pre-defined codes. You can add codes, if necessary.</td></tr>
<tr><td>Pay Status</td><td>A code that indicates whether an employee's pay status is active or inactive.

Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run.

To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.</td></tr>
<tr><td>Employment Status</td><td>A user defined code (07/ES) that identifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. For example:

1 Full-time temporary
2 Part-time temporary
3 Part-time regular
4 Seasonal
5 Casual</td></tr>
<tr><td>Additional Employee No</td><td>An alternate employee number, typically the number from the employee tracking system that your organization used prior to converting to the JD Edwards World system.

When you search using this number, preface the number with a slash (/).</td></tr>
<tr><td>Country Code</td><td>A user defined code 00/CN that determines the mode in which the payroll system runs.

Form-specific information

If you set the International field to Y, you must set the Country Code.</td></tr>
</table>

Field	Explanation
Language	A user defined code (01/LP) that specifies a language to use in forms and printed reports. For World, if you leave the Language field blank, the system uses the language that you specify in your user preferences. If you do not specify a language in your user preferences, the system uses the default language for the system. Before any translations can become effective, a language code must exist at either the system level or in your user preferences.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: ▪ Position (position code and its description) ▪ Fiscal year ▪ Home business unit For example, you can identify position A0-1 as Accounting Manager for fiscal year 1998-1999, for home business unit 41. *Form-specific information* The system does not create a position based on a value that you enter in this field. The position must already exist in the Position Master Information table (F08101). To find a valid position ID, you must search using the appropriate fiscal year and home business unit. When the position ID you enter references a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code.
Job Type (Craft) Code	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates Table.
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
FTE	The full-time equivalent amount (FTE). This figure is the portion of a full-time worker that an employee represents within the business unit. For example, an employee who works 20 hours per week would represent .50 (1/2 FTE). This number cannot be greater than 1 for any employee.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Std Hrs/Year</td><td>The number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate).

When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses the following sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period:
▪ Employee entry forms (this field)
▪ Pay Grade Step table (hours per day multiplied by days per year)
▪ Payroll company constants for the employee’s company
▪ Payroll company constants for the default company (company 00000)
▪ Data dictionary
▪ System default value of 2080 standard hours per year

Form-specific information

When you enter a value in this field, that value overrides the default value from the Pay Grade Step table.</td></tr>
<tr><td>Pay Frequency</td><td>A user defined code (07/PF) that indicates how often an employee is paid. Codes are:
B Bi-weekly
W Weekly
S Semi-monthly
M Monthly
A Annually
C European Annualized

The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee.

Form-specific information

Depending on how your processing options are set, the system might automatically complete this field with the pay frequency entered for the employee’s job. When you add or change employee information, any value you enter in the Pay Frequency field overrides the default value entered at the job level.</td></tr>
</table>

Field	Explanation
Pay Class (H/S/P)	A code that indicates how an employee is paid. Valid codes are: " " Blank H Hourly S Salaried P Piecework *Form-specific information* Depending on how your processing options are set, the system might automatically complete this field with the pay class entered for the employee's job. When you add or change employee information, any value you enter in the Pay Class field overrides the default value entered at the job level.
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays an error or warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade. To set up pay grades, use Pay Grades by Class (P082001).
Pay Grade Step	A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate. If you have set your constants to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields: ▪ Salary ▪ Hourly Rate ▪ Hours per day ▪ Hours per year ▪ Days per year
Workers Comp	A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
EEO Job Cat	A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC), or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by JD Edwards World and Company. You can add codes if needed.
Salary	The amount that an employee is paid in one year, provided that the employee is paid every pay period of the year. For the employee's primary job, the system stores the annual salary in both the Employee Master table (F060116) and the Employee Multiple Job table (F060118). For secondary jobs, the system stores the annual salary in the Employee Multiple Job table (F060118). Depending on how the Display Salary (Annual/Effective) field is set in the History Constants table (F08040), this field displays one of the following: ▪ Annual salary - For salaried employees who are not associated with a contract calendar, this amount is either entered by the user or retrieved from the Pay Grade/Step table. For employees who are associated with a contract calendar, the system calculates this amount using the formula, ((current salary minus salary paid before change) divided by number of periods to pay) multiplied by pay frequency) ▪ Effective salary - Which equals ((annual salary divided by pay frequency) times periods to pay) For employees whose jobs are associated with a contract calendar, the system recalculates the effective salary if you enter a mid-calendar salary adjustment for the employee. After you enter a mid-calendar adjustment, the effective salary equals the salary that is to be paid to the employee from the time of the adjustment to the end of the contract. *Form-specific information* The system uses the value you enter in the Salary field in conjunction with the value in the untitled Pay Frequency field (data item #SFQ) to perform the following calculations: ▪ For salaried employees, the system calculates the yearly salary amount and displays a pay period gross amount, annual salary, and hourly rate. ▪ For hourly employees, the system calculates the hourly rate and does not display a salary or pay period gross amount for employees' primary jobs.
Salary Frequency	A code that indicates the time period upon which the entered salary is based. The system uses the value in this field in conjunction with the value in the Salary field (data item SAL).

Field	Explanation
Hourly Rate	The employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the Employee Master table. In the Employee Master table, this is the employee's base hourly rate. In the Union Rates table, this is the straight time rate. **Note:** If you change the number of the data display decimal digits for this field, you must also change fields Rate - Base Hourly (BHRT) and Rate - Hourly (SHRT) so that they have exactly the same number of data display decimal digits. *Form-specific information* ▪ For salaried employees, the system calculates the yearly salary amount and displays a pay period amount, annual salary, and hourly rate. ▪ For hourly employees, the system calculates the hourly rate and does not display a salary or pay period amount for the employees' primary jobs. ▪ To calculate European annualized salaries for international employees, enter the annualized salary or pay period amount.
Shift Code	A user defined code (07/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard. For payroll and time entry: If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time. If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.
Check Route	A user defined code (07/CR) that specifies the check routing or mail stop code. Use this code to sequence the printing of payroll checks to facilitate their handling and delivery. *Form-specific information* You can also use this code for Human Resources turnover reporting.
Tax Area (Residence)	A code that identifies a geographical location and the tax authorities for the employee's residence. Authorities include both employee and employer statutory requirements. In Vertex payroll number tax terminology, this code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode List for valid codes for your locations.

Field	Explanation
Tax Area (Work)	A code that identifies a geographical location and the tax authorities for the employee's work site. Authorities include both employee and employer statutory requirements. In Vertex payroll tax terminology, this code is synonymous with GeoCode. Refer to Vertex System's Master GeoCode List for valid codes for your locations.
Benefit Group	The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization. This feature is only applicable if your benefit plans are linked to benefit categories which, in turn, are linked to benefit groups.
No. of Pay Periods	The number of periods in the year during which the employee will be paid the salary amount. The system uses this number to calculate the annual salary and pay period gross amount for a job that lasts for only part of a year.

What You Should Know About

Salaries	The displayed salary can be either the annual or effective salary, depending on how you set up your constants. See *Setting Up Human Resources Constants.*
Multiple job information	When you add a new employee record, the system automatically adds a record to the Employee Multiple Job table (F060118) for the employee's primary job.
Entering a job type and step	You can set processing options to automatically retrieve all of the information for the job from the Job Master table and apply it to each employee you enter.

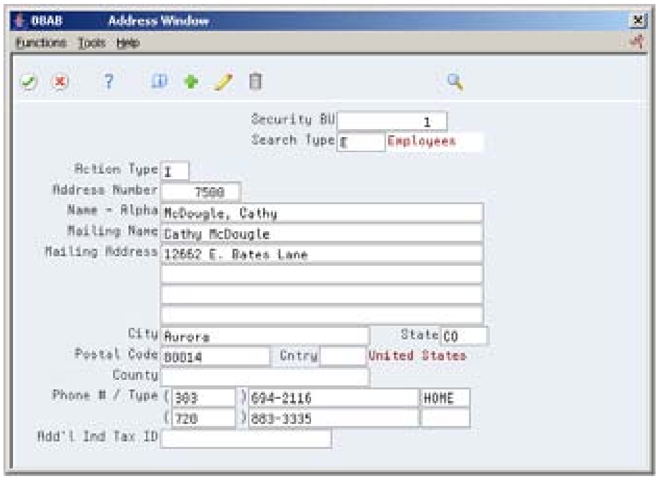
See Also

- *Defining Jobs*

To enter address book information

After you complete the steps to enter basic employee information, you must enter address book information.

On Address Window



1. Complete the following fields and press Enter:
   - Address
   - City
   - State
   - Postal Code
   - Country
   - County
   - Phone 1
   - Phone Type
   - Phone 2
   - Phone Type
2. Review the information in the following field:
   - Search Type
3. Complete the following optional field and press Enter:
   - Additional Ind Tax ID

   After you complete this task, follow the steps to enter history and turnover information.

Field	Explanation
Search Type	A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists
Add'l Ind Tax ID	An additional identification number that a tax authority assigns to an individual.

To enter history and turnover information

After you complete the steps to enter Address Book information, you can enter history and turnover information. You must enter this information only if you have set up your system to track history and turnover.

On History and Turnover Information ONLY

Complete the following fields and press Enter:

- Effective On
- Change Reason

After you complete this task, follow the steps to enter government information.

Field	Explanation
Effective On	The date that you want all the changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date. *Form-specific information* The effective date that you want to record all the changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes you make to the Employee Master table take effective immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the Date Started as the effective date.

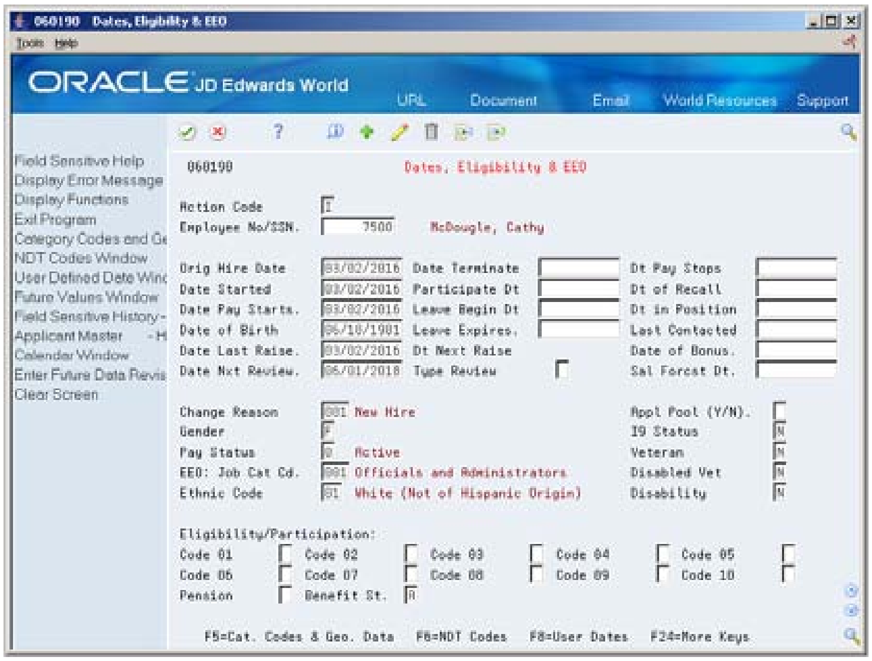
Field	Explanation
Change Reason	To record a reason for the change in the Employee Turnover Analysis table (F08045) and the HR History table (F08042), enter a value in this field. Completing this field also updates the Employee Master table (F060116) and the Employee Multiple Job table (F060118) with the new change reason. The change reason code indicates the following: ▪ Why an active employee's master table record was changed ▪ Why an employee was terminated When the HR Monitor reads the information on this form, it creates a turnover record only if you enter a change reason in this field. If you do not want to create turnover records for a data change, leave this field blank. *Form-specific information* Whenever you make a change and you want to record the reason for the change in the HR History table (F08042), you must enter a value in this field. When you enter a new employee, a default value of 001, New Hire, appears in the field.

To enter government and benefit information

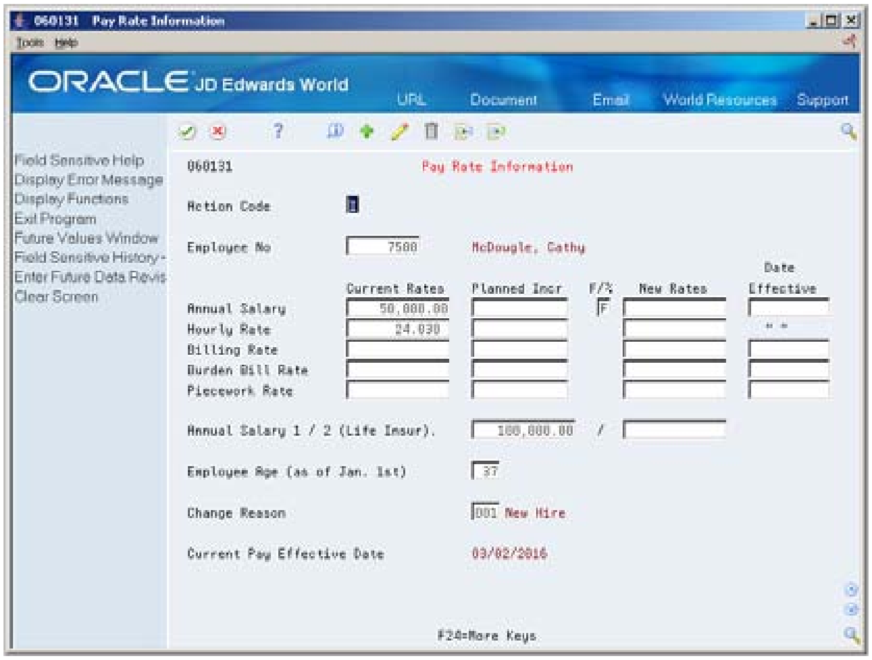
After you complete the steps to enter history and turnover information, you must enter government and benefit information.

Depending on the way in which your processing options are set, the Dates, Eligibility, and EEO form might appear automatically. If your processing options are not set to automatically display this form, choose the EEO Dates function to access it.

On Dates, Eligibility and EEO



1. To enter government information, complete the following fields:
   - I9 Status
   - Veteran
   - Disabled Veteran
   - Disability
2. To enter benefit information, complete the following field and press Enter:
   - Benefit Status
3. Choose the Exit Program function to return to HR Employee Entry.
4. Access Pay Rate Information.



5. On Pay Rate Information, complete any of the following fields and press Enter:

- Annual Salary 1 (Life Insurance)
- Annual Salary 2 (Life Insurance)
- Employee Age (as of Jan. 1st)

Field	Explanation
I9 Status	A code that indicates the method used to verify that this employee is eligible to work in the United States. Valid codes are: Y I9 form on file P Passport used for verification R Resident alien or alien registration card S Social Security card L Driver's license and Social Security card V Visa (worker's permit) B Birth certificate N Waiting for verification
Veteran	A code that indicates the veteran status of the employee. Valid codes are: N No, this employee is not a veteran. Y Yes, this employee is a veteran. V This employee is a Vietnam-era veteran.

Field	Explanation
Employee Benefit Status	A user defined code (07/EA) that allows the system to test an employee's eligibility for benefits and to determine for enrollment parameters (guidelines) for benefits administration. This code specifies the employee action for which the system searches as it tests for eligibility. An asterisk (*) indicates the guidelines refer to all employee actions not otherwise specified. Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.
Rate - Life Ins. Annual Salary	A value that the system uses to calculate deductions, benefits, and accruals (DBAs) for an employee's life insurance premium. Any table method that begins with an I (Insurance) uses this field.
Rate - Life Ins. Annual Salary (Spouse)	A value that the system uses to calculate deductions, benefits, and accruals (DBAs) for a spouse's life insurance premium. Any table method that begins with an F or U uses this field.
Age - Employee	The age of the employee as of a certain date (for example, August 1st) for a given year. You can manually update this field or update it each year using the future data facility.
Age – Spouse	The age of the spouse as of a certain date for a given year. You can manually update this field on the Dependent/Beneficiary Entry (P08901) screen, or it can be updated using WorldWriter Q083/ZJDE0002.

Processing Options

See Human Resources Employee Master (P0801).

Entering Multiple Job Information

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), choose **Employee Multiple Job Entry**

For employees who have more than one job or position within your organization, you can enter multiple job information. Entering multiple job information allows you to:

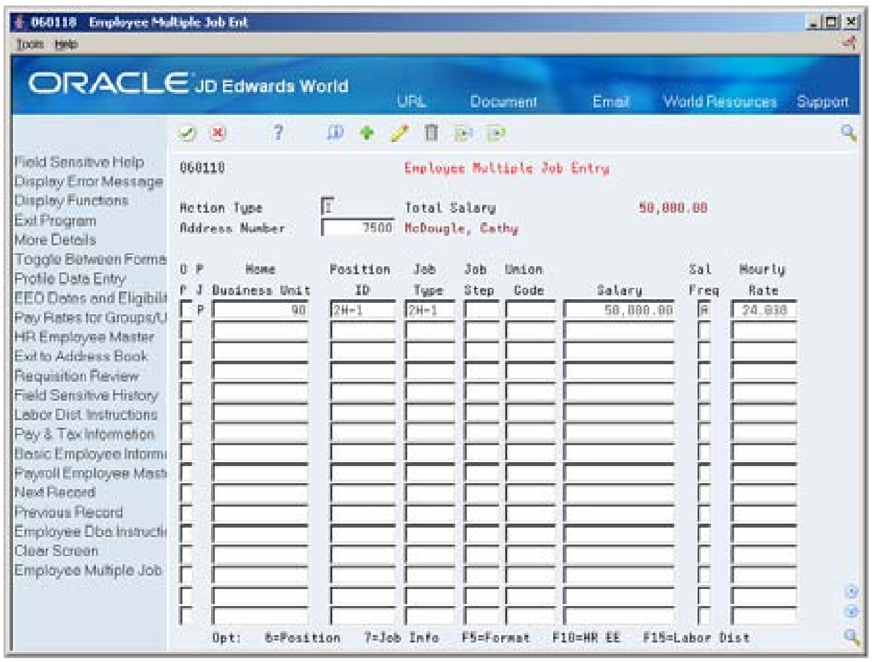
- Track separate job and pay information for each job.
- Define job start and stop dates for each job.
- Avoid entering timecards for an hourly employee by entering a standard number of hours to pay in each payroll, regardless of the number of hours worked.

- Set an employee to autopay status for more than one job. (Autopay status means that you do not need to enter timecards for the employee's regular hours. You enter a timecard only when the employee has exception time, such as vacation or sick time.)

For example, you have an employee who is an English teacher for nine months per year as well as a basketball coach for three months per year. You can track the different rates of pay for each of these jobs. You can also assign different pay start and stop dates to each job so that the employee receives payments for teaching during the nine months that he teaches, and receives payments for coaching only during the three months in which he actually coaches.

To enter multiple job information for employees

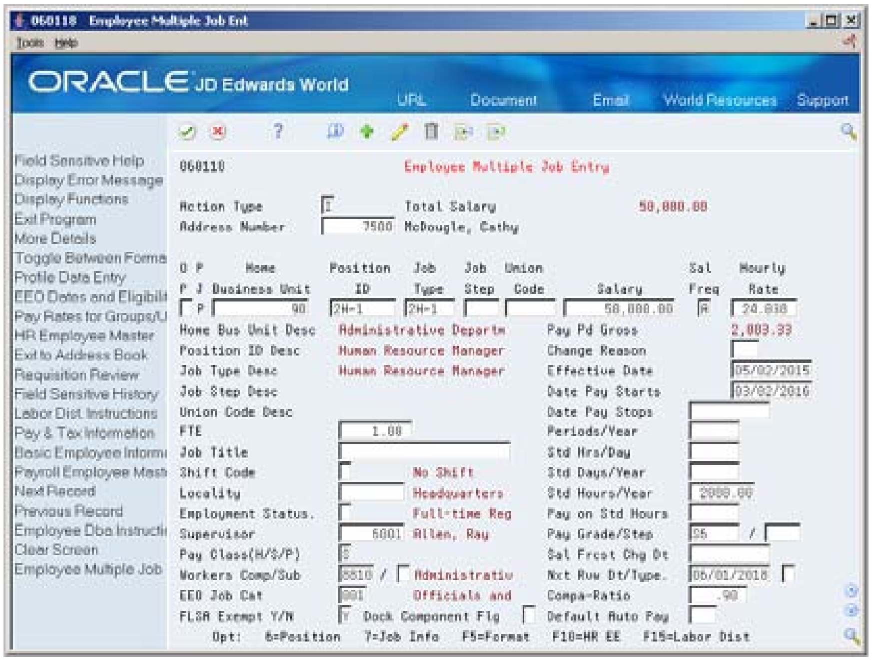
On Employee Multiple Job Entry



1. Complete the following fields:
   - Address Number
   - Home Business Unit
2. Complete one of the following fields:
   - Salary
   - Hourly Rate
3. If you entered an effective salary, complete the following field:
   - Salary Frequency
4. Complete the following optional fields:
   - Position ID

- Job Type
- Job Step
- Union Code

5. Access the detail area.



6. Complete the following fields:

- Change Reason
- Effective Date
- Pay Class (H / S / P)
- FLSA Exempt Y / N
- EEO Job Category

7. To enter pay information for the job, complete the following fields:

- Date Pay Starts
- Date Pay Stops
- Pay on Standard Hours
- Periods per Year
- Standard Hours per Day
- Standard Days per Year
- Standard Hours per Year

8. Complete any of the following additional fields:

- Full Time Equivalents
- Supervisor

- Next Review Date
- Next Review Type
- Default Auto Pay

Field	Explanation
Effective Date	The date that you want all the changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date. *Form-specific information* The effective date on which you want to record all of the primary job changes to the HR History table (F08042) and the Employee Turnover Analysis table (F08045). The changes you make to the Employee Master table take effect immediately. If you are adding an employee record and you do not enter a date in this field, the system uses the current date as the effective date.
EEO Job Cat	A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC), or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by JD Edwards World and Company. You can add codes if needed.
Periods/Year	The number of periods in the year during which the employee will be paid the salary amount. The system uses this number to calculate the annual salary and pay period gross amount for a job that lasts for only part of a year.
Std Hrs/Day	The number of hours that the employee normally works in one day. If you leave this field blank, the default is the standard number of hours per day that you defined in the payroll company constants. For example, if, in the payroll company constants, you specified 8 as the standard number of hours per day, but a few employees normally work 7 hours per day, enter 7 in this field for those employees.
Std Days/Year	The number of work days in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you have set up the human resources constants to use the pay grade step table as the default pay rate source, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.

Field	Explanation
Std Hours/Year	The number of work hours in the year. When you do not set your payroll company constants to use the Pay Grade Step table as the pay rate source, the system uses this number to compute the hourly rate when you supply the annual salary (or to compute the annual salary when you supply the hourly rate). When you set your constants to use the Pay Grade Step table as the pay rate source, the system uses the following sequence to search for the standard number of hours that it uses to calculate the salary or hourly rate per pay period: ▪ Employee entry forms (this field) ▪ Pay Grade Step table (hours per day multiplied by days per year) ▪ Payroll company constants for the employee's company ▪ Payroll company constants for the default company (company 00000) ▪ Data dictionary ▪ System default value of 2080 standard hours per year

What You Should Know About

Updates to employee information

When you add a new employee to the database, you must use HR Employee Entry or Basic Employee Data to add primary job information. These programs update the Employee Multiple Job table (F060118) and the Employee Multiple Job History table (F060119) with primary job information.

You can use Employee Multiple Job Entry to change information for an employee's primary job. When you use this program to change primary job information, the system updates the Employee Master table (F060116) and the Employee Multiple Job History table.

Contract calendars

If you set the contract calendar selection on Constants Information, Contract/Calendar Window automatically appears when you add a new employee record.

If you need to change information on a job with a contract calendar attached, choose the Contract/Calendar Window option.

You can attach a different calendar to different jobs, or you can use the same calendar for more than one job. An example might be a calendar for a substitute school teacher who provides services at different schools in a district.

See *Attaching a Contract Calendar to an Employee Record*.

Occupational Pay Rates	If you are not using the position control features of your Human Resources system, you might find it more convenient to define occupational pay rates for employees who have multiple jobs. When you define occupational pay rates, you can enter only one start and stop date that applies to all jobs. See *Defining Occupational Pay Rates* in the *Payroll* guide.
Purging multiple job records	If you are using the JD Edwards World Payroll system, the system automatically purges obsolete multiple job records when you process a payroll cycle. The system uses the pay stop date for the job to determine whether the job is obsolete. An obsolete job is one that has a pay stop date that is less than the pay period ending date. If you are not using the JD Edwards World Payroll system, you can run a program to purge obsolete multiple job records. You use the same steps to run this purge program as you do to run other types of purges.
Job information	For an employee who has multiple jobs, the position ID can be the same for each of those jobs, so long as the jobs have different home business units.

Processing Options

See Employee Job Entry (P060118).

Attaching a Contract Calendar to an Employee Record

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose HR Employee Entry

For an employee whose work days are specified by contract, such as a public school teacher, you can use the contract calendar feature to track the specific days that the employee works during the course of the contract. You can set up a calendar so that some days count as more than one full day. For example, days on which teachers have parent-teacher conferences might count as 1.5 days.

You can set up separate contract calendars for each of your employees, or you can attach the same contract calendar to multiple employees. Employees who have multiple jobs can have a different contract calendar for each job.

You can also specify how an employee receives payments for each job. For example, for an employee who works only part of a year but wants to receive a payment each pay period throughout the entire year, you can set up the system to withhold part of the employee's salary each pay period and deposit it in an accumulated account. The system uses the money in the accumulated account to pay the employee during the pay periods when the employee is not working.

You can also account for employees who:

- Begin working after the beginning date of the contract
- Receive salary increases in the middle of a contract

- Leave the contract before its ending date

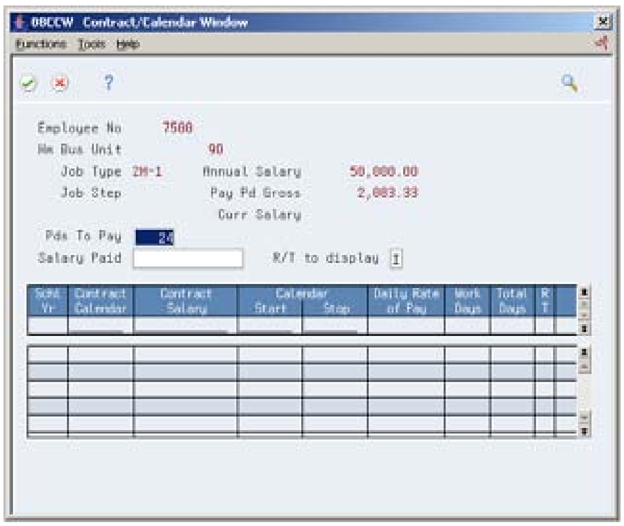
Before You Begin

- Ensure that the contract calendar selection is activated in your human resources constants. See *Setting Up Position Control Information.*
- Set up a contract calendar. See *Setting Up Contract Calendar Information*.

To attach a contract calendar to an employee record

On HR Employee Entry

1. If you are adding a new employee record to the database, the Contract Calendar window appears automatically. To attach a contract calendar to an existing employee record, locate the employee record and then choose the Contract Calendar function.



2. On Contract Calendar, complete the following fields and press Enter:
   - Change Reason
   - Periods to Pay
   - Contract Calendar
   - Calendar Start
   - Stop
3. Review the information in the following fields:
   - Daily Rate of Pay
   - Pay Period Gross
4. Choose the Update function.

Field	Explanation
Pds To Pay	The number of periods in the year during which the employee will be paid the salary amount. The system uses this number to calculate the annual salary and pay period gross amount for a job that lasts for only part of a year. *Form-specific information* When you change contract calendar information for an employee, enter the number of pay periods remaining in the contract calendar for which the employee will be paid.
Contract Calendar	A code that identifies a yearly contract that specifies the number of days that employees work. After you create a contract calendar, you can attach it to employee and position records.
Calendar Start	The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing. You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year). *Form-specific information* When you assign an employee a contract calendar enter one of the following; ▪ The first date covered under the contract, if the employee will begin work by that date ▪ The actual date the employee begins work, if the employee's start date is later than the first date covered by the contract
Stop	The date that an employee's pay stops. This date is used to provide for employees who are seasonal or for employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT. It may also be the date that a deduction, benefit, or instruction stops. *Form-specific information* When you assign an employee a contract calendar enter one of the following; ▪ The last date covered under the contract, if the employee will work to that date ▪ The actual date the employee will stop work, if the employee's stop date is earlier than the last date covered by the contract

Field	Explanation
Daily Rate Of Pay	The daily rate of pay earned by an employee attached to a Contract/Calendar. The system calculates the daily rate of pay as follows: Contract Salary / Number of work days in the contract calendar that fall between the start and stop dates
Amount - Gross Pay	The actual gross pay amount for an employee. This is to be distinguished from the distributed gross pay amount used for labor distribution. See data item DPAY. When using Work Order Time Entry, this field is used to record miscellaneous pay for an employee, (i.e. piece rate bonus). *Form-specific information* To calculate the pay period gross amount, the system divides the annual salary by the pay frequency. For example, assume that: ▪ An employee earns 3000.00 for a job that lasts three months ▪ The employee's pay frequency is monthly ▪ The employee is to receive payments for the job only during the three months that the job lasts The system calculates the following: (3000 divided by 3) x 12 = 12000 = annualized salary 12000 divided by 12 = 1000 = pay period gross salary For employees whose records are attached to contract calendars, payments are not based on the pay period gross amount.

What You Should Know About

Removing a contract calendar

Choose the Detach function for either of the following reasons:

- You attach a contract calendar to an employee in error
- Before the contract calendar dates have expired, an employee transfers to a different position and no longer works under a contract calendar, for example, a teacher transfers to an administrative position

Copying employee records

If you copy an employee record to add a new employee record, you must clear and replace the standard hours per year, salary, and hourly rate information to ensure accurate calculations.

Reviewing salary paid-to-date

If you change salary information for an employee, you can use the Salary Paid function to update the salary paid-to-date for the employee.

Changing periods to pay If you need to change the periods to pay information, make the corrections on Contract Calendar. Do not change this information on Employee Entry.

Entering Pay Basis Information

	From Human Resources (G08), choose Employee Information From Employee Information (G08E1), choose Pay and Tax Information

Pay basis information is the number of hours on which an employee's salary is based. The system uses pay basis information to calculate either:

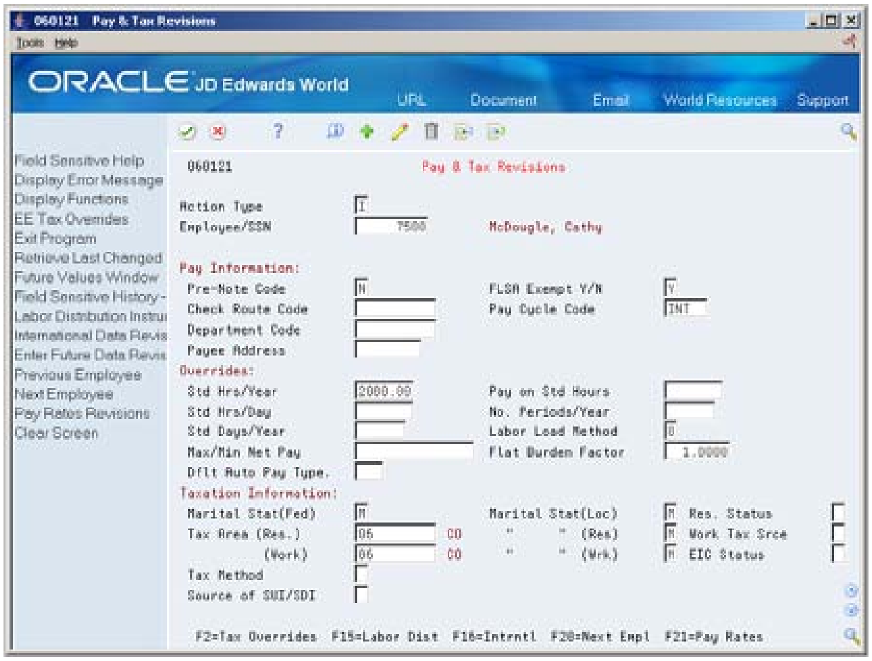
- An employee's annual salary (when you have entered an hourly rate for the employee
- An employee's hourly rate (when you have entered an annual salary for the employee)

To save time and reduce keying errors, you typically enter pay basis information (hours per day and days per year) at the home company level. The system automatically applies that information to all employees in that company. For employees whose pay basis information differs from those you entered for the company, you can override that information at the employee level.

You enter pay basis information for employees who have only one job within your organization. If you are tracking multiple jobs for employees, you can enter pay basis information on Employee Multiple Job Entry. You can enter separate pay basis information for each job an employee works.

To enter pay basis information

On Pay and Tax Information



1. To locate the employee record for which you need to enter pay basis information, complete the following field:
   - Employee / SSN
2. Complete the following fields:
   - Standard Hours Per Year
   - Standard Hours Per Day
   - Number of Periods Per Year
   - Standard Days Per Year

See Also

- *Setting up Company Constants* for information about entering pay basis information at the company level.
- *Entering Multiple Job Information for Employees* for information about entering pay basis information for multiple jobs

What You Should Know About

Contract calendar employees	When you locate an employee record that is attached to a contract calendar, the system displays a message. Press Enter before you enter the pay basis information for the employee.

Processing Options

See Employee Pay & Tax Information (P060121).

Entering User Defined Information for Employees

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Dates, Eligibility and EEO**

After you add an employee, you can enter additional information for the employee. Typically, this information is unique to your organization or your industry. For example, you might need to track the date by which employees' drivers licenses expire.

JD Edwards World provides codes and fields that make it easy for you to track this information. You define these codes and fields when you set up your system.

When you define codes and fields, you enter a name (label) for the information you want to track. For example, you might enter Drivers License Expiration Date for user defined date field 1, and Bonus Plan for eligibility code 1.

When you enter employee information, you enter values in the codes and fields that you have defined. You can use these fields and codes for reporting and analysis purposes. For example, you can set up geographic data codes that you use to prepare unemployment reports.

Entering user defined information for employees includes:

- Entering category and geographic data codes
- Entering eligibility codes
- Entering user defined dates

To enter category and geographic data codes

On Dates, Eligibility and EEO

1. Locate the employee.
2. Choose the Category Codes and Geographic Data function.
3. On Category Codes and Geographic Data, complete the following fields as necessary:
    - Category Codes 1-20
    - Home State (U.S. only)
    - Home City
    - Standard Occupational Class (U.S. only)
    - Work State (U.S. only)
    - Work City
    - Work County

- Region

Field	Explanation
Category Codes - Payroll 001	Use this category code to fit the needs of your organization. For example, you can set up a category code for any of the following categories: ▪ Division ▪ Supervisor ▪ Branch Office ▪ Health Insurance Plan ▪ Stock Plan Category Code 1 is used for time entry. You can use this category code for reporting purposes on timecard and human resources job information. The JD Edwards World Payroll, Human Resources, and Time Accounting systems use this category code. If your company uses more than one of these systems, coordinate the use of this category code.
Home State	The employee's home state for tax reporting purposes. This code designates the state in which the employee resides. **Note:** For W-2 reporting, use the numeric value equivalent of the designated state. For example : 06 - Colorado, 05 - California. Otherwise, the system produces undesirable report results. If you leave this field blank, the system uses the value in the Tax Area (Resident) field on Pay and Tax Information as the employee's resident (base) state.
Home City	The location or city where the employee resides.
Std Occ Class	A series of codes that identify occupational titles and their definitions. These codes are used in one or more states in the preparation of unemployment reports.
Work State	The employee's work state for tax reporting purposes. This code is used to designate the state in which the employee normally works. IT IS THIS CODE THAT WILL BE USED TO COMPUTE STATE INCOME TAX WITHHOLDING. This code can be overridden in the time sheet entry program if required.
Work City	A code identifying the city in which the employee works.
Work County	A code identifying the county in which the employee works.
Region	A region within a state. This field is intended for use in preparation of unemployment reports for Alaska.

What You Should Know About

Entering information in category codes	JD Edwards World pre-defines category codes 1-4 for use by the time entry forms. You can access category codes 1-10 from the Job Entry and Evaluation form.
Updating user-defined codes for job type	A processing option for Job Entry and Evaluation allows you to add job types to the appropriate user defined code tables directly from this form. Therefore, you do not need to set up user defined code tables 07/G before you define jobs.
Accessing category and geographic codes	You can also access the Category Codes and Geographic Data form from the Employee Information menu (G08E1).

To enter eligibility codes

On Dates, Eligibility, and EEO

1. Locate the employee.
2. Complete the following fields:
   - Eligibility Codes 01-10
   - Pension (U.S. Only)
   - Oregon Insurance (U.S. Only)
   - Employee Benefit Status

Field	Explanation
Eligibility Code 001	A code to specify an employee's eligibility for or participation in various user defined plans or programs. For example, these codes can be used to designate the following: Voluntary Accidental Death & Dismemberment Insurance Overtime Call Up Profit Sharing Political Action Committee Coffee Fund U.S. Citizen
Pension	A code that specifies whether an employee is participating in the company's pension or 401(k) plan. The W-2 program uses the code in this field to determine whether to place an X indicating employee participation into the pension box of the tax return form.
Oregon Ins	A code to specify whether an employee is participating in the Oregon Industrial Insurance program. The Oregon SUI continuation report uses the code in this field to determine what to enter in the appropriate box on the tax return.

Field	Explanation
Employee Benefit Status	A user defined code (07/EA) that allows the system to test an employee's eligibility for benefits and to determine for enrollment parameters (guidelines) for benefits administration. This code specifies the employee action for which the system searches as it tests for eligibility. An asterisk (*) indicates the guidelines refer to all employee actions not otherwise specified. Do not change the codes that are hard-coded, such as A (Active) and X (Terminated). These are required codes in the system.

To enter user defined dates

On Dates, Eligibility, and EEO

1. Locate the employee.
2. Choose the User Dates function.
3. On User Defined Dates Window, complete the following fields:
   - User Defined Dates 1-10

Field	Explanation
User Defined Date 01	A user defined date. Because this field is not linked to any specific function or application within the system, you can use this date for any purpose needed by your company. For example, you can use this date field to track the expiration of a license or certification.

Entering International Employee Information

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose Data (G08G13)
From International Information/Procedures, choose Employee International Data

If your company has international employees, you can use Employee International Data to record information such as maiden name, immigrant registration number, and country code. Also, for Canadian employees, you can enter information that is required for Canadian employment equity.

To enter international employee information, complete the following tasks:

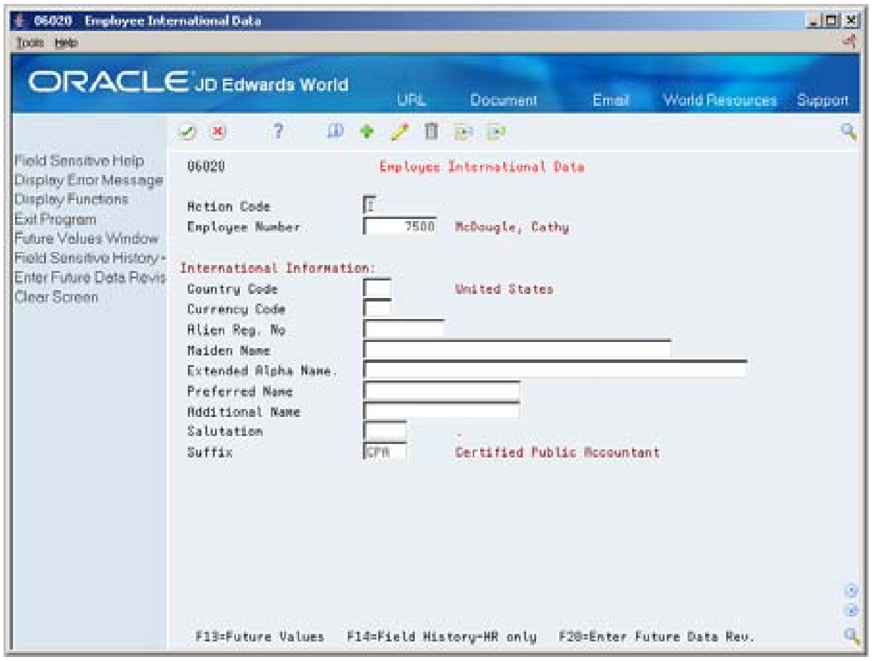
- Enter personal information for international employees
- Enter additional information for Canadian employees

Before You Begin

- To track personal and employment equity information for Canadian employees, verify that the employees' home company is Canadian.
- Verify that the International Flag is set to Y (Yes) for the default company, company 00000, in the payroll company constants.

To enter personal information for international employees

On Employee International Data



Complete any of the following optional fields:

- Country Code
- Currency Code
- Alien Registration Number
- Maiden Name
- Extended Alpha Name
- Preferred Name
- Additional Name
- Salutation
- Suffix

Field	Explanation
Currency Code	A code that indicates the currency of a customer's or a supplier's transactions.

Field	Explanation
Alien Reg. No	The alien registration number for employees who have more than one ID. For instance, if you have a foreign employee who is working under a work permit, you would record that number in this field.
Maiden Name	A female employee's maiden name. If this employee is a resident of Canada, this field is mandatory. This information is used for all government reports.
Extended Alpha Name	A 50-character alphabetical field for the extended name for an employee. You can use this field on certain designated reports in place of the normal 40-character name. *Form-specific information* The standard JD Edwards World name field is 30 characters long. This field allows you to enter the complete legal name of an employee whose name is between 30 and 50 characters long. You can run a World Writer report on the Extended Alpha Name field to obtain a listing of the complete name of all your employees with names longer than 30 characters.
Additional Name	An additional name field for middle name(s), a previous married name, or an alias associated with the employee.
Salutation	A code that identifies the proper title for a given employee. Some examples are Mr., Ms., Dr., and so on.
Suffix	A code that identifies the credentials for a given employee. Some examples are Phd, MD, CPA, and so on.

To enter additional information for Canadian employees

On Employee International Data

1. Complete the following fields:
   - Language
   - Medical Plan ID
2. Complete the following fields to enter Canadian employment equity information:
   - National Occupation Classification
   - Census Metropolitan Area
   - Sector Industrial Code

Field	Explanation
Language	A user defined code (01/LP) that specifies a language to use in forms and printed reports. For World, if you leave the Language field blank, the system uses the language that you specify in your user preferences. If you do not specify a language in your user preferences, the system uses the default language for the system. Before any translations can become effective, a language code must exist at either the system level or in your user preferences.
Medical Plan ID	A number that identifies secondary employee numbers, such as the Canadian Hospital Insurance ID number.
National Occ. Code	A code that identifies the National Occupational Classification (NOC) for a job or employee. The Canadian government defines NOC codes. For more information about NOC codes, see the Canadian Employment Equity documentation. *Form-specific information* You enter the default value for National Occupational Classification (NOC) codes at the job level. This default value does not appear on the Employee International Data form. However, any value you enter in this field on Employee International Data overrides the default value that you entered at the job level. The override value appears on the Employee International Data form.
Census Metrop. Area - Can Emp Equity	A code that identifies the Census Metropolitan Area code of work. Valid codes are defined by the Canadian government and can be found in the Canadian Employment Equity documentation.
Sector Indus. Code	A code that identifies the Sector Industrial Code. These codes are defined by the Canadian government and can be found in the Canadian Employment Equity documentation.

What You Should Know About

Canadian values for visible minorities	The user defined code table for Ethnic Code (07/M) stores values for visible minorities. (Visible minorities are people who belong to ethnic groups other than Caucasian, such as Southeast Asian or Latin American.)

Understand Salary and Hourly Rate Calculations Overview

About Salary and Hourly Rate Calculations

Depending on the nature of your workforce and the planning and budgeting requirements of your organization, you can use several methods to track the amount of money an employee earns each pay period and each year. Three components in the system determine this amount:

- Annual salary
- Hourly rate
- Standard hours per year

An employee's annual salary is the amount of money that the employee earns in one year. An hourly rate is the amount of money that an employee earns in one hour. Standard hours per year is the number of hours per year that an employee works. Therefore:

- Annual salary divided by standard hours per year equals hourly rate
- Hourly rate multiplied by standard hours per year equals annual salary

Employees who have multiple jobs within your organization can have a different annual salary, hourly rate, and standard hours per year for each job.

To save you time and reduce keying errors, you can set up pay information in the following tables

- Pay Rate
- Pay Grade Step

You can use either of these tables as the default source of pay rate information for employees. You can specify a default pay rate source in the human resources constants.

The type of information that you must enter for each employee, as well as the way in which the system calculates salaries or hourly rates, varies depending on the pay rate source that you specify.

The pay rate sources that you can choose from include:

- Pay Rate table
- Pay Grade Step table
- None (no default)

The following scenarios describe, for each pay rate source, the interaction between annual salary, hourly rate, and standard hour per year.

See Also

- *Setting up Pay Grade Steps*
- *Setting up Pay Rate Tables* in the *Payroll Guide*

Scenario 1: Pay Rate Source Equals the Pay Rate Table

When you need to associate pay rates with a specific group of employees, such as the members of a specific union, you can use the Pay Rate table as the default pay rate source. On the Pay Rate table, you set up hourly rates for a group of job types and steps and associate those job types and steps with a union code and effective dates.

To use the information in the Pay Rate table when you add an employee record, you enter a job type, job step, and union code, and leave the salary and hourly rate blank. The job type, job step, and union code must correspond to an entry in the Pay Rate table.

The system automatically enters the appropriate salary and rate information from the Pay Rate table. The system also supplies a default value for standard hours per year,. You can override these default values for an employee, if necessary. Overriding the standard hours per year does not affect the employee's hourly rate.

The following table describes what happens when you enter or change information that affects an employee's earnings:

Item	Description
Hourly rate	When you enter or change the hourly rate for an employee, that rate overrides the default rate from the table.
Standard hours per year	When you change the standard hours per year for an employee, the hourly rate does not change. The system recalculates the annual salary for the employee. If you use Employee Multiple Job to change the standard hours per year, you can delete the employee's salary to cause the system to recalculate the pay period gross salary and the annual salary for the employee.
Full-time equivalents (FTE)	When you change the FTE for the employee, you must also remove the value entered for standard hours per year. The system adjusts the employee's standard hours per year. The hourly rate remains the same.

What You Should Know About

Overriding the default pay rate source	When the Pay Rate table is the default pay rate source, you can do one of the following to avoid using this default for an employee: ▪ Leave the union code blank ▪ Enter a union code that is not included in the Pay Rate table. You must enter either a salary or an hourly rate for the employee. See *Scenario 3: No Pay Rate Source* for information about salary and hourly rate calculations for such employees.

Scenario 2: Pay Rate Source Equals the Pay Grade Step Table

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can use the Pay Grade Step table as the pay rate source. On the Pay Grade Step table, you set up a pay rate for each step within a pay grade.

To use the Pay Grade Step table when you add an employee record, you enter a pay grade and pay step and leave the salary, hourly rate, and standard hours per year blank. The system automatically enters the appropriate salary, rate, and hours per year from the Pay Grade Step table. (For an hourly employee, salary appears only on the Employee Multiple Job form.)

To use the Pay Grade Step table when you add an employee record, you enter a pay grade and pay step and leave the salary, hourly rate, and standard hours per year blank. The system automatically enters the appropriate salary, rate, and hours per year from the Pay Grade Step table.

The following table describes what happens when you enter or change information that affects an employee's earnings:

Item	Description
Pay grade step	When you change the employee's pay grade step, the system replaces the employee's hourly rate, salary, and standard hours per year with the corresponding information from the Pay Grade Step table.
Hourly rate	You cannot change the hourly rate for an employee. The system supplies the default hourly rate from the table.
Standard hours per year	When you change the standard hours per year for an employee, you also must delete the employee's salary. The employee's hourly rate does not change. The system recalculates the employee's salary, based on the new standard hours per year and the hourly rate for the pay grade step.

Item	Description
Salary	When you change the employee's salary, the hourly rate does not change. The system recalculates the employee's standard hours per year, based on the new salary and the hourly rate for the pay grade step.
FTE	When you change the FTE for an employee, you also must delete the employee's salary and standard hours per year. The system adjusts the employee's standard hours per year and salary, based on the pay grade step.

What You Should Know About

Overriding the default pay rate source

When the Pay Grade Step table is the default pay rate source, you can avoid using this default for an employee by leaving the pay grade step blank. You must enter either a salary or an hourly rate for the employee.

See *Scenario 3: No Pay Rate Source* for information about salary and hourly rate calculations for such employees.

Scenario 3: No Pay Rate Source

If your organization consists of employees whose salaries and hourly rates are based on a pay range, rather than specific amounts for a job or pay grade step, you can choose to use no default pay rate source.

When you add employee information, you must enter either a salary or an hourly rate for each employee. The system provides a default value for standard hours per year, which you can override, if necessary. When you enter a salary for an employee, the system automatically calculates an hourly rate, based on the salary and standard hours per year. Conversely, when you enter an hourly rate, the system calculates salary. (For hourly employees, salary appears only on the Employee Multiple Job form.)

When you add employee information, you must enter either a salary or an hourly rate for each employee. The system provides a default value for standard hours per year, which you can override, if necessary. When you enter a salary for an employee, the system automatically calculates an hourly rate, based on the salary and standard hours per year. Conversely, when you enter an hourly rate, the system calculates salary.

The following table describes what happens when you enter or change information that affects a salaried employee's earnings:

Item	Description
Salary	When you change the employee's salary, the system recalculates the hourly rate, based on the new salary and the standard hours per year for the employee.

Item	Description
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the hourly rate, based on the new standard hours per year and the existing salary.
FTE	Changing the FTE for an employee has no effect on salary and hourly rate calculations.

The following table describes what happens when you enter or change information that affects an hourly employee's earnings:

Item	Description
Hourly rate	Changing the hourly rate for an employee has no effect on standard hours per year. The system recalculates the annual salary for the employee, based on the new hourly rate and the standard hours per year for the employee.
Standard hours per year	When you change the standard hours per year for an employee, the system recalculates the salary, based on the new standard hours per year and the employee's hourly rate. (The salary appears only on the Employee Multiple Job form.)
FTE	Changing the FTE for an employee has no effect on salary and hourly rate calculations.

Revise Employee Information

Revising Employee Information

After you add an employee record to the database, you can change, correct, or update the employee's information as necessary. For example, when an employee gets married, you might need to change the employee's marital tax status. When an employee receives a promotion, you usually must update the employee's salary, job type, and pay grade.

You can enter changes that take effect either immediately or on a future date. You can also enter changes that apply to a group of employees.

Compa-ratio is an employee's salary divided by the mid-point of the salary range for the employee's job. Typically, when you change an employee's salary or rate information, the system automatically recalculates the compa-ratio. However, when you run a batch program to update the salary information for a group of employees, the system does not recalculate compa-ratios. For example, the system does not recalculate compa-ratios when you change the mid-point amount for a pay grade. In this case, you can run a program that updates the compa-ratio for all of the employees who are affected by the change.

When an employee arranges to be absent from work for an extended period of time, you can enter leave of absence information for the employee. For example, an employee might take a 3-month leave of absence to care for a newborn child.

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

When you revise any information for which you are tracking history, the system displays a window where you must enter an effective date. If you are also tracking turnover for that information, you must enter a change reason as well. The system stores history information in the Employee Master History Inquiry table (F08042). The system stores turnover information in the Employee Turnover Analysis table (F08045).

Revising employee information includes:

- Entering Changes for Rates Only
- Processing Future Changes for Any Data Item
- Processing Mass Changes
- Correcting Employee Information
- Updating Employee Compa-Ratio

- Entering Leave of Absence Information

What You Should Know About

Revising information that affects salary and hourly rate	The default pay rate source that you specified in your human resources constants determines the information that you need to enter or delete when you revise pay information for an employee. See *Understand Salary and Hourly Rate Calculations.*
Revising pay grade steps	If you change the effective date and rates for the Pay Grade Step table (P082001), you must set up and run pay grade step progression for the changes to take effect. See *Reviewing Jobs.*

Entering Changes for Rates Only

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), choose **Pay Rate Information**

When you know that an employee's pay rate is scheduled to change on a specific date, you can enter a pay rate change for the employee. You can enter a change that takes effect immediately, or you can enter a change that takes effect on a future date.

To enter a change that takes effect on a future date, you enter an effective date for the change. When you process the payroll cycle that includes the future date, the system automatically updates the employee's pay rate information. For example, Cathy is scheduled to receive a five percent pay increase on May 15, 2018. Because you will be on vacation for the entire month of May, you enter Cathy's increase on April 30, 2018, before it actually takes effect. When you process the payroll cycle for May 15, the system automatically increases Cathy's pay rate by five percent.

You can specify the change as a monetary amount or as a percentage of the employee's current pay rate. Alternatively, you can enter a new salary or hourly pay rate.

You can revise the following types of pay rates:

- Annual salary
- Hourly rate
- Billing rate
- Piecework rate

This program updates the Employee Master table (F060116). The JD Edwards World time entry and pre-payroll processing programs use this information, based on the effective date. You can use this program to update only one employee record at a time.

To enter changes for rates only

On Pay Rate Information

1. To locate the employee, complete the following field:
   - Employee Number
2. To enter a new pay rate that takes effect immediately, complete the applicable fields in the following column:
   - Current Rate
3. To enter a future pay change as a percent increase or flat amount, complete the following fields:
   - Planned Increase
   - F/% (Method for Pay Increase)
   - Date Effective
   - Change Reason
4. To enter a future pay change as a new rate, complete the following fields:
   - New Rates
   - Date Effective
   - Change Reason

Field	Explanation
Planned Incr	The amount of increase that you specify either as a monetary amount or as a percentage. The system adds this amount to the current annual salary to obtain the new annual salary. *Form-specific information* When you enter F as the method and a flat dollar amount in the New Rate field, the system calculates and displays the planned increase. When you enter a % as the method and a percentage amount in the New Rate field, the system calculates the planned increase as a flat dollar amount and displays the planned increase. To decrease the pay rate, enter a minus sign (-) either before or after the flat dollar amount or percentage amount in the Planned Increase field.
F/%	The method by which the pay increase amount is to be calculated. The increase can either be a percentage of the current amount or a monetary amount. *Form-specific information* Although you defined the method on the Annual Salary row, the system uses that method for all other rows.

Field	Explanation
New Rates	The employee's new annual salary for all payroll entries that are either manually entered or automatically generated for the payroll period after the Date of Next Raise from the employee's record.
Date Effective	The date on which the hourly or annual pay rate for the employee increases. The new rates go into effect after the payroll processing run that has a payroll date on or after the date of next raise. *Form-specific information* Changes become effective as indicated below: All changes The final update step of the payroll cycle updates the new annual salary, hourly rate, and salary per pay period in the Employee Master table. DBAs DBAs based on annual salary become effective at the next payroll after the effective date Hourly employees Time entry uses the changed information when the effective date is less than or equal to the time entry work date. Autopay employees The new rate applies when the effective date is less than or equal to the pay period end date of the payroll being processed.

What You Should Know About

Employees with contract calendars	You cannot use Pay Rate Information to make pay rate changes for employee records that are attached to contract calendars. For such employees, you must use Contract Calendar Window to change pay information.

See Also

- *Processing Mass Changes* for information about entering pay rate changes for a group of employees
- *Entering Changes for Rates Only (P060131)*

Processing Future Changes for Any Data Item

You enter future changes to specify that a change for an individual employee takes effect on a future date. For example, if an employee changes from one business unit to another on a certain date, you enter the new information prior to the employee actually changing business units. You can automate this process by using this program.

You can also use this program to update a terminated employee's pay status to an alpha code after the employee's last payment has been processed.

You have a choice of when the system processes the change:

- During the final update steps of the payroll cycle
- When you request a batch job to update the changes

When you update the changes using the batch job, the system does not update any employee records that are included in a current payroll cycle. Such records are called *locked* records.

You can enter future changes only for information that the system stores in the Employee Master (F060116) table. When you set up your system, you can limit the data items (fields) that you allow this program to update.

Processing future changes for any data item includes the following tasks:

- Entering future changes
- Updating employee master records

The graphic below illustrates how the system processes future data changes.

Before You Begin

- Choose the data items (fields), that you will allow this program to update. See *Choosing Fields for Future Data Revisions.*

Entering Future Changes

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), enter 27
From Employee Advanced/Technical Operations (G08E3), choose **Employee Master Revisions**

When you enter future changes, you can:

- Enter changes to employee information prior to the effective date of the change.
- Enter multiple changes to the same data item with different effective dates.
- Enter changes to employee records that are included in a current payroll cycle. (These records are called *locked* records.)

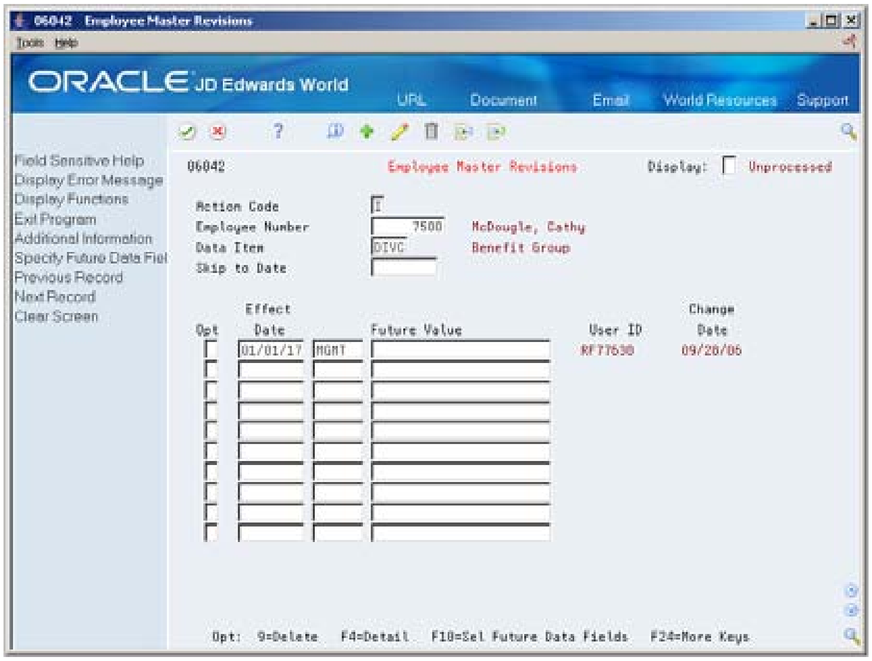
You can use this program to enter changes for only one employee and one data item at a time.

After you enter future changes, you can do one of the following:

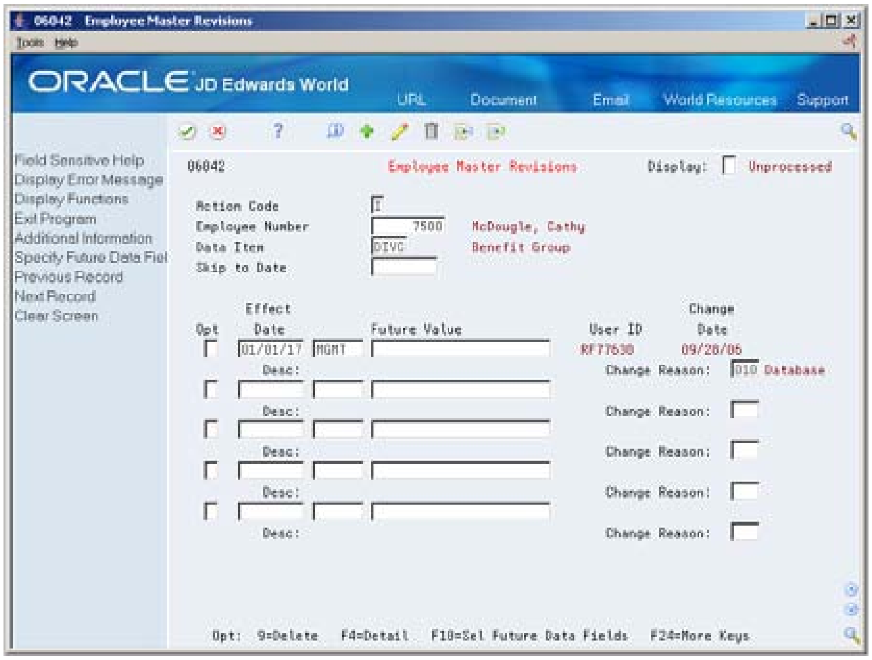
- Allow the system to update the Employee Master table during the final update step of the appropriate payroll cycle (This method applies only if you have the JD Edwards World Payroll system.)
- Manually submit a program that updates the Employee Master table.

To enter future changes

On Employee Master Revisions



1. Locate the employee for whom you want to change data.
2. Complete the following fields:
   - Data Item
   - Effective Date
   - Future Value
3. Access the detail area.



4. Complete the following optional field:

- Change Reason

Field	Explanation
Effect Date	The date that the revision goes into effect. The update program identifies the pay period ending date of the version being processed to determine whether the future value qualifies for the update. Use Skip to Date on Enter Future Data Revisions to specify the first date to display in the detail area. *Form-specific information* The date that the system updates the HR History table (F08042) with the revised information. The update program identifies the pay period ending date of the payroll ID being processed to determine whether the future value qualifies for the update. You can think of the effective date as the date to update. When updating the Employee Master using Final Update, the system updates any changes with an effective date less than or equal to the pay period end date of the payroll. The system automatically submits the update program as part of the final update step. Only those employees included in the payroll are processed for future changes.

Field	Explanation
Future Value	A code that indicates a selection or a future set of information. When the effective date of the revision arrives, the value you enter in this field replaces an existing value in the Employee Master table. *Form-specific information* The new information for the field. You can enter more than one change for the same field if you use different effective dates.
Change Reason:	A user defined code (07/T) that indicates: ▪ The reason that an active employee's record was changed. ▪ The reason that an employee was terminated. ▪ The reason that you are recommending the change in salary or rate. If you are reactivating an employee, you must change the code in this field to a numeric character. **Note:** The default reason code for new hires is the default value for the Change Reason data item.

What You Should Know About

Effective date

The effective date is the date to update the employee record with the new information. When updating the Employee Master table using the final update step of the payroll cycle, the system updates any changes with an effective date that is less than or equal to the pay period end date of the payroll.

For example, assume that your company will run a payroll on July16 for work dates July 1-15. You want the system to apply the future data changes to the Employee Master on the July 16 payroll. Therefore, the effective date you enter for the change should be between July 1 and July 15.

The system automatically submits the update program as part of the final update step. Only those employees that are included in the payroll are processed for future changes.

Hourly and salary rates

If you enter a future value for the annual salary, the system recalculates the hourly rate during the future data update for salary employees. If you enter a future value for hourly rate, the system recalculates the annual salary.

Future Values

You can access the Future Values window to review previous changes for the field where your cursor is located.

You cannot access Future Values if the field where your cursor is located is not specified as valid field for future changes.

See *Choosing Fields for Future Data Revisions*

Entering changes for multiple employees	You can use this program to enter changes for multiple employees and data items. However, if you need to enter the same change for a group of employees, you might find it more convenient to enter a mass change. See *Processing Mass Changes*.
Future Data (F06042) table	The Future Data table is a permanent table. Note the following information about this table and future data changes: ▪ The update does not delete any of the records in this table. ▪ The system does not display future data changes on the Pay Rate Information form. ▪ If you use the Employee History table to monitor changes made to the Employee Master, the system updates the Employee History (F08042) table with turnover and history records for all future data changes.
Employees with contract calendars	For employees whose records are attached to contract calendars, you cannot make changes to any of the data items that affect the employee's salary. For such employees, you must use Contract Calendar Window to change pay information.

Updating Employee Master Records

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), enter 27
From Employee Advanced/Technical Operations (G08E3), choose Employee Master Update

After you enter future changes for one or more employees, you can do one of the following:

- Allow the system to update the Employee Master table during the final update step of the appropriate payroll cycle. This method applies only if you have the JD Edwards World Payroll system.
- Manually submit the Employee Master Update program to apply future changes to the information in the Employee Master table.

Run the update if you need to control when the update occurs and which records the system updates. You can set the processing options for a specific date. The system updates any records with an effective date on or before that date. You can identify all employees or a specific employee in the data selection values.

When you allow the system to make the changes during the payroll cycle, the system processes future changes only for the employees who are included in the current payroll cycle. When you choose to run the master update, you can choose employees who are included in different payroll cycles. For example, you can choose some employees who are included in the payroll cycle for hourly employees and some employees who are included in the payroll cycle for salaried employees.

What You Should Know About

Employees who are locked in the payroll cycle	If an employee's record is not available because it is locked in the payroll cycle, the system displays a message at the bottom of the form. In addition, "Update" flashes beside any data item that will be updated during the processing of the current payroll cycle. During a payroll cycle, you can enter data changes before, but not during, the final update step. This applies only to values that are updated within the active dates of the payroll.

See Also

- *Technical Foundation Guide* for information about running, copying, and changing a DREAM Writer version
- *Entering Future Changes for Rates Only (P060131)*, for an alternative rate change method

Processing Mass Changes

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), enter 27
From Employee Advanced/Technical Operations (G08E3), choose Employee Master Mass Changes

You process mass changes to specify and process new data for a selected data item for groups of employees. For example:

- All employees currently in Building 1 are moving to Building 2. Because you use the check route code to indicate the location of employees, you must reassign the check route code for employees who are currently in Building 1.
- Your company is restructuring departments. You must change the category code for all employees who are currently in department 10 to department 110.

When you process mass changes, you can also:

- Specify employees in the data selection values
- Omit individual employees after selection occurs
- Specify the effective date and reason for the change
- Use percentages or flat amounts when changing salary or hourly rate
- Review both the old and the new data
- Override the mass change data and effective date for specific employees
- Apply changes immediately or at a later date

This program updates the Future Employee Master Data Changes table (F06042).

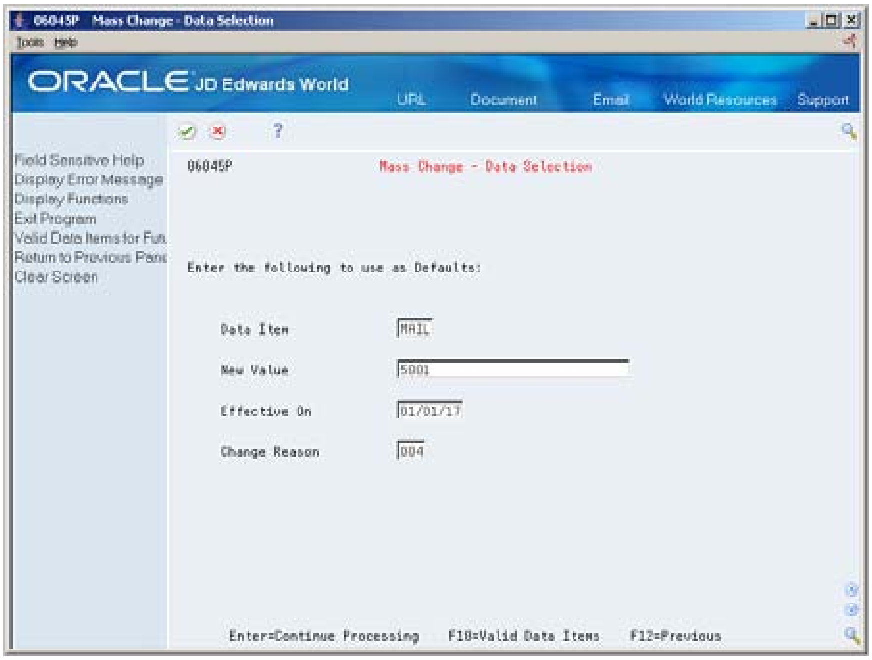
Before You Begin

- Create a version of the DREAM Writer, Employee Master Mass Change, that specifies the employees for whom you need to process the change. See the *Technical Foundation Guide* for information about running, copying, and changing a DREAM Writer version.

To process mass changes

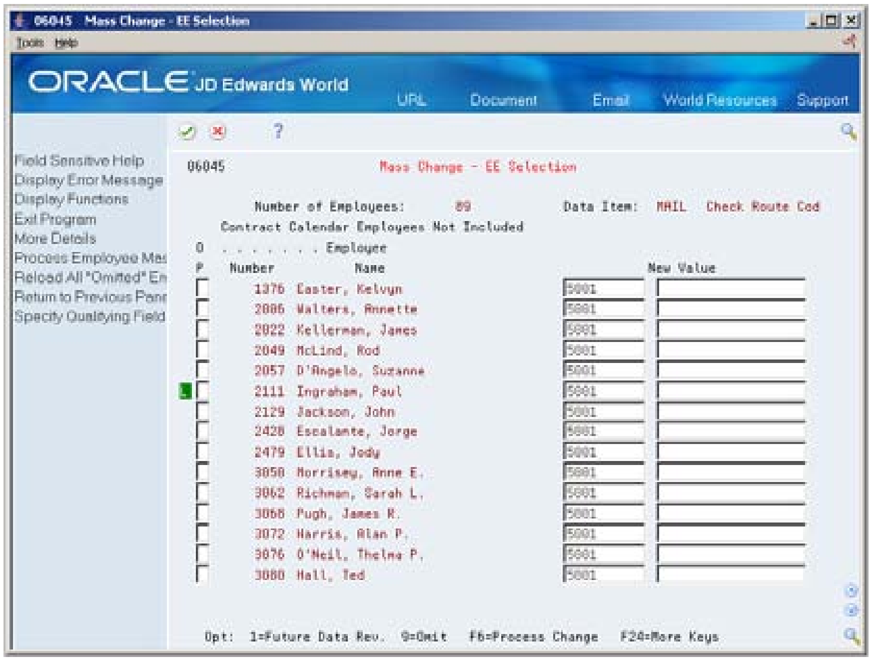
On Employee Master Mass Changes

1. Choose a DREAM Writer version.



2. On Mass Change - Data Selection, complete the following fields and press Enter:
   - Data Item
   - New Value
   - Effective On Date
   - Change Reason
3. If you are revising a rate field, complete the following field:
   - Method for Pay Increase ($ or %)

   The system displays a list of employees that have been selected for the change.



4. On Mass Change - Employee Selection, review the list of employees that will be affected by the mass change.

   If the leftmost field on the form (an unlabeled field called Display Flag) contains an "L," the employee's record is locked (included in a current payroll cycle). Use the detail area to review information about the lock and the current step in the payroll cycle.

5. Change the following field if necessary:
   - New Value
6. Choose one of the following options if necessary:
   - Add the employee to a future data revision
   - Omit the employee from the mass change
7. Access the detail area to review additional information.

8. Change the following fields if applicable:
   - Effective Date
   - Change Reason
9. Choose the Process Change function.

   The system prompts you to...

10. Press Enter.

What You Should Know About

Employees with contract calendars	For employees whose records are attached to contract calendars, you cannot make changes to any of the data items that affect the employee's salary. For such employees, you must use Contract Calendar Window to change pay information.

Correcting Employee Information

If you discover an error in an employee's information, you should correct the error. For example, if you entered an employee's tax ID number incorrectly, you should correct the error so that the correct tax ID number prints on the employee's year-end tax form.

Correcting employee information includes:

- Correcting general employee information
- Correcting an employee's tax ID number

Correcting General Employee Information

When you are tracking employee history and turnover information, the system creates a history record every time you change employee information. When you correct employee information, you typically need to remove the incorrect entries from the employee's history and turnover records.

If you are using the position control feature to budget for employee salaries, changing an employee record updates the Position Activity table. Therefore, you should manually remove the incorrect record from this table.

See Also

- *Correcting History Records*
- *Correcting Turnover Records*
- *Correcting Employee Activity*

Correcting an Employee's Tax ID Number

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose HR Employee Entry

For government reporting purposes, you must correct an employee's tax ID number if you made an error when you initially entered it. When you enter a new tax ID number for an employee, the system updates all the associated payroll history for the employee.

To correct an employee's tax ID number

On HR Employee Entry

1. Locate the employee.
2. Change the number in the following field:
   - Tax ID Number

The system displays the SSN Revisions form.

3. On SSN Revisions, enter the correct tax ID number in the following field and choose the Update function:
   - New

Updating Employee Compa-Ratio

From Employee Information (G08E1), enter 27 From Employee Advanced/Technical Operations (G08E3), choose Compa-Ratio Calculation

Compa-ratio is an employee's salary divided by the mid-point amount for the employee's pay grade. If any of the information that the system uses to calculate compa-ratio changes, you must run a batch program to update employees' compa-ratio. For example, when you change the mid-point amount for a pay grade, you must update the compa-ratio for all of the employees who are assigned to those salary ranges. You can update compa-ratio for one employee or all employees.

You must perform this operation if you have run the global mass update program for pay grades, rates, or jobs and their salary ranges.

This program uses the pay grades that you defined in the Pay Grades by Class table (F082001) and the formulas that you defined in the Pay Range Formulas table (F08290). To calculate the new compa-ratio, the system uses the midpoint amount that is in effect for the effective date.

The system updates the batch, but does not print a report.

What You Should Know About

History and turnover	If you have set up your system to track employee history and turnover, the program creates a history record if the new compa-ratio differs from the existing compa-ratio. The program creates a turnover record only if you enter a change reason.

Processing Options

See Compa-Ratio Batch Calculation (P082501).

Entering Leave of Absence Information

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Dates, Eligibility, and EEO**

When an employee arranges to be absent from work for an extended period of time, you can enter leave of absence information for the employee. For example, an employee might take a 3-month leave of absence to care for a newborn child.

You can enter the date on which the leave begins and the date on which the employee plans to return. Entering leave of absence information allows you to:

- Keep your employee information current
- Indicate whether the employee receives payments while on leave
- Report on inactive employees

To enter leave of absence information

On Dates, Eligibility, and EEO

1. Locate the employee.
2. Complete the following fields:
   - Leave Begin Date
   - Leave Expires

   If you are using the position control feature, the system enters a leave of absence as unpaid leave and adjusts the projected year-end calculations for the position budget.

Work with Profile Data

Working with Profile Data

Profile data is any type of additional information that you want to track, such as the person to contact for an employee in an emergency situation, or certifications and job skills for applicants and employees.

You can use the profile data feature to track detailed information about any of the following:

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

When you set up your Human Resources system, you specify the types of profile information you want to track for each of the items listed above. You can track different types of profile information for each item. For example, you might choose to track job skills for applicants but not for employees.

With the exception of Applicant Status, in the applicant database, profile information is not required by the system.

Working with profile data includes:

- Entering Employee Profile Data
- Copying Profile Data
- Reviewing Profile Data
- Purging Profile Data

Before You Begin

- Define your types of profile data and associated user defined codes. See *Setting Up Profile Data*.

Entering Employee Profile Data

Profile data is any type of additional information that you want to track. Profile information is not required by the system.

For employees, typical types of profile data might include:

- Emergency contacts
- Job skills
- Foreign language competencies
- Work history

When you set up your Human Resources system, you specify the types of profile data (data types) that you want to track. For each data type, you specify the format in which you want to track information. Valid formats include:

- Narrative
- Code

For narrative format data types, you enter free-form text. For code format data types, you enter information in predefined columns. When you enter information in code format, you also can associate narrative information with it.

Entering profile data includes:

- Entering profile data in narrative format
- Entering profile data in code format

What You Should Know About

Entering multiple types of information	To save time during data entry, you can choose multiple types of profile data to update. The data types can be all narrative format, all code format, or a combination of these formats. The system displays, in data type sequence, the form for each type of data you chose. When you exit from one form, the system automatically displays the form for the next type of data that you chose.

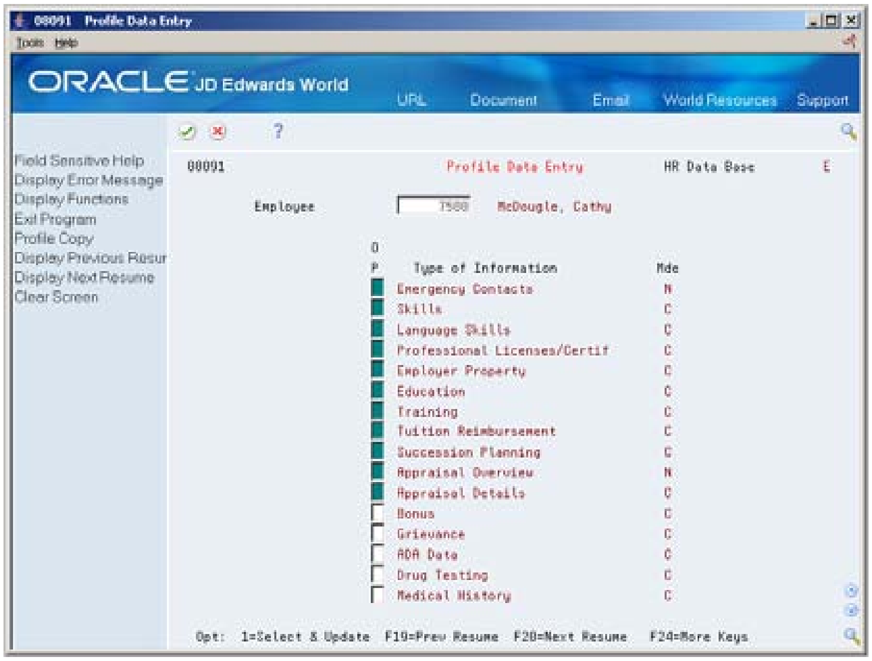
Entering Profile Data in Narrative Format

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), choose **Profile Data Entry**

When you enter profile data in narrative format, you enter free-form text. You typically use narrative format for general information that is unique for each employee. For example, you might use narrative format for performance appraisal information.

To enter profile data in narrative format

On Profile Data Entry



1. Locate the employee for whom you want to enter profile data.
2. To determine which types of profile data are in narrative format, review the information in the following field:
   - Mode
3. Choose the Select and Update option for one or more types of narrative format information.

   The system displays the form for the first type of data.
4. Enter the appropriate information and press Enter.
5. Choose the Field Exit function to advance to the next type of data you chose.

Field	Explanation
Mde	The format of a data type. This code determines the display mode for supplemental data. Valid codes are: C Code format, which displays the form for entering code-specific information. These codes are associated with User Defined Codes table (F0005). N Narrative format, which displays the form for entering narrative text. P Program exit, which allows you to exit to the program you specified in the Pgm ID field. M Message format, which displays the form for entering code-specific information. However, the system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.

What You Should Know About

Deleting narrative format information	To delete an entire form of narrative information, use the Delete action. To delete only some information from a form, use the change action. To delete information, you can either type over it or choose the Delete Line option.

Entering Profile Data in Code Format

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose Profile Data Entry

When you enter profile data in code format, you enter information in predefined columns. For example, the form for entering job skills information might have columns for skill code, number of years of experience, and proficiency level.

To ensure consistency of data entry, code fields are typically associated with user defined code tables. Any value that you enter in one of these fields must be included in the associated user defined code table. For fields that are associated with a user defined code table, the length of the field and the user defined code description display above the column.

When you enter information in code format, you also can associate narrative information with it.

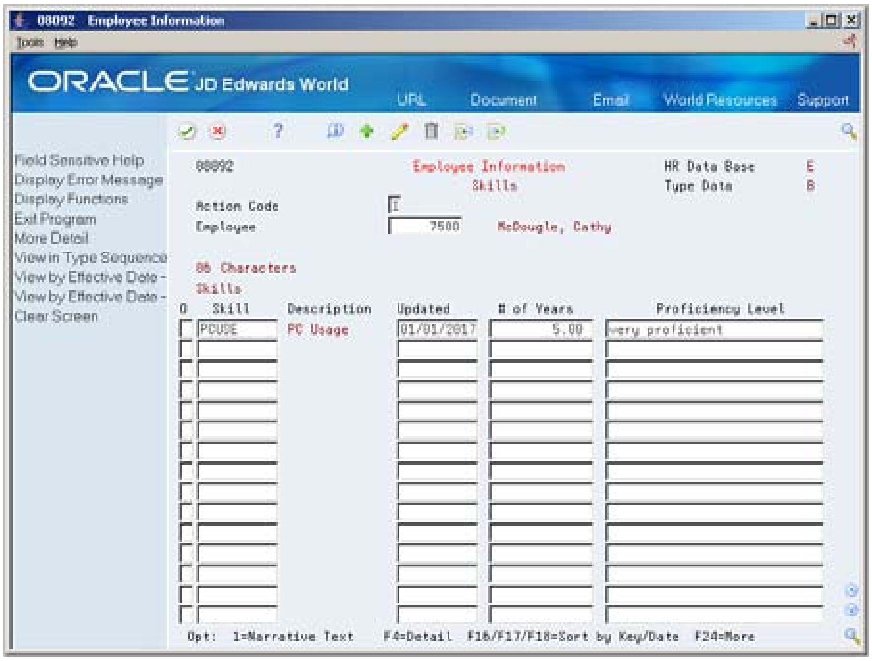
To enter profile data in code format

On Profile Data Entry

1. Locate the employee for whom you want to enter profile data.

2. To determine which types of profile data are in code format, review the information in the following field:
   - Mode
3. Choose the Select and Update option for one or more types of code format information.

   The system displays the form for the first type of data you choose.



4. Enter the appropriate information.
5. To add additional information in narrative format, use the Change action and choose the Narrative Text option.
6. Enter the additional information and press Enter twice.
7. Choose the Field Exit function to advance to the next type of data you chose.

What You Should Know About

Revising code format information	Use the change action to revise or delete individual lines of code format information. Typing new information over existing information does not delete the existing information. The system retains the existing information and creates a new line of information for the change. To delete a line of information, use the Field Exit key to remove all information from the line.

Processing Options

See Applicant Information (P08091).

Copying Profile Data

When you need to enter the same profile data for two or more employees, you can save time and reduce keying errors by copying information from one employee's record to another employee's record. You also can copy all of one employee's profile data to another employee's record.

You can also choose specific types of narrative information, including information that is associated with code format information, to copy from one employee's record to another employee's record. For example, if two employees share the same emergency contact information, but do not have any other profile data in common, you can copy only emergency contact information.

After you copy profile data, you can revise it, if necessary.

Copying profile data includes:

- Copying narrative text
- Copying all profile data for an employee

Copying Narrative Text

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Profile Data Entry**

When you need to enter the same profile data for two or more employees, you can save time and reduce keying errors by copying information from one employee's record to another employee's record.

You can copy narrative information by data type. For example, if two employees have the same emergency contact, you can enter this information for one of the employees and then copy it into the other employee's record.

You also can copy any narrative information that is associated with a code format data type. For example, assume that:

- A group of employees attended the same training class
- You track training information in code format
- You need to enter a description of the class as narrative text

In this case, you do not need to enter the class description for each employee. Instead, you can enter the class description for one employee and then copy it into the training records for all the other employees who attended the class.

To copy narrative text

On Profile Data Entry

1. Locate the employee for whom you want to copy information.
2. Choose the Select and Update option to access the data type into which you want to copy narrative format information.
3. Using the Change action, choose the Copy Text option.

4. On Copy Text, complete the following field with the employee number of the employee from whom you want to copy information:
   - Employee

   The system lists the types of profile data that contain narrative information for that employee.
5. Choose the Select option to specify the data type from which you want to copy information.

   The system displays the narrative information for that employee and data type.
6. On the data type form, choose the Select option to specify the lines of text you want to copy.

   The system copies the text.

What You Should Know About

Using the roll keys	You can scroll through the lines of information to locate the lines you want to copy. However, you cannot select text in one form, scroll up, and then select text from another form. You can select to copy text from only one form at a time.

Copying All Profile Data for an Employee

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose Profile Data Entry

In some cases, you might want to copy all of the profile data for one employee into the record for another employee. You might do this when you need to enter very similar information for two employees. After you copy profile data, you can revise it as necessary.

To copy all profile data for an employee

On Profile Data Entry

1. Locate the employee whose profile data you want to copy.
2. Choose the Profile Copy function.
3. On Profile Copy, complete the following field to specify the employee to whom you are copying profile data:
   - To Employee
4. Choose the Update function to copy all of the profile data.

Reviewing Profile Data

After you enter profile data, you can review that information to determine whether one or more people meet certain criteria. For example, you might be looking for someone who speaks French, or you might need a list of the employees that have completed CPR training.

You can review complete profile information for a particular employee, or you can review all employees who have information in one or more data types.

Reviewing profile data includes:

- Reviewing profile data for a specific employee
- Reviewing profile data by data type
- Working with multi-skill search

Reviewing Profile Data for a Specific Employee

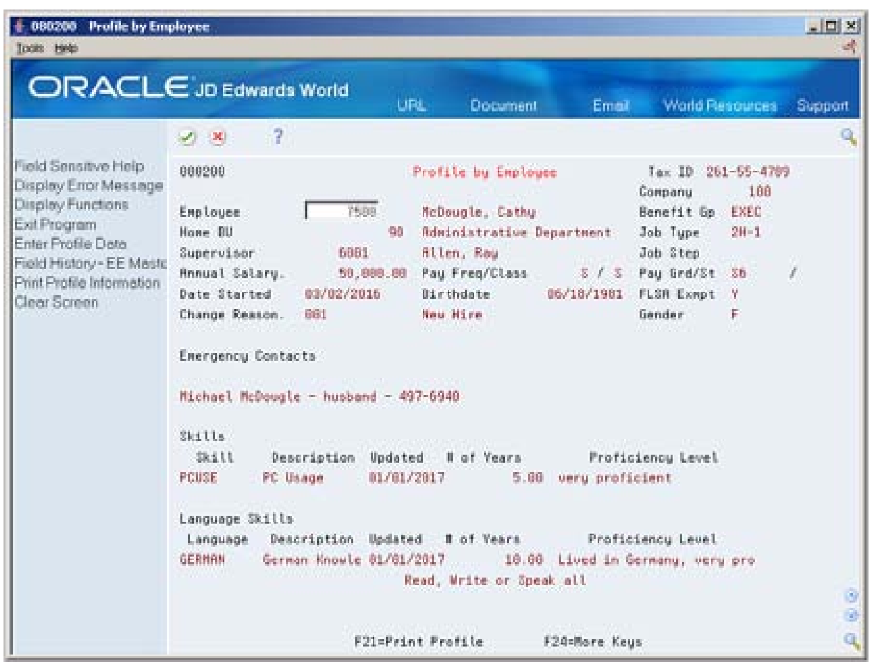
From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Profile by Employee**

Use Profile by Employee to review complete information for a specific employee. This program compiles all of an employee's profile information into an easy-to-read, resume-style format.

You can also print employee resumes for internal use.

To review profile data for a specific employee

On Profile by Employee



Complete the following field:

- Employee

Processing Options

See Profile by Employee (P080200).

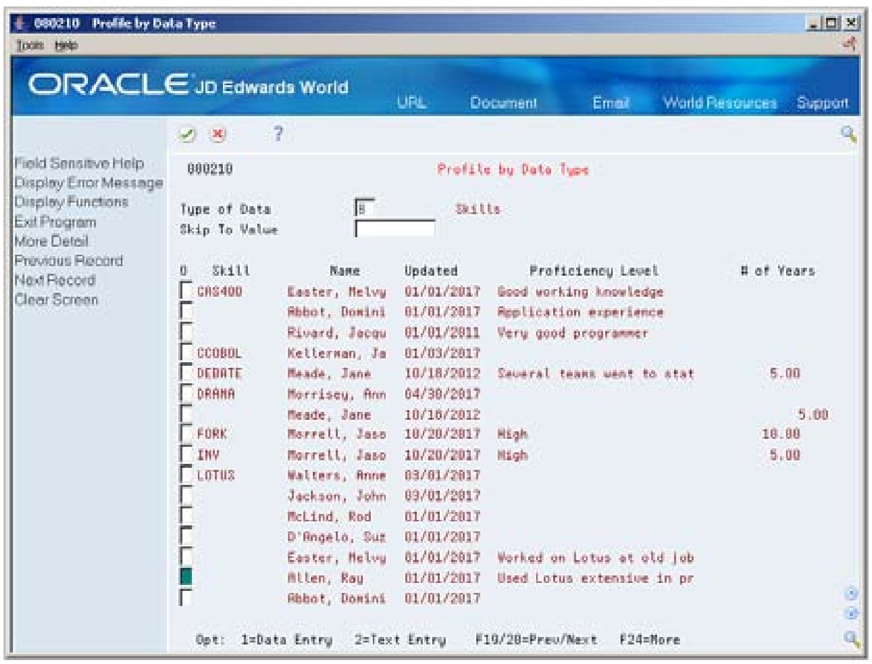
Reviewing Profile Data by Data Type

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Profile by Data Type**

You can review all employees who have information for a specific data type. For example, you can review training profile information to identify employees who have had management training. Or, you can review professional licenses information to identify which employees need to renew their licenses within the next month.

To review profile data by data type

On Profile by Data Type



1. Complete the following field:
   - Type of Data
2. To locate a specific value within a list of data types, complete the following field:
   - Skip To Value
3. Choose More Detail to review additional information.

Processing Options

See Inquiry by Employee (P080210).

Working with Multi-Skill Search

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Profile Multiskill Search**

You can search your database for employees and applicants who meet multiple criteria. You typically use this type of search when you are looking for a person to fill a vacancy within your organization.

You can search for:

- Applicants only
- Employees only
- Both employees and applicants

For example, you can search for all employees and applicants who:

- Have an MBA degree
- Speak French
- Are certified public accountants
- Know the RPG computer programming language

When you perform the search, the system lists all the people who meet the multiple criteria. You can enter up to 20 search criteria.

The criteria you specify can be based on either an “and” condition or an “or” condition. This means that you can search for people who meet either some criteria or some other criteria. For example, you can search for people who:

- Have an MBA degree from any college or a BA in business from Harvard
- Know the C programming language and have a degree in either computer science or mathematics

The system processes search criteria in the order in which you list them. When any of the criteria you specify are based on an “or” condition, the order in which you enter the search criteria is important. To ensure that the results of the search are what you would expect, you typically order the search criteria so that all of the “or” conditions come before any “and” conditions that you want to apply to all records.

Example: Specifying Search Criteria

When you specify search criteria, the order in which you list the criteria determines the outcome of the search. Suppose that you are searching for people who know the C programming language and have a degree in either mathematics or computer science. To locate that group of people, specify the following search criteria in the order listed:

Degree in computer science

or

Degree in mathematics

and

C programming language

To locate the people who meet this search criteria, the system completes the following steps:

1. Locates the people who know C programming (For demonstration purposes, call this group of people group A.)
2. Searches group A for people who have degrees in computer science. (Call these people group B).
3. Searches group A for people who have degrees in mathematics. (Call these people group C).

The result of the search is the total of the people in groups B and C.

To work with multi-skill search

On Profile Multiskill Search

1. To choose the database to search, complete the following field:
   - Employee / Applicant / Both
2. To limit the search, complete the following optional fields:
   - Home Business Unit
   - Job Type
3. To determine the search criteria, complete the following fields:

- And / Or
- Data Type
- Field
- OP (Operator)
- Search Value

4. To review additional information, choose More Detail.

Field	Explanation
And Or	A code that designates whether the test parameters or criteria are based on an AND condition or an OR condition. *Form-specific information* For example, to identify employees who are either CPAs or who have MBAs, enter the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, enter the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by entering Or in the And / Or field of the second line. As another example, to identify employees who are both CPAs and who have MBAs, enter the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, enter the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by typing And in the And / Or field of the second line. To search for applicants who speak Spanish and German, enter Spanish as the first search value, German as the second search value, then enter And in this field. To search for applicants who speak Spanish or German, enter Spanish as the first search value, German as the second search value, then enter Or in this field.
Data Type	The type of data from the profile database that the system uses in a multiple information search.
Field	A code that indicates which data item within the data type is to be included in the multiskill search.

Field	Explanation
OP	A code the identifies the operands in Boolean logic. You can specify any of the following: EQ Equal to LT Less than LE Less than or equal to GT Greater than GE Greater than or equal to NE Not equal to NL Not less than NG Not greater than
Search Value	You must enter a search value based on the data you entered in the profile for the selected field. This field is case sensitive. For example, assume that you want to search for the word Active. If the data was originally entered into the database as Active, then you must enter the value into the search field as Active. Do not enter ACTIVE or active. You can also use the % wildcard character to search for data starting with, ending with, or containing one or more consecutive characters. For example: ▪ BA% displays all words that begin with the letters B and A, such as bamboo and bachelor. ▪ %ing displays all words that end with 'ing'. ▪ %BA% displays any words that contain the letters B and A, such as abate, cabbage, or bachelor.

What You Should Know About

Searching both databases	If you are searching for both employees and applicants, you must enter the data type, field, and search values.

Processing Options

See Employee Profile Multiskills Search (P080250).

Purging Profile Data

	From Employee Information (G08E1), enter 27 From Employee Advanced/Technical Operations (G08E3), choose **Purge Profile Data**

To conserve computer disk space and eliminate obsolete information from your system, you probably need to purge profile data periodically. For example, your organization might have a policy of keeping applicant profile data for only one year. Also, if you are using profile data to track information about a specific project, you might want to delete the profile data after the project has been completed.

You can purge profile data for a single data type, or for multiple data types. You can delete all profile data or only narrative profile data.

This program deletes data from the Profile Database User Defined Code Entry table (F08092) and the Profile Database Narration table (F08093).

This program does not print a report.

Processing Options

See Batch File Purge (P00PURGE).

Terminate an Employee

Terminating an Employee

	From Human Resources (G08), choose Employee Information From Employee Information (G08E1), choose Termination/Rehire

A terminated employee is an employee who has stopped working for your organization. Typical termination reasons include:

- Retirement
- Layoff
- Resignation

For terminated employees, you enter termination information so that you can:

- Keep your employee information current
- Report on terminated employees
- Prevent terminated employees from receiving payments (if you are using the JD Edwards World Payroll system)
- Easily rehire terminated employees, if necessary

When you terminate an employee, you can specify that the system automatically transfer specific employee profile data to the applicant profile data table. Transferring profile data saves you time in the event that you rehire the employee later. For example, you might want to transfer profile data for seasonal employees that you intend to rehire, or for employees that have been laid off and are eligible for rehire.

If you rehire the employee, you can transfer the information back to the employee profile data table.

When you terminate an employee, you can have the system automatically create a new requisition for the position that the employee vacated. Alternatively, you can use an existing requisition to fill the vacancy.

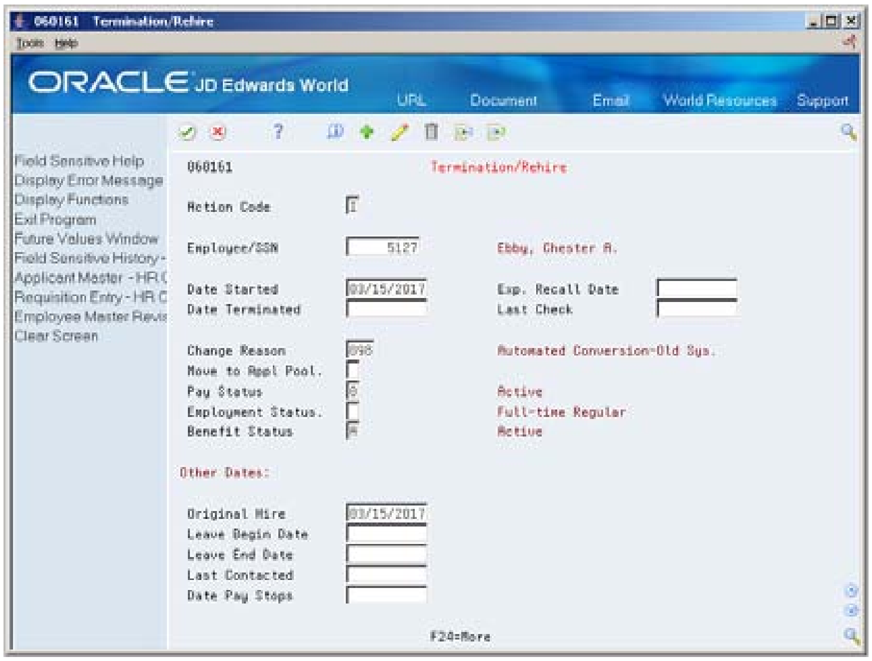
If you use existing requisitions to fill vacancies caused by terminated employees, you can set your processing options so that the system automatically detaches the employee's record from the requisition. This processing option saves you time and improves process flow by causing the system to automatically track the filled head-count for the requisition.

Before You Begin

- Set up your system to transfer selected types of profile data when you terminate an employee. See *Setting Up the Cross-Reference Table for Profile Data.*
- Review the processing options for this program and for Applicant Entry (P08401). To transfer profile data for terminated employees to the applicant profile database, you must set the appropriate processing options.
- To have the system automatically create and display a requisition for the vacancy, verify that the history and turnover constants are set up. See *Setting Up History and Turnover Constants.*
- To use an existing requisition to fill the vacancy, verify the processing options for the Termination / Rehire and Dates, Eligibility, and EEO programs.

To terminate an employee

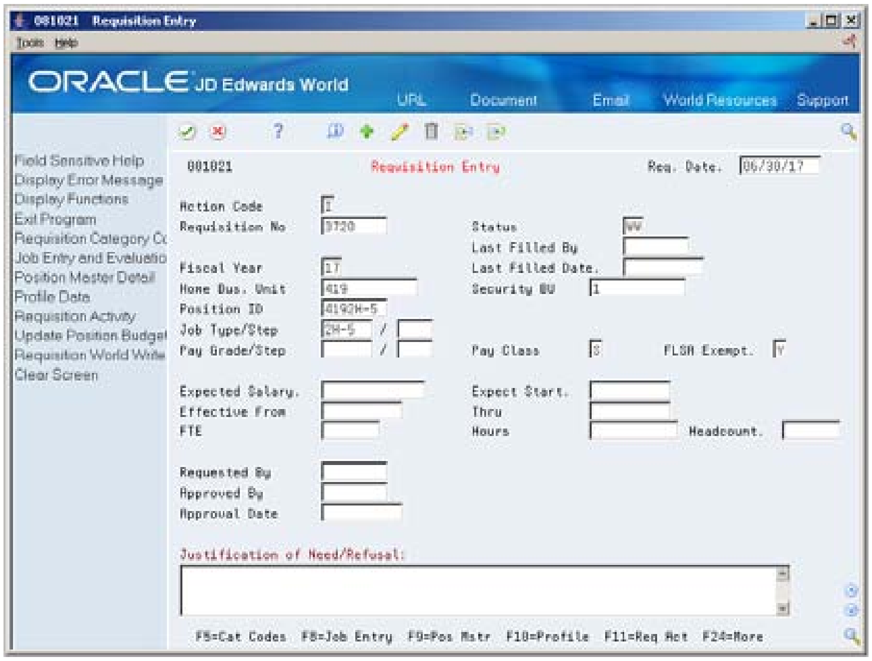
On Termination / Rehire



1. Locate the employee.
2. Complete the following fields:
   - Date Terminated
   - Move to Applicant Pool
   - Benefit Status
3. Complete the following fields, if appropriate:
   - Expected Recall Date
   - Employment Status

4. Change the following fields from a numeric to an alphabetic code:
   - Change Reason
   - Pay Status
5. On History and Turnover Information ONLY, complete the following fields:
   - Effective On
   - Change Reason

   If you have set your history constants to create a requisition when an employee is terminated, the system displays Requisition Entry.



6. On Requisition Entry, complete the steps for entering a requisition.

   See Entering Initial Requisition Information.

Field	Explanation
Date Terminated	The date that the employee was terminated, if applicable. *Form-specific information* If you enter a date in this field, you must also enter an alphabetical termination code in the Change Reason field, change the pay status code, and enter Y (Yes) or N (No) in the Move to Applicant Pool field. If you are reactivating an employee, remove the date from this field.

Field	Explanation
Move to Appl Pool	You can enter a value in this field only when you terminate an employee (enter a termination date). Use this code to indicate whether the information entered for the terminated employee should be moved, by batch job, to the applicant database. Valid codes are: Y Yes, move the employee's information to the applicant database N No, do not move the employee to the applicant database When you enter Yes in this field, the system: ▪ Generates an applicant record for the employee ▪ Retains an employee record for the employee ▪ Changes the employee's search type to Applicant (A) When you enter No in this field, the system changes the employee's search type to Terminated (X).
Exp. Recall Date	The date on which the employee can be recalled for employment.
Employment Status	A user defined code (07/ES) that identifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. For example: 1 Full-time temporary 2 Part-time temporary 3 Part-time regular 4 Seasonal 5 Casual
Pay Status	A code that indicates whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric. Codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run. To process an employee's last check, the pay status must contain a numeric code. After the system processes the check through final update, you can change the pay status to an alphabetic code.

Processing Options

See Extended Employee - Termination/Rehire (P060161).

Rehire Employees

Rehiring Employees

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), choose **Termination/Rehire**

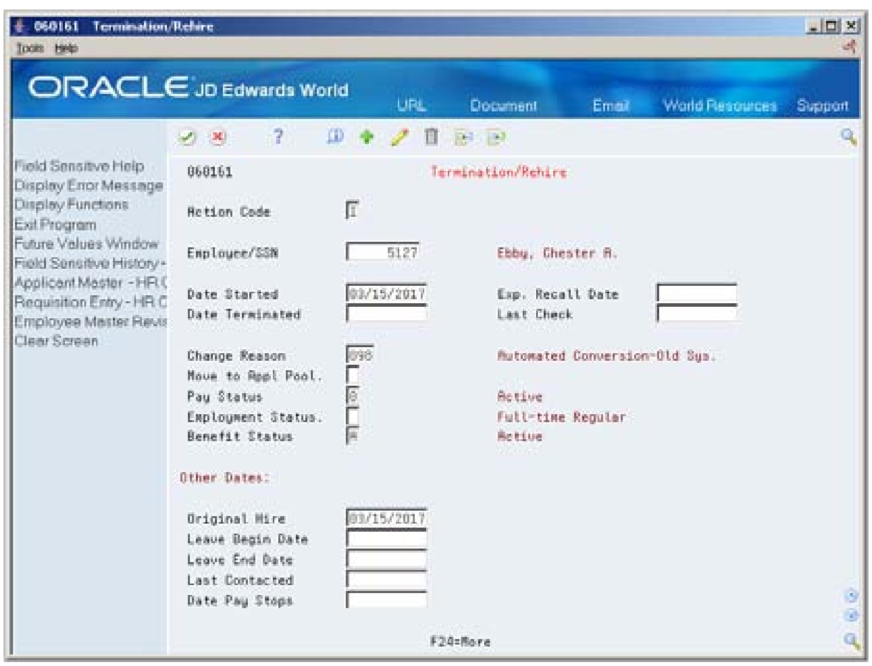
In some cases, you might need to rehire an employee that previously worked for your organization. For example, a ski resort might terminate all seasonal employees at the end of each ski season and rehire those employees at the beginning of the following season.

When you rehire an employee, you can:

- Attach the employee's record to a requisition
- Update employee information
- Update position budget information

To rehire an employee

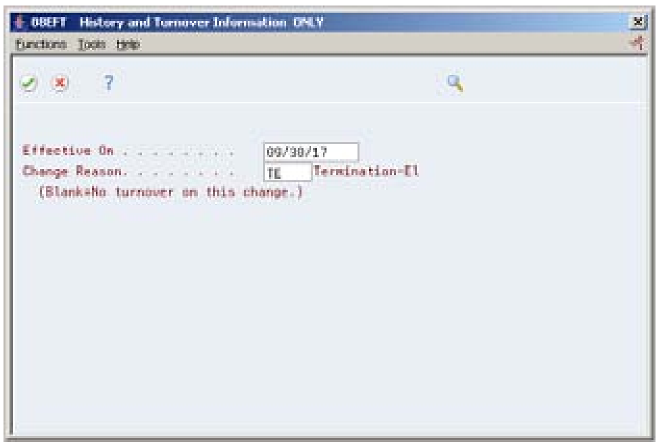
On Termination / Rehire



1. Locate the employee.

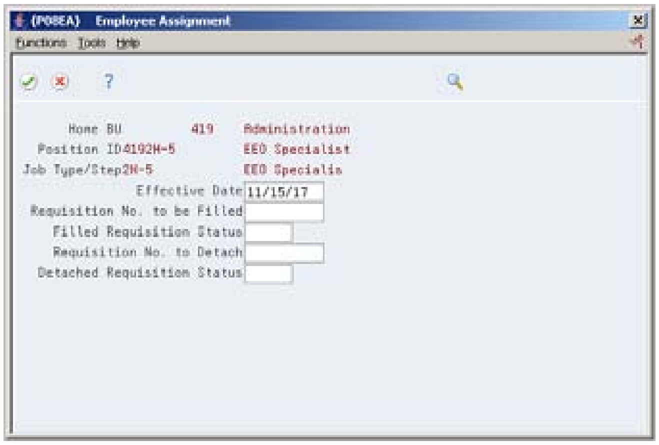
2. Complete the following fields:
   - Date Started
   - Employment Status
   - Benefit Status
3. Change the following fields from an alphabetic to a numeric code:
   - Change Reason
   - Pay Status
4. Delete the information in the following fields and press Enter:
   - Date Terminated
   - Expected Recall Date
   - Last Check
   - Move to Applicant Pool

   The system displays History and Turnover Information ONLY.



5. On History and Turnover Information ONLY, complete the following fields and press Enter:
   - Effective On
   - Change Reason

   The system displays Employee Assignment.



6. On Employee Assignment, complete the following fields:

- Effective Date
- Requisition Number to be Filled
- Filled Requisition Status

Field	Explanation
Date Started	The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker. For the calculation tables in Payroll and the eligibility tables and date codes in Human Resources, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.
Employment Status	A user defined code (07/ES) that identifies an employee's status within the company. You can change the default codes or set up new codes to meet the needs of your company. For example: 1 Full-time temporary 2 Part-time temporary 3 Part-time regular 4 Seasonal 5 Casual
Original Hire	The date on which the employee was originally hired by the company. If the employee was terminated and subsequently rehired, the new start date will be represented by data field Date Started (DST).

Field	Explanation
Effective Date	The date that the current status of a candidate requisition becomes active. *Form-specific information* When you enter or change a position ID for an employee, the system updates the position status on the date that you enter in this field.
Requisition No. to be Filled	The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.
Filled Requisition Status	The current activity level of a candidate that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN. You can group candidate requisition status codes based on the hard-coded Special Handling Code values in the table. These hard-coded values are: CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled Candidate requisition status codes that have special handling codes of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to “Filled and Closed.”

Work with Canadian Federal Employment Equity

Working with Canadian Federal Employment Equity

To be eligible for a government contract of 200,000.00 (Canadian) or more, a Canadian company with 100 or more employees must certify to the Canadian government that it will abide by Canadian Employment Equity legislation. The Canadian government designed this legislation to ensure that federal contractors do not discriminate against minorities or females. Canadian Employment Equity rules are similar to the Equal Employment Opportunity rules of the United States government.

To help federal contractors maintain the information that they need to comply with employment equity rules, the Canadian government provides the Federal Contractors Program Computerized Software (FCPCS). This software shows the specific information that you must track for each of your employees.

You can use the FCPCS to analyze your employee information and to print employment equity reports. This software runs on a personal computer.

To save time and eliminate redundant data entry, you can download information from your Human Resources system into the FCPCS on your personal computer.

Working with Canadian Employment Equity includes:

- Creating the Canadian Employment Equity Workfile
- Downloading the Workfile to Your Personal Computer

Creating the Canadian Employment Equity Workfile

From Employee Information (G08E1), choose **International Data**
From International information/Procedures (G08E13), choose **Create FCPCS Workfile**

Before you can develop an employment equity plan for your organization, you must compile relevant information about the employees in your organization.

This batch program compiles the following information for each of your employees:

- Employee number
- Name
- Gender
- Employment status

- Salary
- Province of work
- Division
- Hire date
- Termination date
- Promotion Dates 1-4
- Ethnic classification
- Disability status
- National Occupation Code (NOC)
- Census Metropolitan Area (CMA) work code
- Sector Industrial Code (SIC)

What You Should Know About

Missing information	If any of the information that is required by the Federal Contractors Program is missing from your employee records, the system does not generate the workfile for any employees. Instead, the system prints an error report that lists the employees who have missing information and the type of information that is missing for each of those employees.

Processing Options

See Create FCPCS Workfile (P08022).

Downloading the Workfile to Your Personal Computer

From Employee Information (G08E1), choose International Data
From International information/Procedures (G08E13), choose Download FCPCS Workfile to PC

After you create the Canadian Employment Equity workfile, you can download a copy of the workfile to your personal computer. The information is then available to help you maintain your Canadian Employment Equity compliance.

Before You Begin

- Use the processing options to specify the directory path and filename on your personal computer into which you want to download the information. To access the processing options before running the program, enter the menu selection number and choose the DW Processing Options function to access the processing options.
- Verify that the directory path and filename that you specified in the processing options exist on your personal computer. This download program cannot

inform you if errors occur during the actual copying of information to your personal computer.

Processing Options

See Download FCPCS Workfile to PC (P08023).

Review Employee Reports

Reviewing Employee Reports

You can print reports that make it easy to review information for a large group of employees. Your Human Resources system provides a variety of reports that you can use to review and verify employee information. You can also print the reports that you need to meet the requirements of the Equal Employment Opportunity Commission (EEOC).

You can run profile data reports to review the auxiliary information for your employees. You can review this information by individual employee, all employees, or by profile data type.

Reviewing employee reports includes:

- Reviewing the Employee Master Record Changes Report
- Printing Employee Master Labels
- Reviewing Employee Profile Reports
- Reviewing Equal Employment Opportunity Reports

What You Should Know About

Defining employees	For reporting purposes, a current employee is an employee who started with the company before or during the reporting period and is still active at the end of the reporting period. An active employee hired during the reporting period is considered as both a current employee and a new hire. An employee hired and terminated during the reporting period is considered a new hire only.

Reviewing the Employee Master Record Changes Report

From Employee Information (G08E1), choose **Employee Reports**
From **Employee Reports** (G08E11), choose **World Writer** under the **Information Reports** heading

Run the World Writer report, Employee Master Record Changes, to review the most recent changes made to the records in the Employee Master table (F060116). Such changes include job and salary changes. This report does not include changes to profile data.

The system stores these changes in the Employee History table (F08042).

Employee Master Record Changes

Page - 1
Date - 02/28/17

Address Number	Alpha Name	Data Item	History Data	Eff On	Date Updated	Chg Rsn	Description	User ID
5127	Ebby, Chester A.	HMCO	00100	01/01/17	07/12/14	098	Automated Conversion	AB709431T
5127	Ebby, Chester A.	HMCU	419	01/01/17	07/12/14	098	Automated Conversion	AB709431T
5127	Ebby, Chester A.	SALY	S	01/01/17	07/12/14	098	Automated Conversion	AB709431T
5127	Ebby, Chester A.	SAL	00002500000	01/01/17	07/12/14	098	Automated Conversion	AB709431T

Printing Employee Master Labels

From Employee Information (G08E1), choose **Employee Reports**
From **Employee Reports** (G08E11), choose **Employee Master Labels**

When you need to send information to your employees' home address, you can run Employee Master Labels to print Cheshire mailing labels. This report prints standard-sized, "four-up" labels. The addresses that print on the labels are from the Address Book Master table (F0101), based on the Employee Master table (F060116). You cannot use this program to print any labels other than Cheshire labels.

Raymond Allen 410 17th Avenue Fairfax VA 22040	Leslie Derrick 198 Pine Avenue North York On M5R6T5 Canada	Melvyn Easter 1601 Old Bayshore Highway Burlingame CA 94010	Jorge Escalante 2807 Bridgeford Drive Sacramento CA 95833
Jack Hawkins 555 IBM Plaza Chicago IL 62207	Debra Johnson 10895 Highway 65 Pittsburgh PA 56412	John Martin 103 West End Drive Aurora IL 62287	Cathy McDougle 12662 East Bates Circle Aurora CO 80014

Reviewing Employee Profile Reports

You can run reports to review employee profile information by:

- Individual employee summary
- A summary of all your employees and their related profile data
- By profile data type

Reviewing employee profile reports includes:

- Reviewing the Employee Profile Data report
- Reviewing the Employees by Data Type report
- Reviewing the Employee Profile Workfile

See Also

- *Reviewing Profile Data* for information for reviewing profile data online

Reviewing the Employee Profile Data Report

From Employee Information (G08E1), choose **Employee Reports** From **Employee Reports** (G08E11), choose **Employee Profile**

When you need to review complete profile information for one or more employees, print the Employee Profile Data report. This report compiles all of an employee's profile information into an easy-to-read, resume-style format.

The information that prints on this report is the same information that you can review online using Profile by Employee. However, the report allows you to print information for multiple employees at one time.

```
  080410                                          JD Edwards World                                 Page Number       8
                                                  Employee Profile                                 Date        3/13/17
                                              in Alphabetical Sequence


Employee Number. .          6002 Abbot, Dominique                                              Pay Class/Freq . . H / B
Home Company . . .         00200 Model Manuf/Distrib Company       Primary Job/Step.         /     Pay Grade. . . . .
Home Bus. Unit . .           741 Accounting                        Date Of Birth . .               Pay Grade Step . .
Benefit Group. . .                                                 Date Started. . . 02/19/16      Pay Status . . . . 0
Union Code . . . .                                               . Annual Salary . .     20,800.00 Change Reason. . . 001
                                                                                                   FLSA Exempt Y/N. . Y

Emergency Contacts
==============================
               Parents:   (303) 671-6364



Training
==============================
     Type    Trng Dte               Where Obtained          Certification Earned         Costs
  ---------- --------       ------------------------------ ---------------------------- -------------
  LDRSHP     02/15/16       Fred Pryor                                                         150.00
               She has shown impressive leadership qualities.

  PLTFRM     05/30/17       Local college                                                      150.00
                                                                                     ------------- -------------
                                                                            Total              300.00



Appraisal Details
==============================
  Appraisal  App.Date               Overall Results              Points Earned           Yrs Wrked
  ---------- --------       ------------------------------ ---------------------------- -------------
  MR         03/15/17       Standard performance
```

Processing Options

See Employee Profile- Alphabetic Sequence (P080410).

Reviewing the Employees by Data Type Report

From Employee Information (G08E1), choose **Employee Reports** From **Employee Reports** (G08E11), choose **Employees by Data Type**

When you need to review a list of all employees who have information entered in a particular profile data type, you can print the Employees by Data Type report. For example, you can review employees whose profile data includes job skills information. The information that prints on this report is the same information that you can review online using Profile Data Entry. You can review information by either data type or by employee.

For each employee, the system lists data types in alphabetical order.

The following sample report displays employee information by data type.

```
080400                                      JD Edwards World                          Page Number        2
                                      Employee Information by Data Type               Date         6/21/17
                                           Alphabetical Sequence
Professional Licenses/Certif
Employee       Name                 Updated             State/Province            Status         Fees
 License   . . . . . CDP        Certified Data Processing
       6010 Eason, Walter           09/01/08          Nebraska
       7704 Rivard, Jacques         01/01/92                                                      250.00
                                                                                             ------------
                                                       Total for: Certified Data Proce            250.00
 License   . . . . . CFP        Cert. Financial Planner
       2022 Kellerman, James        01/01/17
                                                                                             ------------
                                                       Total for: Cert. Financial Plan
 License   . . . . . CMA        Certified Management Acct
       2057 D'Angelo, Suzanne       01/01/17
                                                                                             ------------
                                                       Total for: Certified Management
 License   . . . . . CPA        Certified Public Accountant
       6002 Abbot, Dominique        06/15/17          Colorado                                    250.00
       6001 Allen, Ray              06/01/00
       2022 Kellerman, James        01/01/17
                                                                                             ------------
                                                       Total for: Certified Public Acc            250.00
 License   . . . . . CPP        Certified Payroll Professional
       6002 Abbot, Dominique        06/12/15          Colorado                                    150.00
       7505 Mastro, Robert          10/15/17          Colorado
       7500 McDougle, Cathy         01/01/17          Colorado                                    250.00
       2006 Walters, Annette        10/13/13          Colorado
                                                                                             ------------
                                                       Total for: Certified Payroll Pr            400.00
 License   . . . . . HRM        Certified HR Manager
       7500 McDougle, Cathy         01/01/17          Colorado                                    150.00
       2006 Walters, Annette        10/13/13          Colorado
                                                                                             ------------
                                                       Total for: Certified HR Manager            150.00
```

Processing Options

See Employee Info by Data Type - Alpha Seq (P080400).

Reviewing the Employee Profile Workfile

From Employee Information (G08E1), choose **Employee Reports**
From **Employee Reports** (G08E11), choose an option under the **Workfile and Report** heading

You can print a World Writer report that lists employees by one or more profile data types. For example, a report that lists employees by foreign language proficiency might show that one employee knows French, another knows German, and so on.

Typically, this report does not include records for the employees who do not know any foreign languages (and, therefore, have no information entered in the data type for foreign language proficiency). To include such employees on the report, you must build the Employee Profile Worktable (T08092WF) before you run the World Writer report. The workfile:

- Searches the employee master records to locate employees with no profile data
- Creates a table with Xs in place of actual profile data values

After you build the Employee Profile Workfile, you can run the associated World Writer report that lists employees by profile data types. For employees who have values in the profile data types you specified, the profile data type codes appear in the User Defined Code field. For employees who have no profile data of that type, Xs appear in the User Defined Code field.

```
82000                                              Employee Profile                                    Page -         1
                                               Using Work File T08092WF                                Date -   5/11/17

Address     User    Effective    User
 Number   Def Code    Date        ID
-------- ---------- --------- ----------
    6002 XXXXXXXXXX 02/26/16  SS788627
    6002 MR         03/15/17
    6002 XXXXXXXXXX 02/26/16  SS788627
    6002 XXXXXXXXXX 02/26/16  SS788627
    6002 XXXXXXXXXX 02/26/16  SS788627
    6002 XXXXXXXXXX 02/26/16  SS788627
    6010 PCUSE      01/01/17
    6010 XXXXXXXXXX 02/26/16  SS788627
    6010 CDP        09/01/08
    6010 KEYOFC     01/10/11
    6010 XXXXXXXXXX 02/26/16  SS788627
    6010 XXXXXXXXXX 02/26/16  SS788627
    6010 XXXXXXXXXX 02/26/16  SS788627
    6010 XXXXXXXXXX 02/26/16  SS788627
    6010 ALCOHOL    10/10/11
    6010 COCAINE    10/10/11
```

Reviewing Equal Employment Opportunity Reports

From Employee Information (G08E1), choose EEO/Affirmative Action
From EEO/Affirmative Action (G08E12), choose an option

Employers must report specific employee information to the Equal Employment Opportunity Commission (EEOC) on an annual basis. You can print the reports that you need to submit to the federal government to comply with the requirements of the EEOC. You use these reports to show that your organization provides equal opportunities for all employees, including females and those who are ethnic minorities.

Managers within your organization also can use these reports to analyze hiring and promotion practices within your organization.

To review equal employee opportunity reports (EEO), complete the following tasks:

- Review the EEO-1 Employment Data report
- Review the EEO-4 Analysis report
- Review the EEO Staff Utilization report
- Review the Workforce Analysis report
- Review the Veterans Employment (VETS-100) report

Reviewing the EEO-1 Employment Data Report

To verify that your organization complies with the reporting requirements of the EEOC, review the EEO-1 Employment Data report.

This report groups employees into the standard EEO job categories and sorts them by EEO ethnic codes and gender. The report prints totals for each job category and for each home company or home business unit.

To make it easier for you to review information by company, the report prints only one company per page.

Information for this report is from the Employee Master table (F060116).

068515 JD Edwards World Page - 3
EEO - 1 Employment Data Date - 5/11/17
by Company

001 A Model Core Company . .Reporting Period. .
01/01/17 thru 12/31/17

Job Categories	Row Total	Male White	Male Black	Male Hisp.	Male Asian	Male Indian	Female White	Female Black	Female Hisp.	Female Asian	Female Indian
Supervisors	45	24					21				
Officials and Managers	245	62	66			34	78		1		4
Professionals	197	51	12	38	1	2	48	40	3	1	1
Technicians	28	3	14				8	2	1		
Sales	14	5	2	2			2		3		
Office and Clerical	43	13	2	1	3		20		1	3	
Craft Workers (Skilled)	7	4					3				
Operatives (Semiskilled)	2	2									
Laborers (Unskilled)	9	8					1				
Service Workers	2	1					1				
TOTAL	592	173	96	41	4	36	182	42	9	4	5

Processing Options

See EEO-1 Employment Data (P068515).

Reviewing the EEO-4 Analysis Report

To verify that your organization meets the salary guidelines established by the EEOC, use the EEO-4 Analysis report.

You submit the EEO-4 report at the end of the fiscal year using the Jurisdiction Control Number (JCN) assigned by the EEOC. The EEOC recommends using June 30 as the end of the fiscal year.

The EEO-4 report lists the number of employees in each salary range and ethnic group according to their job function. The report lists the information in the following combinations:

- Ethnic and gender distribution by job category
- Ethnic and gender distribution by job category and pay range
- Totals for ethnic and gender representation by job function for full-time, part-time, and newly hired employees

The EEOC has defined job functions to use for grouping and reporting information. Set up one of the payroll category codes to track these job function codes for each of your employees. The following are the EEOC-defined job functions and their corresponding codes:

Category Code	Description
01	Financial Administration / General Control

Category Code	Description
02	Streets and Highways
03	Public Welfare
04	Police Protection
06	Natural Resources / Parks and Recreation
07	Hospitals and Sanitariums
08	Health
09	Housing
10	Community Development
11	Corrections
12	Utilities and Transportation
13	Sanitation and Sewage
14	Employment Security, State Governments Only
15	Other

The number of employees a jurisdiction or company has will determine how the report is formatted. For jurisdictions with fewer than 1000 full-time employees, the report lists all job functions with fewer than 100 employees separately and combines the numbers into one total. Job functions with more than 100 employees will be listed and totaled separately.

For jurisdictions with 1000 or more employees, the report lists and totals each job function separately regardless of how many employees are included in that job function.

The EEO-4 report contains the following sections for reporting information to the EEOC:

- Full-Time Employees
- Other Than Full-Time Employees
- New-Hire Employees

Employees who are active and have an employment status that is not considered full-time are included in the Other Than Full-Time Employees section of the report.

If an employee's start date falls within the range of dates that you are reporting, the employee is considered a new hire for EEOC reporting purposes. If the new hire is a full-time employee, information for that employee is included in both the New-Hire Employees and Full-Time Employees sections of the EEO-4 report. Part-time new-hire employees are included only in the New-Hire Employees section of the report and are not included in the Other Than Full-Time Employees section of the report.

Information for this report is from the Employee Master table (F060116).

Contact the EEOC for more information about regulations for EEO-4 reporting.

```
068514                                            JD Edwards World                                        Page -        3
                                                     EEO-4 Report                                         Date -   6/24/17
       A Model Financial/Distribution             Full Time Employees
       8055 East Tufts Avenue  Suite                  By Company
       Denver
                      CO  80237
                                             Reporting Period: 07/01/17 thru 06/30/17
                       Annual Salary
                                       Total | . . . . . . . . Male  . . . . . . . . | . . . . . . . . Female . . . . . . . .
     Job Categories     (thousands)    Empls |  White   Black   Hisp.   Asian  Indian |  White   Black   Hisp.   Asian  Indian
 ----------------------- ------------ ------ |  ------  ------  ------  ------  ------ |  ------  ------  ------  ------  ------
Officials and Managers      .0 - 15.9        |                                        |
                          16.0 - 19.9        |                                        |
                          20.0 - 24.9        |                                        |
                          25.0 - 32.9        |                                        |
                          33.0 - 42.9      2 |            1                           |    1
                          43.0 - 54.9      1 |                                        |    1
                          55.0 - 69.9        |                                        |
                          70.0 - PLUS      1 |                                      1 |
                                      ------ |  ------  ------  ------  ------  ------ |  ------  ------  ------  ------  ------
                 Job Category Total        4 |            1                         1 |    2
                                             Total Male. . .      2                    Total Female. .      2
Professionals               .0 - 15.9        |                                        |
                          16.0 - 19.9        |                                        |
                          20.0 - 24.9        |                                        |
                          25.0 - 32.9      1 |    1                                   |
                          33.0 - 42.9        |                                        |
                          43.0 - 54.9        |                                        |
                          55.0 - 69.9      1 |    1                                   |
                          70.0 - PLUS        |                                        |
                                      ------ |  ------  ------  ------  ------  ------ |  ------  ------  ------  ------  ------
                 Job Category Total        2 |    2                                   |
                                             Total Male. . .      2                    Total Female. .
```

See Also

- *Assigning Category and Geographic Data Codes* in the *U.S. Payroll Guide, Volume 1* for more information about assigning category codes.

Processing Options

See EEO-4 Report (P068514).

Reviewing the EEO Staff Utilization Report

To review the number of actual hours that employees of each EEO ethnic code worked within each job, review the EEO Staff Utilization report. If an employee works in multiple jobs, the report counts each job's hours separately.

This report prints totals by job level, job description, and business unit. For each business unit, the report prints totals and percentages for minorities and females.

This report is not required by the EEOC. Information for this report is from the EEO Staff Utilization Worktable (T068902) and the Time and Pay Detail History table (F0618).

```
068901                                             JD Edwards World                                         Page      -          2
                                              EEO Staff Utilization Report                                  Date      -    7/22/17
                                                                                                            Beginning -   03/01/17
                                                                                                            Ending    -   03/30/17
           1 Comptes generales
                                               Total     Hours    Hours     Total     Male     Female
       EEO  Ethnic Description                 Hours     Male     Female  Employees Employees Employees

       01   White (Not of Hispanic Origin)    178.96     88.52    90.44         2         1         1
       02   Black
       03   Hispanic
       04   Asian or Pacific Islander
       05   American Indian/Alaskan Native
       55   Canadian Indian
       99   Unknown
                                             --------- --------- -------- --------- --------- ---------
      Total                             .     178.96     88.52    90.44         2         1         1

Group Total of                                   .

       01   White (Not of Hispanic Origin)    178.96     88.52    90.44         2         1         1
       02   Black
       03   Hispanic
       04   Asian or Pacific Islander
       05   American Indian/Alaskan Native
       55   Canadian Indian
       99   Unknown
                                             --------- --------- -------- --------- --------- ---------
      Total                             .     178.96     88.52    90.44         2         1         1

Total Minorities             Minority %  000       Total Females         1 Female % 051
```

Processing Options

See EEO Staff Utilization Report (P068900).

Reviewing the Workforce Analysis Report

To review a summary of gender and ethnic information for current employee, review the Workforce Analysis report. This report is based on the job type and job step of the employees. For example, you could use this report to determine the percentage of master welders who are Native American and female.

This report lists two totals for each company and business unit. The first total is a quantity (number) that indicates how many employees are in each category. The second total indicates the number as a percentage of all employees. There are also two grand totals, by quantity and by percentage, that indicate a total workforce analysis for all business units and all companies.

This report is not required by the EEOC. Information for this report is from the Employee Master table (F060116).

```
080435                                              JD Edwards World                                   Page Number        2
                                                 Workforce Analysis Report                             Date         2/27/17
                                                 by Cost Center and Company


Job                        Job  EEO  Pay    . .Total. .     . . . . . .  Male  . . . . . . .    . . . . . . Female . . . . . .
Type       Description     Step Job Grade   Empl Minor    Total White Black Hisp   Asian AmInd    Total White Black Hisp  Asian AmInd
------ ------------------- ---- --- ------ ----- -----    ----- ----- ----- -----  ----- -----    ----- ----- ----- ----- ----- -----

  Home Company . . . . 001      A Model Accounting Company
  Home Cost Center . .          701 Corporate Administration
  ------------------- ----------- ----------------------------
A1     President                001 S7         1     1       1                             1
0A-3   Financial Analyst        002 S4         2             2     2
2H-1   Human Resource Mana      001 S4         1     1                                             1     1
2H-5   EEO Specialist           002            1             1     1
5J-5   Electrician              003            1             1
61     Foreman                  006 H8         1     1       1           1
63                              006 H8         1             1     1
67     Laborer             1    008 H5         2             2     2
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
            Corporate Administration          10     3       9     7     1                 1       1     1
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
            % Total:                       100.0  30.0    90.0  70.0  10.0              10.0    10.0  10.0
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
            A Model Accounting Company        10     3       9     7     1                 1       1     1
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
            % Total:                       100.0  30.0    90.0  70.0  10.0              10.0    10.0  10.0
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
              Grand Total:                    11     3      10     8     1                 1       1     1
                                      ----- -----  ----- ----- ----- ----- ----- -----   ----- ----- ----- ----- ----- -----
              % Grand Total:               100.0  27.3    90.9  72.7   9.1               9.1     9.1   9.1
```

Processing Options

See [Workforce Analysis by B.U. & Company (P080435)](#).

Data Sequence

For the system to calculate totals correctly, do not select Job Type (JBCD) and Job Step (JBST) for totaling. A total for these items would be meaningless because the report is designed to print one line for each job type and job step.

Reviewing the Veterans Employment (VETS-100) Report

To review a summary of the number of employees in each EEO job category who are either disabled veterans or Vietnam era veterans, review the Veterans Employment (VETS-100) report. You use this report to satisfy government reporting requirements for veterans.

The federal government requires that you submit the VETS-100 report in magnetic media format. You use a workfile build program to print the report and generate the magnetic media file.

Working with the VETS-100 report includes the following tasks:

- Generating the VETS-100 report
- Deleting a VETS-100 ID

Generating the VETS-100 Report

	From Federal/State/Local Reports (G07241), choose **VETS-100 Reporting** From VETS-100 Workfile Build (G072412), choose **VETS-100 Workfile Build**

When you build the VETS-100 workfile, the system generates the magnetic media file (F060434) and a printed copy of the report for you to review. If you notice an error on the report, you can make the necessary corrections and then rebuild the workfile. Each time you rebuild the workfile for the same version of the report, the new information overwrites the existing information in the F060434 file.

The report lists employees in each EEO job category who are disabled veterans or Vietnam-era veterans. It singles out new hires, or those employees who were hired during the report period that you have specified in your processing options.

The magnetic media version of the report displays totals by company, according to government requirements. Although you can specify any valid date range, for government reporting purposes, the date range is one year.

The print version of the report contains separate columns for new hires and current employees and provides two totals for each company. The first total is categorized by home business unit and company, and indicates by EEO job category the number of employees who are disabled veterans and the number who are Vietnam-era veterans. The second total indicates the number of new hires who are disabled veterans and the number who are Vietnam-era veterans.

The following table contains information about the totals in the columns on the report.

Totals	Description
Totals in the Employee column	This column includes only those employees with a start date before or during the specified reporting period and who remained active for the specified reporting period. It does not include employees who were terminated during the reporting period.
Totals in the New Hire column	This column includes only those employees with a start date during the specified reporting period, regardless of whether these employees were also terminated within the reporting period. Employees who are hired during the reporting period and who are still active employees appear in both the New Hire and the Employee columns.
Totals in the Special Disabled Veterans columns	This column includes only those employees with a Yes (Y) value in the Disabled Vet field in the Employee Master table (F060116). Disabled veterans who are either employees or new hires have separate columns on the report.
Totals in the Vietnam-Era Veterans column	This column includes only those employees with a Veteran (V) status in the Veteran field in the Employee Master table.
Totals in the Total Both Veterans and Non-Veterans column	This column includes the total number of employees in the specified EEO Job Category, Home Business Unit, and Home company, regardless of their veteran status.

To generate the VETS-100 report

1. On VETS-100 Workfile Build, complete the following field:

- VETS-100 ID

2. To associate an existing version of the report with this VETS-100 ID, enter the version identifier in the following field:

   - Version

   You can assign a version to only one VETS-100 ID.

3. To set up a new version of the report, press F1 and then press F8 in the following field:

   - Version

   See *Adding, Revising, or Renaming a DREAM Writer Version* in the *Technical Foundation Guide* for information on setting up a version.

4. To print the report and generate the magnetic media file, choose the Submit function twice.

```
080434                                              JD Edwards World                                      Page Number        2
                                               Veterans’ Employment Report                                Date          2/27/17
                                                       (VETS-100)
                                               by Business Unit and Company

                                                01/01/17 through 12/31/17

                                                       . . . Employees . . .        . . . . . . . New Hires . . . . . . . .
                                                       Special       Vietnam       Special       Vietnam       Total, Both
                                                       Disabled        Era         Disabled        Era         Veterans and
            EEO Job Category                           Veterans      Veterans      Veterans      Veterans      Non-Veterans
--------------------------------------------------- ------------ ------------ ------------ ------------ ---------------

Home Company . . . . 001          A Model Accounting Company
Home Business Unit . .          701 Corporate Administration
------------------- ----------- ----------------------------
001 Officials and Managers                                                                                                1
003 Technicians                                             2                                                             1
004 Sales                                                   1             1             1                                 5
008 Laborers      (Unskilled)                                             1                           1                  10
                                                   ------------ ------------ ------------ ------------ ---------------
    Home Cost Center . . Corporate Administration           3             2             1             1                  17
                                                   ------------ ------------ ------------ ------------ ---------------
    Home Company . . . . A Model Accounting Company         3             2             1             1                  17
```

Deleting a VETS-100 ID

From Federal/State/Local Reports (G07241), choose **VETS-100 Reporting**
From VETS-100 Workfile Build (G072412), choose **VETS-100 Version Review**

You can assign a report version to only one VETS-100 ID. If you inadvertently assign a version to a second VETS-100 ID, the system displays an error message when you attempt to submit the workfile build. To avoid confusion, it is best to delete the invalid VETS-100 ID. You use the VETS-100 Version Review programs to delete invalid or obsolete VETS-100 IDs.

To delete a VETS-100 ID

On VETS-100 Version Review, choose the Delete VETS-100 ID option to delete an invalid ID.

Processing Options

See Veterans' Employment by B.U. & Company (P080434).

Data Sequence

For the system to calculate totals correctly, do not select EEO Job Category for totaling. A total for this item would be meaningless because the report is already designed to print one line for each EEO job category.

3 New-Hire Reporting

Overview to New-Hire Reporting

About New-Hire Reporting

To comply with the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, all employers must report certain information about newly hired employees to designated state agencies. State agencies can use this information to:

- Locate non-custodial parents who are delinquent in their child-support payments
- Establish child-support orders
- Enforce existing child-support orders
- Verify the legitimacy of employees' unemployment benefits or workers' compensation payments

In most states, the reporting requirements went into effect on October 1, 1997. Employers in states that already had new-hire reporting laws have until October 1, 1998, to comply with the new federal standards.

You can use the Payroll system to print the new-hire reports that you need to provide for state agencies. Because reporting requirements vary among states, there is a separate report for each state.

When you need to create new-hire reports for a state that requires information about whether employees and their dependents are eligible for medical insurance, you must set up one or more user defined date fields to track this information. You set up user defined date fields because the Payroll system contains no predefined fields for tracking medical eligibility.

Some states allow you to submit new-hire reports on magnetic media. After you print new-hire reports for those states, you can run a program that creates the magnetic media files.

Working with new-hire reports includes:

- Entering insurance information for new-hire reports (if necessary)
- Printing the generic new-hire report
- Printing the new-hire report for Alabama through Louisiana, which includes the following states:
    - Alabama
    - Alaska
    - Arizona

    - Arkansas
    - California
    - Colorado
    - Connecticut
    - Delaware
    - District of Columbia
    - Florida
    - Georgia
    - Hawaii
    - Idaho
    - Illinois
    - Indiana
    - Iowa
    - Kansas
    - Kentucky
    - Louisiana
- Printing the new-hire report for Maine through Pennsylvania, which includes the following states:
    - Maine
    - Maryland
    - Massachusetts
    - Michigan
    - Minnesota
    - Mississippi
    - Missouri
    - Montana
    - Nebraska
    - Nevada
    - New Hampshire
    - New Jersey
    - New Mexico
    - New York
    - North Carolina
    - North Dakota
    - Ohio

    - Oklahoma
    - Oregon
    - Pennsylvania
- Printing the new-hire report for Rhode Island through Wyoming, which includes the following states:
    - Rhode Island
    - South Carolina
    - South Dakota
    - Tennessee
    - Texas
    - Utah
    - Vermont
    - Virginia
    - Washington
    - West Virginia
    - Wisconsin
    - Wyoming
- Creating magnetic media files for new-hire reports

Entering Insurance Information for New-Hire Reports

	From Payroll Master Menu (G07), choose Employee Information From Employee Information (G0711), choose Additional EE Data & Reports From Additional Employee Data & Reports (G07111), choose Dates, Eligibility, & EEO

Some states require that new-hire reports include information about whether employees and dependents are eligible for health insurance.

If you plan to print new-hire reports for any state that requires information about health insurance, you first must enter health insurance information for all of the employees who will be included on those reports.

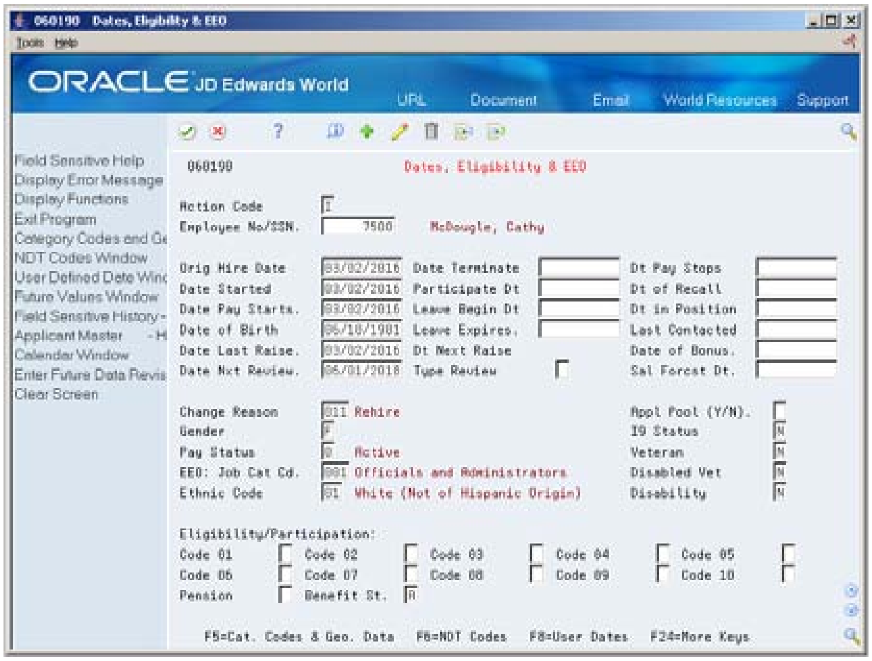
Although the Payroll system contains no predefined fields for tracking health insurance eligibility for employees and their dependents, you can configure user defined date fields to track this information.

Before You Begin

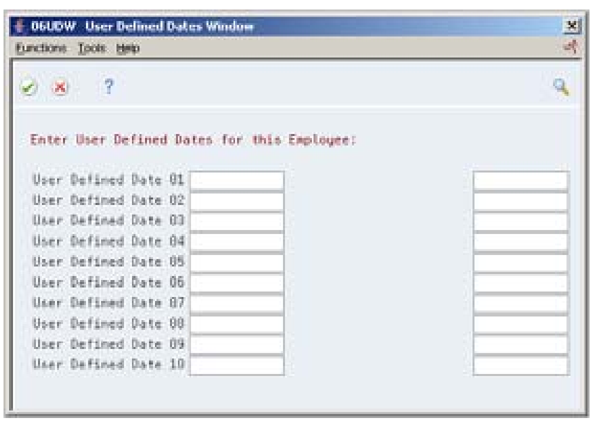
- Choose a user defined date field (for example, User Defined Date 01) for entering the date on which an employee is eligible for health insurance. To clarify data entry, you might want to ask your system administrator to change the vocabulary override for the field to a more meaningful name, such as Health Insurance Eligibility Date.
- For each newly hired employee, complete the steps for entering a new employee record into the Payroll system. See *Entering Employee Master Information (P060101).*

To enter insurance information for new-hire reports

On Dates, Eligibility and EEO



1. Locate the employee record for which you need to enter health insurance eligibility information.
2. Choose the User Dates function.



3. On User Defined Dates Window, complete the fields that you are using to track the dates on which the employee and the employee's dependents are eligible for health insurance.

   You must use the same user defined date fields to track this information for all employees.
4. Press F6 to save your entries.

   After you complete these steps, you can print new-hire reports for states that require information about health insurance eligibility. When you create the new-hire report, indicate which user defined date fields you are using to track this information.

Processing Options

See Extended Employee - Dates, Eligibility (P060190).

Printing the Generic New-Hire Report

	From Governmental Reports (G0724), choose **Federal/State/Local Reports** From Federal/State/Local Reports (G07241), choose **New Hire Reporting** From New Hire Reporting (G072411), choose **Generic - Federal req. only**

You print new-hire reports to provide state agencies with certain information about newly hired employees. State agencies use this information to locate non-custodial parents who have child-support obligations.

You print the generic new-hire report when the employees in your organization work in states that have not yet finalized their new-hire reporting requirements.

Because reporting requirements vary from state to state, you use a separate program to print the report for each state. If your organization has employees in more than one state, you can fulfill your new-hire reporting requirements in either of the following ways:

- Print a separate report for each state in which your organization has employees, and submit each report to the appropriate state.
- Print a new-hire report for one of the states in which your employees work, and include employees from multiple states on that report. Submit the report only to that state for which you printed the report.

When you choose to print only one report and include employees from multiple states, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.

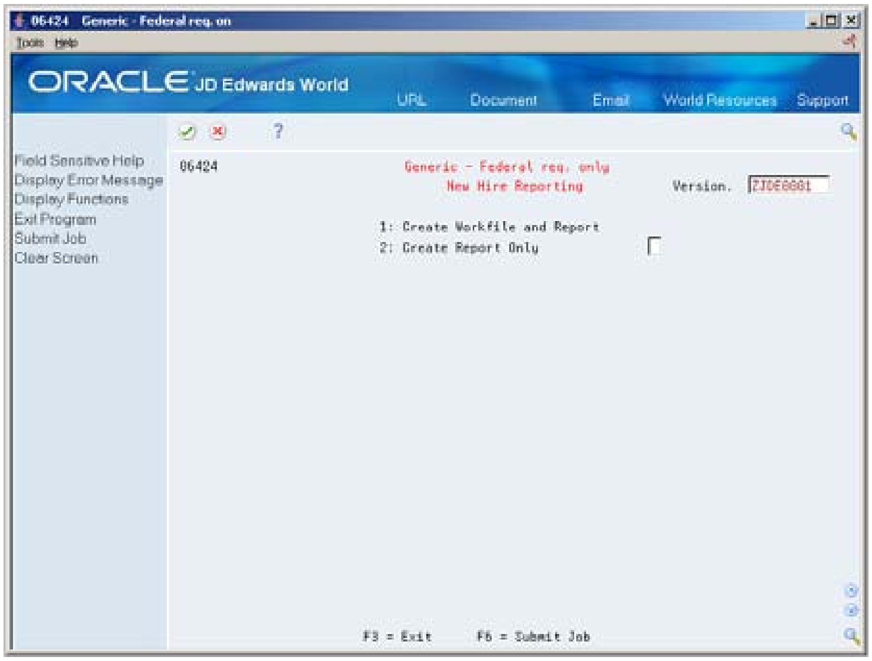
Before you print new-hire reports, you must build a workfile that includes all of the employee records that you need to include on the report. When you build the workfile, the system automatically prints the report. When you need to print extra copies of a report for which you have already built the workfile, you can print the report without rebuilding the workfile. However, if you discover an error on the report, you must correct the employee record that is in error and then rebuild the workfile. If you print the report without rebuilding the workfile, the report will not include any changes that you made to employee records after you last built the workfile.

Before You Begin

- Create a DREAM Writer version of the New Hire report. In the data selection, include the work-tax-area codes in which the employees work.

To print the generic new-hire report

On Generic - Federal req. only



1. Complete the following fields and press Enter:

- Version
- 1: Create Workfile and Report or 2: Create Report Only

2. To specify the date range for which you want to print the report, complete the following fields:

- Beginning Date of Report
- Ending Date of Report

3. Complete the following fields and press F6 twice:

- Work Tax Area
- Field that Identifies the Date Employees First Earned Wages
- Reporting Company Number

The Work Tax Area field determines the name that appears in the heading of the report. It does not determine the employee records that print on the report. Use the data selection to specify the work-tax-area codes for the states whose employee records you want to include on the report.

Data Selection

- The data selection for the report must include the work-tax-area code for the state for which you are printing the report. If you want to include employees from multiple states on the report, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.

- If you want to print a report for employees who work in areas that have 9-digit tax-area codes, the data selection for the report must use the *RANGE parameter to include all work-tax-area codes for the state. For example, to print a report for Colorado, enter the range 06 through 069999999.

Printing the New-Hire Report for Alabama – Louisiana

	From Federal/State/Local Reports (G07241), choose **New Hire Reporting** From New Hire Reporting (G072411), choose **Alabama thru Louisiana** From Alabama thru Louisiana (G0724111), choose the appropriate state

You print new-hire reports to provide state agencies with certain information about newly hired employees. State agencies use this information to locate non-custodial parents who have child-support obligations.

To report new-hire information for the states of Alabama through Louisiana, print the new-hire report for the appropriate state.

Because reporting requirements vary from state to state, you use a separate program to print the report for each state. If your organization has employees in more than one state, you can fulfill your new-hire reporting requirements in either of the following ways:

- Print a separate report for each state in which your organization has employees, and submit each report to the appropriate state.
- Print a new-hire report for one of the states in which your employees work, and include employees from multiple states on that report. Submit the report only to that state for which you printed the report.

When you choose to print only one report and include employees from multiple states, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.

Before you print new-hire reports, you must build a workfile that includes all of the employee records that you need to include on the report. When you build the workfile, the system automatically prints the report. When you need to print extra copies of a report for which you have already built the workfile, you can print the report without rebuilding the workfile. However, if you discover an error on the report, you must correct the employee record that is in error and then rebuild the workfile. If you print the report without rebuilding the workfile, the report will not include any changes that you made to employee records after you last built the workfile.

Before You Begin

- Create a DREAM Writer version of the New Hire report. In the data selection, include the work-tax-area codes in which the employees work.

To print the new-hire report for Alabama through Louisiana

You must specify the state for which you want to print a new-hire report. The report functions the same way for each state.

On Alabama through Louisiana

1. Select the option for the state you are reporting and press Enter.
2. Read SET UP CONSIDERATIONS and press F6 to execute.
3. Create your own version from the Version list by copying the XJDE0001 version. Complete the following and press Enter:
   - Version
   - 1: Create Workfile and Report, or 2: Create Report Only

Note: Be sure to enter the work tax area in the Data Selection.

Data Selection

- The data selection for the report must include the work-tax-area code for the state for which you are printing the report. If you want to include employees from multiple states on the report, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.
- If you want to print a report for employees who work in areas that have 9-digit tax-area codes, the data selection for the report must use the *RANGE parameter to include all work-tax-area codes for the state. For example, to print a report for Colorado, enter the range 06 through 069999999.

4. To specify the date range for which you want to print the report, complete the following fields:
   - Beginning Date of Report
   - Ending Date of Report
5. Complete the mandatory fields beneath the heading, *Please enter additional information*.

   Note: The number of mandatory fields beneath this heading varies by state. Complete all of the fields displayed, as needed.

Printing the New-Hire Report for Maine – Pennsylvania

	From Federal/State/Local Reports (G07241), choose **New Hire Reporting** From New Hire Reporting (G072411), choose **Maine thru Pennsylvania** From Maine thru Pennsylvania (G0724111), choose the appropriate state

You print new-hire reports to provide state agencies with certain information about newly hired employees. State agencies use this information to locate non-custodial parents who have child-support obligations.

To report new-hire information for the states of Alabama through Louisiana, print the new-hire report for the appropriate state.

Because reporting requirements vary from state to state, you use a separate program to print the report for each state. If your organization has employees in more than one state, you can fulfill your new-hire reporting requirements in either of the following ways:

- Print a separate report for each state in which your organization has employees, and submit each report to the appropriate state.
- Print a new-hire report for one of the states in which your employees work, and include employees from multiple states on that report. Submit the report only to that state for which you printed the report.

When you choose to print only one report and include employees from multiple states, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.

Before you print new-hire reports, you must build a workfile that includes all of the employee records that you need to include on the report. When you build the workfile, the system automatically prints the report. When you need to print extra copies of a report for which you have already built the workfile, you can print the report without rebuilding the workfile. However, if you discover an error on the report, you must correct the employee record that is in error and then rebuild the workfile. If you print the report without rebuilding the workfile, the report will not include any changes that you made to employee records after you last built the workfile.

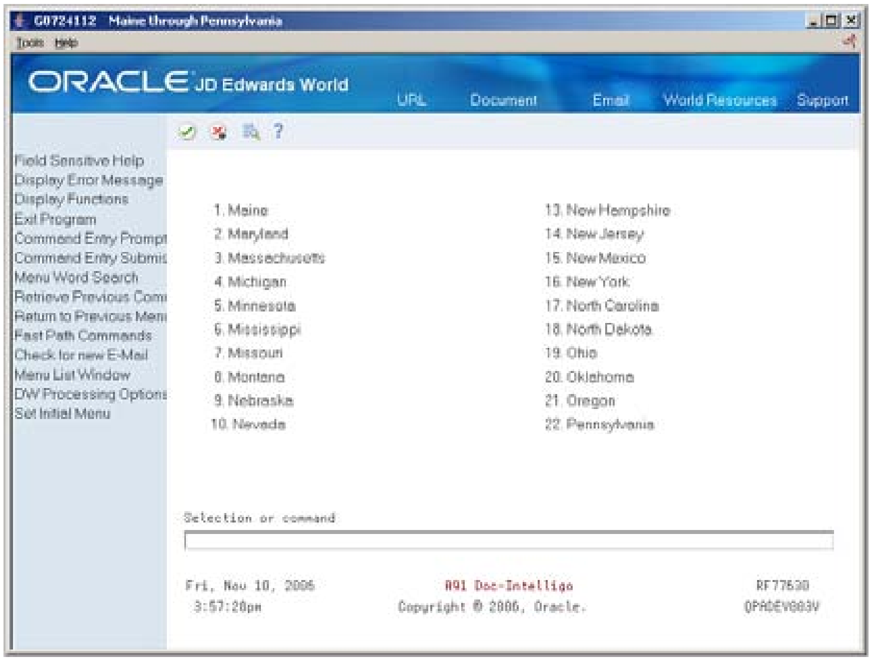
Before You Begin

- Create a DREAM Writer version of the New Hire report. In the data selection, include the work-tax-area codes in which the employees work.

To print the new-hire report for Maine through Pennsylvania

You must specify the state for which you want to print a new-hire report. The report functions the same way for each state.

On Maine through Pennsylvania



1. Select the option for the state you are reporting and press Enter.
2. Read SET UP CONSIDERATIONS and press F6 to execute.
3. Create your own version from the Version list by copying the XJDE0001 version. Complete the following and press Enter:
   - Version
   - 1: Create Workfile and Report, or 2: Create Report Only

Note: Be sure to enter the work tax area in the Data Selection.

Data Selection

- The data selection for the report must include the work-tax-area code for the state for which you are printing the report. If you want to include employees from multiple states on the report, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.
- If you want to print a report for employees who work in areas that have 9-digit tax-area codes, the data selection for the report must use the *RANGE parameter to include all work-tax-area codes for the state. For example, to print a report for Colorado, enter the range 06 through 069999999.

4. To specify the date range for which you want to print the report, complete the following fields:

   - Beginning Date of Report
   - Ending Date of Report

5. Complete the mandatory fields beneath the heading, *Please enter additional information*.

   Note: The number of mandatory fields beneath this heading varies by state. Complete all of the fields displayed, as needed.

Printing the New-Hire Report for Rhode Island – Wyoming

	From Federal/State/Local Reports (G07241), choose **New Hire Reporting** From New Hire Reporting (G072411), choose **Rhode Island thru Wyoming** From Rhode Island thru Wyoming (G0724111), choose the appropriate state

You print new-hire reports to provide state agencies with certain information about newly hired employees. State agencies use this information to locate non-custodial parents who have child-support obligations.

To report new-hire information for the states of Alabama through Louisiana, print the new-hire report for the appropriate state.

Because reporting requirements vary from state to state, you use a separate program to print the report for each state. If your organization has employees in more than one state, you can fulfill your new-hire reporting requirements in either of the following ways:

- Print a separate report for each state in which your organization has employees, and submit each report to the appropriate state.
- Print a new-hire report for one of the states in which your employees work, and include employees from multiple states on that report. Submit the report only to that state for which you printed the report.

When you choose to print only one report and include employees from multiple states, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.

Before you print new-hire reports, you must build a workfile that includes all of the employee records that you need to include on the report. When you build the workfile, the system automatically prints the report. When you need to print extra copies of a report for which you have already built the workfile, you can print the report without rebuilding the workfile. However, if you discover an error on the report, you must correct the employee record that is in error and then rebuild the workfile. If you print the report without rebuilding the workfile, the report will not include any changes that you made to employee records after you last built the workfile.

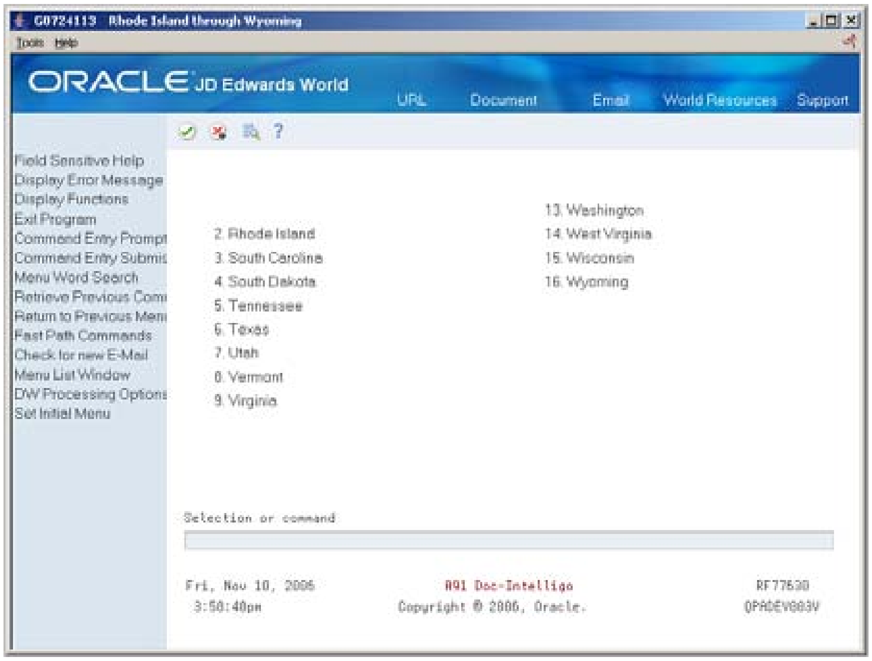
Before You Begin

- Create a DREAM Writer version of the New Hire report. In the data selection, include the work-tax-area codes in which the employees work.

To print the new-hire report for Rhode Island through Wyoming

You must specify the state for which you want to print a new-hire report. The report functions the same way for each state.

On Rhode Island through Wyoming



1. Select the option for the state you are reporting and press Enter.
2. Read SET UP CONSIDERATIONS and press F6 to execute.
3. Create your own version from the Version list by copying the XJDE0001 version. Complete the following and press Enter:
   - Version
   - 1: Create Workfile and Report, or 2: Create Report Only

Note: Be sure to enter the work tax area in the Data Selection.

Data Selection

- The data selection for the report must include the work-tax-area code for the state for which you are printing the report. If you want to include employees from multiple states on the report, the data selection for the report must include the work-tax-area code for each state whose employees you want to include on the report.
- If you want to print a report for employees who work in areas that have 9-digit tax-area codes, the data selection for the report must use the *RANGE parameter to include all work-tax-area codes for the state. For example, to print a report for Colorado, enter the range 06 through 069999999.

4. To specify the date range for which you want to print the report, complete the following fields:
   - Beginning Date of Report
   - Ending Date of Report
5. Complete the mandatory fields beneath the heading, *Please enter additional information*.

Note: The number of mandatory fields beneath this heading varies by state. Complete all of the fields displayed, as needed.

Creating Magnetic Media for New-Hire Reports

	From Governmental Reports (G0724), choose Federal/State/Local Reports From Federal/State/Local Reports (G07241), choose New Hire Reporting From New Hire Reporting (G072411), choose New Hire Mag Media

To expedite the process of delivering new-hire reports to state agencies, some states allow you to use magnetic media to transmit the new-hire reports. After you print new-hire reports for those states, you can create the magnetic media file that you transmit to the agency. You cannot create a magnetic media file for the generic version of the new-hire report, or for any state that does not accept new-hire reports on magnetic media.

You use the same program (P064253) to create magnetic media for all of the states that accept this format. In the processing options for the report, you enter the work tax area code for the state to which you are submitting the magnetic media. This state should be the same state as the state for which you created the new-hire report.

4 Employee History and Turnover

Overview to Employee History and Turnover

Objectives

- To review history and turnover records
- To correct history and turnover records
- To delete or archive history records
- To run reports

About Employee History and Turnover

Within any organization, employees continually change jobs, receive raises, are promoted, or change their marital status. You can set up your system to store historical records of the employee information. This means that when you enter or update employee information, the system creates a historical record of the old information. You can set up your system to store turnover records. Turnover records show employee movement within your organization, such as when an employee changes jobs, as well as movement resulting from new hires and terminations.

For employees who have multiple jobs within your organization, the system stores history records for each job. The system stores this information in a separate table from the employee history and turnover tables.

Working with employee history and turnover information includes:

- Working with employee history records
- Working with multiple job history
- Correcting turnover records
- Purging history and turnover records
- Reviewing employee history and turnover reports

You can track employee history and turnover for any of the information stored in the Employee Master table (F060116). You can use history and turnover information to:

- Review the employee's job progression
- Review salary increases given at the same time a job change was made
- Analyze historical changes to employee information
- Consider an employee for a promotion

- Consider an employee for another position
- Monitor employee movement within your company

What Is Employee Master History?

Employee master history includes the history records that the system creates when you change information on the employee entry forms. You must specify the data items (such as home company, tax ID number, and so on) for which you want to track history. These data items must exist in the Employee Master table. Whenever you change employee information, the system creates a separate history record for each data item for which you are tracking history.

As you enter and revise information for the data items that you selected for history tracking, the system temporarily stores history and turnover records in a data queue. You use the history monitor feature to control when the system transfers the records in the data queue to the permanent history and turnover tables. You activate the history monitor when you want to transfer records to the history and turnover tables immediately after you make a change. When the history monitor is not active, the system stores the history records in the data queue until you activate the monitor. To speed computer response time, you might choose to activate the monitor only at night, when no users are working on the system.

The data queue has limited storage space. If you do not activate the monitor regularly, the data queue can become too large and you will be unable to retrieve records.

The history records include the following information:

- The specific change
- The reason for the change (known as the change reason code)
- The date that the change becomes effective
- The system date when the change was made
- The user ID of the person who made the change
- The program ID that identifies where the change was made

What Is Employee Multiple Job History?

In some organizations, employees can have multiple jobs. Each employee has one primary job. Any additional job that an employee might hold at the same time as the primary is called a secondary job. For employees who have multiple jobs, the system stores history records for each job.

Why Is the Change Reason Code Important?

When you revise employee information, the system prompts you for a change reason code. The change reason code indicates whether the system should record the change to the employee information as employee history only or as both employee history and turnover. The system does not create a turnover record unless you enter a change reason code. The system also stores the change reason code with the employee history record.

When you enter job changes for an employee with multiple jobs, and the change reason code and effective date are different for each job, the system creates a separate record for each change in the Employee Multiple Job History table.

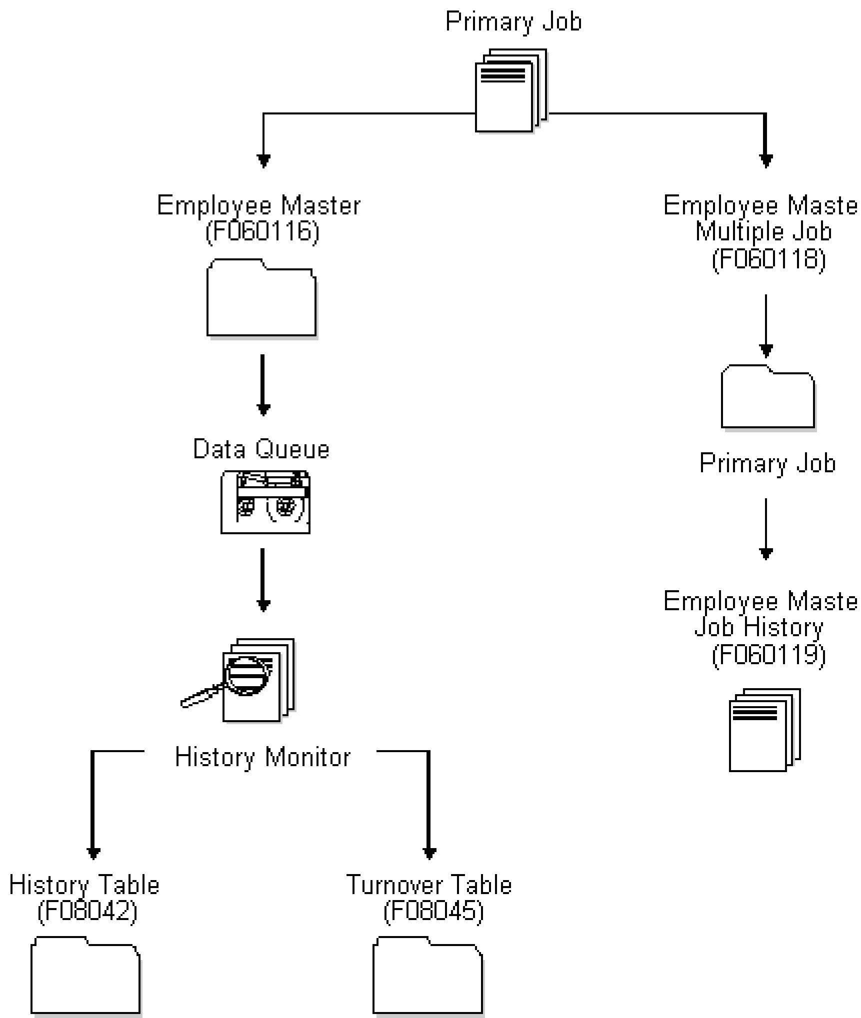
You define change reason codes in the user defined code table 07/T. When you define change reason codes, it is important to note that alphabetic codes have a negative effect on turnover. Conversely, numeric codes have a positive effect on turnover.

Where Does the System Store History and Turnover Records?

The system stores history and turnover information in the following tables:

- Employee master and primary job history in the HR History table (F08042)
- Employee turnover information for employees' primary jobs in the Employee Turnover Analysis table (F08045)
- Primary and secondary job history in the Employee Multiple Job History table (F060119).

When an employee has multiple jobs at one time, the system maintains turnover information only for the primary job. The following diagram shows how the system tracks information from the current employee tables to the history and turnover tables.


Primary Job
Employee Master
(F060116)
Employee Master
Multiple Job
(F060118)
Data Queue
Primary Job
Employee Master
Job History
(F060119)
History Monitor
History Table
(F08042)
Turnover Table
(F08045)

Work with Employee History Records

Working with Employee History Records

When current employee information changes, such as when an employee is promoted or changes marital status, you must update the employee's record to reflect the change. You can set up your system to create historical records of the information you changed when you update employee records to reflect such changes.

Working with employee history records consists of the following tasks:

- Reviewing Employee History
- Correcting Employee History

You can review historical information since the date you began tracking history. This allows you to analyze an employee's qualifications and work record. For example, you can:

- Review an employee's job progression
- Review salary increases given at the same time a job change was made
- Analyze historical changes to employee information
- Analyze an employee's job history to determine whether the employee is ready for a promotion

You can correct history records if you made a mistake when you entered employee information and the system stored that mistake in history records.

You might make a mistake and not want to maintain the record in history. You can delete a history record if it is inaccurate and if you do not want to maintain it in the history table.

To conserve computer disk space, you can transfer past years' history records to tape or to an alternate backup system.

Before You Begin

- Specify the employee data items for which you want to track turnover. See *Choosing Data for History Tracking Purposes*.
- Verify that the Human Resources constants are set to track turnover. See *Setting Up History and Turnover Constants.*
- Verify that the history subsystem and monitor are set to run. See *Activating History and Turnover Tracking.*

See Also

- *Entering Employee Information (P060101)*
- *Understand History and Turnover Tracking (P08042)*
- *Purging History Records (P080860)*

Reviewing Employee History

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), choose **Employee History Inquiry**

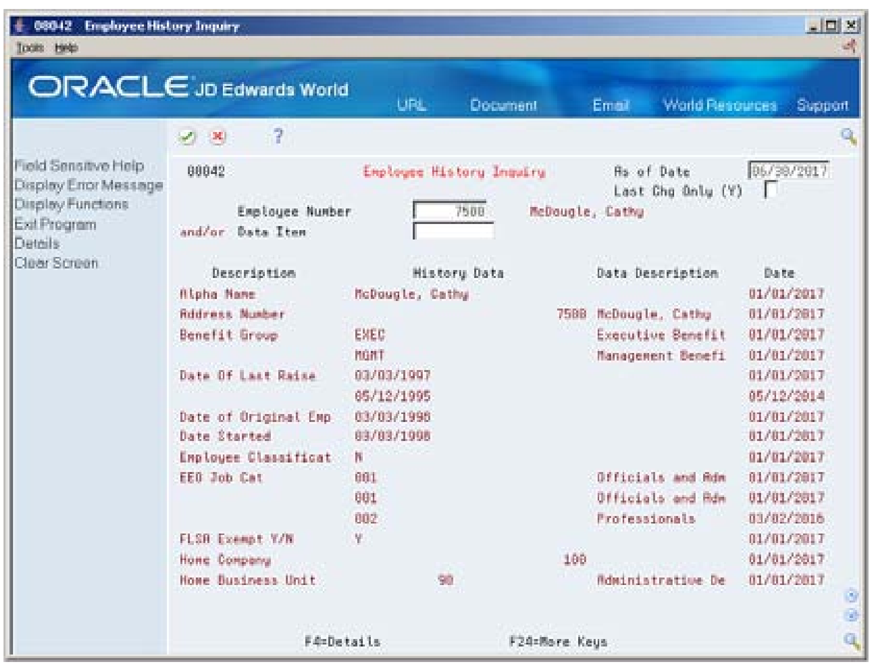
You can set up your constants so that the system creates history records for employees whenever you change employee information. You might want to review this history to:

- Analyze historical changes to employee information
- Consider an employee's work record for promotions or raises
- Consider an employee's work record for another position

To review the complete history records for an individual, from the oldest entry through the most recent entry, you can use Employee History Inquiry. You can also review all the history that is linked to a specific data item.

To review employee history

On Employee History Inquiry



1. Complete the following field:

- Employee Number

2. Complete any of the following optional fields:
   - As of Date
   - Last Change
   - Data Item
3. Access the detail area.

4. Review the information.

Field	Explanation
As of Date	The date for which you want to review employee history and employee turnover. Any history or turnover that has an effective date after the date you enter in this field does not appear on the form. If you do not enter a date, the system date is the default date. In the history or turnover purge programs, all data with an effective date (data item EFTO) on or before this date will be purged. You must enter this date.

Field	Explanation
Last Chg Only (Y)	A code that defines whether the form displays only employee history changes made through the date you indicate in the As of Date field. Valid codes are: Y Yes, display only the history changes in effect through the As of Date. N No, display all changes. Blank The same as N. Note: Since changes are based on effective date, if two changes were made on the same date, the form shows both changes.

What You Should Know About

Reviewing history for a specific date	To review all of the history for an individual employee for one specific date, use Employee History Snapshot. This form displays only the history that is in effect on the date you specify.
Field-sensitive history	For any of the fields for which you are tracking history, you can use the Field Sensitive History function on the employee entry form to access history for a specific field. You must position the cursor in the field for which you want to review history. For example, to review an employee's job history, position the cursor in the Job Type field and choose the Field Sensitive History function.

Processing Options

See Employee History Inquiry (P08042).

Correcting Employee History

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), enter **27**
From History & Turnover Advanced and Technical Operations (G08H3), choose **Employee History**

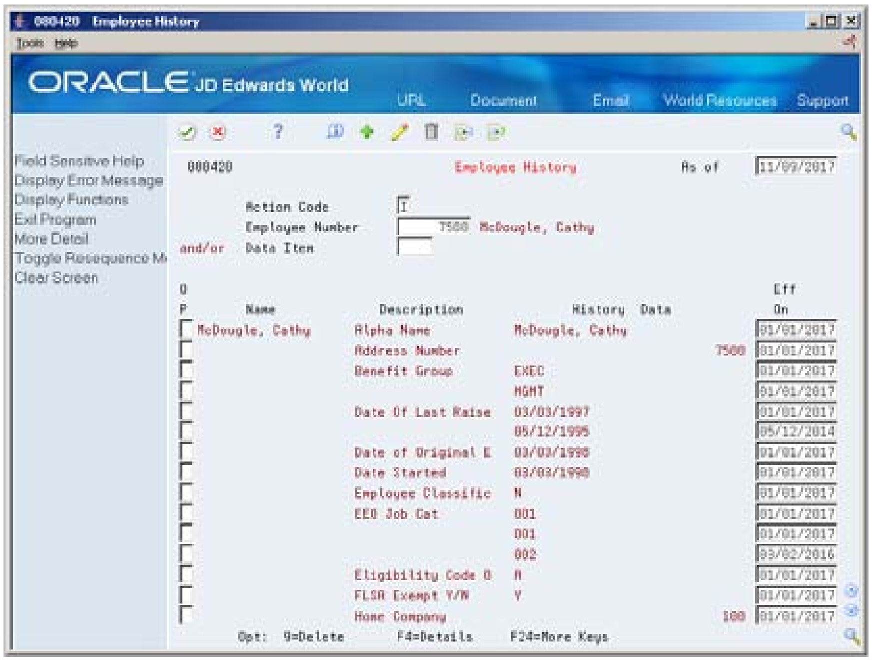
Each time you make an entry in an employee record, the system creates a record in the corresponding history table. If you make a mistake when you enter employee information and then correct the error, you must delete the incorrect record from the corresponding history table to maintain an accurate history trail. When you delete a record in the history table, you do not affect the information in the Employee Master table.

If the only information you incorrectly entered was the change reason or the effective date, you can correct that information in the history table. You do not need to delete the entire record to correct those two fields.

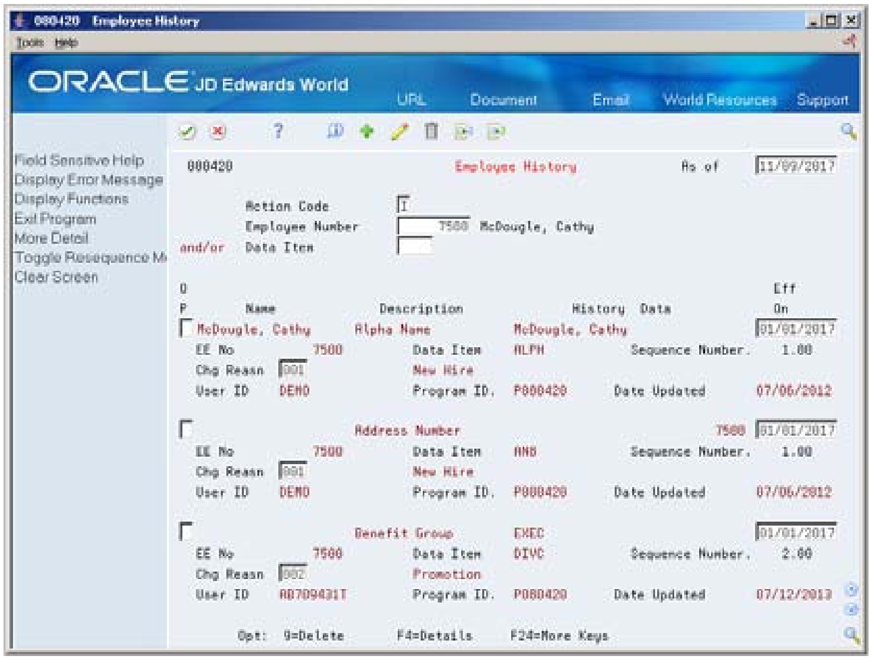
Correcting the error in the history table allows you to maintain accurate history records. If the history record you correct has a change reason, you must also correct the corresponding turnover record.

To correct employee history

On Employee History



1. To locate the record, complete either or both of the following fields:
   - Employee
   - Data Item
2. If the entire record is incorrect and you do not want to maintain it in history, choose the Delete option.
3. If you want to maintain the history record, complete the following optional field:
   - Effective On
4. Access the detail area.



5. Correct the information in the following optional field:
   - Change reason
6. To correct the sequence number for a data item, choose the Toggle Resequence Mode function.
7. Change the value in the following field:
   - Sequence Number

See Also

- *Correcting Turnover Records (P080451)*

Work With Multiple Job History

Working With Multiple Job History

If some employees in your company hold more than one job at one time, you enter multiple jobs for those employees. When employees hold multiple jobs, the system lists one job as the primary job and all others as secondary jobs. Each time you make an entry for a multiple job the system creates a record in the Employee Multiple Job History table (F060119).

The system adds a new record to multiple job history whenever you change any of the following:

- Home business unit
- Job type
- Job step
- Change reason
- Effective date

If you make any other changes to multiple job information, the system writes over the current record in multiple job history and does not create a new record.

To work with multiple job history, complete the following tasks:

- Reviewing Multiple Job History for an Employee
- Deleting Multiple Job History Records

Reviewing Multiple Job History for an Employee

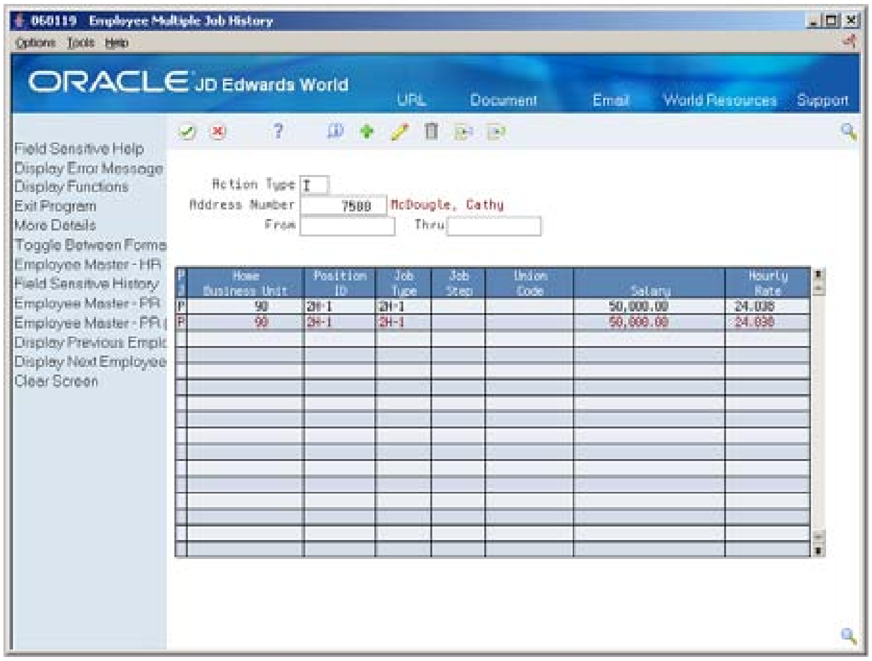
	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), choose **Employee Multiple Job History**

You can review the history for your employees who hold more than one job at a time, such as an art teacher who is also a baseball coach. You can review this information to:

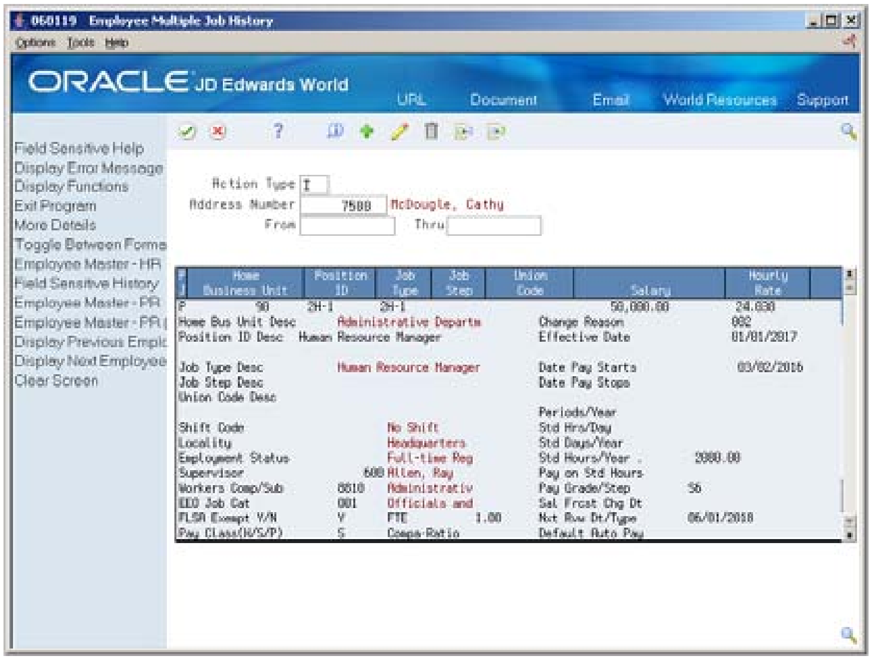
- Determine which jobs the employee has held during the same period of time
- Review the employee’s wage information for each job

To review multiple job history for an employee

On Employee Multiple Job History



1. Complete the following field:
   - Address Number
2. To narrow the search, complete any of the following optional fields:
   - Select From
   - Select Through
3. Access the detail area.



4. Review the information.

Deleting Multiple Job History Records

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), choose **Employee Multiple Job History**

You cannot correct the information in a record in an employee's multiple job history. If you incorrectly enter multiple job information, you must delete the history record unless the correction and the history have the same change reason and effective date.

When the correction has the same change reason and effective date as that of a previous record, the system automatically deletes the previous record from the Employee Multiple Job History table.

For example, assume that you need to correct the salary for an employee's primary job. The salary that you need to correct was entered on 09/01/17 with a change reason of Annual Increase. When you correct the employee's salary, you enter 09/01/17 for the effective date and Annual Increase as the change reason. The system automatically deletes the history record that contains the incorrect salary information.

When the change reason and effective date for the corrected information are different than that for the incorrect record, you must delete the incorrect record on Employee Multiple Jobs History.

When you enter corrections for an employee's primary job on Employee Entry, the system does not delete the corresponding history record, regardless of the change reason and effective date that you entered.

Before You Begin

- Enter the correct information on Employee Multiple Job Entry

To delete multiple job history records

On Employee Multiple Job History

1. Complete the following field:
   - Address Number
2. Locate the incorrect record and use the Delete function.
3. Use the Change action.

Purge History and Turnover Records

Purging History and Turnover Records

To conserve computer disk space, you can transfer obsolete history and turnover records to tape or to an alternate backup system.

Purging history and turnover records includes:

- Purging Employee History Records
- Purging Turnover Records

Purging Employee History Records

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter 27 From History & Turnover Advanced and Technical Operations (G08H3), choose **Purge History Data**

To free computer disk space, you can purge obsolete employee history records from your system. You can choose to archive purged records to tape or to an alternate backup system. When you know that you no longer need certain history records, such as records that are more than five years old, you can delete history records for a specified date or for selected employees.

You can run the purge in either proof or update mode. When you run the purge in proof mode, the system prints a report that shows the records to be purged. Use this report to verify that you want to purge those records. After you run the purge in proof mode, run it again in update mode. When you run the purge in update mode, the system prints a report and purges the records.

If you purge history data without specifying that you want the system to transfer the records to a storage device, the system deletes the records and you cannot retrieve them. The only information you will have about the purged data is the report generated by the system.

Before You Begin

- Review the history reports to verify that you want to purge your history tables. See *Running History Reports.*

What You Should Know About

Purging history information	Purge History Data purges information only in the Employee Master History table. It does not purge information in the Employee Multiple Job history table.

Processing Options

See Purge Employee Multiple Job File (P0601182).

Purging Turnover Records

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter 27 From History & Turnover Advanced and Technical Operations (G08H3), choose **Purge Turnover Data**

To conserve computer disk space, you should periodically purge obsolete turnover records. To purge employee turnover records, use the Purge Turnover Data program. You can choose to archive purged records to tape or to an alternate backup system. When you know that you no longer need certain turnover records, such as records that are more than five years old, you can delete turnover records for a specified date or for selected employees.

If you purge turnover data without specifying that you want the system to transfer the records to a storage device, the system deletes the records and you cannot retrieve them. The only information you will have about the purged data is the report generated by the system.

This program purges data from the Employee Turnover table (F08045).

Before You Begin

- If you need to define the data you want to purge beyond what the processing options allow:
  - Type the menu selection for purging turnover data and choose the function to display the versions.
  - Change the ZJDE0001 DREAM Writer version and define the data you want to purge. Do not add a new version. The system recognizes only the ZJDE0001 version to execute the program.

To purge turnover records

On the message form

Choose the purge function.

Review History and Turnover Reports

Reviewing History and Turnover Reports

To review and analyze employee history and turnover, you can print several reports. You can review:

- The most recent changes that have been made to employee information
- The next-to-last change that was made to your employee history records
- Historical salary information for specific employees

Reviewing history and turnover reports includes:

- Reviewing the Employee History Log Report
- Reviewing the Salary History Analysis Report
- Creating the Last History Change Workfile
- Reviewing the Last Change in History Report
- Reviewing Turnover Analysis Reports

Reviewing the Employee History Log Report

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), choose **Employee History Log**

To review history for either a single data item or for all of the data items for which you are tracking history, print the Employee History Log report. The information that prints on this report is the same information that you can review online using Employee History Inquiry.

```
080423                                    JD Edwards World                                 Page - . . .         9
                                  All Employees by Home Business Unit                      Date - . . .   6/25/17
                                       01/01/17  Thru  12/31/17
 Employee                Data                                                  Effectv    Seq
  Number       Name      Item   Description       History Data       Description     On     Number Change Reason        Changed By
 Home Business Unit .         419 Administration
                          PHRT Hourly Rate. .              26.000                      01/15/17                            DEMO01
                                                            18.000                      01/01/17                            DEMO01
                          PSDT Date Pay Starts 08/17/10                                 01/01/17                            DEMO01
                          SAL  Annual Salary.            54,080.00                      01/15/17                            DEMO01
                                                          37,440.00                     01/01/17                            DEMO01
                          SALY Pay Class(H/S/P H                                        01/01/17                            DEMO01
                          SSN  Employee Tax ID 058-43-2559                              01/01/17                            DEMO01
                          TARA Tax Area (Work) 06                                       01/01/17                            DEMO01
                          TARR Tax Area (Res.) 06                                       01/01/17                            DEMO01
                          TRS  Change Reason.  07                                       03/01/17                            DEMO01
                                               98                                       01/15/17                            DEMO01
                                               010                 Database correc 01/01/17   1.00 010 Database correct DEMO
                                               04                                       01/01/17                            DEMO01
                          UPMJ Date Updated .  10/17/11                                 03/01/17                            DEMO01
                                               04/04/15                                 01/01/17   1.00                     DEMO
                                               10/14/11                                 01/01/17                            DEMO01
                          WCMP Workers Comp .  8810                Administrative  01/01/17   2.00                     DEMO
                                                                    No Worker's Com 01/01/17  1.00 010 Database correct DEMO
                                               8810                Administrative  01/01/17                            DEMO01
 Home Business Unit .         451 Accounting Department
 -------------------- ------------ -----------------------------
     2022 Kellerman, Jame DT   Date Terminated 07/01/17                                 07/01/17   1.00 TE  Termination-Elig BARCLAY
                          HMCU Home Business U          451        Accounting Depa 06/26/17   1.00 010 Database correct DEMO
                          PAST Pay Status . .  9                   Terminated, Las 07/01/17   1.00 TE  Termination-Elig BARCLAY
                          POS  Position ID. .  4510A-1                                  06/26/17   1.00 010 Database correct DEMO
                          TRS  Change Reason.  TE                  Termination-Eli 07/01/17   1.00 TE  Termination-Elig BARCLAY
                          UPMJ Date Updated .  03/31/16                                 07/01/17   1.00 TE  Termination-Elig BARCLAY
                                               06/26/15                                 06/26/17   1.00 010 Database correct DEMO
 Home Business Unit .         701 Corporate Administration
 -------------------- ------------ -----------------------------
     2006 Walters, Annett ALPH Alpha Name . .  Walters, Annette                         01/01/17                            DEMO01
                          AN8  Address Number                2006 Walters, Annett 01/01/17                            DEMO01
                          DIVC Benefit Group.  MGMT                Management Bene 01/01/17                            DEMO01
                          DSI  Date of Origina 06/03/16                                 01/01/17                            DEMO01
                          DST  Date Started .  06/03/16                                 01/01/17                            DEMO01
                          ECNT Employee Classi N                                        01/01/17                            DEMO01
                          EEOJ EEO Job Cat. .  001                 Officials and M 01/01/17                            DEMO01
                          E001 Eligibility Cod Y                                        01/01/17                            DEMO01
                          E010 Eligibility Cod A                                        01/01/17                            DEMO01
                          FLSA FLSA Exempt Y/N Y                                        01/01/17                            DEMO01
                          HMCO Home Company .                  1                        01/01/17                            DEMO01
                          HMCU Home Business U          701        Corporate Admin 01/01/17                            DEMO01
                          HM04 Disability . .  N                                        01/01/17                            DEMO01
                          IFN  First Initial ( A                                        01/01/17                            DEMO01
                          IH   Hrs/Yr . . . .           2080.00                         01/01/17                            DEMO01
                          JBCD Job Type . . .  1M-2                Project Leader  01/01/17                            DEMO01
```

Processing Options

See All Employees by Home Business Unit (P080423).

Reviewing the Salary History Analysis Report

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), choose **Salary History Analysis**

Use the Salary History Analysis report to review salary changes for employees' primary jobs. To use this report to analyze salary information, you must have set up your system to track history for salary, hourly rate, and pay class.

For each employee, the report shows either an annual salary or an hourly rate, depending on the employee's pay class. (The pay class indicates whether an employee is paid on salary or by the hour.)

080424 JD Edwards World Page - . . . 2
Employee Salary History Date - . . . 3/05/17
All Employees by Home Business Unit

01/01/17 Thru 12/31/17

Employee Number	Name	Pay Status	Empl Stats	Job Type	Pay Grade	Grad Step	Compa-Ratio	P C	Salary/Hourly	Percnt Change	Change Reason	Effectv On
7500	McDougle, Cathy	Active		Human Resourc	S4		1.05	S	40,000.00			01/01/17
		Active		Human Resourc	S6		0.79	S	44,000.00	10.00	Promotion	02/15/17
		Active		Human Resourc	S6			S		100.00-		07/01/17
7504	Meade, Jane	Active			S4		0.92	S	35,000.00			01/01/17
7506	Mayeda, Donald	Active		Clerk				H	7.500			01/01/17
7510	Moralez, Jesus	Active					0.67	H	6.500			01/01/17
6001	Allen, Ray	Active			S7		0.73	S	48,800.00			01/01/17
		Active		President	S7		1.05	S	70,000.00	43.44		03/17/17
5127	Ebby, Chester A.	Active		EEO Specialis				S	25,000,00		Automated Con	01/01/17
6000	Easter, Melvyn	Active	Full-time	Secretary			2.57	H	18.000			01/01/17
		Active	Full-time	Foreman			3.71	H	26.000	44.44		01/15/17
2006	Walters, Annette	Active		Project Leade			0.70	S	40,000.00			01/01/17
2111	Ingraham, Paul	Active		Laborer	H5			S	35,000.00			03/15/17
2129	Jackson, John	Active		Financial Ana			1.26	S	50,000.00			01/15/17
6002	Abbot, Dominique	Active	Full-time	Financial Ana	S4		0.74	S	28,000.00			01/01/17
6010	Eason, Walter	Active		Laborer				H	18.000			01/01/17
7701	Anthony Holiday	Active		Fire Fighter			1.34	H	11.250		Automated Con	01/01/17
7702	Derrick, Leslie	Active		Financial Ana			2.54	H	37.500		Automated Con	01/01/17
7703	Bellas, Debbie	Active		Financial Ana			1.34	S	53,000.00		Automated Con	01/01/17
7704	Rivard, Jacques	Active		Payroll Manag			1.04	S	43,620.00		Automated Con	01/01/17
7508	Mai, Tien	Active					0.54	H	5.250			01/01/17

Processing Options

See Salary History Analysis (P080424).

Creating the Last History Change Workfile

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), enter 27
From History & Turnover Advanced and Technical Operations (G08H3), choose **Last History Change Workfile**

Before you can print the Last Change in History report, you must run a program that creates the Last History Change Workfile (T08042W). This workfile is a compilation of changes to data items. The Last Change in History (World Writer) report uses this temporary workfile. When you run Last History Change Workfile, the system does not print a report.

You must run this program individually for each data item that you want to view on the Last Change in History report. For example, to review changes for all salary records (data item SAL) as well as for all job records (data item JBCD):

- Verify that the processing options are set to add records to the workfile
- Run the Last History Change Workfile program for salary records
- Run the Last History Change Workfile program again for job records

You should check your message queue to verify that this program completed successfully.

Processing Options

See Most Recent Change Work File Build (P0804500).

Reviewing the Last Change in History Report

From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter 27 From History & Turnover Advanced and Technical Operations (G08H3), choose **World Writer**

You can print a World Writer report that lists changes to one or more data items in the Employee Master table for which you are tracking history. This report displays the information in a concise, easy-to-read format. Use this report to review historical information for one or more specific data items.

The report shows the value entered in the data item before the most recent change to that data item was entered. For example, assume that:

- You are tracking history for job ID.
- You hire an employee to fill the job of Accountant (job ID Acct-1).
- One year later, the employee receives a promotion to Senior Accountant (job ID Acct-2).
- After three years with your organization, the employee receives a promotion to Accounting Manager (job ID Acct-3). Accounting Manager is the employee's current job.

When you print the report, it shows Acct-1 for the employee's job ID.

Before You Begin

- Create the Last History Change Workfile. This workfile compiles the information that prints on the report.

```
                                                 Last Change In History                       Page      -         1
                                                Using Work File T08042W                       Date      - 03/05/17


 Address     Data          History                    Effective   Date       User      Program
  Number     Item            Data                        On      Updated      ID         ID
-------- ---------- ----------------------------- --------- --------- ---------- ----------
       2 SALY       S                              11/20/15  02/22/15 RP1411506  P0801
       3 SALY       S                                        01/24/16 WC909193   P0801
       4 SALY                                                05/03/16 SS788627   P0804500
       5 SALY       S                                        12/21/15 JE652201   P0801
       6 SALY       S                                        12/21/15 JE652201   P0801
       8 SALY                                                05/03/16 SS788627   P0804500
       9 SALY                                                05/03/16 SS788627   P0804500
      11 SALY                                                05/03/16 SS788627   P0804500
      12 SALY       S                              02/21/16  02/21/16 JE652201   P0801
     100 SALY       S                                        02/28/16 JE652201   P0801
     133 SALY       S                                        01/03/16 JE652201   P0801
     134 SALY       S                                        04/03/16 JE652201   P060101
     135 SALY       S                              04/03/16  04/03/16 JE652201   P060101
     136 SALY       S                              04/03/16  04/03/16 JE652201   P060101
     137 SALY                                                05/03/16 SS788627   P0804500
     138 SALY       S                              01/07/16  04/03/16 JE652201   P0801
     311 SALY                                                05/03/16 SS788627   P0804500
     312 SALY                                                05/03/16 SS788627   P0804500
     315 SALY                                                05/03/16 SS788627   P0804500
     316 SALY                                                05/03/16 SS788627   P0804500
     317 SALY                                                05/03/16 SS788627   P0804500
     319 SALY                                                05/03/16 SS788627   P0804500
     320 SALY                                                05/03/16 SS788627   P0804500
     321 SALY                                                05/03/16 SS788627   P0804500
     329 SALY                                                05/03/16 SS788627   P0804500
     330 SALY                                                05/03/16 SS788627   P0804500
```

Reviewing Turnover Analysis Reports

From Human Resources (G08), choose Turnover/Change Analysis From Turnover/Change Analysis (G08T2), choose an option

When you update an employee's record to reflect organizational assignment changes (such as when an employee changes jobs or moves to a new business unit within your organization), the system creates turnover records of the information you changed.

Turnover records also show employee movement resulting from new hires and terminations.

To review organizational assignment changes for the employees within your organization, you can print reports that show employee movement within one or more:

- Home business units
- Home companies
- Job IDs
- Check route codes

Turnover reports print information from the Business Unit Master table (F0006) and the Employee Turnover Analysis table (F08045).

Before You Begin

- Specify the employee data items for which you want to track turnover. See *Choosing Data for History Tracking Purposes.*
- Verify that the constants are set to track turnover. See *Setting Up History and Turnover Constants.*
- Define the column headings for your turnover reports. See *Setting Up Turnover Columns.*

The following sample is an example of the Employee Turnover by Home Business Unit report.

```
080431                                     JD Edwards World                                 Page - . . .        2
                                  Employee Turnover by Home Business Unit                   Date - . . .  12/31/17
                                        Company 100, by Division

  . . . . . Home Business Unit . . . . .    Initial   NEW   Promo-  Termi-  Salary   Job   Conver-         . Turnover .
   Number        Description                  Emps   HIRES   tions  nations Increas Changes  sion           Total     %
------------ ------------------------------ ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
           1 General Accounts                     0       0       0       0       0       0       0       0       0
           9 Corporate Administration             0       0       1       0       0       1       0       0       2
           3 Denver Branch                        0       0       0       0       0       0       0       0       0
           4 Dallas Branch                        0       0       0       0       0       0       0       0       0
           5 San Francisco Branch                 0       0       0       0       0       0       0       0       0
          MD Model Chart of Accounts              0       0       0       0       0       0       0       0       0
                                            ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
                                                  0       0       1       0       0       1       0       0       2
                                            ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
                                                  0       0       1       0       0       1       0       0       2
                                            ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
                                                  0       0       1       0       0       1       0       0       2
```

What You Should Know About

The Initial Employee column	The total in this column represents the number of employees who: ▪ Worked in the home business unit as of the From Date specified in the processing options. ▪ Have a numeric change reason code. (A numeric change reason code has a positive effect on turnover.)

Processing Options

See All Business Units by Company (P080431).

5 Job Information

Overview to Job Information

Objectives

- To define the jobs within your organization
- To define job profile information
- To attach a job to an employee
- To evaluate jobs
- To review job reports
- To update job information automatically

About Job Information

You can track detailed information about the jobs within your organization. You can use this information to:

- Track pay and other types of information about jobs
- Satisfy reporting requirements
- Simplify the process of entering employee information
- Evaluate jobs to determine how to compensate the employees who work in each job

You can review job information and the employees who are assigned to a particular job. When you change information for a job, you can globally apply your changes to the job information for all of the employees who are assigned to that job.

You can also record auxiliary job information, such as the major responsibilities, authority level, or the background requirements for each job. This type of job information is called profile data.

You can use your JD Edwards World system to define criteria for evaluating jobs. You can then evaluate jobs to determine how to compensate the employees in each of your jobs.

After you define jobs, you can review information about them. You can review job information by:

- Profile data
- Employee
- Evaluation method
- Pay range

- Pay grade

You can use several types of reports to review job information, including:

- Job reports
- Job evaluation reports
- Pay grade and pay step progression reports

Processing job information includes:

- Defining jobs
- Reviewing jobs
- Updating jobs globally
- Working with obsolete jobs
- Reviewing job reports

Define Jobs

Defining Jobs

You define jobs so that you can track pay and other types of information about the jobs within your organization. After you define a job, you can assign it to employees.

When you define a job, you can also enter additional information, such as the major responsibilities, authority level, and background requirements for each job. This type of information is called job profile data. Using profile data, you can set up your system to track any type of additional job information that your organization needs.

You can also evaluate each job by degrees or points, depending on the evaluation method that you link to each job.

Job information is stored in the Job Master table (F08001).

Defining jobs includes the following tasks:

- Entering Initial Job Information
- Entering Job Profile Data
- Entering Job Evaluation Information

Entering Initial Job Information

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Job Entry and Evaluation**

Initial job information is the minimum information required to define a job within your organization. You must enter initial job information before you can evaluate jobs or enter auxiliary data.

Initial job information includes information such as:

- Job identifiers
- Job titles
- Reporting information
- Pay information
- Benefit codes
- Union codes
- Hourly or salary classification

For jobs in Canadian companies, initial job information also includes a Canadian national occupational classification (NOC) code. You use the NOC code for Canadian Employment Equity reporting.

Specifying this information at the job level simplifies the process of entering employee information because it eliminates the need to enter that information for each employee in that job. When you assign a job to an employee, you can have the system automatically assign all the associated job information to the employee. You can override this default job information for individual employees, if necessary.

When you enter a new job, you can review an existing job first, and copy information from it, if applicable.

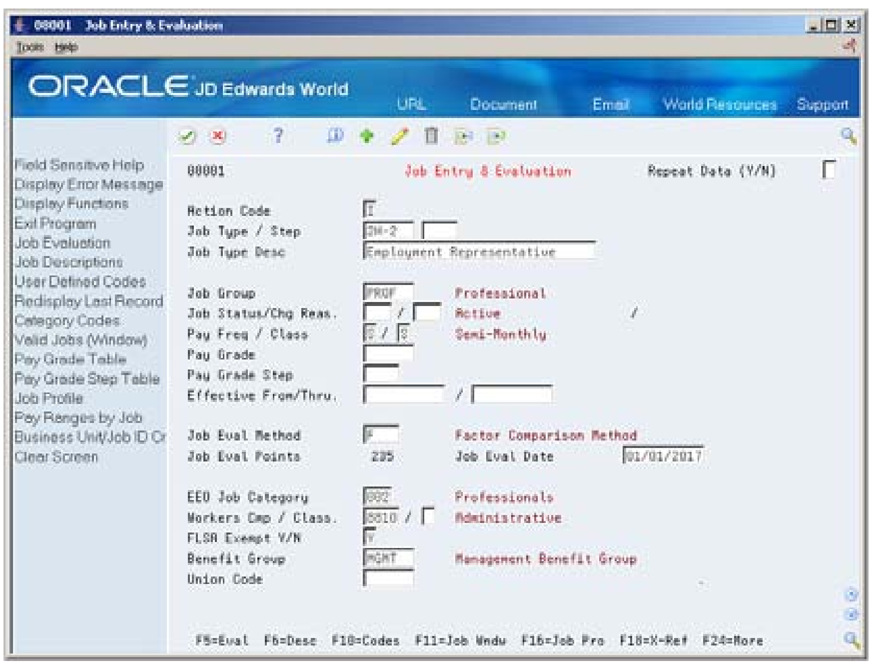
> **Note:** This program supports Import/Export functionality. See Technical Foundation for more information.

Before You Begin

- Set up the user defined code tables for jobs. See *Setting Up User Defined Codes for Human Resources*.
- Set up the pay grades and pay grade steps for jobs. See *Setting Up Job Information*.
- If your company is Canadian, verify that it is defined as Canadian in your company constants. See *Setting Up Human Resources Constants.*

To enter initial job information

On Job Entry and Evaluation



1. Complete the following fields:

- Job Type
- Job Type Description
- FLSA Exempt Y/N
- EEO Job Category

2. To enter reporting information, complete the following fields:

- Job Group
- Job Status
- Job Status Change Reason
- Workers Compensation Insurance Code
- Sub Class - Workers Compensation

3. To enter pay information, complete the following fields:

- Pay Frequency
- Pay Class
- Pay Grade
- Pay Grade Step

4. To enter benefit information, complete the following fields:

- Benefit Group
- Union Code

5. Complete any of the following additional fields:

- Job Step
- Repeat Data (Y/N)
- Effective From
- Effective Through
- Job Evaluation Method
- Job Evaluation Date

6. If the default company in your database is defined as a Canadian company, complete the following field:

- Canadian NOC Code

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

Field	Explanation
FLSA Exempt Y/N	A code that indicates whether the employee fits the rules of the Fair Labor Standards Act and thus does not have to be paid for working overtime. Valid codes are: Y Yes, the employee fits the rules and does not have to be paid for working overtime. N No, the employee does not fit the rules and is to be paid for working overtime.
EEO Job Category	A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC), or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by JD Edwards World and Company. You can add codes if needed.
Job Group	A grouping of similar jobs that are associated as a unit. Similarities can be functions within the organization, job duties, tasks and responsibilities, job evaluation methods to be used, or similarity in pay philosophy. Typical job units are clerical/administrative, technical, engineering, scientific and professional, factory jobs, middle-management, and executive. Consider breaking up groups into separate populations based on the differences between exempt and non-exempt employees according to the rules and regulations of the Fair Labor Standards Act (FLSA). For example, consider assigning all your managers to the Managers job group. You can define job group codes using user defined code table 08/JG.
Job Status/Chg Reas	A code that indicates whether a job is currently active or inactive. You can define codes using user defined code table 08/JS.
Status Change Reason	A user defined code (08/JC) that indicates why you changed the status of a job.
Workers Cmp / Class	A user defined code (00/W) that represents a workers compensation insurance (WCI) code. This code should correspond to the classifications on your periodic workers compensation insurance reports.

Field	Explanation
Sub Class - Workers Comp	The subclass code defines any special circumstances associated with the workers compensation insurance (WCI) code that result in multiple rates for the same WCI code. The multiple rates may be due to location, risk, and so forth. The subclass should remain blank if multiple rates do not exist. Default codes are: blank There are no special circumstances associated with this code. F There are special circumstances associated with this code.
Pay Frequency	A user defined code (07/PF) that indicates how often an employee is paid. Codes are: B Bi-weekly W Weekly S Semi-monthly M Monthly A Annually C European Annualized The system uses the value in the Description-2 field on user defined codes to calculate the amount per pay period for a salaried employee. *Form-specific information* You can leave this field blank and enter a pay frequency at the employee level. A blank value in this field at the job level does not override any value you enter at the employee level.
Pay Class (H/S/P)	A code that indicates how an employee is paid. Valid codes are: " " Blank H Hourly S Salaried P Piecework
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays an error or warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade. To set up pay grades, use Pay Grades by Class (P082001).

Field	Explanation
Pay Grade Step	A code that identifies a pay grade and pay step. You can use this code to determine an employee’s pay rate. If you have set your constants to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee’s pay grade step causes the system to automatically update the following fields: ▪ Salary ▪ Hourly Rate ▪ Hours per day ▪ Hours per year ▪ Days per year
Benefit Group	The benefit group to which the employee is assigned. Benefit groups facilitate employee enrollment by categorizing benefit plans and allowing enrollment rules for those categories. For example, assigning an employee to an executive (EXEC) benefit group automatically links the employee to the benefits available to executives in your organization. This feature is only applicable if your benefit plans are linked to benefit categories which, in turn, are linked to benefit groups.
Union Code	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates Table.
Repeat Data (Y/N)	A code that controls whether the system repeats key information after you press Enter. Codes are: Y Yes, repeat key information (do not clear it from the screen). This can help speed data entry. N No, do not repeat key information.
Job Eval Method	A user defined method or grouping (08/EM) that is used for the evaluating this job. Suggested values are: blank Simple Subjective Point System E Evalucomp Method F Factor Comparison Method P Point Factor Method H Hay Method

Field	Explanation
Canadian NOC Code	A code that identifies the National Occupational Classification (NOC) for a job or employee. The Canadian government defines NOC codes. For more information about NOC codes, see the Canadian Employment Equity documentation.

What You Should Know About

Changing job information	When you change the job specifications for one or more of the jobs in your organization, you can run a program that automatically updates the job information for the employees assigned to those jobs. See *Updating Jobs Globally*.
Deleting jobs	When you delete a job ID, you must enter a new job ID for each of the employee records associated with the deleted job ID. See *Working with Obsolete Jobs*.
Reviewing jobs	To review a list of all jobs in the system, choose the Job Window function

See Also

- *Adding New Employee Records (P0801)* for information about assigning a job to an employee
- *Work with PC Import/Export* in the *Technical Foundation guide*.

Processing Options

See Job Data & Evaluation Points (P08001).

Entering Job Profile Data

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Job Profile Entry**

Profile data is any type of additional information that you want to track about any of the following:

- Employees
- Jobs
- Applicants
- Dependents

- Beneficiaries
- Requisitions
- Safety and health cases

When you set up your Human Resources system, you specify the types of profile data (data types) that you want to track. Profile data is not required by the system.

For jobs, typical types of profile data might include:

- Job descriptions
- Major responsibilities
- Authority level
- Job reporting relationships
- Education required
- Experience required
- Skills required
- Job progression patterns
- Hazardous materials handing
- Succession candidates
- Americans with Disabilities Act (ADA) information

The method you use to enter profile data is the same for any type of information that you track.

See Also

- *Working with Profile Data* for information about entering, copying, reviewing, and purging profile data

Entering Job Evaluation Information

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), choose **Job Entry and Evaluation**

After you enter initial job information, you can evaluate each job to determine an equitable salary range for the job. When you evaluate jobs, you choose an evaluation method and then rate the job using the evaluation factors that you defined for that method. Typical evaluation factors include:

- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities

For each job, you assign values (degrees or points, depending on your evaluation method) to each of the evaluation factors. The system then automatically calculates the total evaluation degrees or points for the job.

You can use job evaluation information to compare job requirements and compensation to other jobs within your organization and to similar jobs within your industry.

Note: This program supports Import/Export functionality. See Technical Foundation for more information.

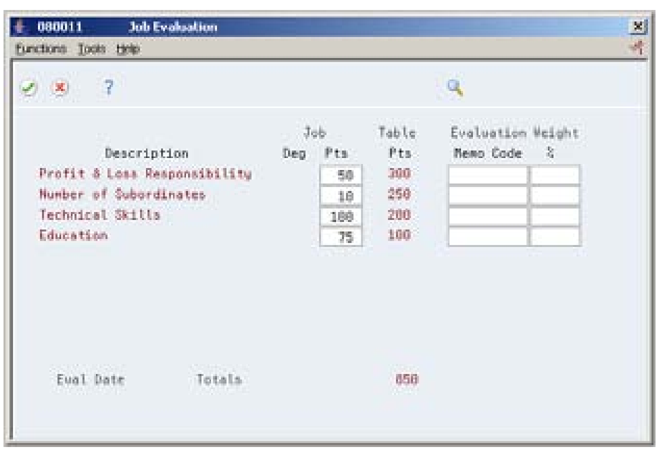
Before You Begin

- Use Compensable Factors Tables to define a table for each evaluation method you want to use. See *Defining Job Evaluation Factors.*

To enter job evaluation information

On Job Entry and Evaluation

1. Locate the job that you need to evaluate.
2. Complete the following fields and press Enter:
   - Job Evaluation Method
   - Job Evaluation Date
3. Locate the job again.
4. Choose the Job Evaluation function.



5. On Job Evaluation, complete either of the following fields that apply to the evaluation method you entered:
   - Job Degree
   - Job Points
6. Complete either of the following optional fields:
   - Evaluation Memo Code

- Weight %

Field	Explanation
Deg	The degree (level of difficulty) awarded to the first factor associated with this job evaluation method. For example, you might have an evaluation method called the degree method that includes the following factors: ▪ Know how ▪ Problem-solving skills ▪ Accountability You could assign the know how factor a degree of 10, the problem-solving skills factor a degree of 9, and the accountability factor a degree of 8.
Job Pts	The points assigned to the first evaluation factor (or evaluation degree) within a job. After you enter the applicable number of points, the points calculation program automatically totals all points entered, and updates the Job Information table (F08001). Total points display for the point method (type 1) or the degree method (type 2) of job evaluation.
Evaluation Memo Code	A field that indicates why a certain point value was assigned to the first job evaluation factor. For example, this field might contain the row and column numbers from a Hay evaluation chart where the particular point value resides. The value in this field is informational only. It does not affect the total evaluation points.
Weight	A field that indicates the relative importance of the points assigned to the first job evaluation factor versus the other factors. The factor weight allows you to recognize that certain job evaluation factors are more important than other factors. This field is informational only. It does not affect the total evaluation points.

What You Should Know About

Accessing the Job Evaluation form

When you add a new job, the system automatically displays Job Evaluation if you enter the following information:

- Job Evaluation Method
- Job Evaluation Date

If you change the job evaluation method or job evaluation date, you must use the appropriate function key to access Job Evaluation.

Updating user-defined codes for job type

A processing option for Job Entry and Evaluation allows you to add job types to the appropriate user defined code tables directly from this form. Therefore, you do not need to set up user defined code tables 07/G before you define jobs.

See Also

- *Work with PC Import/Export* in the *Technical Foundation guide.*

Review Jobs

Reviewing Jobs

After you define and evaluate jobs for your organization, you can review job information to verify that it is correct. To ensure that you entered the correct job for each employee, you can review a list of employees who have been assigned to a particular job.

If your company posts job openings internally, your employees can review job descriptions online to determine if they qualify for job openings. You can also print job descriptions and post them on company bulletin boards.

After you evaluate your jobs, you can review the evaluations for each job to verify that your evaluations are equitable. For example, you might compare the job evaluations for the following jobs to ensure that they received equal evaluation points for accountability:

- Manager of Information Services
- Manager of Documentation
- Manager of Software Development

You can also review the pay ranges for the jobs and pay grades within your organization. You can use this information to verify that these ranges are equitable and appropriate for the job duties and the geographic location where each job is performed.

Complete the following tasks to review jobs:

This section contains the following:

Reviewing Profile Data for Jobs

After you enter profile data for jobs, you can search for jobs that meet specific criteria. You can search by job or by data type.

You can also review all of the profile data available for a specific job in your company. This feature is useful when you need to fill an open job. For example, you can review all the profile data available for the HR Manager job, or you can review all the profile data available for the Accountant job. You can use this information to match applicants and employees to jobs. You can also make this information available to employees so that they can review the job openings within your organization.

You can also review the information for a specific type of data. For example, you can review the major responsibilities that are required for each job in your organization. You can use this information to compare job responsibilities for related jobs within your organization or to similar jobs in your industry.

Because you define the types of data that you want to track for jobs, the specific type of data that you can review depends on the profile data that you defined.

You use the same procedure to review profile data for jobs as you do to review profile data for employees.

See Also

- *Reviewing Profile Data For A Specific Employee*
- *Reviewing Profile Data By Data Type*

Reviewing Employees by Job Type and Step

	From Human Resources (G08), choose Job Specifications From Job Specifications (G08J1), choose Employees by Job Type and Step

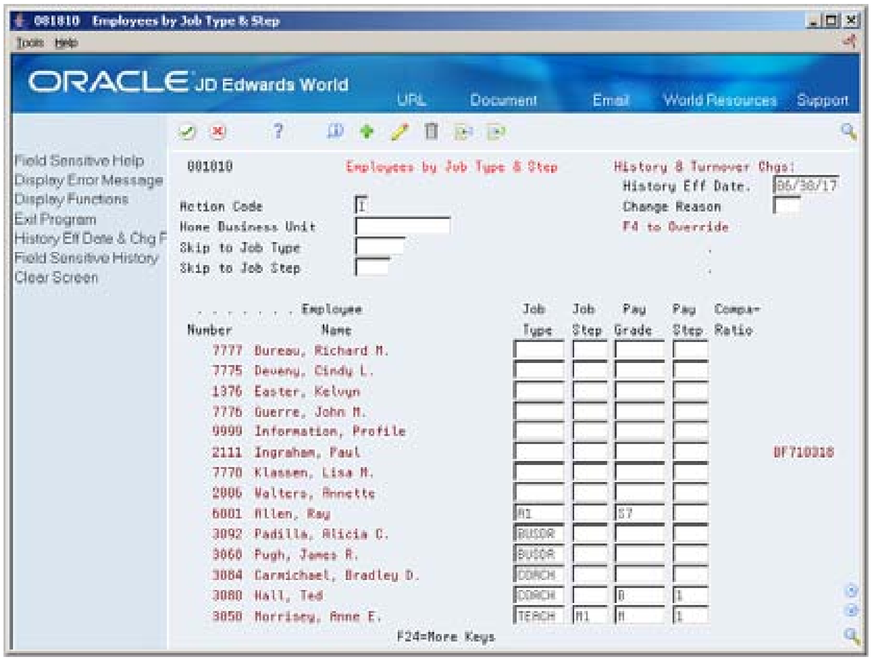
After you define jobs and enter employee information, you can review jobs by employees to verify that you entered the correct job information for each employee. You can also review a list of employees who are in different job types or job steps to determine whether their compa-ratios are equitable.

This program displays employee job information in a concise, easy-to-read format.

Caution: Although you can use this program to update job information for employees, JD Edwards World does not recommend that you do so because the information that you enter here overrides the default pay and position information that you specified in the human resources constants.

To review employees by job type and step

On Employees by Job Type & Step



1. To locate employees, complete one or more of the following fields:
   - History Effective Date
   - Change Reason
   - Home Business Unit
   - Skip to Job Type
   - Skip to Job Step
2. To review additional information, access the detail area.

Field	Explanation
History Eff Date	The date that you want all the changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date. *Form-specific information* You can enter a different effective date in the detail area for individual employees. The date you type in the History Effective Date field of the fold area overrides the date in the upper-right corner of this form.

Field	Explanation
Change Reason	To record a reason for the change in the Employee Turnover Analysis table (F08045) and the HR History table (F08042), enter a value in this field. Completing this field also updates the Employee Master table (F060116) and the Employee Multiple Job table (F060118) with the new change reason. The change reason code indicates the following: ▪ Why an active employee's master table record was changed ▪ Why an employee was terminated When the HR Monitor reads the information on this form, it creates a turnover record only if you enter a change reason in this field. If you do not want to create turnover records for a data change, leave this field blank. *Form-specific information* Enter a value in the Change Reason field in the upper-right corner of this screen only when you need to update the change reason for all the employees listed. You can enter a different change reason in the fold area for individual employees, which then overrides the change reason in the upper-right corner of this screen.

Processing Options

See Job Type & Step Revisions (P081810).

Reviewing Job Evaluation Information

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Job Comparisons by Factor**

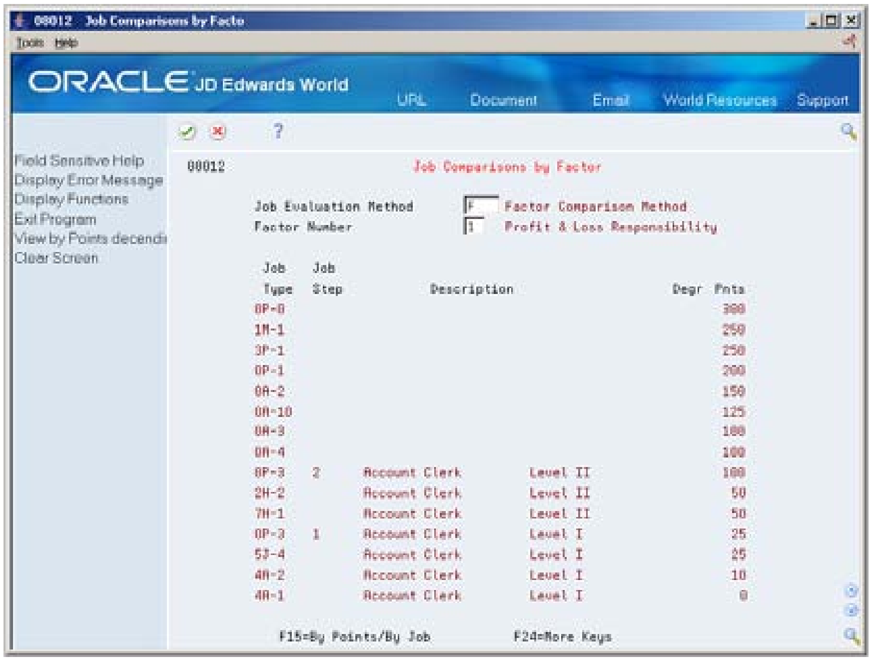
You evaluate jobs to determine an equitable salary range for each job within your organization. You can define one or more evaluation methods that you use to assign degrees or points to the critical aspects of each job. Typical evaluation methods include:

- Degree method
- Hay method
- Factor comparison method

After you define and evaluate jobs, you can review evaluation information for all the jobs that use a specific evaluation method. You can use this information to verify that you evaluated each job equitably.

To review job evaluation information

On Job Comparisons by Factor



Complete the following fields:

- Job Evaluation Method
- Factor Number

Field	Explanation
Factor Number	A sequential number that identifies each job evaluation factor. Each job evaluation factor should: ▪ Distinguish differences between jobs. ▪ Be common to most of the jobs that you are rating. A factor should exist in greater to lesser amounts so that it is easier to measure factors within a job. ▪ Have a maximum allowable number of points for each of the 10 levels of degree. ▪ Not overlap any other factor. ▪ Be accepted by employees and managers. ▪ Be clearly and objectively defined so that all of the people who rate jobs interpret the factor in the same way. For each job evaluation method, define enough factors to ensure that a person can adequately rate the job without being overwhelmed by a large number choices. For example, you might set up the following job evaluation factors for the method, Degree: ▪ Experience ▪ Problem solving ▪ Accountability

Processing Options

See Job Comparisons by Factor (P08012).

Reviewing Pay Ranges for Jobs

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Ranges by Job**

Alternatively, you can access Pay Ranges by Job from Job Entry and Evaluation.

After you define and evaluate the jobs for your organization, the system automatically creates a pay range (minimum, midpoint, and maximum rate) for each job, based on the job evaluation points. To verify that the pay ranges for your jobs are equitable and appropriate for the job duties and the geographic location where each job is performed, you can review pay ranges for jobs.

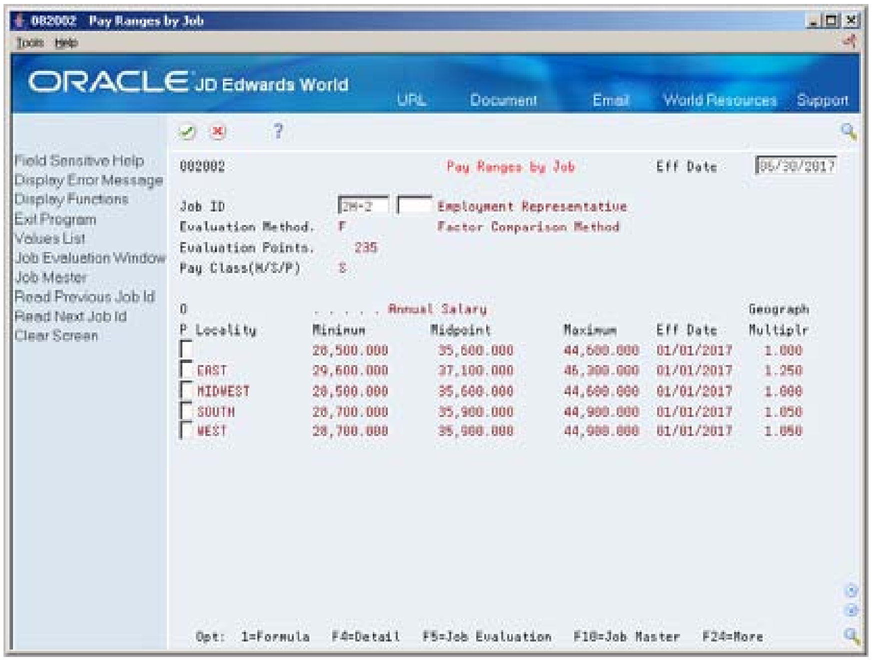
Before You Begin

- Evaluate the job and verify that it is not associated with a pay grade step. See *Entering Job Evaluation Information*.

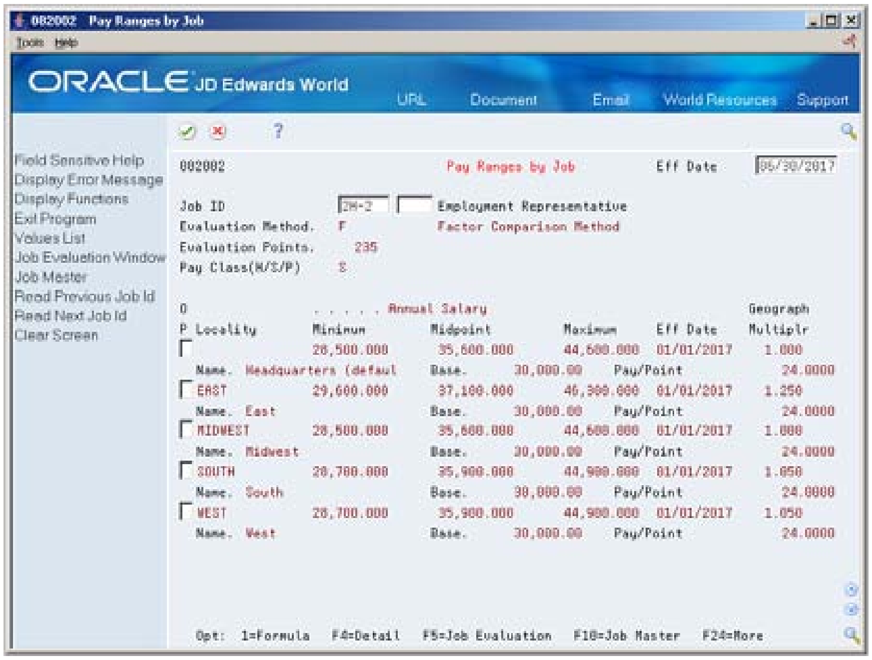
- Verify that the job has a pay class. (The pay class defines the way in which an employee who works in the job is paid. Valid pay classes include salary, hourly, and piecework.) See *Entering Initial Job Information*.
- Set up pay range formulas. See *Defining Pay Information*.

To review pay ranges for jobs

On Pay Ranges by Job



1. Complete the following field:
   - Job ID
2. Complete the following optional field, or let the system use the current date:
   - Effective Date
3. To review additional information, access the detail area.



See Also

- *Reviewing Pay Ranges for Pay Grades (P082001)* for information about reviewing pay ranges for jobs that are associated with pay grades steps

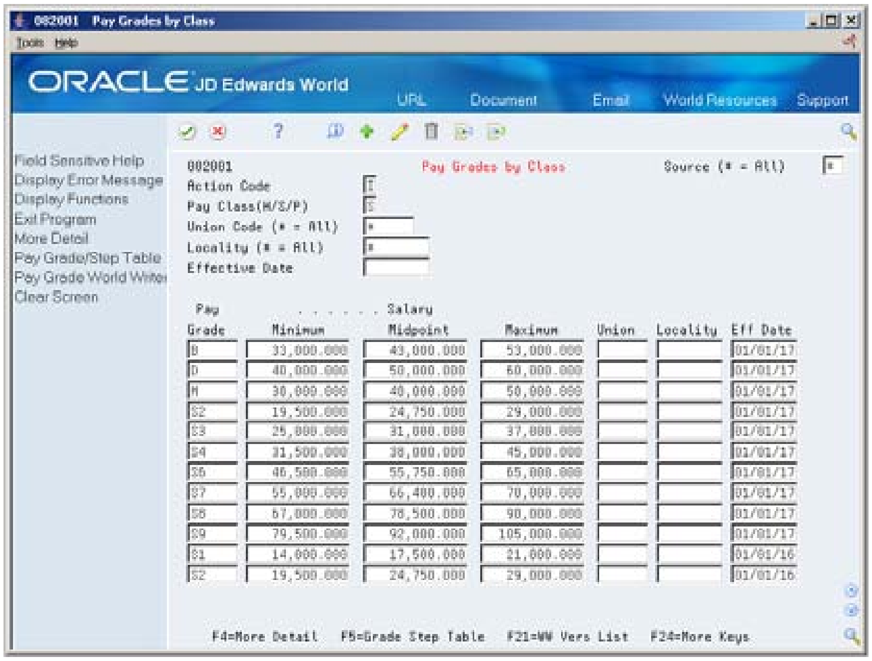
Reviewing Pay Ranges for Pay Grades

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), type **29** in the command line From Job Specifications Setup (G08J4), choose **Pay Grades by Class**

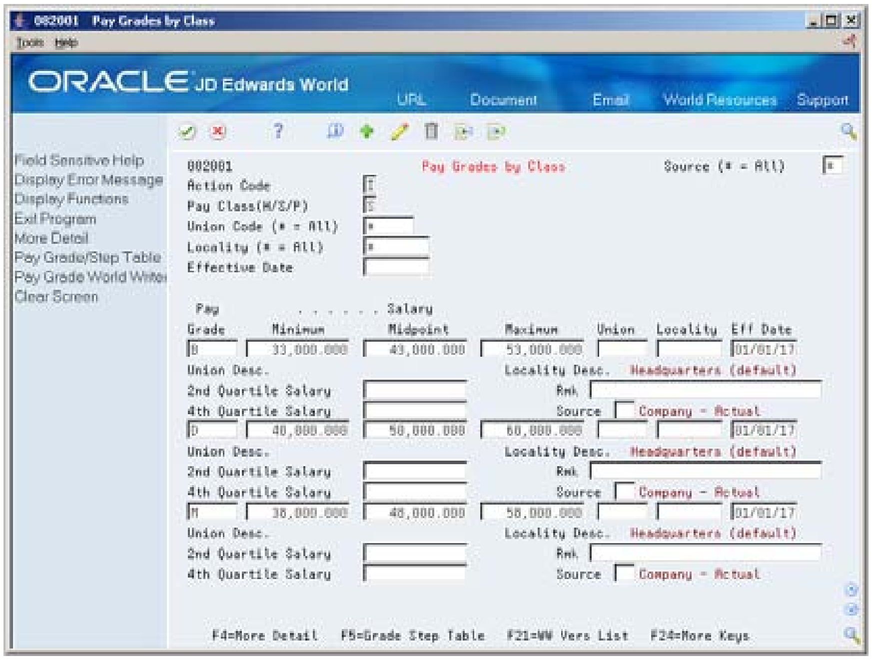
When you define a job, you can enter a pay grade for it. The pay grade defines the pay range (minimum, midpoint, and maximum rate) for the job. To verify that the pay ranges for your pay grades are equitable and appropriate for each job to which these grades are assigned, and for the geographic location where each job is performed, you can review the pay ranges for pay grades.

To review pay ranges for pay grades

On Pay Grades by Class



1. Complete the following field:
   - Pay Class (H / S / P)
2. Complete any of the following optional fields:
   - Source
   - Union Code
   - Locality
   - Effective Date
3. To review additional information, access the detail area.



Field	Explanation
Source	A user defined code (08 / SS) that identifies the source of the salary information. To display all pay grades regardless of the source, place an asterisk (*) in this field.
Minimum	The minimum salary or hourly rate allowed for a pay grade. The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is lower than the minimum rate for the pay grade.
Midpoint	The midpoint salary or hourly rate for a pay grade or pay range. For job IDs with a defined pay grade, you enter the midpoint amount in the Pay Grade table (F082001). For job IDs that you evaluated by points, the system calculates the midpoint amount using a Pay Range Formula table (F08290). The system calculates a compa-ratio (data item #CRA) for an employee by dividing the employee's salary or rate by the midpoint for the employee's pay grade.
Maximum	The maximum salary or hourly rate for a pay grade. The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is higher than the maximum rate for the pay grade.

Processing Options

See Pay Grade/Salary Range Information (P082001).

Update Jobs Globally

Updating Jobs Globally

	From Human Resources (G08), choose Job Specifications From Job Specifications (G08J1), enter 27 From Job Specifications Advanced and Technical Operations (G08J3), choose Update Job Information into Employee Master

When you change the job specifications for one or more of the jobs in your organization, you can automatically update the job information for the employees that are assigned to those jobs. For example, if you change the pay grade for the job named Accountant, you do not need to individually change the pay grades for all the accountants in your organization. Instead, you can run a program that globally updates the pay grades for the employees affected by the pay grade change.

When you run this program, the system updates the job information in your employees' record to match the information in the Job Master table. When you run this program, the system generates a list of all the employee records that are affected by the update.

Caution: When you update jobs globally, the system updates employees' salaries and hourly rates when the following are true:

You have set up the History Constants (G08H4/2) so that the pay rates source is the Pay Grade Step Table.

The update process changes the pay grade step.

The system also updates the employees' records with all of the information associated with the job, except the pay class and pay frequency. This means that if you have overwritten some default job information for individual employees, you must re-enter that override information after you update job information globally. For example, you might have entered a pay grade step for some employees that differs from the default pay grade step for the job. After you update job information globally, you must re-enter the pay grade step information for those employees.

Before You Begin

- Make any changes to job information that you want to reflect in your employees' records.

```
 08801                                       JD Edwards World                                 Page - . . .         4
                                          Employees Affected By Update                        Date - . . .  6/18/17
                                                                                                            Proof
   . . . Employee . . .                                 . . . Job . . .
 Number          Name                                Type   Step Description
 -------- ---------------------------------------- ------ ---- ---------------------------------
     3068 Pugh, James R.                             BUSDR
             P P Pay    Pay  EEO Work S      Benefit Union  . . . . . . Category Codes . . . . . .      Annual       Hrs/
             F C Grade  Step Job Comp C FLSA Group   Code   001 002 003 004 005 006 007 008 009 010     Salary       Year
             - - ------ ---- --- ---- - ---- ------- ------ --- --- --- --- --- --- --- --- --- --- ------------- --------
     After : M H             001          Y                                                              6.149,52  1040,00
     Before: M H             001 5651     Y          BUS                                                 6.149,52  1040,00
   . . . Employee . . .                                 . . . Job . . .
 Number          Name                                Type   Step Description
 -------- ---------------------------------------- ------ ---- ---------------------------------
     3076 O'Neil, Thelma P.                          COACH
             P P Pay    Pay  EEO Work S      Benefit Union  . . . . . . Category Codes . . . . . .      Annual       Hrs/
             F C Grade  Step Job Comp C FLSA Group   Code   001 002 003 004 005 006 007 008 009 010     Salary       Year
             - - ------ ---- --- ---- - ---- ------- ------ --- --- --- --- --- --- --- --- --- --- ------------- --------
     After :   S             001          Y                                                              1.998,88  2080,00
     Before: M H             03           Y  FACBEN                                                      1.998,88  2080,00
   . . . Employee . . .                                 . . . Job . . .
 Number          Name                                Type   Step Description
 -------- ---------------------------------------- ------ ---- ---------------------------------
     3076 O'Neil, Thelma P.                          TEACH  B2   Teacher              Bachelors 1 ye
             P P Pay    Pay  EEO Work S      Benefit Union  . . . . . . Category Codes . . . . . .      Annual       Hrs/
             F C Grade  Step Job Comp C FLSA Group   Code   001 002 003 004 005 006 007 008 009 010     Salary       Year
             - - ------ ---- --- ---- - ---- ------- ------ --- --- --- --- --- --- --- --- --- --- ------------- --------
     After : M S B      2    001          Y                                                             37.000,00  1480,00
     Before: M S B      1    001 8810     Y  FACBEN                                                     35.000,00  2080,00
   . . . Employee . . .                                 . . . Job . . .
```

What You Should Know About

Employees with contract calendars

For employees whose records are attached to contract calendars, you cannot make changes to any of the data items that affect the employee's salary. For such employees, you must use Contract Calendar Window to change pay information.

Processing Options

See Update Employees With Job Information (P08801).

Work with Obsolete Jobs

Working with Obsolete Jobs

Occasionally, a job that you have defined becomes obsolete. A job can become obsolete for many reasons, such as:

- Your organization undergoes a restructuring and eliminates one or more jobs
- You restructure the naming conventions for your jobs

When a job becomes obsolete, you can do one of the following:

- Delete the job from the Job Master table
- Change the status of the job to indicate that is inactive

Deleting the job from the Job Master table conserves computer disk space and eliminates obsolete information. However, after you delete a job, you cannot use it for review or for historical reporting purposes.

To track historical records of all the jobs within your organization, you can change the status of obsolete jobs rather than delete them. After you change a job's status to indicate that it is inactive, you should no longer assign that job to active employees. The inactive job remains in the Job Master table.

After you delete a job from the Job Master table, or change a job's status to inactive, you must change the employee records of each active employee who is assigned to the deleted or inactive job. When you change these employee records, you manually replace the obsolete job ID with a valid job ID.

To identify the employees assigned to obsolete jobs, you can print the report, Invalid Job IDs in Employee Master.

Working with obsolete jobs includes:

- Changing the Status of a Job
- Identifying Employees Assigned to Obsolete Job IDs

What You Should Know About

Deleting jobs	To delete an obsolete job from your system, locate the job on Job Entry and Evaluation and use the Delete action. After you delete a job, you can no longer access the profile data associated with it. To delete this profile data, you must run a purge program. See *Purging Profile Data.*

Changing job IDs for employees

When you replace an obsolete job ID in an employee's record, verify that additional job-related information for the employee, such as the pay frequency, pay class, and pay grade step, are appropriate for the new job.

See *Revising Employee Information*.

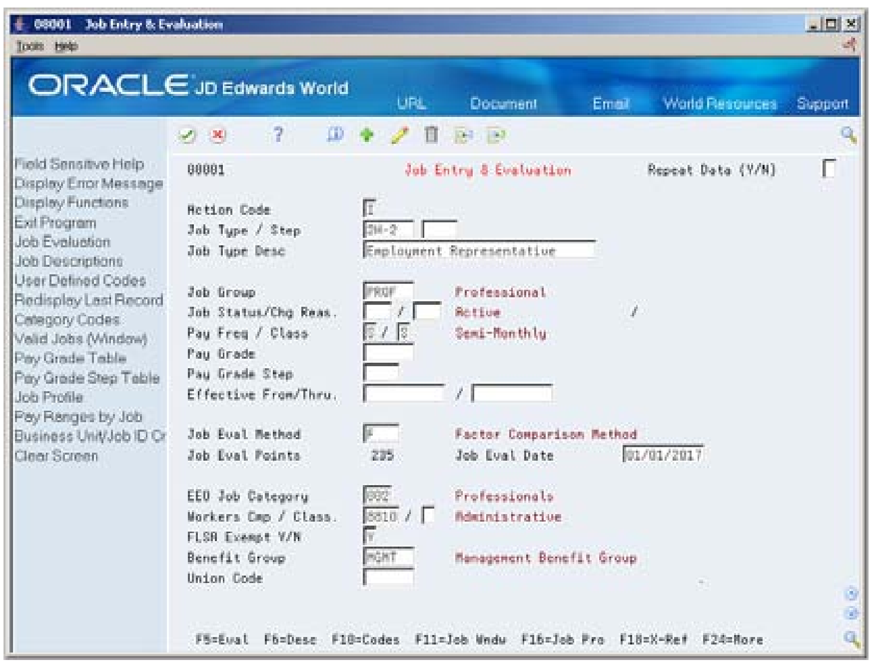
Changing the Status of a Job

From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), choose **Job Entry and Evaluation**

If your organization needs to keep historical records of obsolete jobs, you can change the status of obsolete jobs rather than delete them. When you change a job's status, you indicate that it is inactive (historical). You should not assign inactive jobs to active employees.

To change the status of a job

On Job Entry and Evaluation



1. Locate the obsolete job ID.
2. Change the value in the following field:
   - Job Status
3. Complete the following optional fields:
   - Change Reason

- Effective From Date

What You Should Know About

Job Status	When you enter a Job ID for an employee, you use the Job Entry and Evaluation function to determine the status of a job. You should not assign historical jobs to active employees.
Updating user-defined codes for job type	A processing option for Job Entry and Evaluation allows you to add job types to the appropriate user defined code tables directly from this form. Therefore, you do not need to set up user defined code tables 07/G before you define jobs.

Identifying Employees Assigned to Obsolete Job IDs

From Job Specifications (G08J1), enter 27
From Job Specifications Advanced Operations (G08J3), choose Invalid Job IDs in Employee Master

When a job becomes obsolete, you can delete it from the Job Master table. Then, for each employee that is assigned to the obsolete job, you must manually replace the obsolete job ID with a valid job ID. To identify the employees who are currently assigned to obsolete jobs, review the report, Invalid Job IDs in Employee Master.

```
 08802                                    JD Edwards World                           Page - . . .        2
                                  Invalid Job IDs in Employee Master                 Date - . . . 11/25/17

    . . . Employee . . .                              . . . Job . . .
     Number          Name                 Type         Step             Description                 Not Found In
     ------ ---------------------- ----------- ------------- --------------------------- ------------------------
     5522   Hanrahan, Peter S.                                                            . Job Infor. & Emp. Jobs
     7702   Derrick, Leslie                       5J-3          Purchasing Manager        . Job Infor. & Emp. Jobs
     7775   Deveny, Cindy L.                                                              . Job Infor. & Emp. Jobs
     7776   Guerre, John M.                                                               . Job Infor. & Emp. Jobs
     7777   Bureau, Richard M.                                                            . Job Infor. & Emp. Jobs
     7778   Klassen, Lisa M.                                                              . Job Infor. & Emp. Jobs
     9999   Information, Profile                                                          . Job Infor. & Emp. Jobs
```

Review Job Reports

Reviewing Job Reports

When you need to review information about the jobs within your organization, you can print job reports to verify:

- Job descriptions
- Job evaluations
- Pay ranges for jobs
- Pay grade step progression

To review the auxiliary information (such as job descriptions, skills required, authority level, and so on) for one or more jobs within your organization, you can print profile data reports. You can review profile data by individual job or by job data types.

After you define and evaluate jobs, you can print job evaluation reports. You can use these reports to review the evaluation information for all of the jobs that use a specific evaluation method. Use this information to verify that the salary ranges for your jobs are fair and equitable.

To review information about pay grade step progression, you can print reports that show salary ranges and employee salary reviews. Pay grade step progression is the sequence in which an employee moves from one pay step to the next pay step in sequence.

For example, you might define a pay grade, M, that has pay steps 1, 2, and 3. Employees in step 1 earn 10.00 per hour, employees in step 2 earn 10.50 per hour, and employees in step 3 earn 11.00 per hour.

Reviewing job reports includes:

- Reviewing the Job Profile Information Report
- Reviewing the Jobs by Data Type Report
- Reviewing the Job Evaluation Factor Data Report
- Reviewing the Job Data and Evaluation Points Report
- Reviewing the Employees Below Pay Grade Minimum Report
- Reviewing the Grade/Step and Next Grade/Step Values Report
- Reviewing the Pay Grade/Step and Quartile Values Report
- Reviewing the Compensable Factors Table Report
- Reviewing the Pay Ranges by Job Report

- Reviewing the Pay Grade/Salary Ranges Report
- Reviewing the Employees Above Pay Grade Maximum Report

Reviewing the Job Profile Information Report

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), choose **Job Profile Information**

To review complete job information for each of the jobs you specify, print the Job Profile report. When you have a job opening within your organization, you can print this report and use it as a job posting notice.

The information that prints on this report is the same information that you can review online using Profile by Job. However, the report allows you to print information for several jobs at one time.

```
080412                                       JD Edwards World                                        Page Number        8
                                             Job Descriptions                                        Date         6/25/17

Job ID . . . . .  0A-3         Financial Analyst                             Pay Class / Freq . . . S / S
Job Group. . . .  FINAN        Finance & Administration                      Pay Grade/Step . . . . S4      /
Benefit Group. .  MGMT         Management Benefit Group                      FLSA Exempt Y/N. . . . N
Union Code . . .                                             .               Evaluation Method. . . F
EEO Job Cat. . .  002          Professionals                                 Evaluation Date. . . . 03/01/17
Workers Comp . .  8810 /       Administrative                                Evaluation Points. . .   400
Summary Description
==============================
               Responsible for projecting the financial status of the corporation. Measure
               against marketplace and competitors.  Compare from previous year and project
               for upcoming year.
Major Responsibilities
==============================
               1.  Oversee all financial reporting submitted to vendors and financial
                   instititions.
               2.  Handle the investment recommendations of company income
               3.  Provide monthly financial statements
               4.  Provide future financial assessments and projections.
Authority Level
==============================
    Level     Updated   PrevUpd         Parallel Jobs                Next level job          #Subordina
  ---------- -------- -------- ----------------------------- ----------------------------- ------------
  CLERK      01/01/17
  SECRETARY  01/01/17
Background Requirements
==============================
  BS         01/01/17            Emphasis in Finance
  MS         01/01/17            Emphasis in Financial Mgmt
  Experience Required
==============================
   Position  Updated   PrevUpd   Description of Experience        Additional Comments        Years Req
  ---------- -------- -------- ----------------------------- ----------------------------- ------------
  ACCOUNT    01/01/17                                                                              5.00
  FIN ANALST 01/01/17                                                                              5.00
                                                                          ------------- ------------
                                                                              Total               10.00
```

Processing Options

See Print Job Descriptions (P080412).

See Also

- *Reviewing Profile Data* for information about reviewing job profile information online

Reviewing the Jobs by Data Type Report

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), choose **Job Data Type**

To review a list of all jobs with information in a particular profile data type (such as major responsibilities, and authority level), print the Jobs by Data Type report. The information that prints on this report is the same information that you can review online using Profile Data Entry.

For each job, the system lists data types in alphabetical order.

The following sample report displays the authority level associated with each job.

```
080402                                          JD Edwards World                                     Page Number       4
                                          Job Information by Data Type                               Date         6/25/17


Authority Level
==============================
Employee       Name                  Updated   PrevUpd        Parallel Jobs            Next level job   #Subordina
----------- ----------------------- -------- -------- ------------------------ ---------------------- ------------
  Level    . . . . . CLERK
0A-1        Accounting Manager       01/01/17
0A-3        Financial Analyst        01/01/17
                                                                                                       ------------
                                                                 Total for: CLERK

  Level    . . . . . HIGH
A2          Vice President           01/01/92
                                                                                                       ------------
                                                                 Total for: HIGH

  Level    . . . . . JR. ACCT
0A-1        Accounting Manager       01/01/17
                                                                                                       ------------
                                                                 Total for: JR. ACCT
  Level    . . . . . SECRETARY
0A-1        Accounting Manager       01/01/17
0A-3        Financial Analyst        01/01/17
                                                                                                       ------------
                                                                 Total for: SECRETARY
  Level    . . . . . SENIOR
A0          Chief Executive Officer  01/01/17          A1     President                                     400.00
2H-1        Human Resource Manager   01/01/17          Upper level management
                                                                                                       ------------
                                                                 Total for: SENIOR                          400.00
  Level    . . . . . SR. ACCT
0A-1        Accounting Manager       01/01/17
                                                                                                       ------------
                                                                 Total for: SR. ACCT
                                                                                                       ------------
                                                                 Total for: Authority Level                 400.00
```

Processing Options

See Job Information by Data Type (P080402).

See Also

- *Reviewing Profile Data* for information about reviewing jobs by data type online

Reviewing the Job Evaluation Factor Data Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Job Evaluation Factor Data**

After you evaluate jobs, you can review the evaluation methods, factors, and points that are assigned to each job. Use this information to compare the job evaluations for similar jobs and to determine whether the reporting structure of the jobs accurately reflects their evaluations.

081450 JD Edwards World Page - . . . 2
Job Evaluation Factor Data Date - . . . 6/25/17

Job Typ	Job Step	Description	Eval Meth	Factor Description	Job Deg	Job Pts	Table Pts	Evaluation Memo Code	Weight %
A0		Chief Executive Officer	D	Know How	10	500	500	H-H5	60.00
				Problem Solving	10	350	350	H-H5	10.00
				Accountability	10	450	450	H-H5	30.00
						-----	-----		------
						1300	1300		100.00
A1		President	D	Know How	10	500	500	H-H3	
				Problem Solving	9	250	350	H-H5	
				Accountability	10	450	450	H-5	
						-----	-----		------
						1200	1300		
A2		Vice President	D	Know How	9	450	500		
				Problem Solving	10	350	350		
				Accountability	9	425	450		
						-----	-----		------
						1225	1300		
0A-1		Accounting Manager	D	Know How	8	400	500	CELLVG	33.00
				Problem Solving	10	350	350	CELL4A	34.00
				Accountability	9	425	450	CELL5G	33.00
						-----	-----		------
						1175	1300		100.00
0A-10		Purchasing Agent	F	Profit & Loss Responsibility		125	300		60.00
				Number of Subordinates		0	250		10.00
				Technical Skills		75	200		30.00
				Education		50	100		
						-----	-----		------
						250	850		100.00
0A-2		Senior Accountant	F	Profit & Loss Responsibility		150	300		10.00
				Number of Subordinates		100	250		10.00
				Technical Skills		200	200		40.00
				Education		100	100		40.00
						-----	-----		------
						550	850		100.00
0A-3		Financial Analyst	F	Profit & Loss Responsibility		100	300		
				Number of Subordinates		150	250		
				Technical Skills		50	200		
				Education		100	100		
						-----	-----		------
						400	850		
0A-4		Accountant	F	Profit & Loss Responsibility		100	300		
				Number of Subordinates		50	250		
				Technical Skills		100	200		
				Education		100	100		
						-----	-----		------
						350	850		
0P-0		Finance Director	F	Profit & Loss Responsibility		300	300		
				Number of Subordinates		100	250		

Reviewing the Job Data and Evaluation Points Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **World Writer**

After you evaluate jobs, you can review detailed job information about the job evaluation. The Job Data and Evaluation Points report shows more detailed job information than the Job Evaluation Factor data report. To compare job evaluations in relation to the associated pay grade for each job, print Job Data and Evaluation Points.

Job Data & Evaluation – Date: 06/25/17

Job Typ	Job Step	Description	Job Group	Description	Eval Meth	Description	Eval Date	Eval Pnts	P C	Pay Grade	F L	EEO Job Category	Workers Comp	Bene Plan
A0		Chief Executive	EXEC	Executives	D	Degree Method	03/01/17	1300	S	S9	Y	Officials and	Administrat	
A1		President	EXEC	Executives	D	Degree Method	03/01/17	1200	S	S7	Y	Officials &	Administrat	
A2		Vice President	EXEC	Executives	D	Degree Method	03/01/17	1225	S	S9	Y	Officials &	Administrat	
BUSDR		Bus Driver				No Evaluation Co			H		Y	Officials &	No Worker’s	
COACH		Coach				No Evaluation Co			S		Y	Officials &	No Worker’s	
TEACH	M2	Teacher				No Evaluation Co			S	M	Y	Officials &	No Worker’s	
	M1	Teacher				No Evaluation Co			S	M	Y	Officials &	No Worker’s	
	D2	Teacher				No Evaluation Co			S	D	Y	Officials &	No Worker’s	
	D1	Teacher				No Evaluation Co			S	D	Y	Officials &	No Worker’s	
	B2	Teacher				No Evaluation Co			S	B	Y	Officials &	No Worker’s	
	B1	Teacher				No Evaluation Co			S	B	Y	Officials &	No Worker’s	
TRNER		Trainer	SERVIC	Service Person		No Evaluation Co			S		Y	Professionals	Administrat	
0A-1		Accounting Mana	EXEC	Executives	D	Degree Method	03/01/17	1175	S	S7	Y	Officials &	Administrat	
0A-10		Purchasing Agen	ADMIN	Administrative	F	Factor Compariso	01/01/17	250	H		N	Office & Cle	Administrat	
0A-2		Senior Accounta	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	550	S	S4	Y	Officials &	Administrat	
0A-3		Financial Analy	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	400	S	S4	N	Professionals	Administrat	
0A-4		Accountant	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	350	S		N	Professionals	General Lia	
0P-0		Finance Directo	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	650	S		Y	Officials &	Administrat	
0P-1		Asst Finance Di	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	450	S		Y	Officials &	Administrat	
0P-2		Accountant	FINAN	Finance & Admi		No Evaluation Co			S		Y	Officials &	Administrat	
0P-3	2	Account Clerk	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	200	S		Y	Officials &	Administrat	
	1	Account Clerk	FINAN	Finance & Admi	F	Factor Compariso	03/01/17	100	S		Y	Officials &	Administrat	
1M-1		MIS Manager	MGR	Managers	F	Factor Compariso	03/01/17	800	S	S5	Y	Officials &	Administrat	
1M-2		Project Leader	CMPSYS	Computer & Sys	E	Evalucomp Method	03/01/17	575	S		Y	Professionals	Computer Pr	
2H-1		Human Resource	MGR	Managers	D	Degree Method	03/01/17	1125	S	S4	Y	Officials &	Administrat	
2H-2		Employment Repr	PROF	Professional	F	Factor Compariso	01/01/17	235	S		Y	Professionals	Administrat	
2H-5		EEO Specialist	ADMIN	Administrative		No Evaluation Co			S		Y	Professionals	Administrat	
3P-1		Payroll Manager	MGR	Managers	F	Factor Compariso	01/01/17	500	S		Y	Officials &	** NOT FOUN	
4A-1		Administrative	ADMIN	Administrative	F	Factor Compariso	03/01/17	200	H		N	Office and Cle	Administrat	
4A-2		Secretary	OFFICE	Office/Clerica	F	Factor Compariso	01/01/17	90	H		N	Office & Cle	Administrat	
5J-4		Fire Fighter	TECH	Technical Grou	F	Factor Compariso	01/01/17	145	H		Y	Technicians	Ontario	0
5J-5		Electrician	CRAFT	Craft Workers	F	Factor Compariso	01/01/17	325	H		N	Technicians	Laborer	
5J-6	SR	Senior Engineer	TECH	Technical Grou		No Evaluation Co			H		N	Technicians	** NOT FOUN	
	JR	Junior Engineer	TECH	Technical Grou		No Evaluation Co			H		N	Technicians	** NOT FOUN	
5J-7		Designer	CRAFT	Craft Workers		No Evaluation Co			H		Y	Craft Workers	** NOT FOUN	
5J-8		Trainer	SERVIC	Service Person		No Evaluation Co			S	B	Y	Professionals	Administrat	
5J-9	A.2	Journey Person	CRAFT	Craft Workers		No Evaluation Co			H		Y	Craft Workers	** NOT FOUN	
	A.1	Journey Person	CRAFT	Craft Workers		No Evaluation Co			H		Y	Craft Workers	** NOT FOUN	
		Journey Person	CRAFT	Craft Workers		No Evaluation Co			H		Y	Craft Workers	** NOT FOUN	
6G-2		Purchasing Mana	MGR	Managers		No Evaluation Co			H		Y	Officials &	Administrat	
6S-1		Security Superv				No Evaluation Co			S		N	Officials &	Administrat	
6S-3		Security Screen				No Evaluation Co			H		N	Operatives	Administrat	
6S-5	ARMN	Security Guard				No Evaluation Co			H		N	Operatives	Administrat	
	ARM	Security Guard				No Evaluation Co			H		N	Operatives	Administrat	
61		Foreman	CRAFT	Craft Workers		No Evaluation Co			H		N	Craft Workers	Field Super	7000
62		Laborer	CRAFT	Craft Workers		No Evaluation Co			H		N	Craft Workers	Field Super	4000
63	J	Operator	LABOR	Laborer - Unsk		No Evaluation Co			H		N	Craft Workers	Field Super	
	A	Operator	LABOR	Laborer - Unsk		No Evaluation Co			H		N	Craft Workers	Field Super	
		Operator	CRAFT	Craft Workers		No Evaluation Co			H		N	Laborers	Laborer	8000
64	SR	Engineer	TECH	Technical Grou		No Evaluation Co			H		Y	Technicians	** NOT FOUN	
	PR	Engineer				No Evaluation Co			S		Y	Officials &	Administrat	
	JR	Engineer	TECH	Technical Grou		No Evaluation Co			H		Y	Technicians	** NOT FOUN	

Reviewing the Employees Below Pay Grade Minimum Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
From Pay Grade/Step Administration (G08J2), choose **World Writers**

Your organization might define salary ranges for pay grades, but allow some employee salaries to be higher than the maximum salary in the range or lower than the minimum salary in the range. For example, an employee in pay grade H1 might earn 4.00 per hour, even though the salary range for this pay grade is 4.10 per hour to 7.30 per hour.

To review a list of the employees whose salaries are less than the minimum salary that is defined for their pay grades, print the Employees Below Pay Grade Minimum report. Use this report to determine whether an individual’s salary should be adjusted. You can also use this report to determine whether your organization needs to adjust the salary ranges for its pay grades.

Address No.	Alpha Name	Effective Date	Home Cost Center Location	Job Title	Pay Grade	Max Salary	Annual Sal.	Difference
6001	Allen, Ray	01/01/17	General Accounts Headquarters (default)	President	S7	75,000.00	70,000.000	5.000,000
6005	Ellis, Fred	01/01/17	General Accounts Headquarters	Operator	H7	39,041.60	22.100.000	39.019,500
2129	Jackson, John	01/01/17	General Accounts Headquarters	Fin Analyst	S4	50,000.00	45,000.000	5.000,000
3076	O'Neil, Thelma P.	01/01/17	General Accounts Headquarters	Teacher	B	35,000.00	35.000,000	

Reviewing the Grade/Step and Next Grade/Step Values Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
From Pay Grade/Step Administration (G08J2), choose **World Writers**

To review the pay grade and pay step progression within your organization, print the Grade / Step and Next Grade / Step Values report. You can use this report to verify the step progression within your organization.

Pay Grade/Step & Next Pay Grade/Step Values — Page - 2 — Date - 06/25/17

Union Code	Description	Loc	Description	Src	Pay Grade	Grad Step	Step Rate	Effective Date	Next Pay Grade	Next Pay Grade Step	Hrs Day	Days Year
			Headquarters (defa		H5			01/01/17				
			Headquarters (defa		H6			01/01/17				
			Headquarters (defa		H7			01/01/17				
			Headquarters (defa		H8			01/01/17				
			Headquarters (defa		H9			01/01/17				
			Headquarters (defa		M			01/01/17				
			Headquarters (defa		M	1	38,000.000	01/01/17	M	2	8.00	185
			Headquarters (defa		M	2	40,000.000	01/01/17	M	3	8.00	185
			Headquarters (defa		M	3	42,000.000	01/01/17			8.00	185
			Headquarters (defa		S2			01/01/17				
			Headquarters (defa		S3			01/01/17				
			Headquarters (defa		S4			01/01/17				
			Headquarters (defa		S6			01/01/17				
			Headquarters (defa		S7			01/01/17				
			Headquarters (defa		S8			01/01/17				
			Headquarters (defa		S9			01/01/17				

Reviewing the Pay Grade/Step and Quartile Values Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
From Pay Grade/Step Administration (G08J2), choose **World Writers**

To review salary information for the pay grades within your organization, print the Pay Grade / Step and Quartile Values report. Use this report to verify the salary range for each pay grade and pay grade step.

Print Pay Grade/Step & Quartile Values — Page - 3 — Date - 06/25/17

Union Code	Locality	Src	Pay Grade	Grad Step	Step Rate	Minimum	2nd Quartile	Midpoint	4th Quartile	Maximum	Effective Date
	WEST		H6			16.600		18.200		19.800	01/01/17
	WEST		H7			19.000		20.800		22.600	01/01/17
	WEST		H8			21.700		24.400		26.200	01/01/17
	WEST		S1			14,600.000		18,100.000		21,600.000	01/01/17
	WEST		S2			20,100.000		25,350.000		29,000.000	01/01/17
	WEST		S3			25,600.000		31,600.000		37,600.000	01/01/17
	WEST		S4			39,100.000		47,600.000		56,100.000	01/01/17
	WEST		S5			39,100.000		47,600.000		56,100.000	01/01/17
	WEST		S6			47,100.000		56,350.000		65,600.000	01/01/17
	WEST		S7			55,600.000		67,080.000		77,850.000	01/01/17
	WEST		S8			67,600.000		79,100.000		90,600.000	01/01/17
	WEST		S9			80,100.000		92,600.000		105,600.000	01/01/17

Reviewing the Compensable Factors Table Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **World Writer**

After you evaluate jobs, you can print the Compensable Factors Table report to review the points or degrees that are assigned to each job evaluation method. For example, you can use this report to determine the number of points that each job evaluation method assigns to the factor for problem solving ability.

This report lists the information entered for each job evaluation method in the Compensable Factors table.

Compensable Factors Tables
Page - 1
Date - 06/25/17

Eval Method	Description	Factor Number	Description	Eval Pnts	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr	Pnts Degr
D	Degree Method	1	Know How	500	500	450	400	350	300	250	200	150	100	50
		2	Problem Solving	350	350	250	175	125	100	80	60	40	20	10
		3	Accountability	450	450	425	375	350	300	250	200	150	100	50
Sum				1300	1300	1125	950	825	700	580	460	340	220	110
E	Evalucomp Method	1	Profit & Loss Responsibility	300										
		2	Number of Subordinates	250										
		3	Technical Skills	200										
		4	Working Conditions	150										
		5	Education	100										
Sum				1000										
F	Factor Comparison Method	1	Profit & Loss Responsibility	300										
		2	Number of Subordinates	250										
		3	Technical Skills	200										
		4	Education	100										
Sum				850										
H	Hay Method	1	Know-How	500	500	450	400	350	300	250	200	150	100	50
		2	Problem Solving	350	350	250	175	125	100	80	60	40	20	10
		3	Accountability	450	450	425	375	350	300	250	200	150	100	50
Sum				1300	1300	1125	950	825	700	580	460	340	220	110

Reviewing the Pay Ranges by Job Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Ranges by Job** under the **Job Reports** heading

To review information about the pay ranges that you have defined for each job, print the Pay Ranges by Job report. You can analyze this information to determine whether the pay ranges for the jobs are equitable. The information that prints on this report is the same information that you can review online using Pay Ranges by Job.

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JD Edwards World
Pay Ranges by Job
Page - . . . 13
Date - . . . 6/25/16

Job ID . . . . . . 2H-2 Employment Representative
Evaluation Method. F Factor Comparison Method
Evaluation Points. 235
Pay Class(H/S/P) . S
As of Date 01/01/17

Locality	Name	Minimum	Midpoint	Maximum	Eff Date	Multiplr	Based On	Pay/Points
	Headquarters (default)	28,600.000	35,700.000	44,600.000	01/01/17	1.000	30,000.00	24.0000
EAST	East	29,700.000	37,100.000	46,400.000	01/01/17	1.250	30,000.00	24.0000
MIDWEST	Midwest	28,600.000	35,700.000	44,600.000	01/01/17	1.000	30,000.00	24.0000
SOUTH	South	28,800.000	36,000.000	45,000.000	01/01/17	1.050	30,000.00	24.0000
WEST	West	28,800.000	36,000.000	45,000.000	01/01/17	1.050	30,000.00	24.0000

Processing Options

See [Pay Ranges by Job (P082450)](#).

Reviewing the Pay Grade/Salary Ranges Report

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), choose **Pay Grade/Step Administration** From Pay Grade/Step Administration (G08J2), choose **World Writers**

To review the salary ranges for the pay grades and pay steps within your organization, print the Pay Grade / Salary Ranges report. You can review this information by pay class and geographic location. Use this information to determine whether the salary ranges for your pay grades are equitable.

Pay Grade/Salary Ranges — Page 1 — Date - 06/25/17

P C	Pay Grade	Minimum Salary	Midpoint Salary	Maximum Salary	Effective Date	Loc	Description	Src	Description
H	H1	4.100	5.700	7.300	01/01/17		Headquarters (d		Company - Actua
H	H2	6.500	8.100	9.700	01/01/17		Headquarters (d		Company - Actua
H	H4	11.300	12.900	14.500	01/01/17		Headquarters (d		Company - Actua
H	H5	13.700	15.000	16.900	01/01/17		Headquarters (d		Company - Actua
H	H6	16.100	17.700	19.300	01/01/17		Headquarters (d		Company - Actua
H	H7	18.500	20.300	22.100	01/01/17		Headquarters (d		Company - Actua
H	H8	21.200	24.500	25.700	01/01/17		Headquarters (d		Company - Actua
H	H9	24.800	26.600	28.400	01/01/17		Headquarters (d		Company - Actua
H	H1	4.100	5.700	7.300	01/01/17		Headquarters (d		Company - Actua
H	H2	6.500	8.100	9.700	01/01/17		Headquarters (d		Company - Actua
H	H4	11.300	12.900	14.500	01/01/17		Headquarters (d		Company - Actua
H	H5	13.700	15.000	16.900	01/01/17		Headquarters (d		Company - Actua
H	H6	16.100	17.700	19.300	01/01/17		Headquarters (d		Company - Actua
H	H7	18.500	20.300	22.100	01/01/17		Headquarters (d		Company - Actua
H	H8	21.200	24.500	25.700	01/01/17		Headquarters (d		Company - Actua
H	H9	24.800	26.600	28.400	01/01/17		Headquarters (d		Company - Actua
H	H1	4.100	5.700	7.300	01/01/16		Headquarters (d		Company - Actua
H	H2	6.500	8.100	9.700	01/01/16		Headquarters (d		Company - Actua
H	H3	8.900	10.500	12.100	01/01/16		Headquarters (d		Company - Actua
H	H4	11.300	12.900	14.500	01/01/16		Headquarters (d		Company - Actua
H	H5	13.700	15.000	16.900	01/01/16		Headquarters (d		Company - Actua
H	H6	16.100	17.700	19.300	01/01/16		Headquarters (d		Company - Actua
H	H7	18.500	20.300	22.100	01/01/16		Headquarters (d		Company - Actua
H	H8	21.200	24.500	25.700	01/01/16		Headquarters (d		Company - Actua
H	H9	24.800	26.600	28.400	01/01/16		Headquarters (d		Company - Actua
H	H1	4.600	6.200	7.800	01/01/17	WEST	West		Company - Actua
H	H2	7.000	8.200	10.200	01/01/17	WEST	West		Company - Actua
H	H3	9.400	11.000	12.600	01/01/17	WEST	West		Company - Actua
H	H4	11.800	13.400	15.000	01/01/17	WEST	West		Company - Actua
H	H5	14.200	15.800	17.400	01/01/17	WEST	West		Company - Actua
H	H6	16.600	18.200	19.800	01/01/17	WEST	West		Company - Actua
H	H7	19.000	20.800	22.600	01/01/17	WEST	West		Company - Actua
H	H8	21.700	24.400	26.200	01/01/17	WEST	West		Company - Actua
H	H1	4.600	6.200	7.800	01/01/17	WEST	West		Company - Actua
H	H2	7.000	8.200	10.200	01/01/17	WEST	West		Company - Actua
H	H3	9.400	11.000	12.600	01/01/17	WEST	West		Company - Actua
H	H4	11.800	13.400	15.000	01/01/17	WEST	West		Company - Actua
H	H5	14.200	15.800	17.400	01/01/17	WEST	West		Company - Actua
H	H6	16.600	18.200	19.800	01/01/17	WEST	West		Company - Actua
H	H7	19.000	20.800	22.600	01/01/17	WEST	West		Company - Actua
H	H8	21.700	24.400	26.200	01/01/17	WEST	West		Company - Actua
H	H1	4.600	6.200	7.800	01/01/16	WEST	West		Company - Actua
H	H2	7.000	8.200	10.200	01/01/16	WEST	West		Company - Actua
H	H3	9.400	11.000	12.600	01/01/16	WEST	West		Company - Actua
H	H4	11.800	13.400	15.000	01/01/16	WEST	West		Company - Actua
H	H5	14.200	15.800	17.400	01/01/16	WEST	West		Company - Actua
H	H6	16.600	18.200	19.800	01/01/16	WEST	West		Company - Actua
H	H7	19.000	20.800	22.600	01/01/16	WEST	West		Company - Actua
H	H8	21.700	24.400	26.200	01/01/16	WEST	West		Company - Actua

Reviewing the Employees Above Pay Grade Maximum Report

	From Human Resources (G08), choose Job Specifications From Job Specifications (G08J1), choose Pay Grade/Step Administration From Pay Grade/Step Administration (G08J2), choose World Writers

Your organization might define salary ranges for pay grades, but allow some employee salaries to be higher than the maximum salary in the range or lower than the minimum salary in the range. For example, an employee in pay grade H1 might earn 7.50 per hour, even though the salary range for this pay grade is 4.10 per hour to 7.30 per hour.

To review a list of the employees whose salaries are more than the maximum salary that is defined for their pay grades, print the Employees Above Pay Grade Maximum report. Use this report to determine whether an individual's salary should be adjusted. You can also use this report determine whether your organization needs to adjust the salary ranges for its pay grades.

6 Requisitions

Overview to Requisitions

Objectives

- To enter and approve requisitions
- To control the hiring process through requisitions

About Requisitions

You enter a requisition to begin the process of filling a vacancy within your organization. A vacancy is a job opening or unfilled head count (number of people) in a position.

A requisition contains information about the open position and job. You can use one requisition to fill multiple vacancies in a position. To help you stay within your position budgets, when you hire enough candidates to meet the head count for a position, the system can prevent you from hiring any more candidates for that position.

You can track the status of a requisition through its initial creation to approval or rejection. You can associate a candidate with one or more requisitions. When you hire an applicant or transfer an employee into a new position, the system automatically indicates that the person filled the requisition.

Working with requisitions includes the following tasks:

- Entering requisition information
- Working with requisitions
- Reviewing requisitions online
- Reviewing requisition reports

Enter Requisition Information

You enter a requisition to begin the process of filling one or more vacancies within your organization. Requisition information helps you to match a candidate to a vacancy.

When you enter a requisition, you can also track any additional information that is unique to your organization or your industry. For example, you can specify the skills that a candidate needs to perform the job. For example, if you need a senior consultant who speaks fluent Spanish, you can track Spanish fluency with the requisition.

To help you manage your workflow, you can enter a requisition before the appropriate manager has approved it. When you initially enter a requisition, you can indicate that it is waiting for approval. Then, after the requisition is approved, you can change the status of the requisition to indicate that it is approved.

To enter requisition information, complete the following tasks:

- Entering Initial Requisition Information
- Entering Requisition Profile Data
- Approving a Requisition

Entering Initial Requisition Information

	From Human Resources (G08), choose **Requisitions** From Requisitions (G08R1), choose **Requisition Entry**

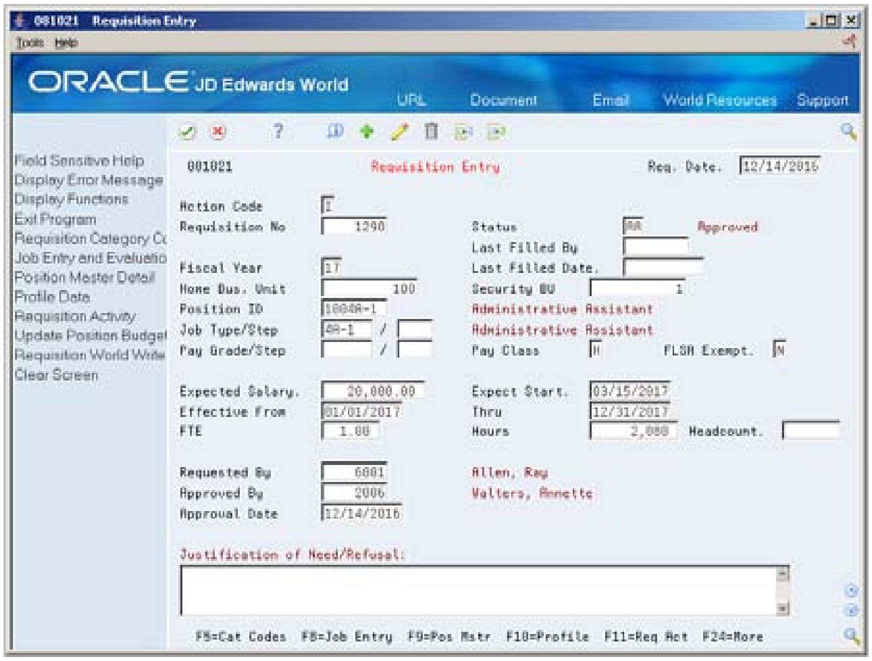
You enter initial requisition information to identify a new vacancy (job opening) within your organization. Some types of initial requisition information are:

- Fiscal year
- Home business unit
- Job type
- Job step
- Pay class
- FLSA exempt

Multiple candidates can fill the same requisition. When you need to hire several people to fill the same position, you can avoid entering a requisition for each person that you hire by specifying a head-count (number of people) for a requisition. The system verifies that the head-count for all of the requisitions that reference a position do not exceed the head count for the position.

To enter initial requisition information

On Requisition Entry



1. To assign a specific requisition number, complete the following field:
   - Requisition Number
2. Complete the following fields:
   - Status
   - Home Business Unit
   - Security Business Unit
   - Requested By
3. Complete any of the following fields, as necessary:
   - Requisition Date
   - Fiscal Year
   - Position ID
   - Job Type/Step
   - Pay Grade/Step
   - Pay Class
   - FLSA Exempt
   - Expected Salary
   - Effective From
   - Effective Through

- FTE (Full Time Equivalents)
- Hours
- Headcount
- Requested Date

Field	Explanation
Requisition No	The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.
Status	A code that describes the status of the position associated with the requisition. JD Edwards World provides several codes that you can use for requisition status purposes. Two of the them are hard-coded and should not be changed: ▪ Approved (AA) ▪ Filled and Closed (99) You can define this code in user defined codes table (08/RS).
Home Bus. Unit	The number of the business unit in which the employee generally resides.
Security BU	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant. You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. **Note:** The system uses this value for Journal Entries if you do not enter a value in the AAI table. *Form-specific information* A business unit number that secures the employee's record from unauthorized access. Any user not authorized to access this business unit cannot access this employee's record.
Req. Date	The effective date of the requisition. The default value for this field is the system date.

Field	Explanation
Fiscal Year	A number that identifies the fiscal year. Generally, you can either enter a number in this field or leave it blank to indicate the current fiscal year (as defined on the Company Numbers and Names form). Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 1998 and ends September 30, 1999. The end of the first period is October 31, 1998. Specify the year 98 rather than 99.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: ▪ Position (position code and its description) ▪ Fiscal year ▪ Home business unit For example, you can identify position A0-1 as Accounting Manager for fiscal year 1998-1999, for home business unit 41.
Job Type (Craft) Code	A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates Table.
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays an error or warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade. To set up pay grades, use Pay Grades by Class (P082001).

Field	Explanation
Pay Grade Step	A code that identifies a pay grade and pay step. You can use this code to determine an employee's pay rate. If you have set your constants to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields: ▪ Salary ▪ Hourly Rate ▪ Hours per day ▪ Hours per year ▪ Days per year
Pay Class	A code that indicates how an employee is paid. Valid codes are: " " Blank H Hourly S Salaried P Piecework
FLSA Exempt.Y / N	A code that indicates whether the employee fits the rules of the Fair Labor Standards Act and thus does not have to be paid for working overtime. Valid codes are: Y Yes, the employee fits the rules and does not have to be paid for working overtime. N No, the employee does not fit the rules and is to be paid for working overtime.
Expected Salary	The salary that you expect to pay the individual who fills the requisition.
FTE	The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.
Hours	The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all the full-time equivalents (FTEs). If you do not enter a value in this field when you budget the position, the system enters a default value that equals the number of FTEs multiplied by the standard number of hours per year for the company.
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Field	Explanation
Requested By	The address book number of the person who enters a position requisition. This field is required.

Entering Requisition Profile Data

From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **Profile Data Entry**

Profile data is any type of additional information that you want to track about any of the following:

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

When you set up your Human Resources system, you specify the types of profile data (data types) that you want to track. Profile data is not required by the system.

For requisitions, typical types of profile data might include:

- Requirements
- Approval steps
- Interview steps
- Requisition notes
- Requisition activity
- Requisition review

The method you use to enter profile data is the same for any other type of profile information that you track.

See Also

- *Working with Profile Data* for information about entering, copying, reviewing, and purging profile data

Approving a Requisition

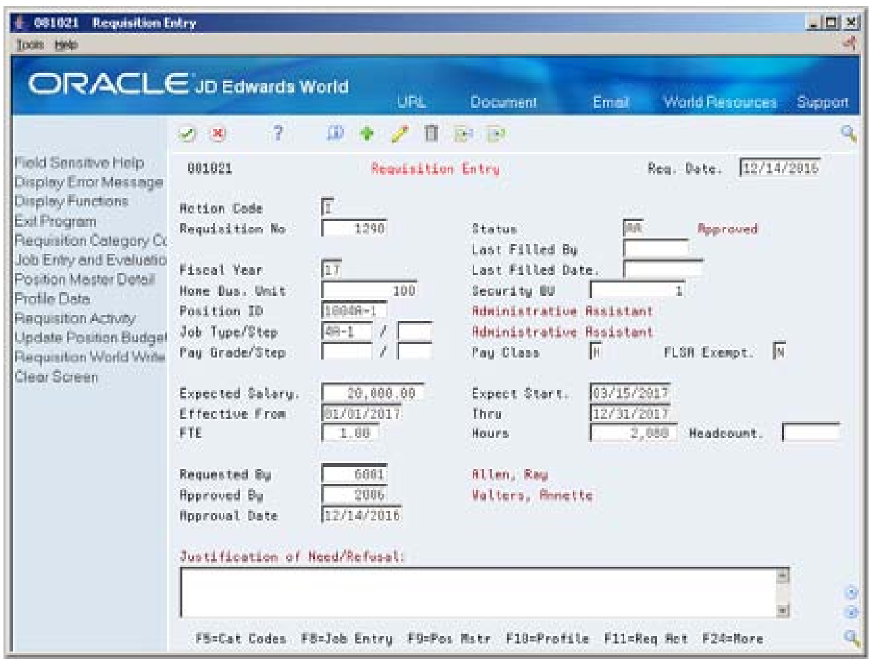
From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **Requisition Entry**

In some cases, you might need to enter a requisition before the appropriate manager has approved it. For example, if the managers in your organization approve requisitions only once per month, and you have 20 unapproved requisitions that you are reasonably sure will be approved, you can enter the requisitions early, to avoid entering all of the data at one time. When you enter a requisition, you can indicate that it is waiting for approval. After the requisition is approved, you can change its status to indicate that it is approved.

Typically, you wait until a requisition is approved before you begin searching for candidates to fill the requisition. The system does not allow you to hire a candidate to fill a requisition unless the requisition status is “approved.”

To approve a requisition

On Requisition Entry



1. Locate the requisition that you need to approve.
2. Complete the following fields:
   - Status
   - Approved By
   - Approval Date

Field	Explanation
Approved By	The address book number of the person who approves any given work. The system verifies this number against the Address Book.

Field	Explanation
Approval Date	The date on which the person with the appropriate authority approves a requisition.

Processing Options

See Position Requisitions (P081021).

Work with Requisitions

Working with Requisitions

After you enter basic requisition information and approve a requisition, you can begin matching candidates to the requisition. For each candidate that you want to consider for a requisition, you can attach the candidate's record to the requisition. Attaching candidate records to a requisition makes it easy to track the candidates' progress as you interview them and evaluate their qualifications. When you hire a candidate to fill a requisition, the system automatically increases the filled head count for the requisition and the associated position.

When you hire enough candidates to meet the head count for the requisition, the system automatically indicates that the requisition is filled and closed. You cannot hire candidates for a requisition that is filled and closed. If necessary, you can reopen a requisition by increasing the head count and changing the requisition status.

Working with requisitions includes:

- Attaching a Candidate Record to a Requisition
- Reopening a Requisition

Attaching a Candidate Record to a Requisition

	From Human Resources (G08), choose **Requisitions** From Requisitions (G08R1), choose **Requisition Activity**

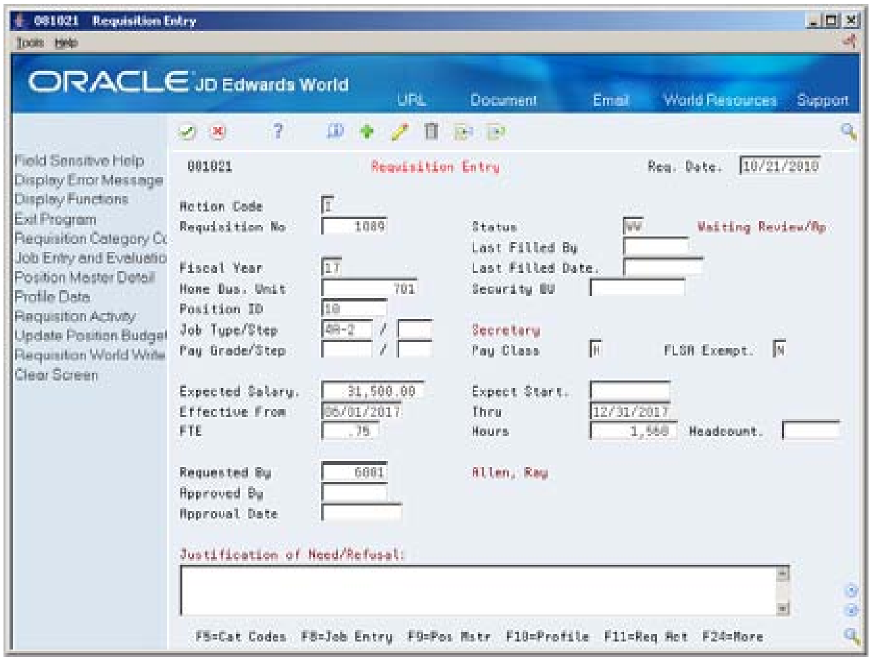
When you determine that a candidate might be suitable to fill a vacancy, you can attach the candidate's record to the requisition. Attaching candidate records to a requisition simplifies the process of monitoring each candidate's status as you interview and evaluate them for the vacancy.

After you attach candidate records to a requisition, you can easily review the status of all of the candidates who are being considered for a requisition. You can limit your review to include only applicants or only employees. For applicants, you can further limit the search to include only those with a specific applicant status, such as applicants who have passed the tests required for employment with your organization.

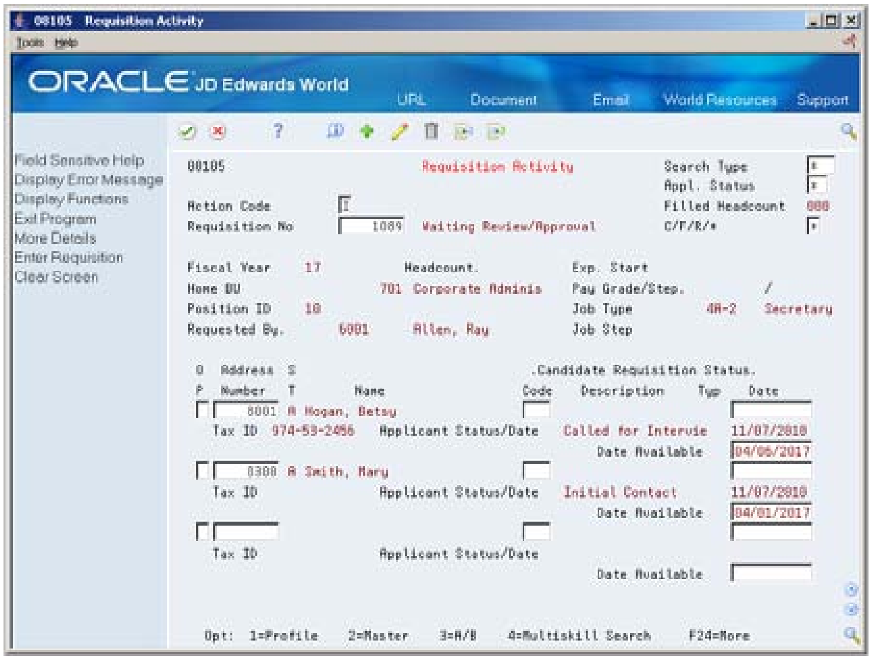
You can also update the candidate's requisition status as necessary. For example, when you decide that a candidate is not suitable for the vacancy, you can reject the candidate. When you hire an applicant or assign an employee to a requisition, the system automatically changes the candidate's status to indicate that the candidate filled the requisition.

To attach a candidate record to a requisition

On Requisition Activity



1. Complete the following fields:
   - Requisition Number
   - Address Number
   - Candidate Requisition Status Code
   - Date
2. Access Requisition Activity.
3. Access the detail area.



4. Complete the following optional field:

- Date Available

Field	Explanation
Candidate Requisition Status	The current activity level of a candidate that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN. You can group candidate requisition status codes based on the hard-coded Special Handling Code values in the table. These hard-coded values are: CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled Candidate requisition status codes that have special handling codes of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to "Filled and Closed."

What You Should Know About

Attaching applicant records to a requisition

You can attach applicant records to a requisition by either entering them directly on the Requisition Activity form or by accessing Requisition Review from the Applicant Entry form.

See *Attaching an Applicant Record to a Requisition.*

Matching candidates to requisitions

You can use the profile multi-skill search feature to locate candidates that match the requirements that you entered in the profile data associated with the requisition. For example, you can search for employees who:

- Have an MBA degree
- Speak French
- Are Certified Public Accounts

See *Working with Multi-Skill Search.*

Processing Options

See Requisition Activity (P08105).

Reopening a Requisition

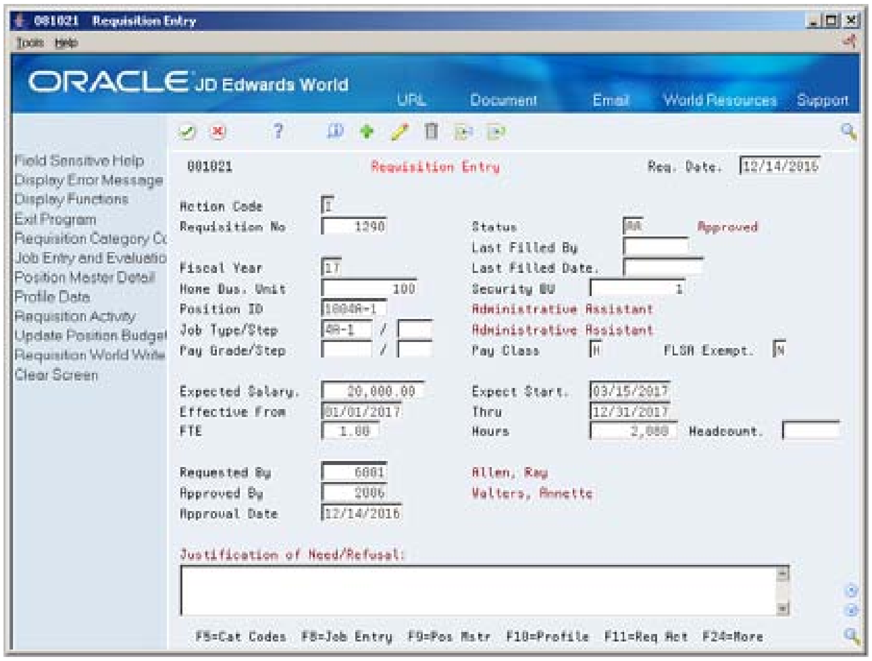
In some cases, you might need to reopen a requisition that is filled and closed. For example, assume that you receive the necessary funding to increase the head count for a position that had previously reached its maximum filled head count. If you have a filled and closed requisition that references the position, you can save time by reopening that requisition instead of creating a new one.

Before You Begin

- Increase the head count for the position associated with the requisition. See *Changing Position Budgets.*

To reopen a requisition

On Requisition Entry



1. Locate the requisition.
2. Change the following fields:
   - Status
   - Headcount

Review Requisitions Online

Reviewing Requisitions Online

After you enter requisition information, you can review that information to verify that it is correct. You can review detailed information about individual requisitions, or about all of the requisitions for a specific business unit or job type. For example, you can review all of the requisitions in business unit 701 to determine which of them have been approved and the name of the person who approved them.

You can also review the profile data available for requisitions. Use this information to match candidates to a requisition, based on the requirements you enter in the profile data for the requisition and the skills you entered in the profile data for the applicant or employee.

To review requisition information, complete the following tasks:

- Reviewing Requisition Details
- Reviewing Profile Data for Requisitions

Reviewing Requisition Details

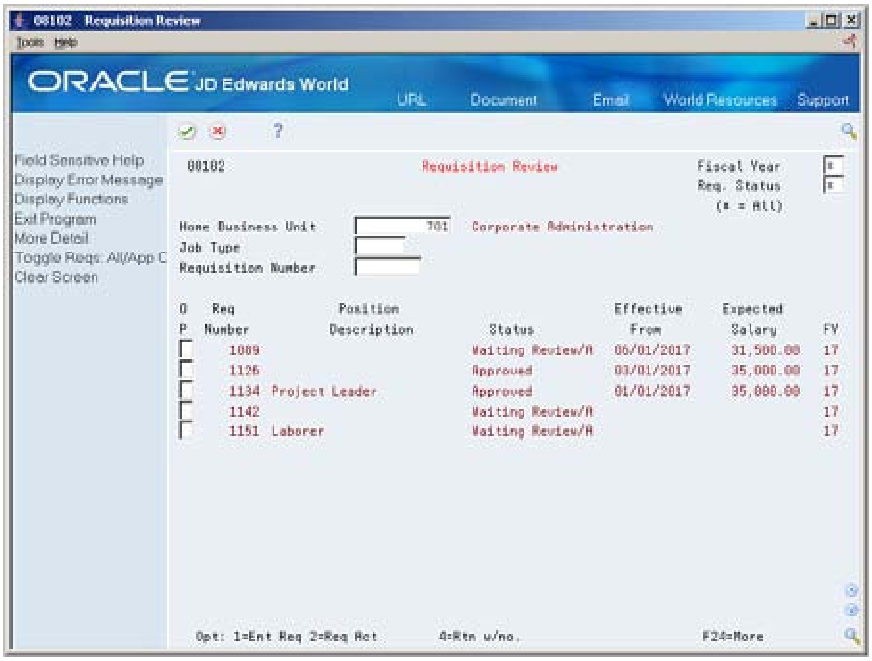
	From Human Resources (G08), choose **Requisitions** From Requisitions (G08R1), choose **Requisition Review**

Your organization might have people who need access to requisition information, but who are not allowed to enter and update this information. For example, department managers might need to know whether the requisitions they requested have been approved. You can allow these managers to review requisition information online, which improves communication between departments.

You can review detailed information about individual requisitions or all the requisitions for a specific business unit or job type.

To review requisition details

On Requisition Review



Complete the following optional fields to narrow your search:

- Fiscal Year
- Requisition Status
- Home Business Unit
- Job Type

Processing Options

See Requisition Review (P08102).

Reviewing Profile Data for Requisitions

After you enter profile data for requisitions, you can search for requisitions that meet specific criteria. You can search by requisition or by data type.

You can review all of the profile data available for a specific requisition. Use this information to match candidates to a requisition. You can make this information available to employees so that they can review the vacancies within your organization.

You can also review the information that has been entered for a specific type of data. For example, if you need to review the approval steps for requisitions, you can choose only the data type for approval steps.

You use the same procedure to review profile data for requisitions as you do to review profile data for employees.

See Also

- *Reviewing Profile Data For A Specific Employee*
- *Reviewing Profile Data By Data Type*

Review Requisition Reports

After you enter requisition information, you can print several reports to review the information and verify that it is correct. You can also find out information about groups of requisitions, such as their approval status, filled status, and the candidate records that are attached to them.

Reviewing requisition reports includes:

- Reviewing the Requisition Profile Report
- Reviewing the Requisitions by Data Type Report
- Reviewing the Requisition Review Report
- Reviewing the Unfilled Requisitions Report

Reviewing the Requisition Profile Report

From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **Requisition Profile**

To review complete information for one or more requisitions, print the Requisition Profile report. You can review this information online for a single requisition using Profile by Requisition. However, this report allows you to print information for multiple requisitions at one time.

You can list requisitions by either requisition number or alphabetically by requisition description. You also choose whether the report includes text information.

```
080416                                              JD Edwards World                              Page Number        4
                                                   Requisition Profile                            Date          5/07/17
                                                 In Alphabetical Order


 Req No.  . . .     1089      Secretary             Expected Salary.   31.500,00          Requested By .     6001 Allen, Ray
 Business Unit.                                     Job Type/Step. . 4A-2    /            Approved By. .
 Status . . . . 99            Filled and Closed     Budgeted FTE . .        0,75          Request Date . 10/21/11
 Position ID. . 10            Secretary             Headcount. . . .                      Approval Date.

 Approval Steps
 ==============================
     Levels     Date                    Approved by:                Follow up required
   ---------- --------           ------------------------------ ------------------------------
   ONE        01/01/17           Annette Walters
   THREE      01/31/17           Ray Allen
   TWO        01/15/17           Dominique Abbot



 Requisition Requirements
 ==============================
      Test      Date                    Description
   ---------- --------           ------------------------------
   EXP        01/01/17           Three years previous exper
   EXT        01/01/17           Hire outside after Int
   INT        01/01/17           Post internally for 30 days
```

Processing Options

See Requisition Profile - Alphabetical Order (P080416).

Reviewing the Requisitions by Data Type Report

From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **Requisition by Data Type**

To review a list of all requisitions with information in a particular profile data type, print the Requisitions by Data Type report. You can review this same information you can review online using Profile Data Entry.

```
080406                                             JD Edwards World                                    Page Number        2
                                                Requisition Info by Type                               Date          5/08/17
                                                 in Alphabetical Order


Approval Steps
==============================
Requisition    Name                     Date                      Approved by:           Follow up require
----------- ----------------------- -------- -------- ------------------------ ----------------------



  Levels   . . . . . ONE
       1089 Secretary                 01/01/17         Annette Walters


  Levels   . . . . . STEPA
       3404 Swim Coach                01/01/17         HR


  Levels   . . . . . STEPB
       3404 Swim Coach                01/01/17         HR


  Levels   . . . . . STEPC
       3404 Swim Coach                01/01/17         HR


  Levels   . . . . . STEPD
       3404 Swim Coach                01/01/17         HR
```

Processing Options

See Requisition Info by Requisition -Alphabet (P080406).

Reviewing the Requisition Review Report

From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **World Writer**

To determine the approval status of a group of requisitions, print the Requisition Review report. You can print two versions of this World Writer report. One version shows all approved requisitions and the other version shows all unapproved requisitions. This report retrieves the data from the Requisition Master table (F08102).

Requisition Review
w/ Approvals

Page - 1
Date - 05/08/17

FY	Business Unit	Description	Position ID	Description	Expected Salary	Req No.	St	Description	Request By	Description	Req. Date
98	1	General Account	BD01	Bus Driver		3391	99	Filled and Clos	7500	Cathy McDougle	12/31/17
								Approved by :	6002	Ms. Dominique A	03/01/17
98	1		CH01	Swim Coach		3404	AA	Approved	7500	Cathy McDougle	12/31/17
								Approved by :	6002	Ms. Dominique A	01/15/17
98	1		CH02	Tennis Coach		3439	99	Filled and Clos	7500	Cathy McDougle	03/15/17
								Approved by :	6002	Ms. Dominique A	03/15/17
98	1		TR01	Art Teacher		3421	99	Filled and Clos	7500	Cathy McDougle	12/31/17
								Approved by :	6002	Ms. Dominique A	01/15/17
98	1		TR03	English Teacher		3412	99	Filled and Clos	7500	Cathy McDougle	12/31/17
								Approved by :	6002	Ms. Dominique A	01/15/17
98	1		10B-1	Trainer	25,000.00	1206	WW	Waiting Review/	7500	Cathy McDougle	03/15/17
								Approved by :	7505	Robert Mastro	03/15/17
98	1		10B-1	Trainer	25,000.00	1214	WW	Waiting Review/	7500	Cathy McDougle	12/31/17
								Approved by :	7505	Robert Mastro	12/31/17
98	1		10B-1	Trainer	25,000.00	1222	WW	Waiting Review/	7500	Cathy McDougle	10/14/17
								Approved by :	7505	Robert Mastro	10/14/17

Reviewing the Unfilled Requisitions Report

From Human Resources (G08), choose **Requisitions**
From Requisitions (G08R1), choose **World Writer**

To review a list of all open requisitions, print the Unfilled Requisitions report. Use this information to determine which requisitions you need to fill. This World Writer report retrieves the data from the Requisition Master table (F08102).

Unfilled Requisition by Effective Date

Page - 1
Date - 07/01/17

Req Number	Home Business Unit	Position ID	Position Description	FY	Effect From	Effect Thru	Approval Date	Rq St	Status Description
1142	Corporate Administration	6	Foreman	98				WW	Waiting Review/Approval
1151	Corporate Administration	7	Laborer	98				WW	Waiting Review/Approval
1231	General Accounts	5067	Laborer Level I	98			10/14/17	AA	Approved
2330	General Accounts	63	Operator	98				WW	Waiting Review/Approval
1134	Corporate Administration	4	Project Leader	98	01/01/17	01/01/99	10/18/91	AA	Approved
1177	Accounting Department	4510P-2	Accountant	98	01/01/17	12/13/17	12/15/17	AA	Approved
1185	Balance Sheet	1000A-4	Accountant	98	01/01/17	12/13/17	12/15/17	AA	Approved
1193	Balance Sheet	1004A-1	Administrative Assistant	98	01/01/17	12/31/17	12/15/17	AA	Approved
1257	** NOT FOUND **	488P	Lathe Operator	98	01/01/17	12/31/17	12/15/17	AA	Approved
1290	Balance Sheet	1004A-1	Administrative Assistant	98	01/01/17	12/31/17	12/15/17	AA	Approved
1302	Administrative Department	5J-8	Teacher	98	01/01/17	12/31/17	12/14/17	AA	Approved
1337	Administrative Department	5J-8	Teacher	98	01/01/17	12/31/17	12/14/17	AA	Approved
3404	School	CH01	Swim Coach	7	01/01/17		01/15/17	AA	Approved
1126	Corporate Administration	2	Senior Accountant	98	03/01/17	12/31/17	10/18/91	AA	Approved
3535	General Accounts			98	03/01/17		03/01/17	AA	Approved
1311	Administrative Department	5J-8	Teacher	98	05/01/17	12/31/17	12/14/17	AA	Approved
1089	Corporate Administration	10	Secretary	98	06/01/17	12/31/17		WW	Waiting Review/Approval
1206	Administrative Department	10B-1	Trainer	98	06/01/17	06/01/99	03/15/17	WW	Waiting Review/Approval
1214	Administrative Department	10B-1	Trainer	98	06/01/17	06/01/99	12/31/17	WW	Waiting Review/Approval
1222	Administrative Department	10B-1	Trainer	98	06/01/17	06/01/99	10/14/17	WW	Waiting Review/Approval
1265	Administrative Department	2H-2	Employment Specialist	98	06/01/17	06/01/99	10/14/17	AA	Approved
1329	Administrative Department		Trainer	98	06/30/17		12/14/17	AA	Approved

7 Applicant Information

Overview to Applicant Information

Objectives

- To enter and maintain all applicant information
- To automate the process of responding to applications

About Applicant Information

An applicant is a person who applies for a vacancy (job opening) in your organization. An applicant is someone who is not currently working for your organization.

You can track detailed information about applicants. Use this information to:

- Match applicants to requisitions
- Evaluate the qualifications of each applicant
- Meet government reporting requirements

Standard types of applicant information that you can track include:

- Personal information, such as name, address, and tax identification number
- The job and position for which each applicant applies
- Pay information
- Governmental reporting information, such as that required to meet Equal Employment Opportunity (EEO) and Canadian Employment Equity requirements

The system also gives you the flexibility to track any other type of information that your organization needs. You can use the profile data feature to track entire categories of auxiliary information for applicants, such as job skills or professional licenses. The system makes it easy to search on this information to locate applicants who meet specific criteria.

After you enter applicants into the system, you can begin evaluating them to determine whether they are suitable for the vacancies within your organization. The system makes it easy to track the status of applicants as they move through the hiring process and automates many routine data entry tasks.

The system provides several types of reports that you can use to review and analyze applicant information. These reports include those that you need to meet the reporting requirements of the Equal Employment Opportunity Commission (EEOC).

To manage applicant information, complete the following tasks:

- Enter applicant information
- Work with applicant information
- Review applicant reports

Enter Applicant Information

Entering Applicant Information

Before you can begin evaluating applicant information, you must add a record for the applicant. This record contains personal information about the applicant.

You can track detailed information about applicants. Use this information to evaluate applicants' qualifications and to match applicants to open requisitions. You can also track the applicant information you need to meet government reporting requirements.

When you know the job or position for which the applicant is applying, you can enter that information. Entering position information streamlines your position control efforts by ensuring that, if you hire the applicant, the system automatically updates position budget information. (Position control is the process by which you create, maintain, and monitor positions and their budgets.)

After you enter initial information for an applicant, you can enter profile data, which is any additional information that you want to use to help match the applicant to a job or position.

After you enter initial information for an applicant, you can enter supplemental data, which is any additional information that you want to use to help match the applicant to a job.

Entering applicant information includes:

- Adding New Applicant Records
- Entering Applicant Profile Data

See Also

- *Attaching a Candidate Record to a Requisition (P08105)* for information about associating applicants with requisitions.

Adding New Applicant Records

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **Applicant Entry**

Before you can track applicant information or search for an applicant who has a specific skill, you must add a record for the applicant. This record contains personal information about the applicant, such as:

- Name

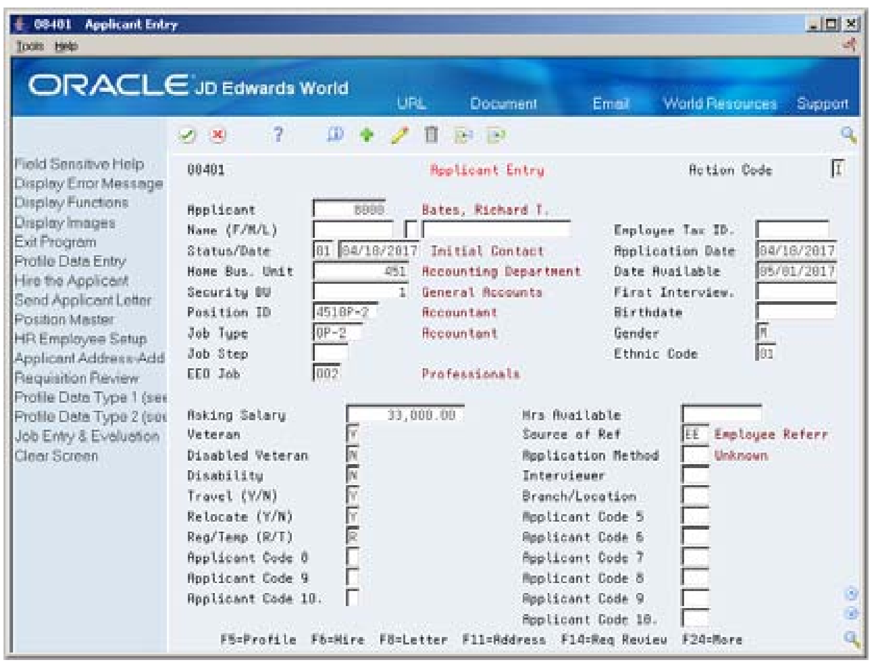
- Address
- Veteran status
- Disability status

To help prevent discrimination in hiring practices, you might not want the people who work with applicant information (such as recruiters, data entry clerks, and hiring managers) to have access to sensitive information. In this case, you can set a processing option that prevents the fields for ethnic code, gender, and date of birth from appearing on the form. To ensure that you meet your EEO and Affirmative Action requirements, you can enter that sensitive information later, when you hire (or reject) the applicant. You might also choose to set the processing option to display these fields when you enter applicants, and then suppress the display afterwards, so that no other people can review it.

When you know the position or job for which the applicant is applying, you can enter that information at the same time. When you hire an applicant to fill the position, the system automatically updates the budget information for the position.

To add new applicants

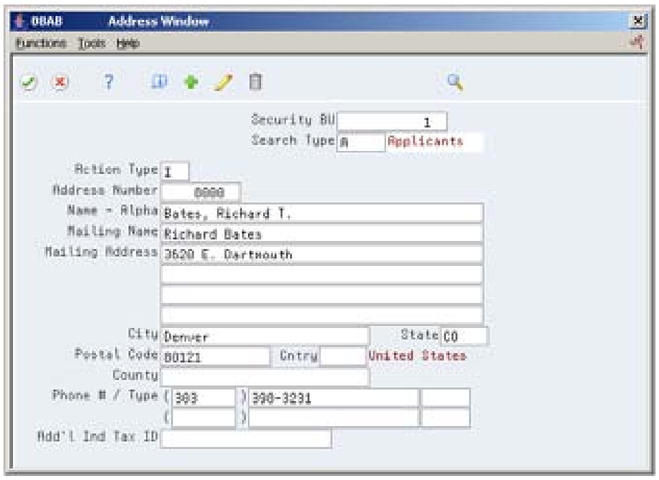
On Applicant Entry



1. Complete the following fields:
   - Applicant
   - Name (First/Middle/Last)
   - Status
   - Date
   - Application Date

- Ethnic Code
- Gender
- EEO Job

2. To attach the applicant’s record to a position, complete the following fields:
   - Home Business Unit
   - Position ID
3. Choose the Address Window function.



4. On Address Window, complete the following fields and press Enter:
   - Mailing Address
   - City
   - State
   - Postal Code
   - Phone

Field	Explanation
Applicant	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members. *Form-specific information* This number becomes the applicant’s employee number if the applicant is hired. You can assign this number or you can let the system assign it using Next Numbers.

Field	Explanation
Status - Applicant	A code that defines a step in the hiring process (such as initial contact, first interview, and so on) that the applicant has completed. You define these codes in user defined code table 08/AS. When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the profile data type for applicant status. To review the history of an applicant's status, you can review the information that was entered for the applicant in this profile data type.
Date - Effective On	The date that you want all the changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date. *Form-specific information* The date you entered the applicant into the system.
Home Bus. Unit	The number of the business unit in which the employee generally resides. *Form-specific information* The number of the business unit that has a position for which the applicant is applying.
Position ID	A code that you use for budgetary (position) control purposes. The position ID consists of: ▪ Position (position code and its description) ▪ Fiscal year ▪ Home business unit For example, you can identify position A0-1 as Accounting Manager for fiscal year 1998-1999, for home business unit 41. *Form-specific information* The system does not create a position based on a value that you enter in this field. The position must already exist in the Position Master Information table (F08101).
Address Line 1	The first line of the mailing address in the Address Book system. *Form-specific information* The employee's street address and apartment number, if applicable. On W-2 forms, the system prints only the mailing name and last three non-blank lines of the mailing address. On W-2 forms that are provided in magnetic media, the system prints only the mailing name and last two non-blank lines of the mailing address. On 1099 forms, the system prints only the mailing name and last non-blank line of the mailing address.

Processing Options

See Applicant Information (P08401).

Entering Applicant Profile Data

From Human Resources (G08), choose **Applicant Information**
From Applicant Information (G08A1), choose **Profile Data Entry**

Profile data is any type of additional information that you want to track about any of the following:

- Employees
- Jobs
- Applicants
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

When you set up the Human Resources system, you specify the types of profile data (data types) to track. You must set up a profile data type for applicant status. With the exception of Applicant Status, profile data is not required by the system.

For applicants, typical types of profile data might include:

- Applicant status history
- Work experience
- Education
- Job Skills
- References

The method that you use to enter profile data is the same for any type of information that you track.

To help you match applicants with open jobs and positions, you can search profile data to locate applicants who have specific skills, training, or experience. You can review a list of applicants that meet a single criteria, or you can search for applicants that meet multiple criteria. You can also review all of the profile data that is entered for a specific applicant.

See Also

- *Working with Profile Data* for information about entering, copying, reviewing, and purging profile data

- *Working with Multi-Skill Search (P080250)* for information about locating applicants who have specific skills, training, or experience

Work with Applicant Information

Working with Applicant Information

After you add applicant records into the system, you can begin the process of evaluating applicants and matching them to open requisitions. When you work with applicant information, you can simplify the process of tracking the status of applicants as they move through the hiring process and eliminate many routine data entry tasks. For example, you can set up your system to:

- Generate form letters that inform applicants of the status of their applications
- Automatically transfer a hired applicant's information to the employee database
- Automatically update the head-count for the requisition and position that a hired applicant fills
- Remove a group of obsolete applicant records from your system

Working with applicant information includes:

- Attaching an Applicant Record to a Requisition
- Printing Letters of Acknowledgement
- Hiring an Applicant
- Purging Applicant Information

You attach applicant records to a requisition so that you can monitor each applicant's status as you interview applicants and evaluate them for vacancies. When you make a job offer to an applicant and the applicant accepts it, you need to indicate that the applicant is hired. You can set up your system so that, when you hire an applicant, the system automatically transfers the applicant's information to the employee database.

To conserve computer disk space, you should periodically purge obsolete applicant information.

Attaching an Applicant Record to a Requisition

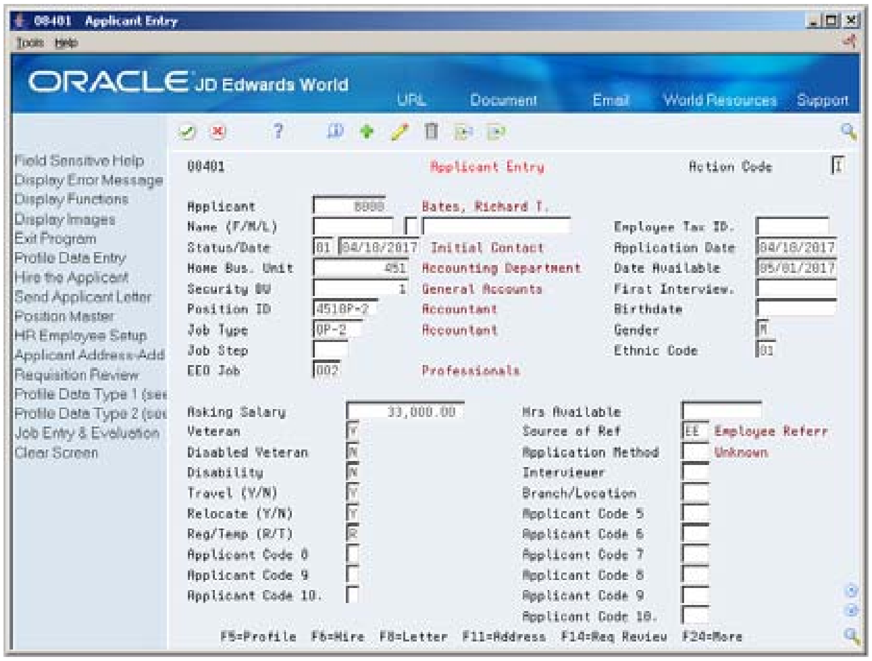
	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **Applicant Entry**

When you determine that an applicant might be suitable to fill an open requisition, you can attach the applicant's record to the requisition. Attaching applicant records to a requisition simplifies the process of monitoring each applicant's status as you interview applicants and evaluate them for the vacancy.

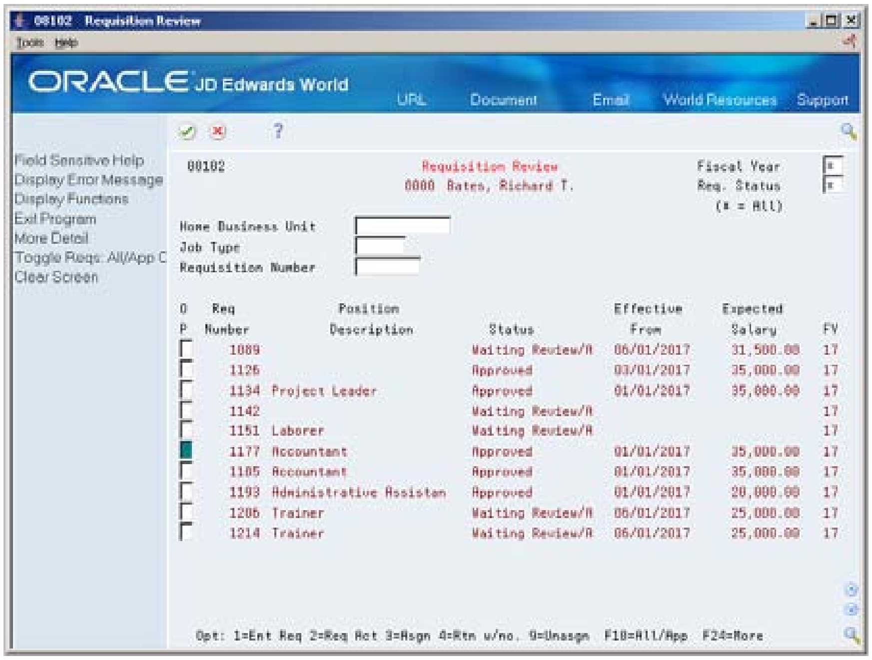
After you attach applicant records to a requisition, you can review the status of all of the candidates who are being considered for a requisition. You can also limit your review to include only a specific type of requisition, such as rejected requisitions or filled requisitions.

To attach an applicant record to a requisition

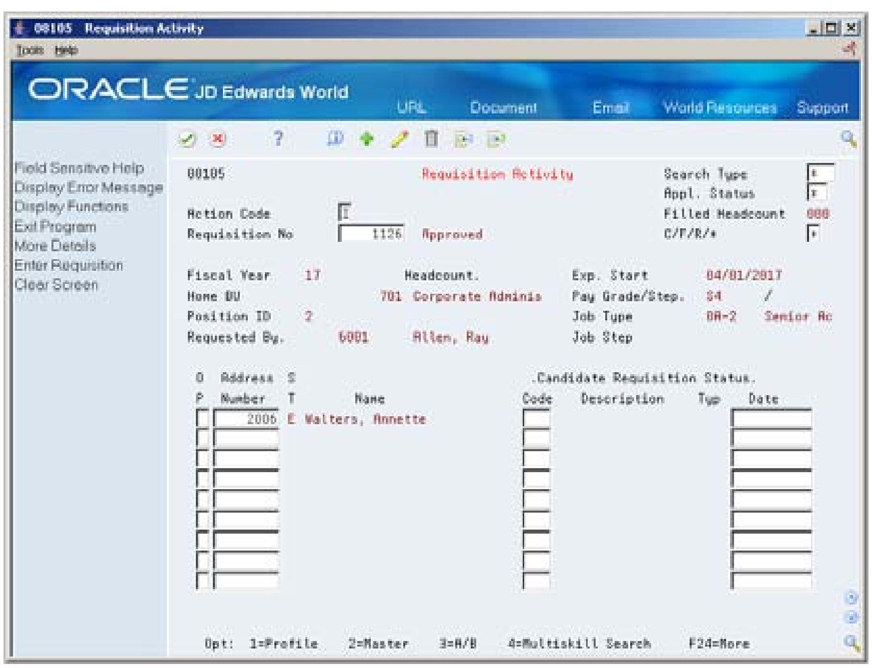
On Applicant Entry



1. Locate the applicant record.
2. Choose the Requisition Review function.



3. On Requisition Review, complete the following fields to narrow your search:
   - Requisition Status
   - Home Business Unit
   - Job Type
   - Requisition Number
4. To attach the applicant to a requisition, choose the Assign option.
5. To review all of the candidates who are attached to a requisition, choose the Requisition Activity option.



What You Should Know About

Attaching applicant records to a requisition	An alternate method for attaching applicant records to a requisition is to enter them directly on the Requisition Activity form. See *Attaching a Candidate Record to a Requisition.*
Removing applicant records from a requisition	If you attach an applicant records to the wrong requisition, choose the Unassign option to remove the attachment.

Printing Letters of Acknowledgement

From Human Resources (G08), choose Applicant Information
From Applicant Information (G08A1), choose Applicant Entry

Before You Begin

- Verify that OfficeVision AS/400 is installed on your system
- Create one or more letter templates in OfficeVision AS/400 and put them in a folder

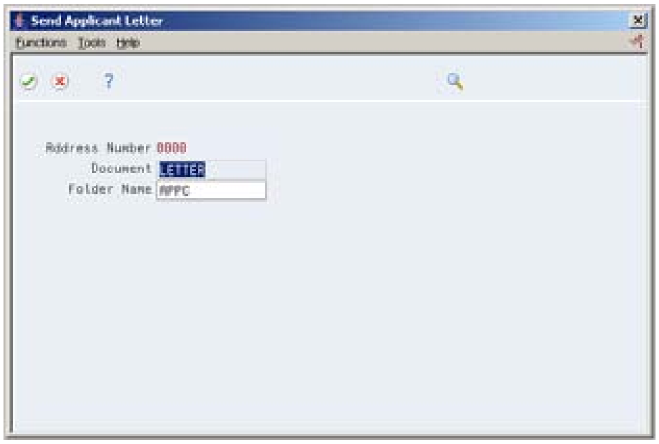
To simplify the process of responding to applications and communicating with applicants, you set up your system to print form letters for applicants. To print form letters from your Human Resources system, you must first create the letter template in the program, Office Vision/400. When you need to send a copy of the letter to a specific applicant, the system generates a copy of the letter that includes the applicant's name and address. You can then send the letter to the applicant.

You can create several standard letters that inform applicants of the status of their applications. For example, you can create one letter that informs applicants that their applications have been received, and another letter that informs applicants that they are no longer being considered for the position for which they applied.

To print letters of acknowledgement

On Applicant Entry

1. Locate the applicant to whom you need to send a letter.
2. Choose the Letter function.



3. On Send Applicant Letter, complete the following fields:
   - Document
   - Folder Name

Field	Explanation
Document	This field is for the name of a document in a folder.
Folder Name	The name of a folder used by OfficeVision/400.

See Also

- The *IBM OfficeVision/400 Manual* for information about creating letters in OfficeVision.

Hiring an Applicant

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **Applicant Entry**

When you offer an applicant a job and the applicant accepts it, you need to indicate that the applicant is hired. To save time and eliminate redundant data entry, you can set up your system to automatically copy applicant information to the employee database when you hire an applicant. You can copy both initial applicant information, such as name, address, and position information, and applicant profile data.

Because you typically need to retain applicant records for government reporting requirements, copying applicant information to the employee database does not delete that information from the applicant database.

When you hire an applicant, you can also enter any additional employee information. To ensure that you enter the information required to process the employee through a payroll cycle, you can set a processing option that requires you to enter that information before you can complete the hiring process.

Before You Begin

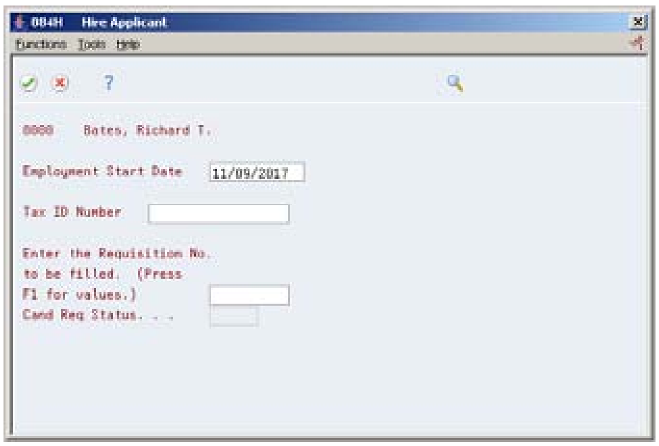
- Set up your system to transfer selected types of profile data when you hire an applicant. See *Setting Up the Cross-Reference Table for Profile Data.*
- Review the processing options for this program and for HR Employee Entry (P0801). To transfer profile data for applicants to the employee profile database, you must set the appropriate processing options.
- Verify that the applicant status is set up on Define Types of Data. See *Defining Types of Profile Data.*

To hire an applicant

On Applicant Entry

1. Locate the applicant.

2. Choose the Hire function.



3. On Hire Applicant, complete the following fields and press Enter:

- Employment Start Date
- Employee Tax Identification
- Requisition Number to be filled
- Candidate Requisition Status

4. On HR Employee Entry, enter any additional employee information.

Field	Explanation
Employment Start Date	The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker. For the calculation tables in Payroll and the eligibility tables and date codes in Human Resources, the system also uses this date as a start date when it calculates deductions, benefits, and accruals. *Form-specific information* The date the applicant's employment begins with the company.
Candidate Requisition Status	The current activity level of a candidate that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN. You can group candidate requisition status codes based on the hard-coded Special Handling Code values in the table. These hard-coded values are: CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled Candidate requisition status codes that have special handling codes of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to "Filled and Closed."

What You Should Know About

Search type changes after hiring an applicant

When you use the Hire function to hire an applicant, the system automatically updates the person's Address Book record to indicate that they are an employee.

Entering an employee tax identification number

You can enter this number either on Applicant Entry, Hire an Applicant or HR Employee Entry.

Entering employee information

Depending on how your processing options are set, when you hire an applicant, you might need to enter the information required to enter an employee.

See Also

- *Entering Employee Information (P0801)*

Purging Applicant Information

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), enter 27 From Applicant Technical Operations (G08A3), choose **Purge Applicants by Date**

Depending on your organization's policies, you typically purge information for applicants that you no longer consider as active. To conserve computer disk space, you can use a purge program to remove obsolete applicant records from your system.

Purging applicant information does not affect any of the related employee information for the applicants that you have hired.

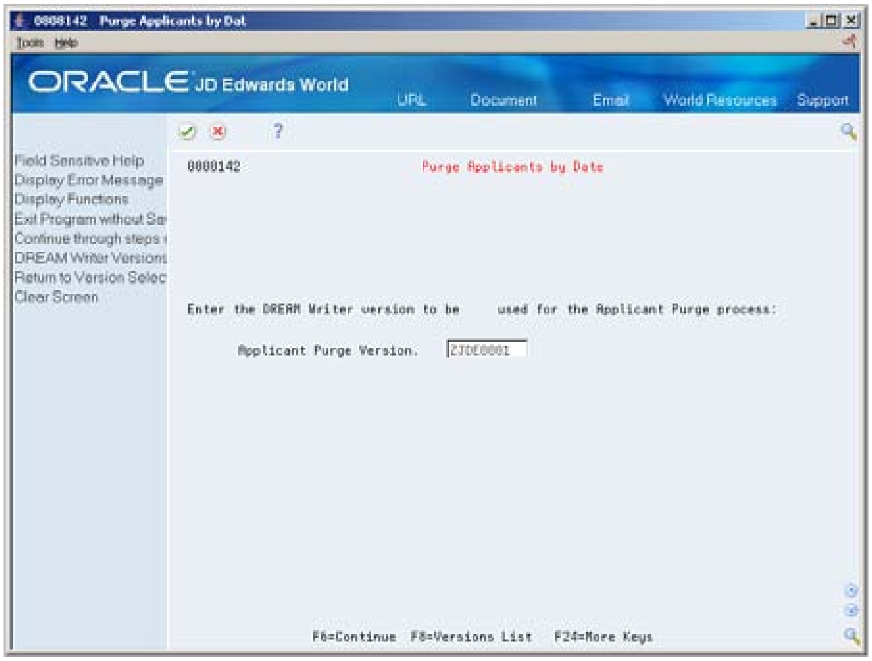
You can purge applicant records according to application dates. You can enter other criteria to retain applicants who are still being considered for employment, are in the process of being tested, or who have already been hired. For example, if an applicant is waiting to take a scheduled examination, you can choose to exclude that applicant's record from the purge program.

Before You Begin

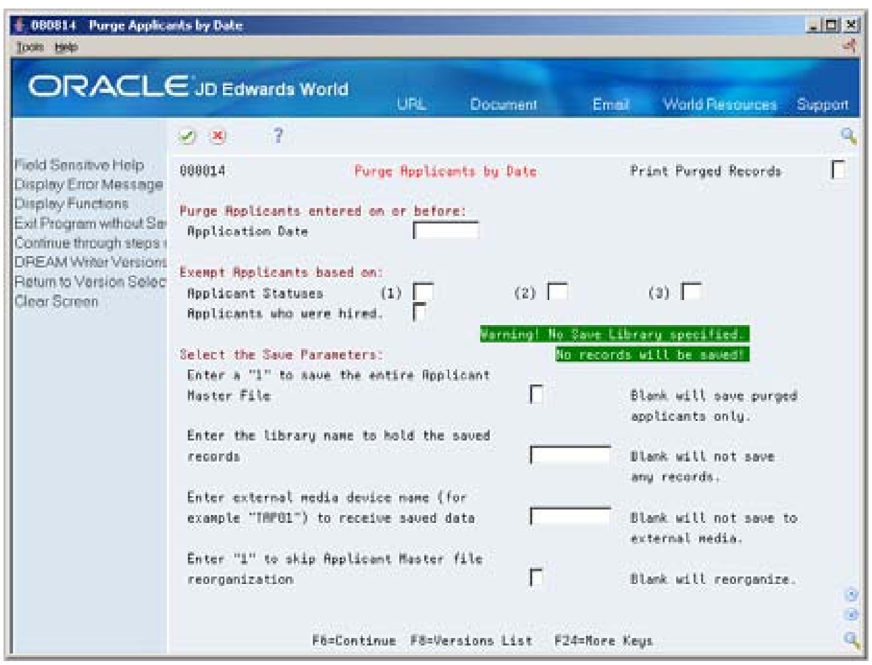
- Create your own DREAM Writer version of the Applicant Purge Program. See the *Technical Foundations Guide* for information about creating DREAM Writer versions.

To purge general information

On Purge Applicant by Date



1. Complete the following field and choose the continue function:
   - Applicant Purge Version



2. On Purge Applicants by Date, complete the following fields:
   - Print Purged Records

- Purge Applicants entered on or before: Application Date
- Exempt Applicant Statuses
- Applicants who were hired
- Enter a “1” to save the entire Applicant Master File
- Enter the library name to hold the saved records
- Enter external media device name (for example, “TAP01”) to receive saved data
- Enter “1” to skip Applicant Master file reorganization

Field	Explanation
Date - Applicant Master Purge Date	The system uses this date in one of two ways, depending on the application dates that were entered on the Applicant Entry form (F08401). 1 If a value exists in the Application Date on the Applicant Entry form, the purge date depends on the Application Date. If the application date is equal to or older than the purge date, the system purges the applicant record. 2 If no value exists in the Application Date field on the Applicant Entry form, the purge date depends on the date that the applicant record was last updated. If the date of the last update is equal to or older than the purge date, the system purges the applicant record. **Note:** If you use today’s date as the purge date, the system purges all applicant records that are included in the DREAM Writer selection criteria. For selective purging, see DREAM Writer considerations in the program helps.
Applicant Statuses	A code that defines a step in the hiring process (such as initial contact, first interview, and so on) that the applicant has completed. You define these codes in user defined code table 08/AS. When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the profile data type for applicant status. To review the history of an applicant’s status, you can review the information that was entered for the applicant in this profile data type.

Field	Explanation
Applicants who were hired	The Yes or No Entry field is a single character entry field for a yes or no response. You may elect to purge applicant information for applicants who were hired as employees. Another option is to retain the applicant information for applicants who were hired even if all other criteria for purge is met. YES Hired applicant information will not be purged. NO Hired applicant information will be purged if all other criteria for purge is met.
Enter a "1" to save the entire Applicant Master File	A code that indicates which records the system copies to the save table. Valid values includes: Blank The system copies only the records that are purged to the save table. To reload the purged records, copy the saved table into the original table using the Add Action. (You can re-purge the saved records when necessary.) 1 The system copies all records to the save table. To reload it, you must return the saved table to the system intact. For example, you could reload the saved table to a new library, use it, and then remove it from disk storage. In either case, you should copy the saved table to an external media, such as magnetic tape, and archive it for possible future needs.
Enter the library name to hold the saved records	These are the names of the libraries that contain JD Edwards World files and programs. Each file should exist in only one library in the environment other than the 'JDF' library (usually JDFDATA). You may, however, enter multiple 'COM' or 'DTA' libraries. COM Common Files (ex. DREAM Writer, Data Dictionary, etc.) CSO Custom executable programs CSS Custom source library DTA Data files (ex. F0411, F0911, etc.) JDF JD Edwards World data (ex. JDFDATA) KBG World Case files OBJ JD Edwards World executable programs (ex. JDFOBJ) SEC Security files (ex. F0092, F0094) SRC JD Edwards World source code (ex. JDFSRC)
Enter external media device name (for example "TAP01") to receive saved data	The name of the tape device to which magnetic media is to be sent.

Field	Explanation
Enter ”1” to skip Applicant Master file reorganization	This code indicates whether the system reorganizes the table after a purge process has completed. Valid codes include: blank The system reorganizes the table after it purges the records you specified. 1 The system does not reorganization the table. Although reorganizing the table requires extra processing time, it increases the speed and efficiency of the system when you access and report on applicant information. If the table is very large, reorganizing it might impact other jobs that the system is processing.

What You Should Know About

Purging applicant profile data	The Purge Applicants by Date program does not purge the profile data associated with the applicant records you specify. To purge applicant profile data, you must run the Purge Profile Data program (P080800). See *Purging Profile Data*.

Processing Options

See Applicant Purge (P080814).

Review Applicant Reports

Reviewing Applicant Reports

You can review applicant information using a variety of applicant reports. These reports make it easy to:

- Search for applicants who have certain specific skills
- Satisfy government reporting requirements
- Evaluate the hiring practices of your organization

Reviewing applicant reports includes:

- Reviewing the Applicant Profile Report
- Reviewing the Applicants by Data Type Report
- Reviewing World Writer Reports for Applicants
- Reviewing the Hired Applicants by EEO Job Report
- Reviewing the Application Flow Analysis Report
- Reviewing the Adverse Impact Analysis Report

To review a summary of applicant information, as well as detailed profile information for each applicant, you can print applicant profile reports. You can review applicant profile information by individual employee or by profile data type.

To review a variety of applicant information, including the positions, business units, and jobs for which applicants applied, you can print a variety of World Writer reports.

To satisfy the requirements of the Equal Employment Opportunity Commission (EEOC), you can print EEO and Affirmative Action reports. You use these reports to show that your organization provides equal opportunities for all of the applicants who apply to your organization, especially females and those who are ethnic minorities. Managers within your organization also can use these reports to analyze hiring and promotion practices within your organization.

For EEO reporting purposes, employees who apply for jobs within your organization are considered applicants. However, to include employees on applicant EEO reports, you must enter them into the system as applicants.

See Also

- *Reviewing Profile Data (P080200, P080210)* for information about review profile data online.

- *Working with Multi-Skill Search (P080250)* for information about locating applicants that meet multiple criteria.

Reviewing the Applicant Profile Report

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **Applicant Profile**

To review complete profile information for one or more applicants, print the Applicant Profile Data report. This report compiles all of an applicant's profile information into an easy-to-read, resume-style format.

The information that prints on this report is the same information that you can review online using Profile by Applicant. However, the report allows you to print information for multiple applicants at the same time.

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  080411                                              JD Edwards World                           Page Number        2
                                                      Applicant Profile                          Date         6/28/17
                                                    Alphabetical Sequence


Applicant. . . .          8000 Bates, Richard T.              Employee Tax ID. 225-69-8695      Ph 303    398--3231
Appl Status. . .            01 Initial Contact                Job Type . . . . 0P-2             Dates:
Business Unit. .             1 General Accounts               Job Step . . . .                   Application. . . 04/10/17
Position ID. . .                                              Hours Available.                   Available. . . . 05/01/17
EEO Job Cat. . .           001 Officials and Managers         Asking Salary. .    33,000.00      First Interview.
Applicant Status
  Status     Date
  01         04/10/17
Prior Employment
Position  St.Date  End Date          Company Name                Years in Position
---------- -------- -------- ----------------------------- -----------------------------
ACCOUNTANT 01/05/07          Coopers & Lybrand
FIN.ANALST 06/01/10          Cyprus Minerals
Interview Notes
==============================
               Seemed alittle nervous at first but came prepared with questions.  Seems
               very interested and knowledgeable in the company.  Would like to have him
               back for a second interview.
Skills
     Type    App Date              Miscellaneous Comments
  ---------- --------          -----------------------------
  LOTUS      03/15/17
  PCUSE      03/15/17
Professional Licenses/Certif
   License   Dte Rec. Exp Date          State/Agency                                        Fees
  ---------- -------- -------- -----------------------------                             -------------
  CFP        01/05/10          Colorado
  CPA        08/01/08          Colorado
```

Processing Options

See Applicant Profile- Alphabetical Sequence (P080411).

Reviewing the Applicants by Data Type Report

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **Applicants by Data Type**

To review a list of all applicants who have information entered in a particular profile data type, you can print the Applicants by Data Type report. For example, you can review applicants whose profile data includes job skills information. The information that prints on this report is the same information that you can review online using Profile by Data Type. You can review information by either data type or by applicant.

For each applicant, the system lists data types in alphabetical order.

The following sample report displays applicant information by data type.

```
080401                                       JD Edwards World                              Page Number        3
                                     Applicant Information by Data Type                    Date          6/28/17
                                          Alphabetical Sequence


Prior Employment
Applicant      Name                    St.Date  End Date          Company Name           Years in Position
----------- ----------------------- -------- -------- ------------------------ ----------------------
 Position  . . . . . ACCOUNTANT
       8000 Bates, Richard T.          01/05/06          Coopers & Lybrand
       8007 Tucker, Steve              06/21/12          Alexander Grant
 Position  . . . . . ADM ASS
       8001 Hogan, Betsy               02/01/13          Kelly Services           2
 Position  . . . . . BEN. CRD
       8500 Thomas, Suzanne            01/14/09 10/15/12 Davidson Electronics     3
 Position  . . . . . FIN.ANALST
       8000 Bates, Richard T.          06/01/09          Cyprus Minerals
 Position  . . . . . RECRUITER
       8500 Thomas, Suzanne            10/25/12          Career Track
 Position  . . . . . SECRETARY
       8001 Hogan, Betsy               03/15/13 01/04/14 Lear Siegler             1
 Position  . . . . . SR. ACCT
       8007 Tucker, Steve              10/21/14          Cypress Minerals
 Position  . . . . . TEACHER
       8004 Torres, Elizabeth M.       08/15/12 06/01/14 Ben Lomond High
       8004 Torres, Elizabeth M.       08/01/15          George Washington High   current
```

Processing Options

See Applicant Info by Type -Alphabetical Seq (P080401).

Reviewing World Writer Reports for Applicants

From Human Resources (G08), choose **Applicant Information**
From Applicant Information (G08A1), choose **Applicant Information**

To review detailed applicant information, you can print a variety of World Writer reports. For example, when you are looking for candidates to fill a requisition, you can review a list of all the applicants who applied for a specific job or position.

You can use the information on these reports to:

- Manage and update your applicant information
- Satisfy governmental regulatory reporting requirements

You can review the following standard reports:

- Applicant List - Other Codes
- Applicant List - EEO Information
- Applicant Log by Business Unit and EEO Job
- Applicant List - Basic Information
- Applicant List - by Position

Reviewing the Hired Applicants by EEO Job Report

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **EEO/Affirmative Action** From EEO/Affirmative Action (G08E12),choose **Hired Applicants by EEO Job**

To analyze the number of female and ethnic minority applicants that your organization has hired, print the Hired Applicants by EEO Job report. You can also use this report for Affirmative Action reporting purposes.

You can review applicants by job categories and ethnic codes. The report shows how many of those applicants were hired, as well as the percent of hired applicants from each of the ethnic groups within the EEO job categories by gender.

```
084400                                              JD Edwards World                                                 Page No. . .        2
                                           Hired Applicants by EEO Job Category                                      Date - . . .  6/28/17
                                                                                                                     Reporting Period:
                                                                                                                     01/01/17 - 12/31/17

                                          . . . Total . . .    . . White . .     . . Black . .     . . Hispanic . .   . . Asian . .      . . Indian . .
     Job Category                          Appld  Hired   %    Appld Hire   %    Appld Hire   %    Appld Hire   %    Appld Hire   %    Appld Hire   %
-----------------------------             ------ ----- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----
Officials and Managers          Male . .     1                    1
                                Female .     2                    2
                                Total. .     3                    3
Professionals                   Male . .     3      1  33.3       2                                                   1     1 100.0
                               Female .
                                Total. .     3      1  33.3       2                                                   1     1 100.0
Office and Clerical            Male . .
                                Female .     1                    1
                                Total. .     1                    1
Craft Workers (Skilled)         Male . .     1                    1
                               Female .
                                Total. .     1                    1
                                          ------ ----- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----  ----- ---- -----
                                Male . .      5      1  20.0      4                                                      1     1 100.0
                                Female .      3                   3
                                TOTAL. .      8      1  12.5      7                                                      1     1 100.0
```

Processing Options

See Hired Applicants by EEO Job Category (P084400).

Reviewing the Application Flow Analysis Report

	From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **EEO/Affirmative Action** From EEO/Affirmative Action (G08E12),choose **Application Flow Analysis**

To review information about the steps in the hiring process that minority and female applicants completed, print the Application Flow Analysis report. You can review the number of applicants in each EEO job category who have received offers, the number hired, and the number rejected. The report also shows the number of male and female applicants within each EEO ethnic group.

```
 084411                                         JD Edwards World                                 Page -              3
                                             Application Flow Analysis                           Date -        6/28/17
                                                 by Business Unit
                               Applicant Dates Selected  FROM:  01/01/17   THRU:    12/31/17

                             . . All Applicants . .     . . . . .  Male  . . . . .      . . . . . Female . . . . .
  EEO Job Category           Total    Male   Female    White  Black  Hisp   Asian  AmInd    White  Black  Hisp   Asian  AmInd
--------------------------   ------  ------  ------    -----  -----  -----  -----  -----    -----  -----  -----  -----  -----
Home Business Unit .
001 Officials and Managers
  Applicants                     1               1                                              1
  Offers
  New Hires
  Rejections
002 Professionals
  Applicants                     1       1                                     1
  Offers
  New Hires
  Rejections
                             ------  ------  ------    -----  -----  -----  -----  -----    -----  -----  -----  -----  -----
                                 2       1       1                             1                1
```

Processing Options

See [Application Flow by Business Unit (P084411)].

Reviewing the Adverse Impact Analysis Report

From Human Resources (G08), choose **Applicant Information** From Applicant Information (G08A1), choose **EEO/Affirmative Action** From EEO/Affirmative Action (G08E12),choose **Adverse Impact Analysis**

To compare the number of male, female, and ethnic minority applicants who applied to your organization to the number who were actually hired, print the Adverse Impact Analysis report. Because this report is divided into male, female, and ethnic groups, one applicant can be counted in more than one group. For example, a Hispanic woman would be counted as both female and ethnic.

```
 084412                                         JD Edwards World                         Page Number        2
                                              Adverse Impact Analysis                    Date         7/01/17
                                          All Employees by Business Unit
                                           01/01/17 through  12/31/17

                                  . . . . . .Male. . . . . .     . . . . . Female . . . . .     . . . . . .Ethnic. . . . . .
       EEO Job Category           Hired  Applied % Hired % Ratio  Hired  Applied % Hired % Ratio  Hired  Applied % Hired % Ratio
------------------------------   ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
  Home Business Unit .
  ------------------- ----------- ----------------------------
Officials and Managers                                                         1                               1
Professionals                              2                                   1                               3
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
                                           2                                   2                               4
  Home Business Unit .            1 General Accounts
  ------------------- ----------- ----------------------------
Officials and Managers                     1                                                                   1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     General Accounts                      1                                                                   1
  Home Business Unit .           90 Administrative Department
  ------------------- ----------- ----------------------------
Officials and Managers                                                         1                               1
Professionals                              1                                                                   1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     Administrative Department             1                                   1                               2
  Home Business Unit .          152 Parcel Express: Payable Tenant
  ------------------- ----------- ----------------------------
Craft Workers (Skilled)                    1                                                                   1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     Parcel Express: Payable T             1                                                                   1
  Home Business Unit .          451 Accounting Department
  ------------------- ----------- ----------------------------
Professionals                              1                                                                   1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     Accounting Department                 1                                                                   1
  Home Business Unit .          701 Corporate Administration
  ------------------- ----------- ----------------------------
Office and Clerical                                                            1                               1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     Corporate Administration                                                  1                               1
                                 ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- ------- -------
     Grand Total:                          6                                   4                              10
```

Processing Options

See All Employees by Business Unit (P084412).

8 Position Control

Overview to Position Control

Objectives

- To budget for employee salaries, hours, and full-time equivalents (FTEs)
- To analyze and review position budgets
- To transfer position budget information to the general ledger
- To assign an employee to a position budget

About Position Control

A position is an employee's assignment for a fiscal year. You use positions to budget for employee salaries.

Position control refers to the creation, maintenance, and monitoring of positions and their budgets. You do not need to create positions to use your Human Resources and Payroll systems. However, to use positions, you must have a position budget. Positions and their budgets are also called position budgets.

You define a position budget to establish, monitor, and control budgets for employee assignments. In the same way that a project manager allocates time and material resources to a project, your organization can create position budgets for its employee resources. You can choose to define your position budgets manually, or you can let the system automatically define them for you. You can also calculate position budget information for the next fiscal year.

After you define position budgets, you can transfer them to the general ledger so that your accounting department can use and review them. Depending on the requirements of your accounting and human resources departments, you can transfer complete position budget information or summary information only.

You can attach employee records to a position budget and then review position budget information to ensure that the salary, hours, and FTE for your employees compare favorably to those that you budgeted for the position.

When a position budget changes, or when you need to correct a data entry error, you can revise position budget information.

To review information about positions, position budgets, and the employees in those positions, you can print position reports. You can review budgeted and projected position budget amounts. For quick access to position budget information, you can also review that information online.

Working with position control includes the following tasks:

- Defining a position budget

- Transferring a position budget to the general ledger
- Working with position activity information
- Reviewing position budget information
- Defining next year's position budget
- Reviewing position reports

Define a Position Budget

Defining a Position Budget

You define position budgets to establish, monitor, and control budgets for employee assignments. In the same way that a project manager allocates time and material resources for a special project, your organization can generate position budgets for its employee resources. For each position, your organization can plan for and control components such as:

- Salary expenditures
- Hours worked
- Full-time equivalents (FTEs)
- Head count (number of employees)

When you define a position budget, the system updates the Position Master Information table (F08101).

You can choose to define your position budgets manually, or you can let the system automatically define them for you, based on the job and employee information that you have already entered into the system. Letting the system define positions automatically saves time and helps you avoid data entry errors. You typically define position budgets manually when one or both of the following occur:

- The initial position budget (the position budget for the first fiscal year for which you are using position control) does not equal the salary, standard hours per year, and FTEs for the employee that you intend to assign to the position. In this case, if you create position budgets automatically, you will need to manually revise the budget values.
- You want the identifier for the position (the position ID) to be different than the corresponding job type. When you create position budgets automatically, the program uses the corresponding job type for the position ID.

When you define position budgets manually, you can enter the information using either of the following methods:

- Group together all of the position budgets that are in the same business unit and enter them at one time
- Enter each position budget separately

Defining a position budget consists of the following tasks:

- Defining Multiple Position Budgets Manually
- Defining a Single Position Budget Manually
- Defining a Position Budget Automatically

- Defining Position Accounts

When defining a position budget, you:

- Identify the need for one or more employees
- Approve the need for the employees
- Set up a budget for the employee salary and hours worked
- Assign the appropriate FTEs and head count to the position
- Monitor hiring to ensure that you do not exceed the position budget

Example: Budget Processing

You need a stock clerk position in your warehouse. To fill this position you need enough employees to equal 10 FTEs. The plant manager approves the need for this position, specifying that, to expedite training, you should hire no more than 14 people to fill the position (some of the employees can be part-time). When you define the position budget, you enter:

Item	Description
Salary	200000.00 (annual)
FTEs	10
Head count	14

The person with the appropriate authority approves the position. When you hire employees to fill the position, the system can immediately alert you if you exceed the budgeted amounts for salary, hours, FTE, or head count.

Before You Begin

- Set up position control information in the human resources constants. See *Setting Up Position Control Information*.
- Set up your business units and fiscal periods.
- Specify the range of accounts in the general ledger to use for position budgets. See *Setting Up AAIs*.
- Define the job type codes that you want to associate with each position. See *Defining Jobs*.

What You Should Know About

Future position activity	After you create your position budgets and activate the appropriate system constants, the system automatically creates a position activity record whenever you enter a position ID on the HR Employee Entry form. The system uses the values in the activity record to generate the projected through year-end values. The activity record identifies the following: ▪ Employee ▪ Home business unit ▪ Assigned position ▪ Date the employee was assigned to the position ▪ Employee's salary ▪ Standard hours per year ▪ Full-time equivalent

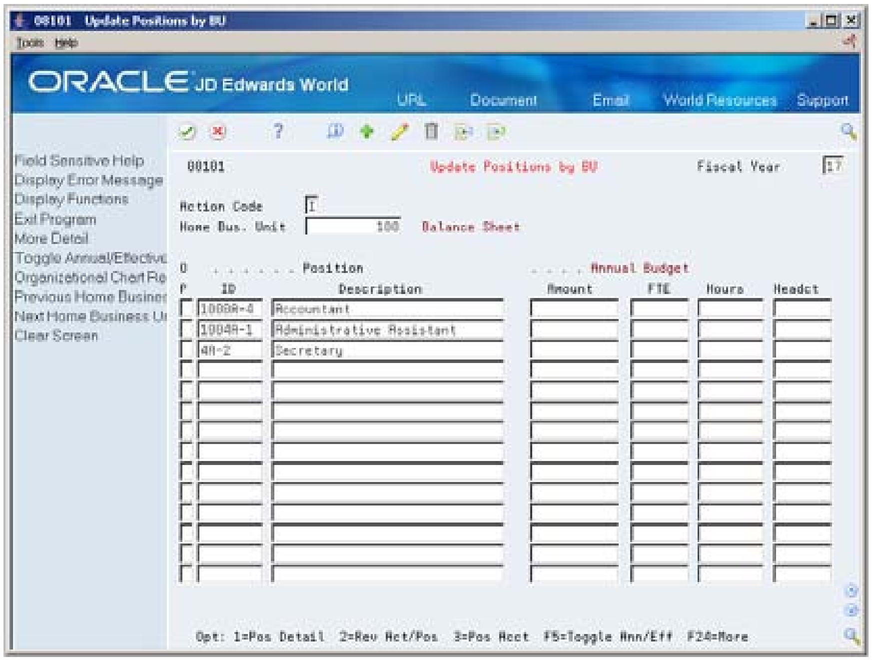
Defining Multiple Position Budgets Manually

From Human Resources (G08), choose Position Control
From Position Control (G08P1), choose Update Positions by Business Unit

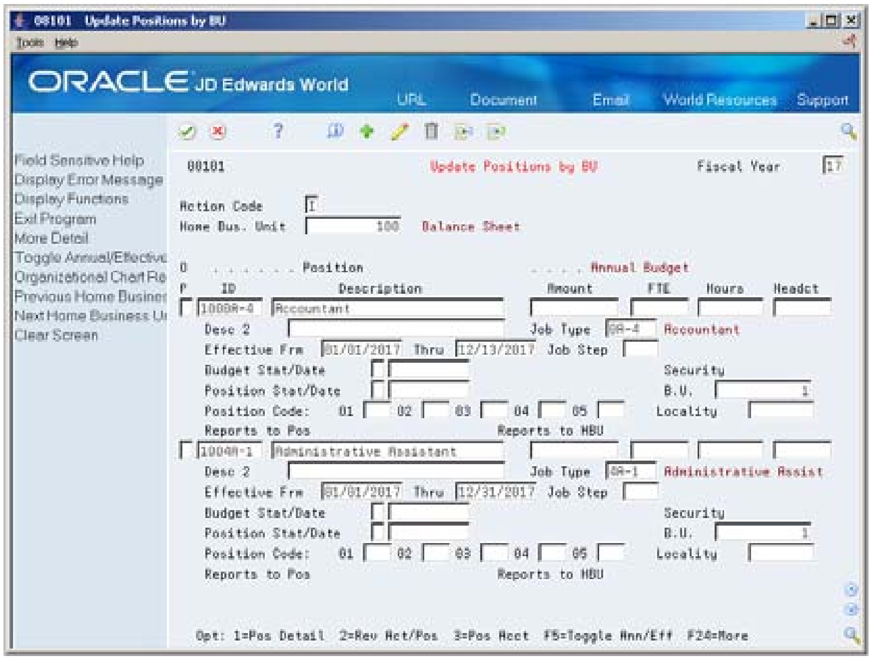
You can define and update a group of position budgets for the same business unit. This entry method makes it easy to update and review position budget information for an entire business unit at the same time.

To define multiple position budgets manually

On Update Positions by Business Unit



1. To locate the home business unit, complete the following fields:
   - Home Business Unit
   - Fiscal Year
2. Complete the following fields:
   - Position ID
   - Position Description
   - Amount
   - FTE
   - Hours
   - Headcount
3. Access the detail area.



4. To associate a job with the position budget, complete the following fields:
   - Job Type
   - Job Step
   - Locality
5. To enter status information, complete the following fields:
   - Effective From
   - Effective Through
   - Budget Status
   - Budget Status Date
   - Position Status
   - Position Status Date
6. Complete any of the following additional fields:
   - Description 2
   - Security Business Unit
   - Position Codes 01-05

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Fiscal Year</td><td>A number that identifies the fiscal year. Generally, you can either enter a number in this field or leave it blank to indicate the current fiscal year (as defined on the Company Numbers and Names form).

Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2017 and ends September 30, 2018. The end of the first period is October 31, 2017. Specify the year 17 rather than 18.</td></tr>
<tr><td>Home Bus. Unit</td><td>The number of the business unit in which the employee generally resides.</td></tr>
<tr><td>Position ID</td><td>A code that you use for budgetary (position) control purposes. The position ID consists of:
▪ Position (position code and its description)
▪ Fiscal year
▪ Home business unit

For example, you can identify position A0-1 as Accounting Manager for fiscal year 2017-2018, for home business unit 41.</td></tr>
<tr><td>Amount</td><td>The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table, represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position.</td></tr>
<tr><td>FTE</td><td>The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.</td></tr>
<tr><td>Hours</td><td>The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all the full-time equivalents (FTEs).

If you do not enter a value in this field when you budget the position, the system enters a default value that equals the number of FTEs multiplied by the standard number of hours per year for the company.</td></tr>
<tr><td>Headcount</td><td>The number of employees requested, budgeted, or approved for a position or requisition.</td></tr>
<tr><td>Job Type</td><td>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</td></tr>
</table>

Field	Explanation
Job Step	A user defined code (07/GS) that designates a specific level within a particular job type. The system uses this code in conjunction with job type to determine pay rates by job in the Pay Rates Table.
Effective From Date	The date on which a requisition, a position, or activity within a position takes effect. *Form-specific information* When the date you enter in this field occurs after the first day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank. Effective budget amounts are the amounts that the system uses to: ▪ Verify position budget information, if you have set up your system constants to warn or prevent users from exceeding position budget amounts ▪ Update general ledger information
Thru	The date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures. *Form-specific information* When the date you enter in this field occurs before the last day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank. Effective budget amounts are the amounts that the system uses to: ▪ Verify position budget information, if you have set up your system constants to warn or prevent users from exceeding position budget amounts ▪ Update general ledger information
Status - Budget	A code that indicates the status of the position budget. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or to an approved requisition. Positions with a closed budget status are not included when you run Create Next Year's Position Budgets (P081820).
Budget Status Date	The date that the current budget status became active.

Field	Explanation
Position Status	The current activity level of the position. When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.
Position Status Date	The date that the current status of the position became active.
Position 01	A user defined code (08 / P1) that classifies Position Master records (unique by fiscal year, business unit, and position ID) for reporting purposes. For example, you might classify positions by their field of work. In this case, position codes could be set up as follows: CLT Client Services ENG Engineering FIN Business Finance LAB Contract Labor MGR Business Management PRG Programming
Locality	A user defined code (07 / SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.

Processing Options

See Position Master Information (P08101).

Defining a Single Position Budget Manually

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **Positions Master Detail**

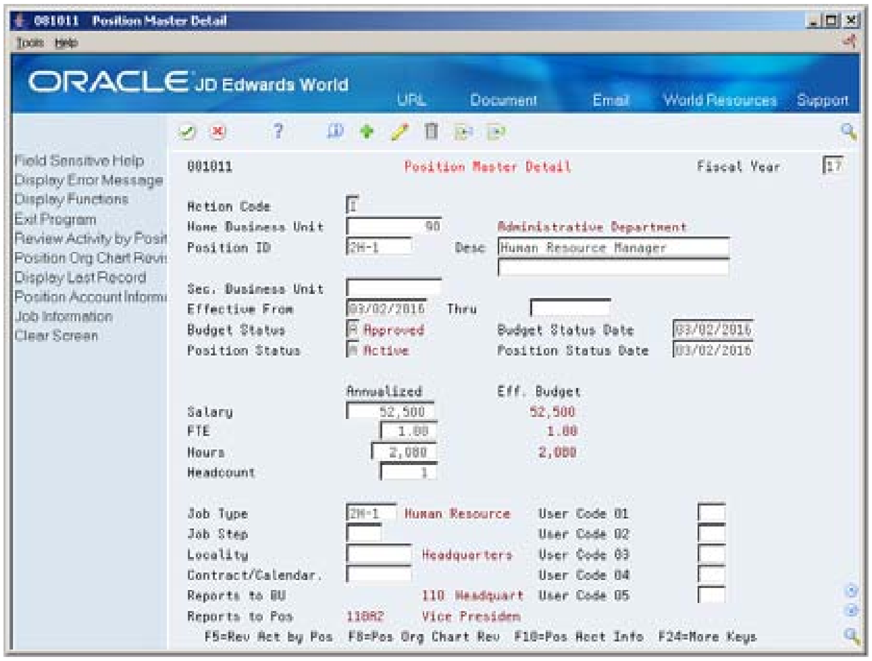
When you enter position budgets, you might prefer to enter each budget separately. You define a single position budget manually for the following reasons:

- You want to create a position budget for a new position that does not currently exist in the employee database.
- The budget amounts that you have allocated for this year's positions are different at the position level from the budget amounts for next year's positions.

To save data entry time, you can also copy information from existing position budgets to create new position budgets.

To define a single position budget manually

On Position Master Detail



1. Complete the following fields:
   - Fiscal Year
   - Home Business Unit
   - Position ID
   - Description
   - Salary
   - FTE (Full-Time Equivalent)
   - Hours
   - Headcount
2. To associate a job with the position budget, complete the following fields:
   - Job Type
   - Job Step
   - Locality
3. To associate a contract calendar with the position budget, complete the following fields:
   - Contract/Calendar

4. To enter status information, complete the following fields:

- Effective From
- Effective Through
- Budget Status
- Budget Status Date
- Position Status
- Position Status Date

5. Complete any of the following additional fields:

- Position Codes 1-5
- Description 2
- Security Business Unit

What You Should Know About

Deleting position records	You can delete a position record on Position Master Detail if no current activity exists for the record. To delete a position record with activity, use Purge Positions and Activity. If your system has only a small number of activity records, you might prefer to delete them using Enter Employee Activity or Revise Employee Activity, and then delete the position using Position Master Detail.

Processing Options

See Single Position Revisions (P081011).

Defining a Position Budget Automatically

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), enter **29**
From Position Control Setup (G08P4), choose **Start Position Control**

When you begin using the position control feature, you must decide whether to enter position budgets manually or run a program that creates them automatically. Defining position budgets automatically saves you time and reduces data entry errors.

You can define position budgets automatically when both of the following are true:

- Your initial position budgets equal the salary, hours, FTE, and headcount that already exists in your current employee records
- You plan to use your employees' job type codes as the position IDs.

When you define position budgets automatically, the program uses the employee's job type, job type description, home business unit, and salary as the respective position ID, position description, home business unit, and salary for the position budget. The program creates and populates the following tables:

- Position Master Information (F08101)
- Position Budget Detail (F08111)

When you define position budgets automatically, the system automatically enters the budget status with an approved status code. Only positions with approved budget status codes can be assigned to employee records. Further, an approved requisition can reference only a an approved position budget.

You might also need to enter other information manually, such as effective dates or user defined information.

To modify position budget information after you have defined position budgets automatically, use either Update Positions by Business Unit, Position Master Detail, or the World Writer Global Update.

The program does not include an employee's job record when it creates position budgets if:

- The employee is terminated prior to the beginning of the current fiscal year.
- No job type exists in the employee's record.
- The employee has a hire date that occurs after the system date of the day that you started position control. For example, if you run Start Position Control on August 16th, and the employee's hire date is September 1st, the employee will not be included.

If more than one employee is associated with a job type, the system totals the values for all of the employees to generate values for the position budget.

What You Should Know About

Assigning position budgets	You can assign an approved position budget to an approved requisition, and then assign both of them to an employee. You can assign an unapproved position budget to an unapproved requisition, and then assign both of them to an applicant.

See Also

- *Setting Up Employee History and Turnover Tracking*
- *Defining Multiple Position Budgets Manually (P08101)*
- *Defining a Single Position Budget Manually (P081011)*

Processing Options

See Build Position Control Files (F08101 / 11) (P081800).

Defining Position Accounts

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **Position Account Information**

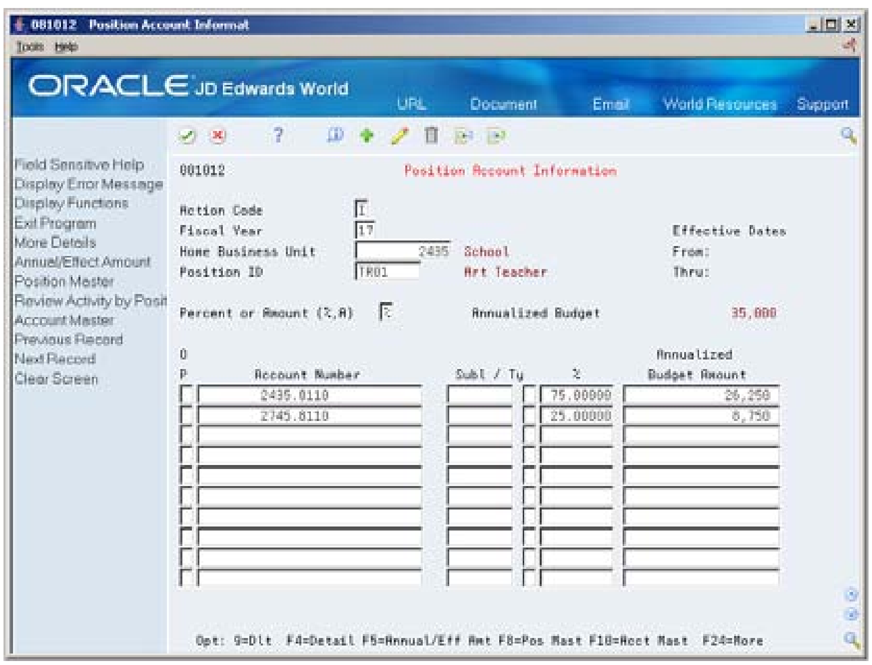
After you define your position budgets, you typically must transfer the budget information to accounts in the general ledger so that the accounting department can track the amounts that you have budgeted. To make it easier to track position budgets, you can set up the system to automatically summarize all position budgets and transfer the information to the general ledger accounts that you specify.

If you receive funding for a position from more than one source, you can divide a position budget among multiple accounts.

You define position accounts only if your human resources department is responsible for creating salary budgets. If your accounting department determines salary budgets, do not define position accounts. Instead, set up automatic accounting instructions (AAIs) for position budgets.

To define position accounts

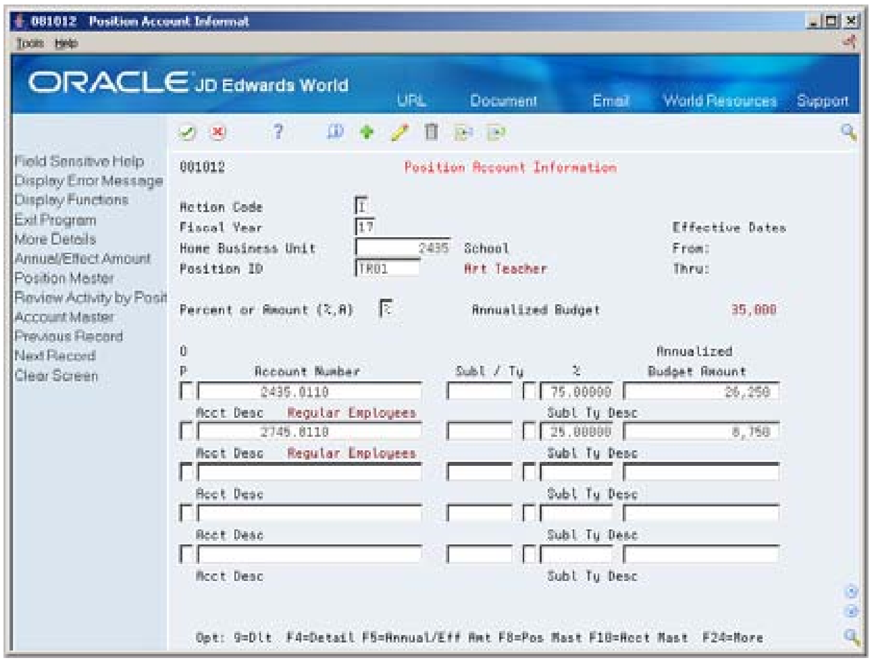
On Position Account Information



1. Complete the following fields:
   - Fiscal Year
   - Home Business Unit
   - Position ID
   - Account Number
2. To specify the method of calculation, complete the following field:

- Percent or Amount (%, A)

3. If the method of calculation (Percent or Amount field) is percent, complete the following field:
   - % (Percentage)
4. If the method of calculation is amount, complete the following field:
   - Annualized Budget Amount
5. Complete the following optional fields:
   - Subledger
   - Ty (Subledger Type)
6. To review additional information, access the detail area.



Field	Explanation
Percent or Amount (%,A)	A value that indicates the method that the system uses to calculate the portion of a position budget that is distributed to each account. Valid values include: % A percentage A An amount This is an input field only. The system does not store the value that you enter in the Account Information table.
Subledger - G/L	A code that identifies a detailed auxiliary account within a general ledger account. A subledger can be an equipment item number, an address book number, and so forth. If you enter a subledger, you must also specify the subledger type.

Field	Explanation
Subledger Type	A user defined code (00 / ST) that is used with the Subledger field to identify the subledger type and subledger editing. On the User Defined Codes form, the second line of the description controls how the system performs editing. This is either hard-coded or user defined. For example: A Alphanumeric field, do not edit N Numeric field, right justify and zero fill C Alphanumeric field, right justify and blank fill
Percentage - Position Account	This field is a percentage of a position account.
Annualized Budget Amount	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table, represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position.

Processing Options

See Position Account Information (P081012).

See Also

- *Setting Up AAIs for Position Budgets (P0012)*

Transfer a Position Budget to the General Ledger

Transferring Position Budget Information to the General Ledger

After you define your position budgets and position accounts, you can transfer position budget information to the general ledger so that your accounting department can access it.

Depending on the requirements of your accounting and human resources departments, you can transfer either summary position budget information or detailed information.

Summary information includes monthly totals of salary amounts and hours for all the position budgets you specify. Detailed information includes a record of the salary amount and hours for each individual position budget.

To transfer summary information to the general ledger, you must transfer position budgets to the Account Balances table (F0902). To transfer detailed position budget information, you can post position budgets to the Account Ledger table (F0911).

> **Caution:** You transfer position budget information to the general ledger only if your human resources department is responsible for creating salary budgets. To avoid overwriting information, you should not transfer position budget information to the general ledger if your accounting department determines the salary budgets for your organization.

To transfer position budgets to the general ledger, complete one of the following tasks:

- Transferring Position Budgets to the Account Balances Table
- Posting Position Budgets to the Account Ledger Table

Before You Begin

- Define your position budgets. See *Defining a Position Budget*.
- Define your position accounts. See *Defining Position Accounts.*

See Also

- *Entering Annual Budget Amounts (P14102)* and *Entering Detailed Budget Amounts (P14101)* in the *General Accounting I Guide*

Transferring Position Budgets to the Account Balances Table

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose an option under the **Update BL Budgets** heading

To create or refresh your position budget accounts, you transfer summary position budget information to the general ledger Account Balances table. You typically perform this task to establish an initial budget for a new year.

As you work through the budgeting process, you can transfer three types of position budgets to the Account Balances table:

- Requested budgets
- Approved budgets
- Final (also know as original) budgets

You use a different version of the same DREAM Writer program to transfer each of these types of position budgets. This program updates the Account Balances table (F0902). You (or someone in your accounting department) can review this information as you work through the budgeting process.

You transfer requested, approved, and final position budget information to the Account Balances table so that you have an audit trail from the beginning budget amounts through the final budget amounts as you work through the budget process.

When you run this program for the requested position budgets, the system updates the approved and final budget fields for the same account in the Account Balances table with the same values. When you run this program for the approved budget, the system also updates the final budget for the same account in the Account Balances table with the same value. When you run the program for the final budget, the system updates only that value. In this case, the values for requested and approved budgets remain the same.

The system transfers to the general ledger only hour values and effective budget amounts for positions.

What You Should Know About

Revising position budget accounts	Because this program overwrites all existing information in the Account Balances table, you transfer position budgets to the Account Balances table only when you are setting up budgets for a new year. If you need to revise position budgets in the middle of a year, do not rerun this program. Instead, post position budgets to the Account Ledger table (F0911). See *Posting Position Budgets to the Account Ledger table.*

Processing Options

See Update Position Budgets - Requested (P08902).

Posting Position Budgets to the Account Ledger Table

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose **Create Batch**

To track detailed information for your position budgets, you can update the position budget information to the Account Ledger (F0911) table. Position budgets must have an approved status before you can post them. When you post position budgets to the Account Ledger table, you can distribute them between up to 12 accounts in the Account Balances table (F0902).

See Also

- *Posting Journal Entries (P09800)* in the *General Accounting I Guide* for more information about posting information to the Account Ledger table

Processing Options

See Update Position Budgets to Acct. Ledger (P08911).

Work with Position Activity Information

Working with Position Activity Information

After you define and approve your position budgets, you can attach employee records to them. You attach employee records to ensure that the actual salaries, hours, and FTEs for your employees are within those that you established for your position budgets. *Position activity* illustrates employee movement into and out of positions. To help you determine appropriate position budgets, you can set up your system to store historical records of position activity.

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create position activity records when you update employee records to reflect position changes.

You can correct position activity records if you entered incorrect position information for an employee.

Working with position activity includes:

- Attaching an Employee Record to a Position Budget
- Correcting Employee Position Activity

What You Should Know About

Purging position activity records	To conserve computer disk space, you can purge obsolete position activity records from your system. The method you use to purge position information is the same method that you use to purge other types of information. See *Purging History Records.*

Attaching an Employee Record to a Position Budget

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), choose HR Employee Entry

After you define and approve your position budgets, you can attach employee records to them. You attach an employee record to a position budget to control budget expenditures and ensure data integrity. To attach an employee record to a position budget, you enter a position ID in the employee's record.

To help you stay within your position budgets when you are entering employee information, the system alerts you when you exceed the approved salary, hours, FTE, or head count for the position. In such situations, the system displays either an error or a warning message. When you set up your constants information, you specify the type of message that appears when you enter information that exceeds a position's effective budget.

When you attach an employee record to a position budget, the system:

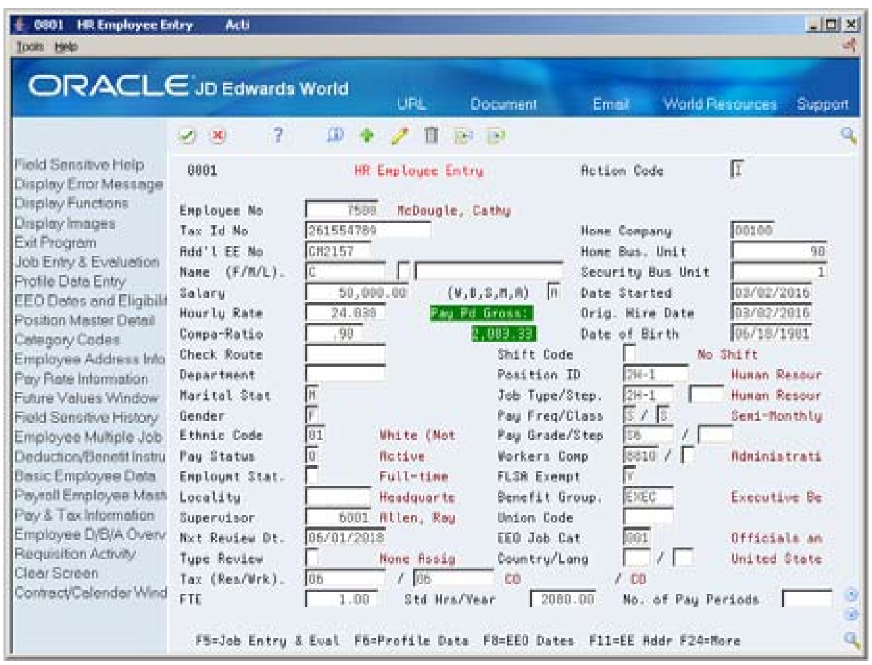
- Adds the salary, hours, FTEs, and head count amounts for the employee to the total position budget amounts that are projected through the fiscal year-end.
- Adds to the employee's record any job information that is associated with the position.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee's assignment, the employee's salary, FTE, and hours. The system then uses this information to project the effect of these values on the budget through the end of the fiscal year.

Before You Begin

- Verify that the Position Control (Y/N) field on the Constants Information form is set to Y. See *Setting Up Position Control Information*.
- For each position to which you need to attach employee records, verify that the budget status is approved. See *Defining a Position Budget*.

To attach an employee record to a position budget

On HR Employee Entry



1. Locate the employee.

2. Complete the following field:
   - Position ID

What You Should Know About

Alternate entry method	To maintain position activity records separate from employee records, you can use the Enter Employee Activity program to attach an employee record to a position budget. When an employee enters a position or transfers to a new position, you must manually update this program.

See Also

- *Adding a New Employee* for information about how processing options affect position assignments.

Correcting Employee Position Activity

	From Human Resources (G08), choose Position Control From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose Revise Employee Activity

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create historical records of the information you have changed. In addition to these employee history records, you can set up your system to create position activity records when an employee:

- Enters a position
- Leaves a position
- Changes positions within your organization

Tracking position activity records makes it easy to review all of the employees who ever worked in a specific position.

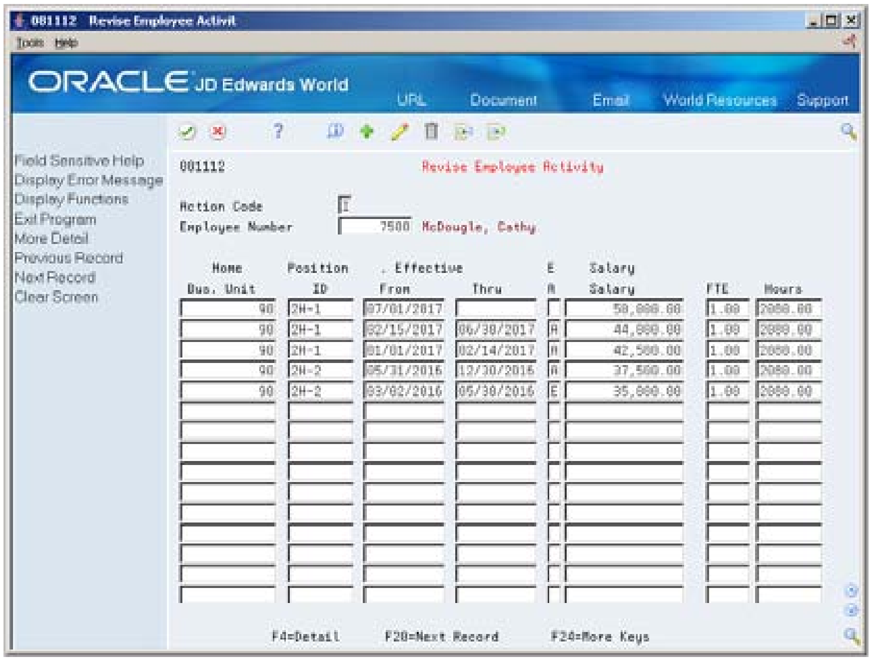
You can correct position activity records if you made a mistake when you entered position information for an employee.

This program updates the Position Budget Detail table (F08111) and the Position Master Information table (F08101). It does not update the employee history tables.

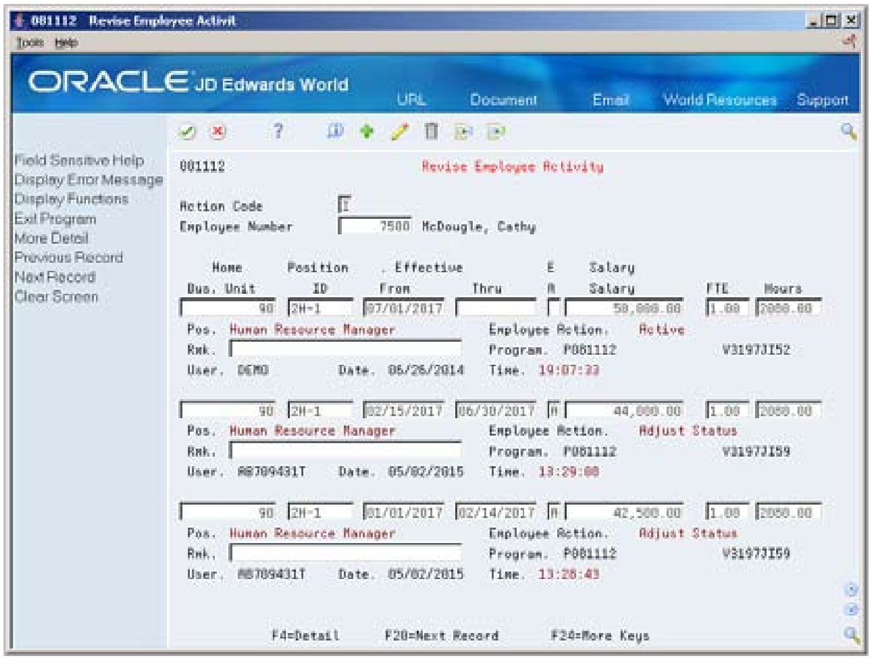
Caution: Because the system does not create an audit trail of the changes that you make when you correct position activity records, JD Edwards World recommends that you assign this program high security.

To correct employee position activity

On Revise Employee Activity



1. Change the incorrect information in any of the following fields:
   - Home Business Unit
   - Position ID
   - Effective From
   - Effective Through
   - Employee Action
   - Salary
   - Full Time Equivalents (FTE)
   - Hours
2. Access the detail area.



3. To make additional comments, complete the following field:

- Remark

What You Should Know About

Deleting an incorrect position activity record	If an entire position activity record is incorrect, you can delete the record by using the Field Exit function to remove the value in each field of the record. Use the Change action when you delete this information.
Tracking historical position activity information	You can also use Revise Employee Activity to enter historical position activity information that you previously stored in another system.

See Also

- *Setting Up Position Control Information (P08040)* for information about setting up your system to create position activity records

Review Position Budget Information

Reviewing Position Budget Information

To ensure that the salary amounts that you specified in your position budgets compare favorably to the actual salaries of the employees in those positions, you should periodically review position budget information. You can review this information for a specific business unit or position or by the activity involving the position.

When you review position budget information, the system displays projected year-end salary amounts that you can use to compare to budgeted amounts. The system calculates these amounts based on the employees' annualized salaries and their associated effective dates. The system calculates projected year-end amounts by adding together the pro-rated annualized salaries for all of the employees who were in the position during the year. If the employee does not work an entire year in the same position, the system pro-rates the employee's annualized salary for the amount of time that they worked in the position during the fiscal year.

For example, assume that:

- Position A1 (accountant) pays an annual salary of 42,000.
- Cathy worked in position A1 from January 1 through April 30, so her projected annualized salary for that position is 14,000 (42,000 divided by 12 = 3500. 3500 multiplied by 4 months = 14,000)
- The position was vacant from May 1 to May 31
- George worked in position A1 from June 1 through December 31 and his projected annualized salary was 24,500 (42,000 divided by 12 = 3500. 3500 multiplied by 7 months = 24,500)

The system calculates the projected year-end amount for position A1 as 38,500 (14,000 plus 24,500).

Reviewing position budget information consists of the following tasks:

- Reviewing Position Budget Information by Business Unit
- Reviewing Position Budget Information by Position
- Reviewing Position Activity by Position
- Reviewing Position Activity by Employee

Reviewing Position Budget Information by Business Unit

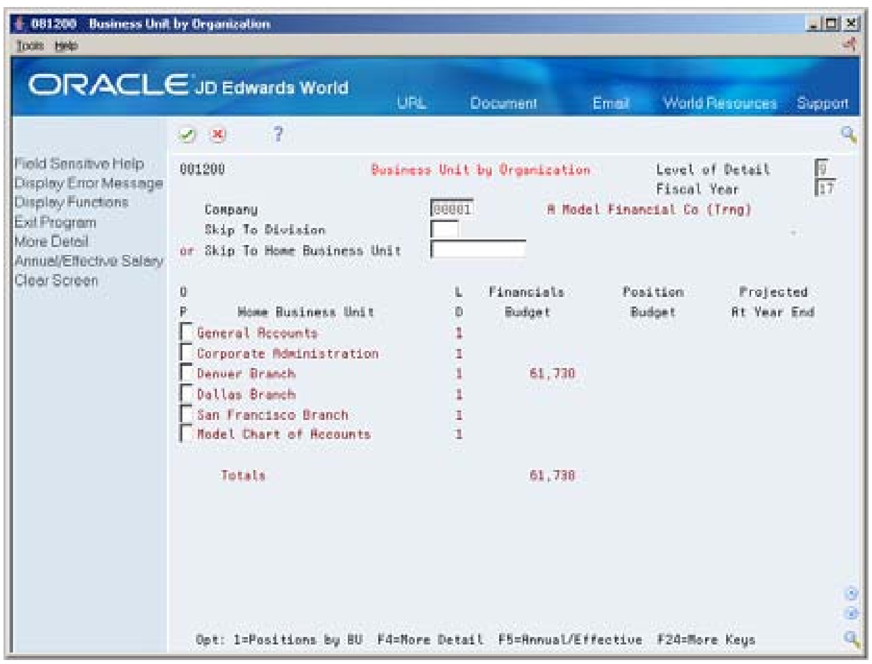
	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Business Unit by Organization**

To determine whether the position budget amounts for a business unit compare favorably with the amounts that your accounting department budgeted for salaries, you can review position budget information by business unit. To determine whether you are likely to remain within position budget amounts through the end of the fiscal year, you can also review projected year-end salary amounts for each business unit.

You typically need to review this information only when your accounting department determines salary budgets. If your human resources department determines position budgets and updates the general ledger with position budget information, that information is the same as the financial budget information.

To review position budget information by business unit

On Business Unit by Organization



1. Complete the following fields and press Enter:
   - Company
   - Fiscal Year
2. Review the information in the following fields:
   - Financials Budget
   - Position Budget
   - Projected at Year End

3. Access the detail area.
4. Review the information in the following fields:
   - Co (Home Company)
   - BU (Home Business Unit)
   - Div (Division)
5. To review effective budget information, choose the Annual/Effective function.

Field	Explanation
Position Budget	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table, represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position.
Financials Budget	The number in this field is the accounting-perspective budget of the business unit. It allows you to compare the position budget from the HR perspective with the accounting budget for the business unit. The amount budgeted to a range of salary accounts in the Account Balances file (F0902) is dictated by automatic accounting instructions (AAIs) data items HRSB and HRSE.
Projected At Year End	A figure representing the amount of salary paid over a period of time. At the employee level, this is calculated by multiplying the employee's annual salary by the fraction of the fiscal year the employee worked. At the business unit level, this is calculated as the sum of all the employee activity in the position for the fiscal year. For example, an employee earning 40,000 annually who works from April 1 to December 31 represents a projected salary cost of 30,000 for that year.

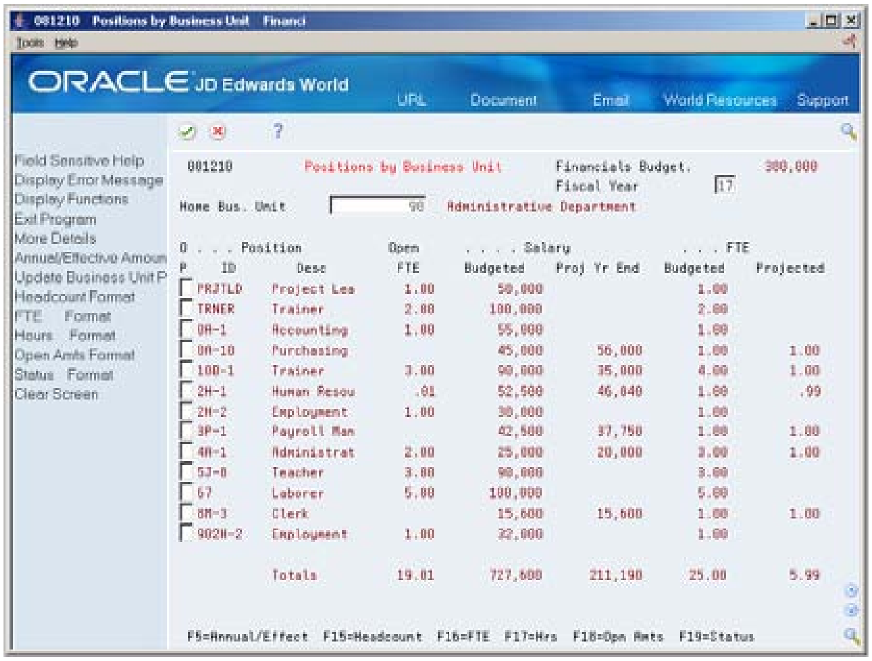
Reviewing Position Budget Information by Position

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **Positions by Business Unit**

To compare budgeted amounts for salaries, FTEs, hours, and head count to the corresponding actual amounts that are projected through year-end, you can review position budget information by position. You use this information to determine whether you expect to meet or exceed your position budgets through the end of the year.

To review position budget information by position

On Positions by Business Unit



1. Complete the following fields:
   - Fiscal Year
   - Home Business Unit
2. Review the information in the following fields:
   - Position ID
   - Position Description
   - Open FTE
   - Budgeted Salary
   - Projected Salary
   - Budgeted FTE
   - Projected FTE

Field	Explanation
Open FTE	A figure representing the difference between the full-time equivalent (FTE) budgeted for a position and the FTE that will actually be devoted if the current activity in that position is projected to year-end. For example, if you have 50 employees budgeted for the position, and you currently have 45 employees linked to the position, the number 5 will display in this field. If this amount is negative, it indicates that more FTEs will be devoted to the position by the end of the year than were originally budgeted.
Budgeted Salary	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table, represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position.
Budgeted FTE	The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.
Projected FTE	A figure representing the full-time equivalents (FTEs) projected for the fiscal year. At the employee level, this is calculated by multiplying the individual's FTE by the fraction of the year that the employee worked in the position. For example, a full-time employee (FTE=1.0) working from April 1 to December 31 has a projected FTE of .75.

What You Should Know About

Open Amounts

A positive open amount for salary, hours, head count, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

Processing Options

See Positions by Business Unit (P081210).

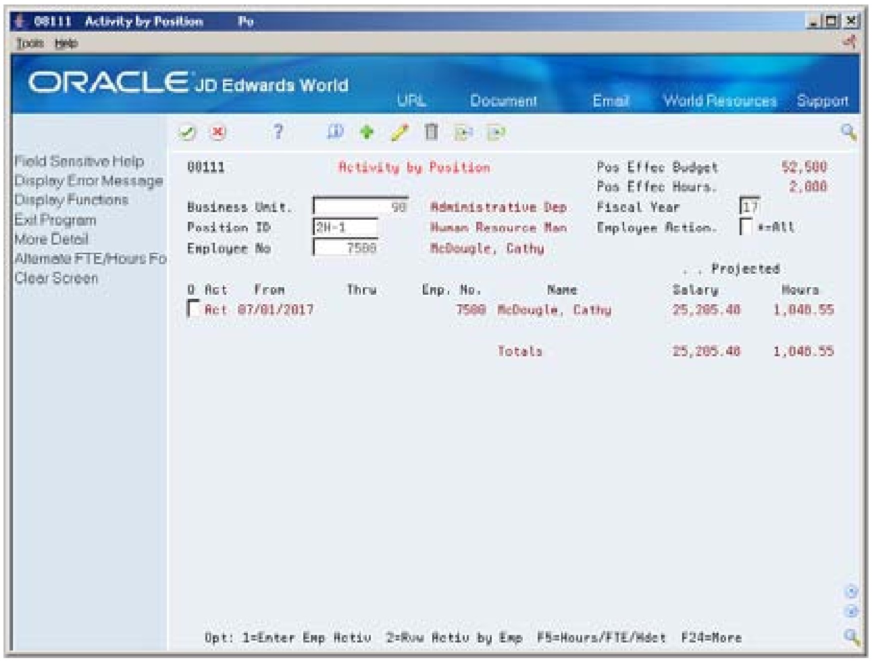
Reviewing Position Activity by Position

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Activity by Position**

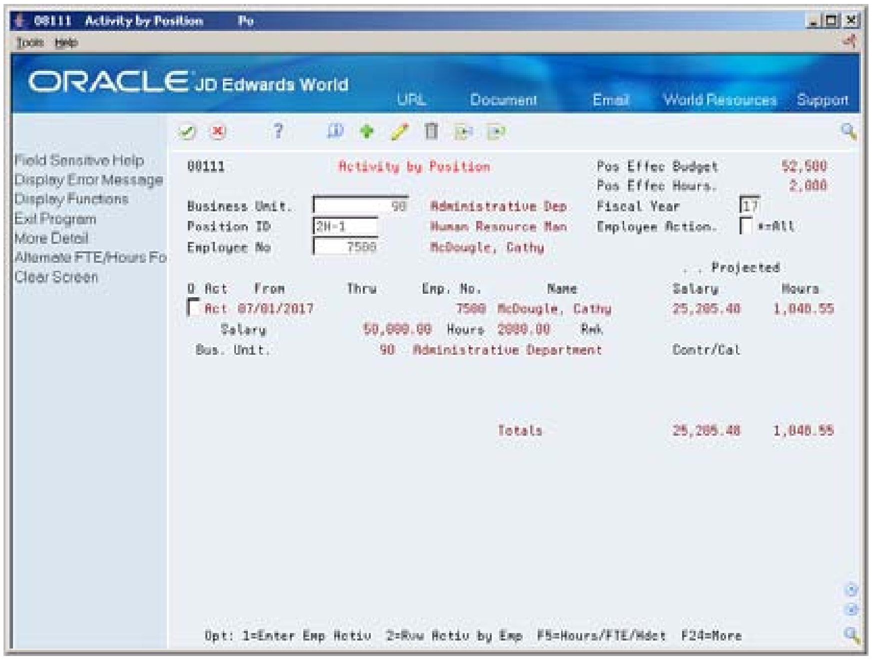
To review information about all of the employees that are associated with a position budget, you can review position activity by position. Use this information to determine whether you are likely to stay within the budgeted amounts for salary and head count through the end of the fiscal year.

To review position activity by position

On Activity by Position



1. Complete the following fields:
   - Business Unit
   - Fiscal Year
   - Position ID
2. To limit your search, complete the following optional fields:
   - Employee Action
   - Employee Number
3. Access the detail area.



Field	**Explanation**
Employee Action	A code that indicates the type of employee activity for which you are tracking position activity information. This code indicates why the position activity record was created. JD Edwards World provides the following employee action codes: blank Active A Adjust status (i.e., salary, FTE, hours) E Expired L Leave of absence T Transfer (from one business unit to another) X Terminate * Display records of all actions For example, to review only those employees who are associated with the position and are on a leave of absence, enter L in this field. Do not change these codes. You can add codes to user defined code table 08/AT, if necessary. *Form-specific information* The E (expired) status code indicates that the employee is no longer assigned to or working in the specified position after the pay stops date in the employee's multiple job record. This code does not indicate that the employee has been transferred or terminated.

Processing Options

See [Review Activity by Position (P08111)](#).

Reviewing Position Activity by Employee

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Activity by Employee**

To review information about all the positions in which an employee has worked, you can review position activity by employee. You can review position information for an employee who works in more than one position during a fiscal year.

To review position activity by employee

On Activity by Employee

To locate the employee, complete the following field:

- Employee Number

Processing Options

See [Review Activity by Employee (P081220)](#).

Define Next Year’s Position Budget

Defining Next Year’s Position Budget

	From Human Resources (G08), choose Position Control From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose Create New Year's Position

Although a position budget is valid for only one fiscal year, you do not need to enter position budget information each year. When the position budget information for next year will be the same as the corresponding information for the current year, you can save time by running a program that automatically creates position budgets for the next fiscal year, based on the position budgets for the current year.

When you run this program, the system:

- Creates the position, fiscal year, home business unit, and position ID and description
- Prints a DREAM Writer exception report that lists any positions that have effective through dates that are prior to the first day of the new fiscal year
- Creates a position accounts table for the next fiscal year (optional)

The system does not create budgets for:

- Closed positions
- Vacant positions that had no activity during the year

The system generates an exception report that lists the positions for which no budgets were created.

Before You Begin

- Set up the fiscal date patterns for the next fiscal year. See *Setting Up Fiscal Date Patterns*
- Set up a salary default source in your human resources constants. See *Setting Up Position Control Information.*

What You Should Know About

Data Selection	Your data selection for this program must include the fiscal year from which you want the system to calculate position budget information.

Purging position budgets

To conserve computer disk space, you can purge past years' position budget records from your system. The method that you use to purge position information is the same as that that you use to purge other types of information.

See *Purging History Records.*

```
 081820                                               JD Edwards World                                 Page Number        1
FY              17                           Create Next Year's Position Budgets                       Date          7/22/17
HBU:            90                                    Exception Report
Emp. No.        Employee Name                     P E Position Position Desc.      Pos Effect   Effect            Comments
                                                   S S   ID                        St  From Dt  Thru Dt
-------- ---------------------------------        - - -------- ------------------- --- -------- -------- ------------------------
    7504 Meade, Jane                              0   10B-1    Trainer                 08/03/17          EE Not in Position
    7500 McDougle, Cathy                          0 1 2H-1     Human Resource Manag A  03/03/17          EE Not in Position
Total Positions by HBU           2
 081820                                               JD Edwards World                       Page Number        2
FY              17                             Create Next Year's Position Budgets                     Date          7/22/16
HBU:         707                                         Exception Report
Emp. No.        Employee Name                     P E Position Position Desc.      Pos Effect   Effect            Comments
                                                   S S   ID                        St  From Dt  Thru Dt
-------- ---------------------------------        - - -------- ------------------- --- -------- -------- ------------------------
    7704 Rivard, Jacques                          0   5J-4     Firefighter                               EE has no EE Master Recor
    7704 Rivard, Jacques                          0   5J-4     Firefighter                               EE has no EE Master Recor
    7704 Rivard, Jacques                          0   5J-4     Firefighter                               EE has no EE Master Recor
    7704 Rivard, Jacques                          0   5J-4     Firefighter                               EE has no EE Master Recor
Total Positions by HBU           1
Grand Total - Positions          3
```

Processing Options

See Create Next Year's Position Budgets (P081820).

Review Position Reports

Reviewing Position Reports

To ensure that the salary amounts that you specified in your position budgets compare favorably to the actual salaries, FTEs, hours worked, and head count of the employees in those positions, you should periodically review position budget information. To make it easy to review and evaluate this information, you can print position reports. You can review this information for current, previous, or future fiscal years.

To review the most recent changes that have been made to position budgets, you can also print position reports.

To determine whether you need to hire additional employees, you can review reports that list open positions.

To limit position reports to the specific information that you need, you can display information:

- For an entire fiscal year
- As a comparison between two fiscal years
- By both budgeted and projected figures through the fiscal year end
- As the difference between projected and budgeted effective amounts
- As a review of the current position activity to the level budgeted for the upcoming fiscal year
- As the percentage change in each budget from one fiscal year to the next

Reviewing position reports includes:

- Reviewing the Open Amounts by Position Report
- Reviewing the Open Effective Amounts by Position Report
- Reviewing the Cross-Year Budget Comparison Report
- Reviewing the Cross-Year Effective Budget Comparison Report
- Reviewing the Position Full-Time Equivalents Report
- Reviewing the Position Headcount Report
- Reviewing the Position Budgets Report
- Reviewing the Position Budgets by Job Type and Step Report
- Reviewing the Position Budgets by Business Unit Report
- Reviewing the Position Effective Budgets Report

- Reviewing the Position Effective Budget by Job Type & Step Report
- Reviewing the Position Effective Budget by Home Business Unit Report
- Reviewing the Employee Activity by Number Report
- Reviewing the Employee Activity by Name Report

Reviewing the Open Amounts by Position Report

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Open Amounts by Position**

To review position information for salaries, FTEs, and hours worked, print the Open Amounts by Position report. Use this information to compare budgeted amounts to projected amounts through the fiscal year end. The report displays open amounts, which are the differences between budgeted and projected amounts.

081420 JD Edwards World Page - 2
Open Amounts by Position Date - 7/01/17
All Business Units - Fiscal Year 2017

Home BU : 50 General Accounts

Fiscal Year. 98
Home Business Unit . 50 General Accounts

ID/Desc	Pos. Budget	Salaries Projected	Salaries Open	Full Time Equivalents Budgeted	Full Time Equivalents Projected	Full Time Equivalents Open	Headcount Budget	Headcount Project	Headcount Open	Hours Worked Budgeted	Hours Worked Projected	Hours Worked Open
5J-9 Draftsperson	75,000	62,702	12,298	2.00	2.00			2	2-	4,160	4,160	
5067 Laborer Level I	53,111		53,111	1.00		1.00				2,080		2,080
62 Foreman	47,840	47,840		1.00	1.00			1	1-	2,080	2,080	
63 Operator	76,440	75,296	1,144	2.00	1.97	.03		2	2-	4,160	4,097	63
66 Electrician	52,832	52,832		1.00	1.00			1	1-	2,080	2,080	
67 Laborer98	75,712	174,712	99,000-	2.00	4.00	2.00-		4	4-	4,160	8,320	4,160-
9S-2 Sales Representative	25,480	25,480		1.00	1.00			1	1-	2,080	2,080	
HBU Tot:	406,415	438,862	32,447-	10.00	10.97	.97-		11	11-	20,800	22,817	2,017-

What You Should Know About

Calculating projected amounts for a position

The way in which the system calculates the projected amounts depends on the fiscal year for which you defined the position. The system uses the fiscal pattern for the company with which the position is associated when it calculates these amounts. The system:

- Uses the beginning of the fiscal year date and end of the period 14 date for the fiscal pattern as the start and end date ranges for the position's fiscal year.
- Includes all position activity records that overlap the ranges in the projection calculations.

Reviewing the Open Effective Amounts by Position Report

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Open Effective Amounts by Position**

To review the differences between projected and budgeted effective amounts for one or more positions, print the Open Effective Amounts by Position report. Use this information to determine whether you are likely to meet or exceed your position budgets for the year.

The system calculates effective amounts based on the effective from and effective through dates for the position.

081420 JD Edwards World Page - 3
Open Amounts by Position Date - 5/29/17
All Business Units - All Years

Home BU : 90 Administrative Depar

		. . . . Salaries		. Full Time Equivalents . .			. . . Headcount . . .			. . . . Hours Worked		
ID/Desc	Pos. Budget	Projected	Open	Budgeted	Projected	Open	Budget	Project	Open	Budgeted	Projected	Open
Fiscal Year.		98										
Home Business Unit .		90 Administrative Department										
. . . .												
TRNER Trainer	100,000		100,000	2.00		2.00	2		2	4,160		4,160
0A-01 Accounting Supervisor	45,000		45,000	1.00		1.00				2,080		2,080
0A-1 Accounting Manager	60,000		60,000	1.00		1.00	1		1	2,080		2,080
0A-10 Purchasing Agent	45,000	56,000	11,000-	1.00	1.00			1	1-	2,080	2,080	
10B-1 Trainer	90,000	35,000	55,000	4.00	1.00	3.00		1	1-	8,320	2,080	6,240
2H-1 Human Resource Manager	52,500	46,840	5,660	1.00	0.99	0.01	1	1		2,080	2,080	
2H-2 Employment Specialist	30,000		30,000	1.00		1.00				2,080		2,080
3P-1 Payroll Manager	42,500	37,750	4,750	1.00	1.00		1	1		2,080	2,080	
4A-1 Administrative Assistant	25,000	20,000	5,000	3.00	1.00	2.00		1	1-	6,240	2,080	4,160
5J-8 Teacher	90,000		90,000	3.00		3.00	3		3	6,240		6,240
8M-3 Clerk	15,600	15,600		1.00	1.00			1	1-	2,080	2,080	
902H-2 Employment Specialist	32,000		32,000	1.00		1.00				2,080		2,080
HBU Tot:	627,600	211,190	416,410	20.00	5.99	14.01	8	6	2	41,600	12,480	29,120
FY Tot:	627,600	211,190	416,410	20.00	5.99	14.01	8	6	2	41,600	12,480	29,120
Grand:	895,240	347,549	547,691	30.00	10.66	19.34	12	11	1	62,400	22,184	40,216

Reviewing the Cross-Year Budget Comparison Report

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Cross-Year Budget Comparison**

To simultaneously review the position budgets for two fiscal years, print the Cross-Year Budget Comparison report. You can compare the budget information for two years in a side-by-side format. The report also displays the percentage change in each budget from one fiscal year to the next.

081430					JD Edwards World Cross-Year Budget Comparison 2016 and 2017 All Business Units				Page - 2 Date - 2/11/17			
	. . . . 16				. . . . 16				. . . . % Change			
ID /Desc	Salary	FTE	Hdcnt	Hours	Salary	FTE	Hdcnt	Hours	Salary	FTE	Hdcnt	Hours
10A-3 Administrative Assistant	23,520	1.00	1	2,080					100.00-	100.00-	100.00-	100.00-
10B-1 Trainer	90,000	4.00	1	8,320	90,000	4.00	4	8,320			300.00	
2H-1 Human Resource Manager	42,500	1.00	1	2,080	52,500	1.00	1	2,080	23.53			
2H-2 Employment Specialist	40,000	1.00	1	2,080	30,000	1.00	1	2,080	25.00-			
3P-1 Payroll Manager	42,500	1.00		2,080	42,500	1.00	1	2,080				
4A-1 Administrative Assistant	13,520	1.00		2,080	25,000	3.00	3	6,240	84.91	200.00		200.00
8M-3 Clerk	15,600	1.00		2,080	15,600	1.00	1	2,080				
HBU: 90	267,640	10.00	20,000	20,800	255,600	11.00	11	22,880	4.50-	10.00	175.00	10.00

What You Should Know About

Calculating percentage change figures

The system calculates the percentage change amounts by dividing the difference between the budget amounts for each year by the first year's budget amount, as it appears in the leftmost column of the report.

Processing Options

See Cross-Year Compare-All BUs (P081430).

Reviewing the Cross-Year Effective Budget Comparison Report

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **Cross-Year Effective Budget**

To simultaneously review the effective position budgets for two fiscal years, print the Cross-Year Effective Budget Comparison report. You can compare the effective budgets for two years in a side-by-side format. The report also displays the percentage change in each budget from one fiscal year to the next.

081431					JD Edwards World Cross-Year Effective Budget Comparison 2 year Comparison by Processing Option All Business Units				Page - 2 Date - 2/11/17			
	. . . . 16				. . . . 17				. . . . % Change			
ID /Desc	Salary	FTE	Hdcount	Hours	Salary	FTE	Hdcount	Hours	Salary	FTE	Hdcnt	Hours
10A-3 Administrative Assistant	4,510	0.19	1	398					100.00-	100.00-	100.00-	100.00-
10B-1 Trainer	90,000	4.00	1	8,320	37,233	1.65	4	3,442	58.63-	58.75-	300.00	58.63-
2H-1 Human Resource Manager	4,890	0.11	1	239	52,500	1.00	1	2,080	973.62	809.09		770.29
2H-2 Employment Specialist	40,000	1.00	1	2,080	30,000	1.00	1	2,080	25.00-			
3P-1 Payroll Manager					42,500	1.00	1	2,080				
4A-1 Administrative Assistant	2,592	0.19		398	25,000	3.00	3	6,240	864.51	478.95		467.84
8M-3 Clerk	1,795	0.11		239	15,600	1.00	1	2,080	769.08	809.09		770.29
HBU: 90	143,787	5.60	4	11,674	202,833	8.65	11	18,002	41.06	54.46	175.00	54.21

Processing Options

See Cross-Year Effective Budget - All BU (P081431).

Reviewing the Position Full-Time Equivalents Report

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **Position Full-Time Equivalents (FTE)**

To review current position activity and compare it to the FTEs budgeted for the upcoming fiscal year, print the Position Full-Time Equivalents (FTEs) report. Use this information to determine whether you need to do either of the following:

- Hire additional employees to fill a position
- Request approval for additional FTEs for a position

Current head count is a total of all FTEs in a position. A new position is the difference between current head count and the next year's budgeted FTE. This report displays the new position amount as the number of FTEs that would have to be hired for current head count to match the budgeted head count. This report also displays the ratio of new positions to current head count.

081440 JD Edwards World Page No. . . 2
Position FTE Report Date - . . . 7/01/17
Current Activity vs. Fiscal Year 17

. . . . . Position . . . . . ID	Description	Current FTE	. . . . 17 . . . . New Positions	Total Planned	Percent Increase
5J-9	Draftsperson	2.00		2.00	
5067	Laborer Level I		1.00	1.00	
62	Foreman	1.00		1.00	
63	Operator	2.00		2.00	
66	Electrician	1.00		1.00	
67	Laborer98	4.00	2.00-	2.00	50.00-
9S-2	Sales Representative	1.00		1.00	
	50 General Accounts	11.00	1.00-	10.00	9.09-
TRNER	Trainer	1.00	1.00-		100.00-
0A-10	Purchasing Agent	1.00		1.00	
10B-1	Trainer	1.00	3.00	4.00	300.00
2H-1	Human Resource Manager	4.00	3.00-	1.00	75.00-
2H-2	Employment Specialist	1.00		1.00	
3P-1	Payroll Manager	1.00		1.00	
4A-1	Administrative Assistant	1.00	2.00	3.00	200.00
5J-8	Teacher		3.00	3.00	
8M-3	Clerk	1.00		1.00	
902H-2	Employment Specialist		1.00	1.00	
	90 Administrative Depar	11.00	5.00	16.00	45.45

Processing Options

See Current vs. Fiscal - All Positions (P081440).

Reviewing the Position Headcount Report

From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **Position Headcount**

To review the current head count for your positions to the budgeted head count for the next fiscal year, print the Position Headcount report. Use this information to determine whether you need to do either of the following:

- Hire additional employees to fill a position
- Request approval for additional head count for a position

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081441                                                    JD Edwards World                                   Page No. . .        3
                                                      Position Headcount Report                              Date - . . .   7/01/17
                                                 Current Activity vs. Fiscal Year 17
                                                             . . . . 17 . . . .
    . . . . . Position . . . . .                 Current     New        Total         Percent
   ID            Description                    Headcount  Positions   Planned       Increase
---------------------------------------------  ----------  ----------  ----------    ----------
488P     Setup Person                                   2          2-                  100.00-
8P-5     Production Worker                              1          1-                  100.00-
                                               ----------  ----------  ----------    ----------
         200       Distrib/Manuf Balanc                 3          3-                  100.00-
4192H-5  EEO Specialist                                 1          1-                  100.00-
4194A-1  Administrative Assistant
4194A-2  Secretary                                      2          2-                  100.00-
4195J-7  Nurse
                                               ----------  ----------  ----------    ----------
         419       Administration                       3          3-                  100.00-
4500P-32 Accounting Clerk
4510A-1  Accounting Manager
4510A-2  Senior Accountant
4510P-2  Accountant                                     1          1-                  100.00-
```

Processing Options

See Current vs. Fiscal - All Positions (P081441).

Reviewing the Position Budgets Report

From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **World Writer**

To review by fiscal year the position budgets that are established for all business units and positions, print the Position Budgets report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year.

Position Budgets — Page - 1 — Date - 07/01/17

FY	Home Business Unit	Description	Position ID	Description	Position Budget	Budgeted FTE	Budgeted Hours	Headcount
17	50	General Accounts	5J-9	Draftsperson	75,000	2.00	4,160	
	50		5067	Laborer Level I	53,111	1.00	2,080	
	50		62	Foreman	47,840	1.00	2,080	
	50		63	Operator	76,440	2.00	4,160	
	50		66	Electrician	52,832	1.00	2,080	
	50		67	Laborer98	75,712	2.00	4,160	
	50		9S-2	Sales Representative	25,480	1.00	2,080	
	90	Administrative Department	TRNER	Trainer				
	90		0A-10	Purchasing Agent	45,000	1.00	2,080	
	90		10B-1	Trainer	90,000	4.00	8,320	
	90		2H-1	Human Resource Manager	52,500	1.00	2,080	
	90		2H-2	Employment Specialist	30,000	1.00	2,080	
	90		3P-1	Payroll Manager	42,500	1.00	2,080	
	90		4A-1	Administrative Assista	25,000	3.00	6,240	
	90		5J-8	Teacher	90,000	3.00	6,240	
	90		8M-3	Clerk	15,600	1.00	2,080	
	90		902H-2	Employment Specialist	32,000	1.00	2,080	
	100	Balance Sheet	1000A-4	Accountant				
	100		1004A-1	Administrative Assista				
	100		4A-2	Secretary				
	110	Headquarters	110A1	President	100,000	1.00	2,080	
	110		110A2	Vice President	80,000	1.00	2,080	
	110		1100A-1	Senior Accountant	100,000	2.00	4,160	
	110		1100A-2	Accountant	100,000	2.50	5,200	

Reviewing the Position Budgets by Job Type and Step Report

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **World Writer**

To review, by fiscal year, the position budgets for all business units and positions for each job type and job step within your organization, print the Position Budgets by Job Type and Step report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year.

Position Budget by Job Type & Step — Page - 1 — Date - 07/01/17

FY	Job Typ	Job Step	Description	Home Business Unit	Description	Position ID	Description	Position Budget	Budgeted FTE	Headcount
7	BUSDR		Bus Driver	2435	School	BD01	Bus Driver	30,000	2.00	2
	COACH		Coach	2435	School	CH01	Swim Coach	25,000	2.00	2
	TEACH	B1	Teacher	2435	School	TR01	Art Teacher	35,000	1.00	1
		M1		2435	School	TR03	English Teacher	60,000	2.00	
Fiscal Year. . . . 16										
Sum								380,935	9.00	
97	0A-3		Financial Analyst	707	Corporate Administra	0A-3	Financial Analyst	110,000	2.00	
	2H-1		Human Resource Manag	90	Administrative Depar	2H-1	Human Resource Manag	42,500	1.00	
	2H-2		Employment Represent	90	Administrative Depar	2H-2	Employment Specialis	40,000	1.00	
	3P-1		Payroll Manager	90	Administrative Depar	3P-1	Payroll Manager	42,500	1.00	
				707	Corporate Administra	3P-1	Payroll Manager	65,000	1.00	
	4A-1		Administrative Assis	90	Administrative Depar	10A-3	Administrative Assis	23,520	1.00	
				90	Administrative Depar	4A-1	Administrative Assis	13,520	1.00	
	5J-4		Fire Fighter	707	Corporate Administra	5J-4	Firefighter	60,000	3.00	
	5J-8		Trainer	90	Administrative Depar	10B-1	Trainer	90,000	4.00	
	67	A.2	Laborer	50	General Accounts	67	Laborer97	75,712	2.00	
	8M-1		Manufacturing Manage	M30	Memphis Mfg. Plant	8M-1	Manufacturing Manage	65,000	1.00	
	8M-3		Clerk	90	Administrative Depar	8M-3	Clerk	15,600	1.00	
Fiscal Year. . . . 17										
Sum								643,352	19.00	
98				110	Headquarters	110A2	Vice President	80,000	1.00	
				110	Headquarters	1100A-1	Senior Accountant	100,000	2.00	
				110	Headquarters	1100A-2	Accountant	100,000	2.50	
				142	Information Systems	1421M-2	Project Leader	40,000	1.00	
				2435	School	CH02	Tennis Coach	12,500	1.00	1

Reviewing the Position Budgets by Business Unit Report

From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **World Writer**

To review position budget information segregated by business unit, print the Position Budgets by Business Unit Report. You can compare the budgeted amounts for one business unit to those for another business unit and analyze the differences.

Position Budgets by Business Unit — Page - 1 — Date - 07/01/17

FY	Description	Home Business Unit	Position ID	Description	Budgeted Amount	Budgeted FTE	Budgeted Hours	Headcount	Job Type	Job Step
17	General Accounts	50	5J-9	Draftsperson	75,000	2.00	4,160		5J-9	A.2
		50	5067	Laborer Level I	53,111	1.00	2,080		67	1
		50	62	Foreman	47,840	1.00	2,080		62	
		50	63	Operator	76,440	2.00	4,160		63	J
		50	66	Electrician	52,832	1.00	2,080		66	FORE
		50	67	Laborer98	75,712	2.00	4,160		67	A.2
		50	9S-2	Sales Representative	25,480	1.00	2,080		9S-2	
Home Business Unit . . . . . . Sum					406,415	10.00	20,800			
	Administrative Depar	90	TRNER	Trainer					TRNER	
		90	0A-10	Purchasing Agent	45,000	1.00	2,080		0A-10	
		90	10B-1	Trainer	90,000	4.00	8,320		TRNER	
		90	2H-1	Human Resource Manag	52,500	1.00	2,080		2H-1	
		90	2H-2	Employment Specialis	30,000	1.00	2,080		2H-2	
		90	3P-1	Payroll Manager	42,500	1.00	2,080		3P-1	
		90	4A-1	Administrative Assis	25,000	3.00	6,240		4A-1	
		90	5J-8	Teacher	90,000	3.00	6,240		5J-8	
		90	8M-3	Clerk	15,600	1.00	2,080		8M-3	
		90	902H-2	Employment Specialis	32,000	1.00	2,080		2H-2	

Reviewing the Position Effective Budgets Report

From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **World Writer**

To review the effective position budgets for all positions and business units for the fiscal year, print the Position Effective Budgets report. The system calculates an effective position budget based on the annualized salaries for all the employees in the position and the position's beginning and ending dates.

Use this information to determine whether you are likely to meet or exceed your positions budgets for the current fiscal year.

Position Effective Budgets — Page - 1 — Date - 07/01/17

FY	Home Business Unit	Description	Position ID	Description	Effective Budget	Effective Hours	Effective FTE
17	50	General Accounts	5J-9	Draftsperson	75,000	4,160	2.00
	50		5067	Laborer Level I	53,111	2,080	1.00
	50		62	Foreman	47,840	2,080	1.00
	50		63	Operator	76,440	4,160	2.00
	50		66	Electrician	52,832	2,080	1.00
	50		67	Laborer98	75,712	4,160	2.00
	50		9S-2	Sales Representative	25,480	2,080	1.00
	90	Administrative Depar	TRNER	Trainer			
	90		0A-10	Purchasing Agent	45,000	2,080	1.00
	90		10B-1	Trainer	90,000	8,320	4.00
	90		2H-1	Human Resource Manag	6,041	239	.11
	90		2H-2	Employment Specialis	30,000	2,080	1.00
	90		3P-1	Payroll Manager			
	90		4A-1	Administrative Assis	4,794	1,196	.57
	90		5J-8	Teacher	90,000	6,240	3.00
	90		8M-3	Clerk	1,795	239	.11
	90		902H-2	Employment Specialis	7,715	501	.24
	100	Balance Sheet	1000A-4	Accountant			
	100		1004A-1	Administrative Assis			
	100		4A-2	Secretary			
	110	Headquarters	110A1	President	19,999	415	.19
	110		110A2	Vice President	15,999	415	.19
	110		1100A-1	Senior Accountant	19,999	831	.40
	110		1100A-2	Accountant	100,000	5,200	2.50

Reviewing the Position Effective Budget by Job Type & Step Report

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **World Writer**

To review, by fiscal year, the effective position budgets for all business units and positions for each job type and job step within your organization, print the Position Effective Budgets by Job Type and Step report. The system calculates an effective position budget based on the annualized salaries for all the employees in the position and the position's beginning and ending dates.

Use this information to determine whether you are likely to meet or exceed your positions budgets for the current fiscal year.

Position Eff. Budget by Job Type & Step — Page - 1 — Date - 07/01/17

FY	Job Typ	Job Step	Description	Home Business Unit	Description	Position ID	Description	Effective Budget	Effective FTE	Headcount
7	BUSDR		Bus Driver	2435	School	BD01	Bus Driver	30,000	2.00	2
	COACH		Coach	2435	School	CH01	Swim Coach	25,000	2.00	2
	TEACH	B1	Teacher	2435	School	TR01	Art Teacher	35,000	1.00	1
		M1	Teacher	2435	School	TR03	English Teacher	60,000	2.00	2
								---------------	---------	---------
Fiscal Year. . . . 16										
Sum								285,706	6.89	
16	0A-3		Financial Analy	707	Corporate Admin	0A-3	Financial Analy	110,000	2.00	
	2H-1		Human Resource	90	Administrative	2H-1	Human Resource	4,890	.11	
	2H-2		Employment Repr	90	Administrative	2H-2	Employment Spec	40,000	1.00	
	3P-1		Payroll Manager	90	Administrative	3P-1	Payroll Manager			
			Payroll Manager	707	Corporate Admin	3P-1	Payroll Manager	65,000	1.00	
	4A-1		Administrative	90	Administrative	10A-3	Administrative	4,510	.19	
			Administrative	90	Administrative	4A-1	Administrative	2,592	.19	
	5J-4		Fire Fighter	707	Corporate Admin	5J-4	Firefighter	60,000	3.00	
	5J-8		Trainer	90	Administrative	10B-1	Trainer	90,000	4.00	
	67	A.2	Laborer	50	General Account	67	Laborer97	75,712	2.00	
	8M-1		Manufacturing M	M30	Memphis Mfg. Pl	8M-1	Manufacturing M	65,000	1.00	
	8M-3		Clerk	90	Administrative	8M-3	Clerk	1,795	.11	
								---------------	---------	---------
Fiscal Year. . . . 17										
Sum								519,499	14.60	
17				110	Headquarters	110A2	Vice President	15,999	.19	
				110	Headquarters	1100A-1	Senior Accounta	19,999	.40	
				110	Headquarters	1100A-2	Accountant	100,000	2.50	
				142	Information Sys	1421M-2	Project Leader	40,000	1.00	
				2435	School	CH02	Tennis Coach	12,500	1.00	1

Reviewing the Position Effective Budget by Home Business Unit Report

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **World Writer**

To review effective position budget information, segregated by business unit, print the Position Effective Budget by Home Business Unit report. You can compare the budgeted amounts for one business unit to those for another business unit and analyze the differences.

The system calculates an effective position budget based on the annualized salaries for all the employees in the position, and the position's beginning and ending dates.

Position Effect Budget by Home Business Unit — Page - 1 — Date - 07/01/17

FY	Home Business Unit	Description	Position ID	Description	Effective Budget	Effective Hours	Effective FTE	Headcount	Job Type
17	50	General Account	5J-9	Draftsperson	75,000	4,160	2.00		5J-9
	50		5067	Laborer Level I	53,111	2,080	1.00		67
	50		62	Foreman	47,840	2,080	1.00		62
	50		63	Operator	76,440	4,160	2.00		63
	50		66	Electrician	52,832	2,080	1.00		66
	50		67	Laborer98	75,712	4,160	2.00		67
	50		9S-2	Sales Represent	25,480	2,080	1.00		9S-2
	90	Administrative	TRNER	Trainer					TRNER
	90		0A-10	Purchasing Agen	45,000	2,080	1.00		0A-10
	90		10B-1	Trainer	90,000	8,320	4.00		TRNER
	90		2H-1	Human Resource	6,041	239	.11		2H-1
	90		2H-2	Employment Spec	30,000	2,080	1.00		2H-2
	90		3P-1	Payroll Manager					3P-1
	90		4A-1	Administrative	4,794	1,196	.57		4A-1
	90		5J-8	Teacher	90,000	6,240	3.00		5J-8
	90		8M-3	Clerk	1,795	239	.11		8M-3
	90		902H-2	Employment Spec	7,715	501	.24		2H-2
	100	Balance Sheet	1000A-4	Accountant					0A-4
	100		1004A-1	Administrative					4A-1
	100		4A-2	Secretary					4A-2
	110	Headquarters	110A1	President	19,999	415	.19		A1
	110		110A2	Vice President	15,999	415	.19		
	110		1100A-1	Senior Accounta	19,999	831	.40		
	110		1100A-2	Accountant	100,000	5,200	2.50		
	140	Finance Departm	1400A-3	Financial Analy	19,999	831	.40		0A-3
	140		1400P-0	Finance Directo	11,999	415	.19		0P-0
	140		1400P-1	Assistant Finan	7,999	415	.19		0P-1

Reviewing the Employee Activity by Number Report

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), choose **World Writer**

To review, by employee number, all of the position activity for each employee within your organization, print the Employee Activity by Number Report. You can analyze employee movement between positions and determine whether you need to hire additional employees or reduce the head count for a position.

If you prefer a report that lists employees numerically, by employee number, print this report. If you find it easier to review information when the report lists employees alphabetically by last name, print the Employee Activity by Name report.

Employee Activity by Number — Page - 1 — Date - 07/01/17

Employee Number	Name	Home Business Unit	Description	Position ID	Description	Annual Salary	Em Ac	Description	Eff From
2006	Walters, Annette	701	General Account	5	Human Resource	45,000.00		Active	06/03/16
2022	Kellerman, James	451	** NOT FOUND **	4510A-1	Accounting Mana	30,000.00	X	Terminate	02/05/15
2111	Ingraham, Paul	50		67	Laborer98	52,000.00		Active	05/21/16
		50		67	Laborer97	52,000.00		Active	05/21/16
		50		67	Laborer96	52,000.00		Active	05/21/16
		701	General Account	7	Laborer	52,000.00	X	Terminate	03/15/15
2129	Jackson, John	701	General Account	3	Financial Analy	50,000.00		Active	03/15/08
3050	Morrisey, Anne E.	2435		CH02	Tennis Coach	3,000.00		Active	04/01/17
		2435		TR03	English Teacher	44,000.00		Active	03/01/17
		2435		TR03	English Teacher	34,000.00		Active	06/01/17
		2435		TR03	English Teacher	30,000.00		Active	06/01/16
3068	Pugh, James R.	2435		BD01	Bus Driver	6,149.52		Active	06/01/07
		2435		BD01	Bus Driver	12,300.00	A	Adjust Status	06/01/07
3076	O’Neil, Thelma P.	2435		TR01	Art Teacher	36,000.00	A	Adjust Status	06/01/07
		2435		TR01	Art Teacher	35,000.00		Active	03/23/16
		2435		TR01	Art Teacher		A	Adjust Status	03/23/16
		2435		TR01	Art Teacher	30,000.00	A	Adjust Status	03/23/16
3084	Carmichael, Bradle	2435		CH03	Football Coach	38,000.00		Active	06/01/10
3092	Padilla, Alicia C.	2435		BD01	Bus Driver	12,499.08		Active	06/01/07
		2435		BD01	Bus Driver	12,500.00	A	Adjust Status	09/01/06

Reviewing the Employee Activity by Name Report

From Human Resources (G08), choose **Position Control**
From Position Control (G08P1), choose **World Writer**

To review, by employee name, all of the position activity for each employee within your organization, print the Employee Activity by Name report. You can analyze employee movement between positions and determine whether you need to hire additional employees or reduce the head count for a position.

If you prefer a report that lists employees alphabetically, by last name, print this report. If you find it easier to review information when the report lists employees numerically by employee number, print the Employee Activity by Number report.

Employee Activity by Name — Page - 1 — Date - 05/29/17

Employee Number	Home Business Unit	Position ID	Description	Annual Salary	Em Ac	Eff From	Hours
7500	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00
	90	2H-1	Human Resource	50,000.00		07/01/17	2080.00

9 Safety and Health Administration

Overview to Safety and Health Administration

Objectives

- To work with injury and illness data
- To satisfy government reporting requirements

About Safety and Health Administration

To satisfy the requirements of the Occupational Safety and Health Administration (OSHA), you must track information about all aspects of work-related injuries and illnesses. Using this information, you can create accurate and complete OSHA 200 and OSHA 300 reports. You can also review this information to help you determine how your organization can provide a safer working environment for its employees.

OSHA reporting requirements changed effective January 1, 2002. You use OSHA 200 reports to provide historical information to OSHA about work-related injuries and illnesses that occurred *before* January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

You can use your Human Resources system to satisfy all OSHA 200 and OSHA 300 reporting requirements.

Safety and health administration includes:

- Working with injury and illness information
- Reviewing safety and health reports

Work with Injury and Illness Information

Working With Injury and Illness Information

To satisfy OSHA requirements, you can track detailed information about any injuries or illnesses that your employees suffer when they are working for your organization. The information includes:

- Date of incident
- Time of incident
- Description of incident
- Employee's name
- Employee's occupation
- Department in which the employee works
- Part of body
- Action taken

You use this information to create and print the OSHA 200 reports and the OSHA 300 reports. OSHA has approved JD Edwards World' versions of these reports for submission and posting in the United States.

You use OSHA 200 reports to provide information to OSHA about work-related injuries and illnesses that occurred before January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

You begin tracking OSHA information by opening an injury or illness case and entering the information that OSHA requires.

After you enter the required information for an injury or illness, you can enter profile data. Profile data includes any additional information that you want to track about injuries and illnesses, regardless of whether you need to report the case to OSHA. Profile data appears on the OSHA 301 Injury and Illness report, but it does not print on the OSHA 200 reports or on the OSHA 300 Log or 300A Summary reports.

After you have resolved an injury or illness case and printed the OSHA reports, you close the case. To analyze and verify injury and illness information, you can review information online.

Working with injury and illness information includes:

- Opening an Injury or Illness Case
- Entering Profile Data for Injury and Illness Cases

- Closing an Injury or Illness Case
- Reviewing Injury and Illness Cases by Establishment
- Reviewing Profile Data for Injury and Illness Cases

Opening an Injury or Illness Case

From Human Resources (G08), choose **Safety & Health Admin.**
From Safety & Health Admin. (G08S1), choose **Case Entry**

When a work-related injury or illness occurs, you open an OSHA case to begin tracking information about it. You use this information to create and run the OSHA 200 or OSHA 300 reports, which are required by the federal government.

In addition to the information that is required by OSHA, you can track injury and illness statistics that your organization can use to:

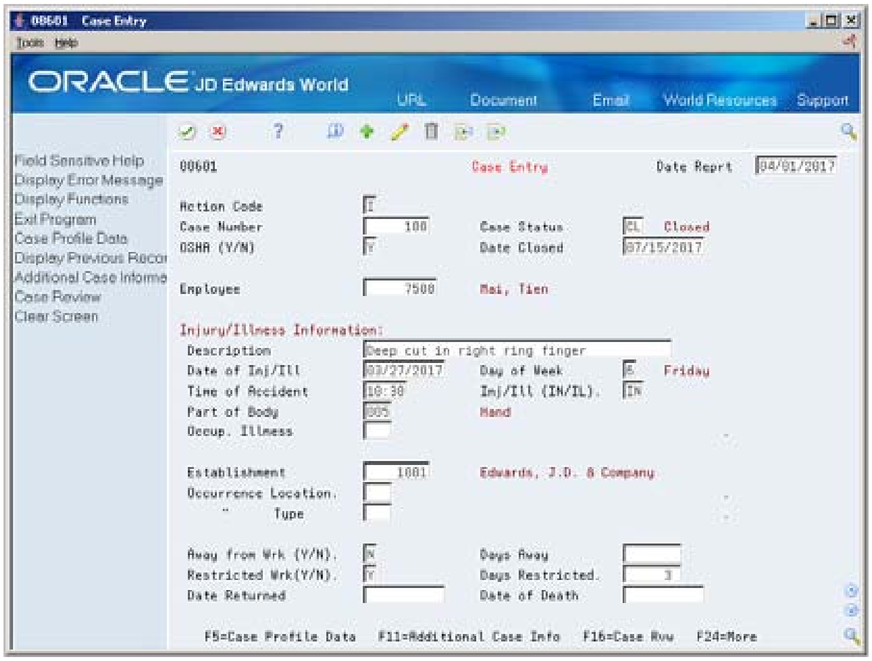
- Identify hazards
- Increase safety awareness
- Evaluate safety procedures

Before You Begin

- Set up the types of establishments that you have in your organization in the Address Book system. Establishments are the places where your employees report for work or perform their duties, or are the business units from which they are paid. See *Setting Up Safety and Health Administration* in the *Human Resources Guide.*
- Set up UDC table 08/BU (Establishments for OSHA) to define the physical locations that you want to use as establishments for the purposes of OSHA reporting.
- Set up data type ES for establishments in the profile data, using the supplemental database code E for employees. See *Working with Profile Data* in the *Human Resources Guide.*
- After you set up UDC table 08/BU, assign each employee to the appropriate establishment. See *Working with Profile Data* in the *Human Resources Guide.*
- Review UDC table 08/H5 (Occupational Illness) for the occupational illness codes that are designated for use in OSHA 200 and OSHA 300 reporting. The Description-2 fields and the special handling codes indicate which occupational illness codes are valid for OSHA 300 reporting (that is, for reporting occupational injuries and illnesses that occur on or after January 1, 2002.)

To open an injury or illness case

From Safety and Health Administration (G08S1), choose Case Entry

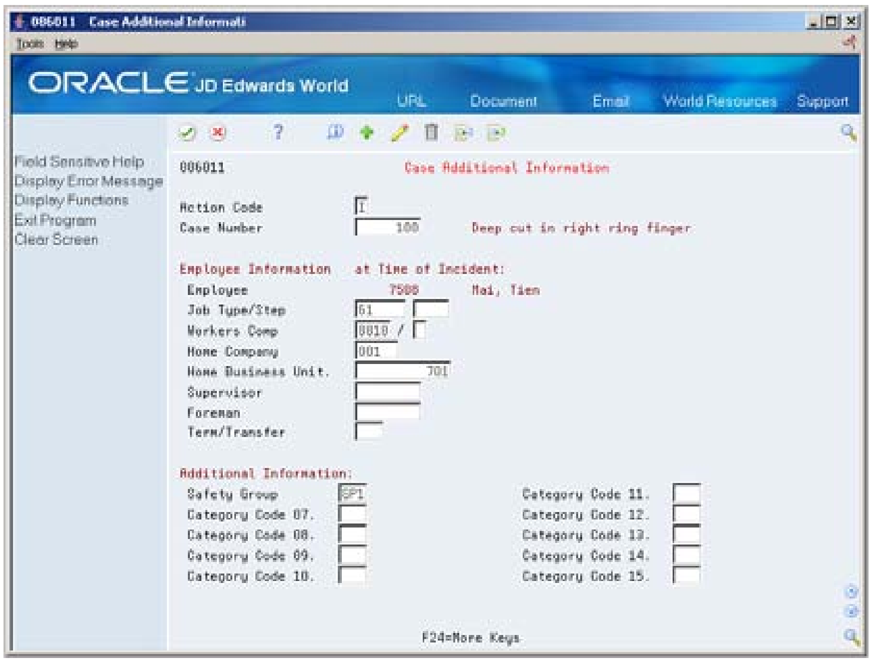


1. On Case Entry, complete the following required fields:
   - Case Number
   - Case Status
   - OSHA (Y / N)
   - Employee
   - Description
   - Date of Injury or Illness
   - Injury or Illness
   - Establishment
   - Occup Illness
2. Complete any of the following fields that apply:
   - Part of Body
   - Away from Work
   - Restricted Work
   - Days Away
   - Days Restricted
   - Date Returned
   - Date of Death

> **Note:** Use the Part of Body field to identify that an individual's name should not be disclosed. See field description for explanation.

3. If the case is for an illness, complete the following field:
   - Occupational Illness
4. Choose the Add action.

   The system creates the record and the Case Additional Information screen appears.
5. On Case Additional Information, review the information in the following fields, and change it, if necessary:
   - Job Type / Step
   - Workers Comp Insurance
   - Home Company
   - Home Business Unit
   - Supervisor



6. If the case is for an illness, complete the following field:
   - Termination / Transfer

7. Choose the Change action if you change the information.

Field	Explanation
Case Status	A code that indicates the current status of an occupational injury or illness case. You define these codes in user defined code table 08/CS. When you set up this table, you can enter more than one code that indicates that a case is closed. For each closed code, you must enter the letter 'X' in the Description-2 field. *Form-specific information* If you enter the code CL (Closed) in this field, you must enter a date in the Date Closed field.
Description	A brief description of the occupational injury or illness, including the part or parts of the employee's body that are affected.
Day of Week	A code to indicate the day of the week the occupational injury or illness occurred. If you leave this field blank, the system calculates the day of the week based on the date in the Date of Injury/Illness field. You can define this code using user defined code table 08/WD.
Inj/Ill (IN/IL)	A code that indicates whether the case is an injury or an illness. Valid codes are: IN Injury: Injuries are caused by immediate events in the work environment. You must record an injury when it requires medical treatment (other than first aid), or if it involves loss of consciousness, restriction of work or motion, or transfer to another job. IL Illness: Illnesses are any abnormal condition or disorder, other than one resulting from an occupational injury, caused by exposure to environmental factors associated with employment. You must record all work-related illnesses.
Part of Body	A code that indicates the part of the body affected by the occupational injury or illness case. You can define this code in user defined code table 08/H4. Occasionally you will encounter a person whose name should not be disclosed. Create a value in the user defined table 08/H4 to indicate someone whose name should not be disclosed, and insert a value of Y in the Special Handling Code field on that UDC value. This code will then cause the OSHA 300 report to print Trivacy Case' instead of the employee's name.
Establishment	An establishment is a single physical location where your organization conducts business or performs services or industrial operations.

Field	Explanation
Away from Wrk (Y/N)	A code that indicates whether the employee missed any days of work as a result of the injury or illness. Valid codes are: Y Yes, the employee lost days of work N No, the employee did not lose days of work This field is required when reporting OSHA 200 and OSHA 300 incidents.
Restricted Wrk (Y/N)	A code that indicates whether the injury or illness involves any days of restricted work activity. Valid codes are: Y Yes, the employee has work restrictions N No, the employee does not have work restrictions. Work restrictions include: ▪ Being assigned to another job on a temporary basis ▪ Working at a permanent job less than fulltime ▪ Working at a permanent job but not being able to perform all of the duties normally required of it This field is required when reporting OSHA 200 and OSHA 300 incidents.
Days Away	The number of workdays (consecutive or not) on which the employee would have worked but could not because of occupational injury or illness. **Note:** The number of lost workdays should not include the day of injury or onset of illness or any days on which the employee would not have normally worked. This field is required when reporting OSHA 200 and OSHA 300 incidents.
Days Restricted	The number of work days (consecutive or not) on which the employee has work restrictions as a result of the injury or illness. Work restrictions include: ▪ Being assigned to another job on a temporary basis ▪ Working at a permanent job less than full time ▪ Working at a permanent job assignment but not being able to perform all of the duties normally required of it

Field	Explanation
Occup. Illness	A code that defines the exact nature of the occupational illness. You can define this code in user defined code table 08 / H5. The sequence of the illness codes provided by. Edwards corresponds exactly to the sequence on the OSHA 200 and OSHA 300A Summary reports. If you are sending. Edwards' OSHA 200 and OSHA 300A Summary reports to the U.S. Department of Labor, you should not change the sequence. If you are not sending the reports, you can change the codes, the descriptions, and the sequence.
Term / Transfer	A code that defines whether the employee was terminated or permanently transferred as the result of an occupational illness. Do not change the codes that JD Edwards provides. The OSHA 200 Log and OSHA 300 Log reports are designed to check this field if the incident is an illness. If the occupational illness did not result in the employee's termination or permanent transfer, you must leave this field blank.

Processing Options

See Case Entry (P08601).

See Case Entry - Additional Information (P086011).

Entering Profile Data for Injury and Illness Cases

From Human Resources (G08), choose **Safety & Health Admin.**
From Safety & Health Admin. (G08S1), choose **Case Profile Entry**

Profile data is any type of additional information that you want to track about any of the following:

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

When you set up your Human Resources system, you specify the types of profile data (data types) that you want to track.

For safety and health cases, typical types of profile data might include:

- How the injury occurred
- Medical expenses
- Hazardous materials involved
- Hospital
- Attending physician

Profile data appears on the OSHA 301 Injury and Illness report, but it does not print on the OSHA 200 reports or on the OSHA 300 Log or 300A Summary reports.

The method you use to enter profile data is the same for any type of information that you track.

See Also

- *Working with Profile Data* in the *Human Resources Guide* for information about entering, copying, reviewing, and purging profile data.

Closing an Injury or Illness Case

	From Human Resources (G08), choose Safety & Health Admin. From Safety & Health Admin. (G08S1), choose Case Entry

After you resolve an injury or illness case and print the OSHA reports, you must close the case to fulfill OSHA requirements. To close a case, you must enter a closed status as well as the date that you closed the case.

To close an injury or illness case

From Safety and Health Administration (G08S1), choose Case Entry.

1. Locate the case you want to close.
2. Complete the following fields:
   - Case Status
   - Date Closed

Reviewing Injury and Illness Cases by Establishment

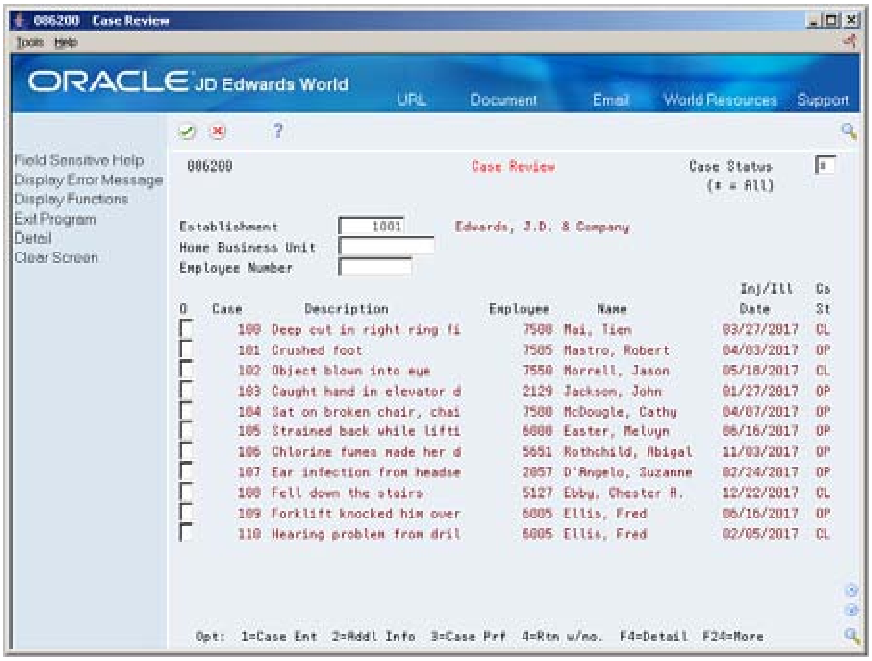
	From Human Resources (G08), choose Safety & Health Admin. From Safety & Health Admin. (G08S1), choose Case Review

When you enter a case, you must include the establishment in which it occurred. The establishment is any single location where your organization conducts business or performs services. To determine the relative safety of each of your organization's establishments, you can review the number and types of incidents that occur at one establishment, such as a branch office. You can narrow the search to incidents that occur at a specific home business unit or to one employee.

To determine which cases are resolved and which are still open, you can also review cases by case status.

To review injury and illness cases by establishment

From Safety and Health Administration (G08S1), choose Case Review.



1. On Case Review, complete the following field, or leave it blank to show all establishments:
   - Establishment
2. To specify your search criteria, complete any of the following fields, and press Enter:
   - Home Business Unit
   - Employee Number
   - Case Status

Reviewing Profile Data for Injury and Illness Cases

From Human Resources (G08), choose **Safety & Health Admin.**
From Safety & Health Admin. (G08S1), choose **Cases by Profile or Cases by Type of Data**

After you enter profile data for injury and illness cases, including those that you do not need to report to OSHA, you can review that information by case or by data type. Use this information to identify unsafe conditions and develop solutions for them.

You use the same procedure to review profile data for injury and illness cases as you do to review profile data for employees.

See Also

- *Reviewing Profile Data For A Specific Employee (P080200)* in the *Human Resources Guide*
- *Reviewing Profile Data By Data Type (P080210)* in the *Human Resources Guide*

Review Safety and Health Reports

Reviewing Safety and Health Reports

To satisfy government reporting requirements, you can print the OSHA 200 and the OSHA 300 reports. In addition to the reports required by OSHA, you can review reports that show detailed information about the injuries and illnesses that occur in your organization. Use this information to identify potential safety hazards.

OSHA reporting requirements changed effective January 1, 2002. You use OSHA 200 reports to provide information to OSHA about work-related injuries and illnesses that occurred before January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

This section includes the following tasks:

- Reviewing the OSHA 200 Log Report
- Reviewing the OSHA 200 Summary Report
- Reviewing the Cases by Profile Report
- Reviewing the OSHA 300 Log Report
- Reviewing the OSHA 300A Summary Report
- Reviewing the OSHA 301 Injury and Illness Incident Report
- Reviewing the Cases by Type of Data Report
- Reviewing World Writer for Safety and Health Administration

Reviewing the OSHA 200 Log Report

	From Human Resources (G08), choose **Safety & Health Admin.** From Safety & Health Admin. (G08S1), choose **OSHA 200 Log**

From Safety and Health Administration (G08S1), choose OSHA 200 Log.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occurred before January 1, 2002, print the OSHA 200 Log report. This report includes both case information and employee information. You can also use this report to track company injury and illness statistics.

Because OSHA has approved the format of JD Edwards' OSHA 200 Log, you can submit the report directly to the government. This report shows the employees who suffered an injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

```
086410                                                                              JD Edwards World                                                                 Page No. .    1 of __
                                                                              OSHA 200 Injury and Illness Report                                                     Date - . .    5/17/17
                                                                                                                                                                     Calendar Year –  2017
                                                 Establishment.  00001001      JD Edwards World
                                                                               8055 E. Tufts Ave.
                                                                               Suite 1300
                                                                               Denver
                                                                               CO           80237
                                                                                               INJURIES                                                ILLNESSES
                                                                            | Fatalities   . . . Nonfatal Injuries . . .   | . .Occupational Illness. .  Fatalities  . . . Nonfatal Illnesses . . .
  Case   Date of                                                Home        |  Date of   Away or Awy Frm Days  Days  W/out |                              Date of   Away or Awy Frm Days  Days  W/out
 Number  Inj/Ill    Employee Name             Job ID         Business Unit  |  Death     Restr    Work   Away  Rstr  loss  |           (7)                 Death      Restr    Work   Away  Rstr  loss
  (A)      (B)          (C)                    (D)              (E)         |   (1)       (2)      (3)    (4)   (5)   (6)  | (a) (b) (c) (d) (e) (f) (g)    (8)       (9)     (10)   (11)  (12) (13)
-------- -------- -------------------- -------------------- --------------  | ---------- ------- ------- ----- ----- ----- | --- --- --- --- --- --- --- ---------- ------- ------- ----- ----- -----
     100 03/27/17 Mai, Tien            Foreman              Corporate Admin |             X                   3            |
       Description of Inj/Ill (F). Deep cut in right ring finger            |                                              |
     101 04/03/17 Mastro, Robert       Financial Analyst    Corporate Admin |             X        X       1  5            |
       Description of Inj/Ill (F). Crushed foot                             |                                              |
     102 05/18/17 Morrell, Jason       Laborer      Level I Corporate Admin |             X        X       1  5            |
       Description of Inj/Ill (F). Object blown into eye                    |                                              |
     103 01/27/17 Jackson, John        Financial Analyst    Corporate Admin |                                         X    |
       Description of Inj/Ill (F). Caught hand in elevator door             |                                              |
     104 04/07/17 McDougle, Cathy      Human Resource Manag Administrative  |             X        X      14               |
       Description of Inj/Ill (F). Sat on broken chair, chair collapsed     |                                              |
     105 06/16/17 Easter, Melvyn       Secretary            Administration  |             X        X       7               |
       Description of Inj/Ill (F). Strained back while lifting boxes        |                                              |
     106 11/03/17 Rothchild, Abigal    Project Leader       Corporate Admin |                                              |             X                                        X      1
       Description of Inj/Ill (F). Chlorine fumes made her dizzy            |                                              |
     107 02/24/17 D’Angelo, Suzanne    Senior Accountant    Corporate Admin |                                              |                 X                       X                     5
       Description of Inj/Ill (F). Ear infection from headsets              |                                              |
     108 12/22/17 Ebby, Chester A.     EEO Specialist       Administration  |             X        X       3  5            |
       Description of Inj/Ill (F). Fell down the stairs                     |                                              |
     109 06/16/17 Ellis, Fred          Operator             Corporate Admin |                                         X    |
       Description of Inj/Ill (F). Forklift knocked him over, hurt head     |                                              |
     110 02/05/17 Ellis, Fred          Operator             Corporate Admin |                                              |                     X                                                  X
       Description of Inj/Ill (F). Hearing problem from drill               |                                              |
                                                                            | ---------- ------- ------- ----- ----- ----- | --- --- --- --- --- --- --- ---------- ------- ------- ----- ----- -----
                                                             Total          |         0        6       5    26    18     2 |  0   0   0   1   1   1   0          0       1       1     1     5     1
```

Reviewing the OSHA 200 Summary Report

	From Human Resources (G08), choose **Safety & Health Admin**. From Safety & Health Admin. (G08S1), choose **OSHA 200 Summary**

From Safety and Health Administration (G08S1), choose OSHA 200 Summary.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occurred before January 1, 2002, print the OSHA 200 Summary report. This report contains a summary of each injury or illness and its extent or outcome. Because OSHA has approved the format of JD Edwards' OSHA 200 Summary, you can submit the report directly to the government.

You should use this report only for injuries and illnesses that occurred before January 1, 2002.

```
086400                                                   JD Edwards World                                Page - . .    1 of __
                                                 OSHA 200 Injury and Illness Report                      Date - . .    5/26/17
                            INJURIES                                                   ILLNESSES
            Fatalities   . . . Nonfatal Injuries . . .     . .Occupational Illness. .  Fatalities  . . . Nonfatal Illnesses . . .
             Date of    Away or Awy Frm #Days #Days W/out |                             Date of    Away or Awy Frm #Days #Days W/out
              Death      Restr   Work    Away  Rstr loss  |             (7)              Death      Restr   Work    Away  Rstr loss
               (1)        (2)     (3)     (4)   (5)   (6) | (a) (b) (c) (d) (e) (f) (g)    (8)        (9)    (10)    (11)  (12) (13)
            ---------- ------- ------- ----- ----- ----- | --- --- --- --- --- --- --- ---------- ------- ------- ----- ----- -----
                          X                      3        |
                          X       X       1      5        |
                          X       X       1      5        |
```

Reviewing the Cases by Profile Report

	From Human Resources (G08), choose **Safety & Health Admin**. From Safety & Health Admin. (G08S1), choose **Cases by Profile** under the **Case Information** heading

To review complete information for each injury or illness case that you specify, print the Cases by Profile report. Use this report to identify safety hazards and to improve your organization's safety record.

The information that prints on this report is the same information that you can review online using Cases by Profile. However, the report allows you to print information for several cases at one time.

```
080413                                                  JD Edwards World                               Page Number           2
                                                        Case Information                               Date            5/17/17
Case Number. . . . .         100 Deep cut in right ring finger      OSHA Recordable . Y                Dates:
Employee Number. . .        7508 Mai, Tien                          Case Status . . . CL               Reported . . . . 04/01/17
Home Company. . . .          001                                    Establishment . .     1001         Injury/Illness . 03/27/17
Home Business Unit .         701 Corporate Administration           Occur Loc/Type. .     /            Returned . . . .
Job Type/Step . . .  61     /      Foreman                          Days Restr/Away .    3  /          Closed . . . . . 07/15/17
How Incident Occurred
==============================
               Tien &  some other employees were using a truck to pull up a ladder with a
               rope and block.  The rope hung up on the side of the block and Tien tried to
               free the rope which resulted in catching his finger.
Action While Injured
               Pulling material up a pole with a handline.
Physical Object Involved
    Object     Date               Explanation of Object
  ---------- --------         -----------------------------
  BLOCK      03/27/17         Static block
  ROPE       03/27/17         Handline
Medical Expenses
  Treatment    Date              Explanation of Treatment          Administered Where         Amt Due
  ---------- --------         ----------------------------- ----------------------------- ------------
  TREATMENT  03/27/17         Stopped bleeding and bandaged                                      225.00
  XRAYS      03/27/17                                                                            250.00
                                                                               ------------- ------------
                                                                                   Total         475.00
```

Processing Options

See OSHA 301 Injury / Illness (P080413).

Reviewing the OSHA 300 Log Report

	From Human Resources (G08), choose **Safety & Health Admin.** From Safety & Health Admin. (G08S1), choose **OSHA 300 Log**

From Safety and Health Administration (G08S1), choose OSHA 300 Log.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occur on or after January 1, 2002, print the OSHA 300 Log report. This report includes both case information and employee information. You can also use this report to track company injury and illness statistics.

Because OSHA has approved the format of JD Edwards' OSHA 300 Log, you can submit the report directly to the government. This report shows the employees who suffered an injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

This report replaces the OSHA 200 Log report. You should use this report for injuries and illnesses that occur on or after January 1, 2002.

Processing Options

See OSHA 300 Log (P086430).

Reviewing the OSHA 300A Summary Report

	From Human Resources (G08), choose **Safety & Health Admin.** From Safety & Health Admin. (G08S1), choose **OSHA 300A Summary**

From Safety and Health Administration (G08S1), choose OSHA 300A Summary.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occur on or after January 1, 2002, print the OSHA 300A Summary report. This report contains a summary of each injury or illness and its extent or outcome.

Because OSHA has approved the format of JD Edwards' OSHA 300A Summary, you can submit the report directly to the government.

This report replaces the OSHA 200 Summary report. You should use this report for injuries and illnesses that occur on or after January 1, 2002.

Processing Options

See OSHA 300A Summary (P086431).

Reviewing the OSHA 301 Injury and Illness Incident Report

	From Human Resources (G08), choose **Safety & Health Admin**. From Safety & Health Admin. (G08S1), choose **OSHA 301 Injury/Illness**

From Safety and Health Administration (G08S1), choose OSHA 301 Injury / Illness.

To satisfy OSHA record-keeping requirements, run the OSHA 301 Injury and Illness report. This report provides complete information for any injury or illness case that you defined as an OSHA case when you opened the case. (That is, you entered Y in the OSHA field on the Case Entry form.)

The information on this report is the same information that you can review online using the Case Review form. However, the report allows you to print information for several cases at one time.

Because OSHA has approved the format of JD Edwards' OSHA 301 Injury and Illness report, you can submit the report directly to the government.

Use this report to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

Reviewing the Cases by Type of Data Report

	From Human Resources (G08), choose **Safety & Health Admin**. From Safety & Health Admin. (G08S1), choose **Cases by Type of Data** under the **Case Reports** heading

From Safety and Health Administration (G08S1), choose Cases by Type of Data.

To review a list of all injury and illness cases with information in a particular profile data type (such as physical object involved or medical expenses), print the Cases by Type of Data report. The information that prints on this report is the same information that you can review online using Case Profile Entry.

For each case, the system lists data types in alphabetical order.

The following sample report displays how each injury or illness occurred.

```
080403                                           JD Edwards World                              Page Number        2
                                         Case Information by Data Type                         Date         5/17/17
How Incident Occurred
==============================
        100 Deep cut in right ring finger
               Tien &  some other employees were using a truck to pull up a ladder with a
               rope and block.  The rope hung up on the side of the block and Tien tried to
               free the rope which resulted in catching his finger.
        101 Crushed foot
               While picking up reports in the computer room, a box of computer paper fell
               off the stack and hit Robert's foot.
        102 Object blown into eye
               A heavy truck blew dirt and sand into Jason's eye
        104 Sat on broken chair, chair collapsed
               In the process of moving chairs from the storage room,  Kathy took a break
               and sat down on a broken chair that was in the storage room.  The chair
               collapsed causing Kathy to land on the floor injuring her lower back.
        105 Strained back while lifting boxes
               Moving paper from mail room to printer room
```

Processing Options

See Case Information by Data Type (P080403).

Reviewing World Writer for Safety and Health Administration

From Human Resources (G08), choose **Safety & Health Admin.**
From Safety & Health Admin. (G08S1), choose **World Writer**

From Safety and Health Administration (G08S1), choose World Writer.

To analyze health and safety statistics for your organization, you can print a World Writer report that lists detailed information about OSHA cases. You can print one version of this report to review illness cases and another to review injury cases. Use this information to identify establishments and employees who might need additional safety reviews.

The following report sample shows illness cases.

Occupational Illness Cases — Page - 1 — Date - 01/23/17

Case Number	OSHA Y/N	Onset of Illness	Employee	Name	Description of Illness	Days Restr	Days Away	Date Returned	Cs St	Description
106	Y	11/03/17	5651	Abigal Rothchild	Chlorine fumes made her dizzy		1	11/05/17	OP	Open
107	Y	02/24/17	2057	Ms. Suzanne D'Angelo	Ear infection from headsets	5			OP	Open
110	Y	02/05/17	6005	Mr. Fred Ellis	Hearing problem from drill				CL	Closed

The following report sample shows injury cases.

Occupational Injury Cases — Page - 1 — Date - 01/23/17

Case Number	OSHA Y/N	Injury Date	Employee	Name	Description of Injury	Days Restr	Days Away	Date Returned	Cs St	Description
100	Y	03/27/17	7508	Tien Mai	Deep cut in right ring finger	3			CL	Closed
101	Y	04/03/17	7505	Robert Mastro	Crushed foot	5	1	04/05/17	OP	Open
102	Y	05/18/17	7550	Mr. Jason Morrell	Object blown into eye	5	1	05/19/17	CL	Closed
103	Y	01/27/17	2129	Mr. John Jackson	Caught hand in elevator door				OP	Open
104	Y	04/07/17	7500	Cathy McDougle	Sat on broken chair, chair collapsed		14	04/29/17	OP	Open
105	Y	06/16/17	6000	Mr. Melvyn Easter	Strained back while lifting boxes		7	06/29/17	OP	Open
108	Y	12/22/17	5127	Mr. Chester A. Ebby	Fell down the stairs	5	3	12/29/17	CL	Closed
109	Y	06/16/17	6005	Mr. Fred Ellis	Forklift knocked him over, hurt head				OP	Open

See Also

- The *World Writer Guide*

10 Wage and Salary Administration

Overview to Wage and Salary Administration

Objectives

- To understand the concepts of making pay changes
- To make current or planned pay changes for an employee
- To make current or planned pay changes for a group of employees
- To learn how to apply the same pay change to a group of employees
- To print an analysis of pay changes

About Wage and Salary Administration

To adequately budget for employee salaries, you must plan for employee pay changes and assess the financial impact of those changes on your salary budget. Typical types of pay changes include:

- Merit increases
- Cost of living adjustments
- Regularly planned increases based on seniority changes

You can choose from a variety of methods for entering employee pay changes. In some cases, you might make a pay change, such as a merit increase, to an individual employee's record. You can enter changes that take effect in the next payroll cycle, or you can enter a future date on which a pay change becomes effective.

If your organization performs annual salary reviews for all employees at the same time, you typically need to enter pay changes for large groups of employees. In this case, you can analyze and review changes, and determine their impact on your financial budget, before you apply the changes to employee records.

To analyze and adjust pay changes before you apply those changes to employee records, you can create salary review groups. When you work with salary review groups, the system stores the information that you enter in a temporary worktable.

If you plan to make pay changes to groups of similar employees, such as all workers who are paid on an hourly basis, you can use a salary review group to apply a flat amount or percent increase to the entire group. You can organize similar employees into a review group and apply the changes to the group.

When you are satisfied with the pay changes, you can run a program that updates employee records with the information in the worktable.

For employees whose jobs are associated with pay grade steps, their pay rates are also associated with the pay grade step. To change an employee's pay, you must either advance the employee to the next pay grade step, or change the pay rate associated with pay grade steps. When you need to advance several employees to the next pay grade step, you can save time and reduce data entry by running a program to simultaneously advance a group of employees.

After you have finished entering proposed pay changes for a salary review group, you can print the Employee Salary Analysis report. Use this report to review employee's salary histories and proposed pay changes.

Wage and salary administration includes the following tasks:

- Entering pay changes for individual employees
- Working with salary review groups
- Working with pay grade step administration
- Reviewing the Employee Salary Analysis report

Enter Pay Changes for Individual Employees

Entering Pay Changes for Individual Employees

Pay changes can include an increase or decrease in an employee's salary or hourly rate. You can enter pay changes at any time. For example, employees might receive a cost-of-living allowance once every year. To make it easier to manage pay changes, you can enter changes that take effect in the current or next pay period. You can also enter changes that take effect on a future date.

When you need to enter a current pay change for an employee, you might find it most convenient to enter the change directly in the employee's record. You can enter the amount in weekly, biweekly, semi-monthly, monthly, or annual amounts. When you change an employee's salary or hourly rate, the system calculates the compa-ratio automatically.

Some employees might have more than one job within your organization. For example, a teacher might also be a coach for three months out of the year. For employees who have multiple jobs, you must use the Employee Multiple Job Entry program to enter pay changes for secondary jobs.

Entering pay changes for individual employees includes:

- Entering a Pay Change for a Primary Job
- Entering Pay Changes for Multiple Jobs

Before You Begin

- Review your human resources constants to determine whether you need to enter or delete any additional information when you change an employee's salary or hourly rate. See *About Salary and Hourly Rate Calculations.*

See Also

- *Entering Changes for Rates Only (P060131)* for information about entering future pay changes for a primary job

Entering a Pay Change for a Primary Job

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), choose **HR Employee Entry**

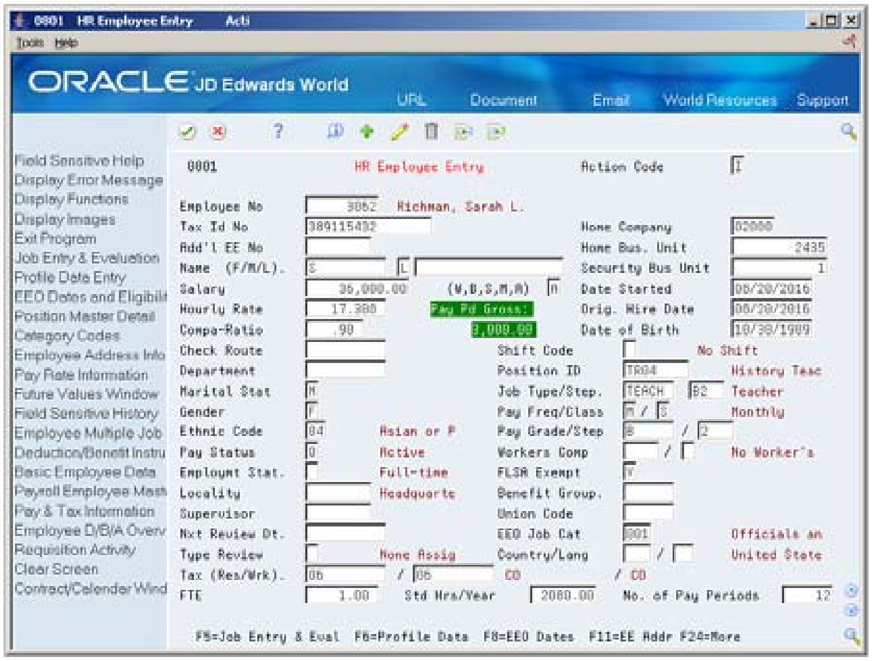
When an employee receives a performance review or a promotion, you typically need to enter a permanent pay change for the employee. If the pay change affects only the employee's primary job, you can enter the pay change directly in the employee's record. Such pay changes take effect in the next payroll cycle.

To permanently change an employee's rate of pay, complete one of the following tasks:

- Change the rate of pay for an employee
- Change the rate of pay for an employee with a contract calendar

To change the rate of pay for an employee

On Employee Entry



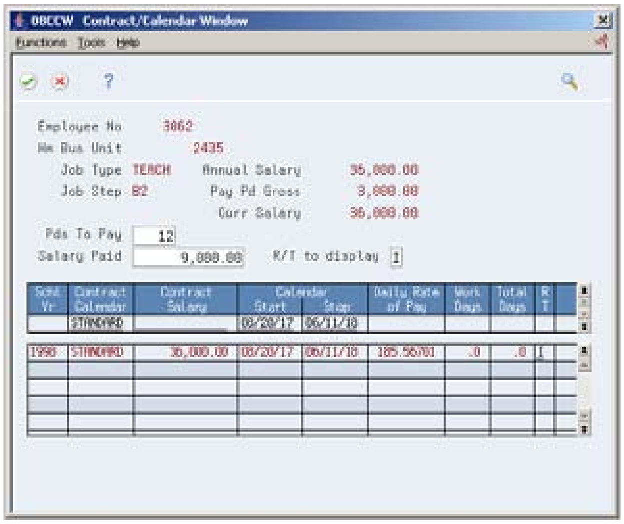
1. To locate the employee, complete the following field:
   - Address Number
2. Change the value in any of the following fields:
   - Salary
   - Hourly Rate

To change the rate of pay for an employee with a contract calendar

On Employee Entry

1. To locate the employee, complete the following field:
   - Address Number

2. Choose the Contract / Calendar function or change the value in one or both of the following optional fields:
   - Pay Grade
   - Pay Step



3. On Contract Calendar, complete the following fields and press Enter:
   - Change Reason
   - Periods to Pay
   - Contract Calendar
   - Contract Salary
   - Calendar Start Date
   - Calendar Stop Date
   - R / T to Display
4. Review the information in the following field:
   - Daily Rate of Pay
5. Choose the Update function.

Field	Explanation
Calendar Start	The date that an employee may begin participating in the company's benefit plans or may be included in payroll processing. You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year). *Form-specific information* When you assign an employee a contract calendar enter one of the following; ▪ The first date covered under the contract, if the employee will begin work by that date ▪ The actual date the employee begins work, if the employee's start date is later than the first date covered by the contract
Stop	The date that an employee's pay stops. This date is used to provide for employees who are seasonal or for employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT. It may also be the date that a deduction, benefit, or instruction stops. *Form-specific information* When you assign an employee a contract calendar enter one of the following; ▪ The last date covered under the contract, if the employee will work to that date ▪ The actual date the employee will stop work, if the employee's stop date is earlier than the last date covered by the contract

Field	Explanation
R/T to display	A field denoting which records, or lines, to include in a contract salary calculation. Valid values are: I Include this contract and salary information in the current calculation (default) O Omit this contract and salary information in the current calculation Blank Display both the included and the omitted records and include in the calculation The entry you use as the R/T to display determines the records that display and the records that you want the system to include or omit in the calculation. For example, if you enter I as the R/T to display, only records with I display in the list of contracts attached to this employee. If you want to see both omitted and included records, leave the R/T to display field blank. If you do not want the system to include one or more of the contract records in the current calculation, you must enter O on the line for that record.
Daily Rate of Pay	The daily rate of pay earned by an employee attached to a Contract/Calendar. The system calculates the daily rate of pay as follows: Contract Salary / Number of work days in the contract calendar that fall between the start and stop dates

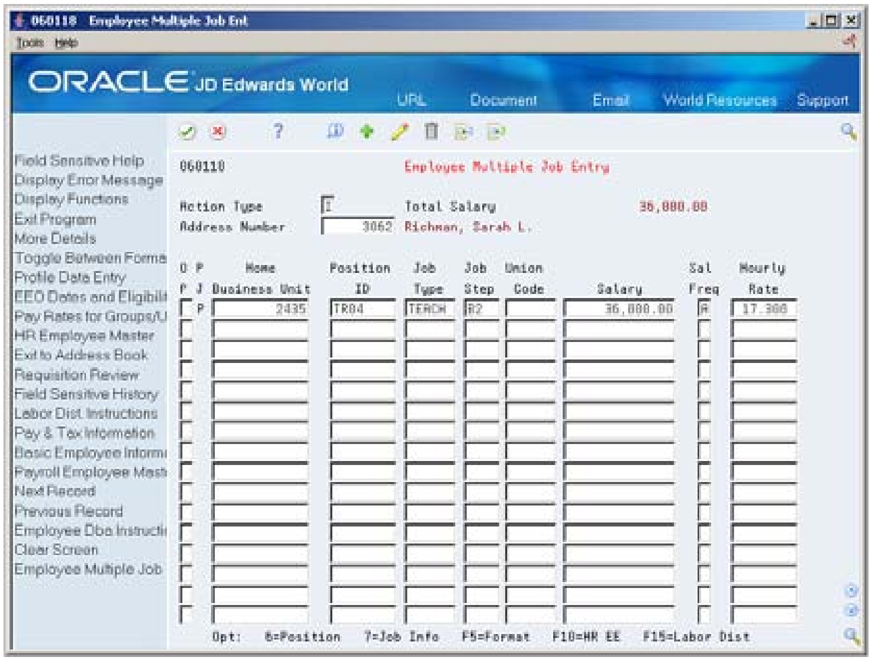
Entering Pay Changes for Multiple Jobs

From Human Resources (G08), choose **Employee Information**
From Employee Information (G08E1), choose **Employee Multiple Job Entry**

Some employees might have more than one job within your organization. For example, a teacher might also be a coach for three months of the year. Such employees have a primary, or main, job (in this case, teacher) and one or more secondary, or additional jobs (in this case, coach). When you need to enter pay changes for employees' secondary jobs, you must use the Employee Multiple Job Entry program.

To enter pay changes for multiple jobs

On Employee Multiple Job Entry



1. To locate the employee, complete the following field:
   - Address Number
2. Change the value in either of the following fields:
   - Salary
   - Hourly Rate

Work with Salary Review Groups

Working with Salary Review Groups

When you need to enter pay changes for a group of employees, you can review proposed changes before you apply them to the employees' records. To apply the same pay change, such as a cost-of-living adjustment, to a group of employees, you can create a salary review group and apply the change to all of the employees in that group.

When you use salary review groups to enter employee pay changes, you can review and adjust the changes before you apply them to employee records. You can also enter additional changes for individual employees in the review group. For example, you can enter an additional merit increase for an employee who received an outstanding performance appraisal. This feature allows you to assess the financial impact of pay changes before you actually make them.

In addition to pay change information, you can enter bonus and performance appraisal information for the employees in a review group. Use this information to justify employee pay changes.

When you are satisfied with the pay changes and other information that you entered for a review group, you can run a program to update the employee records to reflect the pay changes and information.

In some cases, a review group might become obsolete or invalid. In these cases, you can delete the review group without updating the employee records.

You can use salary review groups to enter pay changes for employees whose salary increases are not associated with pay grade step progression.

Working with salary review groups includes:

- Creating a Review Group
- Revising Pay Changes for a Review Group
- Entering Bonus Information for Employees in a Review Group
- Entering Appraisal Information for Employees in a Review Group
- Reviewing Recommended Pay Changes
- Updating Salary Actuals
- Deleting Obsolete Review Groups

See Also

- *Working with Pay Grade Step Administration* for information about entering pay changes for employees whose salary increases are associated with pay grade step progression.

Creating a Review Group

From Human Resources (G08), choose **Wage and Salary Administration** From Wage and Salary Administration (G08W2), choose **Create Review Groups**

When you create a review group, you can enter a pay change that you want to apply to everyone in the group. After you create a review group, you can review and adjust pay changes for individual members of the group, if necessary.

Creating review groups enables you to efficiently evaluate pay changes for a large group of employees before you apply the changes to the employees' records.

When you create a review group, you can:

- Assign employees to a review group
- Assign a pay change to the group
- Assign an effective date
- Assign a date for the next review
- Assign a change reason for the pay change

What You Should Know About

Employees assigned to multiple review groups	An employee can only be in one review group in the worktable at a time. If the employee is in another review group, the system produces an error report.

Processing Options

See Create Review Groups All Salaried Emp. (P082800).

Revising Pay Changes for a Review Group

From Human Resources (G08), choose **Wage and Salary Administration** From Wage and Salary Administration (G08W2), choose **Review & Rank Employees**

When you create a review group that includes an initial pay change for all of the employees in the group, you can analyze how the pay change affects each employee's pay and make revisions, if necessary.

You can revise the pay change for the entire group, or for individual members of the group. For example, if everyone in the group is receiving a merit increase, and the total amount of money budgeted for merit increases is fixed, the percentage increase that each employee receives might vary based on their performance appraisals.

You can also enter additional pay changes for some members of the group. For example, everyone in the group might receive a five percent cost-of-living increase, and group members in business unit seven receive an additional three percent merit increase.

When you work with a review group, the system does not apply the changes you make to the employees' records. Use this program to experiment with different changes and create a variety of scenarios until you are satisfied with the results.

Revising pay changes for a review group includes:

- Revising pay changes for multiple employees
- Revising pay changes for individual employees
- Entering additional pay changes for individual employees

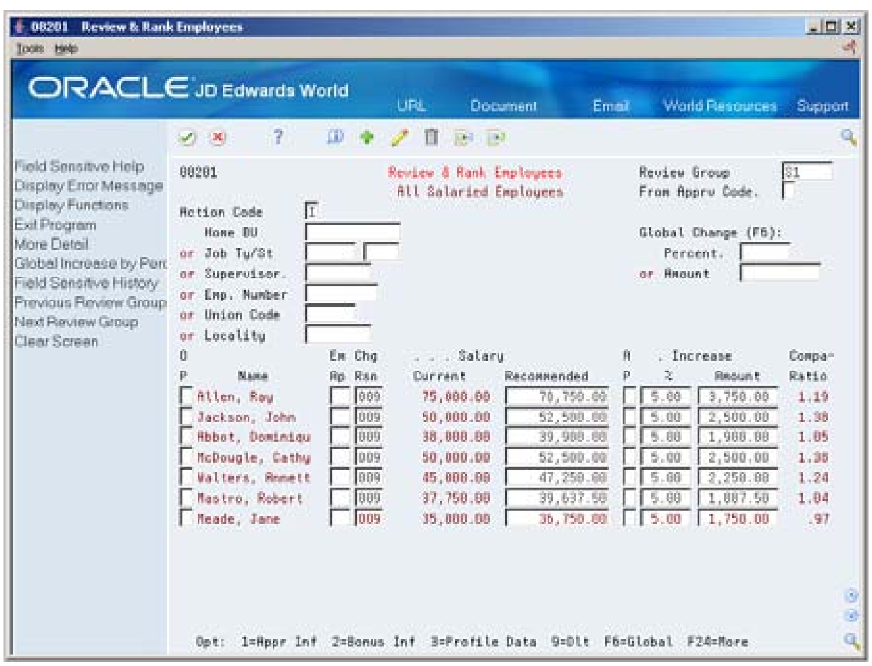
> **Note:** This program supports Import/Export functionality. See Technical Foundation for more information.

Before You Begin

- Verify that business unit security is set up in the Business Unit Security table (F0001). If so, you can only work with employees in the security business units for which you are authorized.

To revise pay changes for multiple employees

On Review and Rank Employees



1. Complete the following field and press Enter:
   - Review Group
2. Use the Roll function to review all employee records in the group.
3. To limit the group of employees to which you apply the pay change, complete any of the following fields and press Enter:
   - From Approval Code
   - Home Business Unit
   - Job Type/Step
   - Supervisor
   - Employee Number
   - Union Code
   - Locality
4. To enter a change that affects all of the employees that you selected, complete either of the following fields and choose the Global Change function:
   - Percent
   - Amount

Field	Explanation
Review Group	The name that you assign to a group of employees who are going through a similar salary or wage review process. For example, you might group all salaried employees for annual review and call the review group SAR. Or you might group all hourly employees due a merit increase and name the review group HMI. You can define this code using user defined codes list 08/RG.
From Apprv Code	A code that defines the status of the recommended raise for employees in a review group. You can use this code to limit the screen display to only employees linked to amount approval codes greater than or equal to the code you type in this field. If you leave this field blank, all employees will display regardless of their approval codes. You can define this code using user defined codes table 08/AR.
Home BU	The number of the business unit in which the employee generally resides. *Form-specific information* This field is optional. You can limit the information that displays on the form to a particular business unit by entering a code in this field.

What You Should Know About

Reviewing records	You must use the roll function to review all employee records before you revise any pay changes. The system applies changes to only those records that you have reviewed.

See Also

- *Work with PC Import/Export* in the *Technical Foundation guide.*

To revise pay changes for individual employees

On Review and Rank Employees

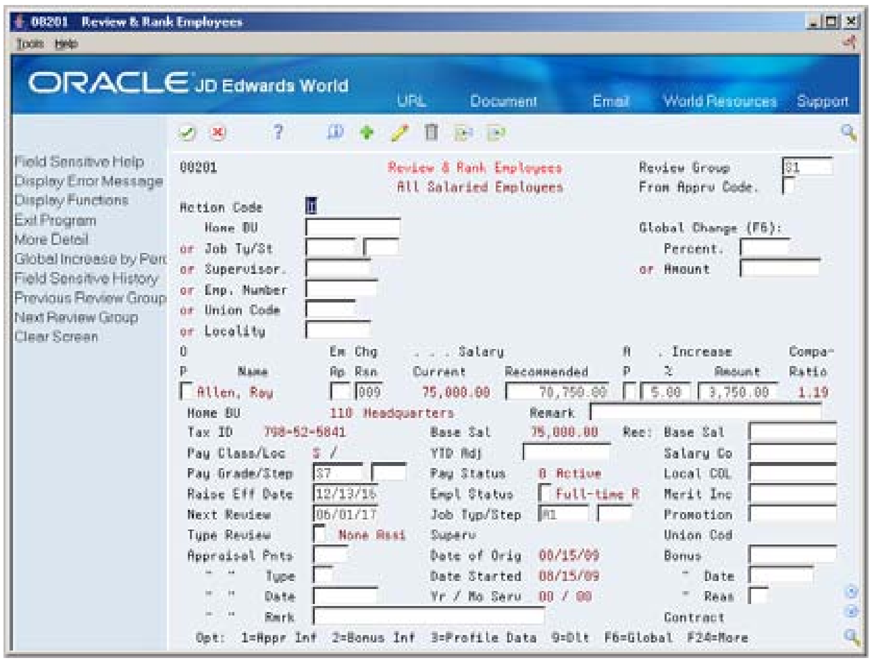
1. Complete the following field and press Enter:
   - Review Group
2. For the employee whose pay change you need to adjust, enter a new value in one of the following fields and delete the values in the other two fields:
   - Salary Recommended
   - Increase Percent
   - Increase Amount

Field	Explanation
Salary Recommended	The employee's new annual salary for all payroll entries that are either manually entered or automatically generated for the payroll period after the Date of Next Raise from the employee's record. *Form-specific information* The employee's recommended salary. The system generates this rate either when you create a review group or when you enter a value in the New Raise field on the Pay Rate Information form.
Increase Percent	The percentage by which the salary or wage of one employee or all of the employees in a review group is to be increased. *Form-specific information* You can use the Global Change (F6) Percent field to simultaneously assign a percentage of pay increase for all the employees in a review group. You can use the Increase % field to assign a percentage of pay increase for individual employees in a review group.
Increase Amount	The amount by which the salary of one or more employees is to be increased.

To enter additional pay changes for individual employees

On Review and Rank Employees

1. Complete the following field and press Enter:
   - Review Group
2. For the employee for whom you need to enter an additional pay change, delete the values in the following fields:
   - Salary Recommended
   - Increase %
   - Increase Amount
3. Access the detail area.



4. Complete any of the following fields, depending on the types of pay changes you need to enter:
   - Base Sal
   - Salary Cost of Living
   - Merit Increase
   - Promotion Amount
   - YTD Adj

Field	Explanation
Base Sal	The change amount or percentage of a salary increase to the employee's current base salary. The system totals the values in the following fields to determine the employee's recommended salary: ▪ Change in Salary (data item SALC) ▪ Cost of Living (data item AMT1) ▪ Local Cost of Living (data item AMT2) ▪ Merit Increase (data item AMT3) ▪ Promotion (data item AMT4) The Recommended: Base Salary field in the detail area allows you to further define any recommended salary change.
Salary Cost of Living	Either the percentage or the amount of a recommended company-wide cost of living salary increase. The system adds this figure to any other recommended raise fields in order to create a new recommended salary. The system totals the values in the following fields to determine an employee's recommended salary: ▪ Base Salary (data item SALC) ▪ Cost of Living (data item AMTI) ▪ Local Cost of Living (data item AMT2) ▪ Merit Increase (data item AMT3) ▪ Promotion (data item AMT4)
Merit Increase	Either the percentage or the amount of a merit increase. The system adds this figure to any of the other recommended raise fields in order to create a new recommended salary. The system totals the values in the following fields to determine an employee's recommended salary: ▪ Base Salary (data item SALC) ▪ Cost of Living (data item AMT1) ▪ Local Cost of Living (data item AMT2) ▪ Merit Increase (data item AMT3) ▪ Promotion (data item AMT4)

Field	Explanation
Promotion Amount	Either the percentage or the amount of a recommended salary increase for a promotion. The system totals the values in the following fields to determine an employee's recommended salary: ▪ Base Salary (data item SALC) ▪ Cost of Living (data item AMT1) ▪ Local Cost of Living (data item AMT2) ▪ Merit Increase (data item AMT3) ▪ Promotion (data item AMT4)
YTD Adj	The year to date net amount, or budget requested. *Form-specific information* You can use this field to enter any salary additions that have been made to the employee over the course of a year. When added to the current base salary, this figure is the amount in the Current Salary field. Use this field if you want additional earnings considered as base pay for salary adjustment purposes.

What You Should Know About

User defined fields	The following fields are user defined and can be changed to meet your needs: ▪ Salary Cost of Living ▪ Merit Increase ▪ Promotion ▪ Year to Date Adjustment
Global changes	When you enter an additional pay change for an employee in a review group, this change replaces any revision that you made for multiple employees in the group. To retain that revision, re-enter its amount in the appropriate field in the detail area for the employee.

Processing Options

See Review & Rank Employees - Salary Format (P08201).

Entering Bonus Information for Employees in a Review Group

From Human Resources (G08), choose **Wage and Salary Administration**
From Wage and Salary Administration (G08W2), choose **Review and Rank Employees**

To efficiently track the amount of money that your organization spends on bonuses for employees, you can enter bonus information when you work with a review group. The bonus entry is for information only. Entering bonus information for an employee in the review group does not cause the system to generate a bonus payment when you update employee records with review group information.

See Also

- *Entering a Bonus for an Employee (P061121)* or *Entering a Standard Interim Check (P060531)* in the *Payroll Guide* for information about generating bonus payments

To enter bonus information for employees in a review group

On Review and Rank Employees

1. Complete the following field and press Enter:
   - Review Group
2. Locate the employee for whom you need to enter a bonus and access the detail area.
3. Complete the following fields:
   - Bonus
   - Bonus Date
   - Bonus Reason

Field	Explanation
Bonus	The bonus amount given to the employee. This is a separate amount not added to the recommended salary. Information can be entered in conjunction with the Bonus Reason (data item BNUS) and Bonus Data (data item BSDT) fields.
Date - Bonus	The date an employee is to receive a bonus. This date is also part of the supplemental data for a bonus review.
Bonus Reason	The reason for an employee's bonus. You can define this code using user defined code table 08/BN.

Entering Appraisal Information for Employees in a Review Group

	From Human Resources (G08), choose Wage and Salary Administration From Wage and Salary Administration (G08W2), choose Review and Rank Employees

To track the information you need to justify employee pay changes, you can enter appraisal information for individual employees in the review group. You can appraise contract or temporary employees as well as regular employees. When you update employee records with review group information, the system transfers appraisal information to the appropriate profile data type.

To enter appraisal information for employees in a review group

On Review and Rank Employees

1. Complete the following field and press Enter:
   - Review Group
2. Locate the employee for whom you need to enter appraisal information and access the detail area.
3. Complete the following fields:
   - Em Ap (Employee Appraisal)
   - Appraisal Points
   - Appraisal Type (Performance Appraisal Type)
   - Appraisal Date (Date - Performance Appraisal)
4. To enter additional information about the appraisal, complete the following optional field:
   - Appraisal Remark (Remark - Appraisal)

Field	Explanation
Em Aprs	A code that defines the employee's job performance. You can define this code using user defined code table 08/AP. This is the edit field for the performance appraisal data type in supplemental data. The system verifies that you are using only valid user defined codes.
Appraisal Pnts	The points an employee received during appraisal in relation to the job description.
Performance Appraisal Type	The type of employee appraisal performed. You can define this code using user defined code table 08/TY.
Date - Performance Appraisal	The date an employee's performance appraisal was performed. This date is also part of the supplemental data type for a performance review.
Remark - Appraisal	A memo field for information concerning an employee's latest appraisal. This is also part of the supplemental data type for a performance review.

Reviewing Recommended Pay Changes

From Human Resources (G08), choose **Wage and Salary Administration**
From Wage and Salary Administration (G08W2), choose **Review Group Inquiry**

To enter pay changes for all of the employees in your organization, you might need to create more than one review group. For example, you might have one review group for salaried employees and another for employees who are paid hourly.

After you create review groups and enter any revisions or additional information for the employees in each group, you can review:

- Totals of the current and recommended total pay for each group
- The percent change from the current total pay

Use this information to verify that the pay changes are within the amounts that your organization has allotted for pay increases.

To review recommended pay changes

On Review Groups Inquiry

Complete the following field:

- Pay Class

Updating Salary Actuals

	From Human Resources (G08), choose Wage and Salary Administration From Wage and Salary Administration (G08W2), choose Update Actuals (Clear Workfile)

When you are satisfied with the pay changes and other information that you entered for a review group, you can run a program to update the employee records to reflect the changes. If you entered appraisal or bonus information for any employees, this program also updates the employees' profile data with that information.

The program updates the following tables, as well as all affected profile data types:

- Employee Master (F060116), for the primary job only
- HR History (F08042)
- Employee Turnover Analysis (F08045)
- Employee Multiple Job (F060118), for primary and secondary jobs
- Employee Multiple Job History (F060119), for primary and secondary jobs

When you update salary actuals, the system does not update any employee records that are being processed in a current payroll cycle. When the payroll cycle completes, you can rerun the update program to update pay information for those employees.

For employee records that are associated with contract calendars, the effective date of the pay change must be greater than or equal to the start date for the contract calendar. If the effective date of an employees salary change is less than the calendar start date, the system uses the calendar start date as the effective date of the pay change.

The system generates a report that lists the new salary information for the employees whose records were updated. The report also shows the number of employee records that were excluded from the update.

Each time that you run the program, the system deletes from the review group all information that has been updated to employee records. When all employee records are updated, the system deletes the review group.

Processing Options

See Update Salary Actuals - All Groups (P082810).

Deleting Obsolete Review Groups

	From Human Resources (G08), choose **Wage and Salary Administration** From Wage and Salary Administration (G08W2), choose **Delete a Review Group**

When you update salary actuals, the system deletes records from a review group as it updates employee records. When all employee records are updated, the system deletes the review group.

A review group might contain employee records that the system did not update when you ran the program to update salary actuals. For example, the approved code that you entered for an employee might not be included in the approved codes that you specified in the processing options for the update program. In this case, you can either resolve the problem and rerun the update program, or you can update the employee's record manually. If you choose to update the record manually, you should delete the obsolete review group.

A salary review group might also become obsolete or invalid when you consolidate review groups or move employee records from one review group to another. For example, if you have two review groups that include salaried employees, you might want to consolidate all of those employees into one review group. Because the system does not allow you to include an employee in more than one review group, you must delete one of the review groups before you can consolidate them.

When you do not want to transfer the information in a review group to the corresponding employee records, you can delete the review group without updating the employee records. When you delete a review group, you delete the information for all of the employees in that group.

Processing Options

See Delete a Review Group (P082801).

Work with Pay Grade Step Administration

Working with Pay Grade Step Administration

Employees whose jobs are associated with pay grade steps can receive a pay rate increase when they move to the next pay grade step within a pay grade or range of pay grades. For example, you might have a pay grade, A, that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour. To change an employee's pay, you must do one of the following:

- Advance the employee to the next step for the pay grade. The process of advancing from one pay grade step to another is called pay grade step progression.
- Change the pay rate associated with the pay grade step.

You typically advance an employee to the next pay grade step when the employee has been in the current step for a specific amount of time. To streamline the task of advancing employees to the next pay grade step, you can use a work group to select a group of employees and simultaneously advance them to the next pay grade step. You can apply pay grade step changes to both primary and secondary jobs.

When you use a work group to advance employees to the next pay grade step, you can review step progression information before you apply it to the employee records. You can also delete employee records from a review group, if necessary. After you review and verify work group information, you can run a program to update that information to employee records.

Occasionally, you might need to adjust the pay rates for your pay grade steps. For example, you might need to enter a cost-of-living increase for all pay grade steps. When you use pay grade step administration to apply the cost-of-living adjustment to a pay grade step, all of the employees in that pay grade step receive the increase.

Working with pay grade step administration includes:

- Creating a Work Group
- Reviewing Work Group Information
- Updating Employee Records with Step Progression Information
- Updating Pay Rates for Pay Grade Steps

What You Should Know About

Skipping steps	When you use pay grade step administration to advance employees to a new pay grade step, the new step must be the next step in the sequence. For example, an employee cannot advance from step A1 to step A3.

Creating a Work Group

> From Human Resources (G08), choose **Job Specifications**
> From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
> From Pay Grade/Step Administration (G08J2),choose **Create Review Work Group**

To specify the employees who need to advance to the next pay grade step, you create a work group. The employees that you specify do not need to be in the same pay grade and step. For example, you could select a group of employees by a particular job title or status, such as elementary school teachers who are completing a year's service.

For an employee who has multiple jobs, the work group includes each of those jobs that meets your selection criteria. The employee can advance to the next pay grade step for one job and not advance for other jobs.

To review pay grade step information for the employees that you included in the work group, you can print an optional report.

082005 Page Number 1
Build Grade Progression Work Group Date 5/30/17
Business Unit 2435 Updated Records

Alpha Name	Address Number	Home Business Uni	Job Type/Step	P J	Current Pay Grade	Current Grad Step	Current Hourly Rate	Current Annual Salary	New Pay Grade	New Grad Step	New Hourly Rate	New Annual Salary
Morrisey, Anne E.	3050	2435	TEACH /M1	P	M	1	25.676	34,000.000	M	2	27.027	40,000.000
O'Neil, Thelma P.	3076	2435	TEACH /B1	P	B	1	16.826	35,000.000	B	2	25.000	37,000.000
Total Number of Jobs	2		Total Annual Salary					69,000.000				77,000.000
Grand Total	2		Grand Total					69,000.000				77,000.000

Processing Options

See Build Grade Progression Work Group. (P082005).

Reviewing Work Group Information

> From Human Resources (G08), choose **Job Specifications**
> From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
> From Pay Grade/Step Administration (G08J2),choose **Reviewing Work Group Summary**

After you create a work group for pay grade step progression, you can review pay information for each of the employees in the review group. If you have created more than one work group, you can review combined totals for all work groups. Use these totals to verify that the pay changes that result from the pay grade step progression do not exceed the amounts that your organization has allotted for pay increases.

To verify that the correct employees are included in a work group, you can review detailed information.

If the work group contains incorrect records, you can delete an entire work group or delete individual employee records from a work group.

To review work group information

On Review Work Group Summary

1. Review the information.
2. To review detailed information for a specific work group, choose the Review the Work Group option.
3. On Review Work Group Detail, complete any of the following fields to limit the work groups that appear:
   - Union Code
   - Locality
   - Pay Grade
   - Pay Grade Step

What You Should Know About

Deleting an employee from a work group	If the work group includes an employee who should not advance to the next pay grade step, you can choose the Delete a Record option on Review Work Group Detail to delete the employee from the work group.
Deleting a work group	If the work group includes many employees who should not advance to the next pay grade step, you might choose to delete the work group and create a new one. To delete a work group, choose the Delete Work Group option on Review Work Group Summary.

Updating Employee Records with Step Progression Information

From Human Resources (G08), choose Job Specifications
From Job Specifications (G08J1), choose Pay Grade/Step Administration
From Pay Grade/Step Administration (G08J2),choose Update Employee Master/Mult-Job

After you have created and reviewed the work group, you can run a program to update the employee records with the new pay grade step information. For each employee included in the update, the program updates:

- Pay grade
- Pay grade step

- Salary
- Hourly rate
- Hours per day
- Hours per year

For employee records that are associated with contract calendars, the effective date of the pay grade step change must be greater than or equal to the start date for the contract calendar. If the effective date of an employees salary change is less than the calendar start date, the system uses the calendar start date as the effective date of the pay change.

Processing Options

See Grade Step Progression Work Group Update (P082008).

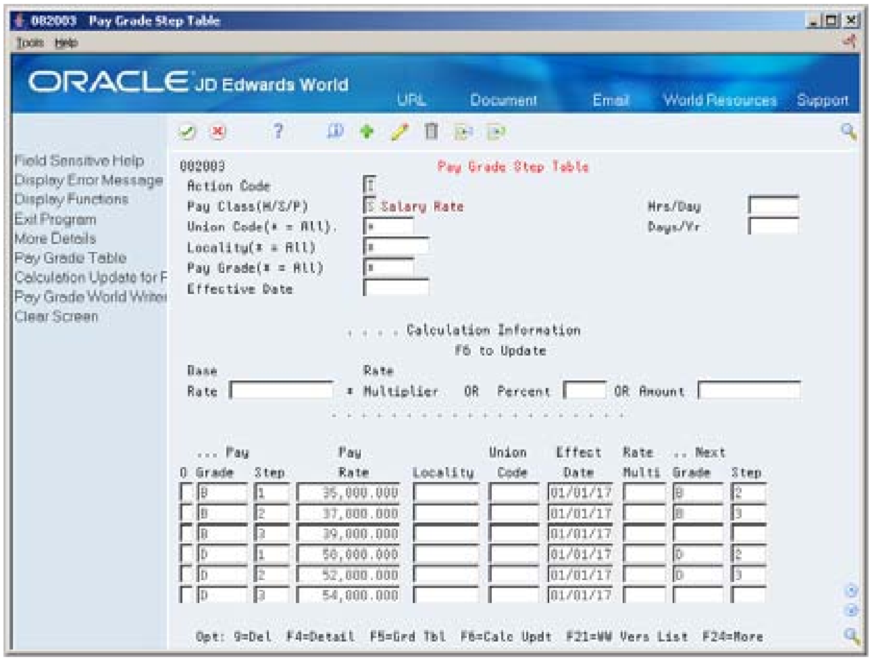
Updating Pay Rates for Pay Grade Steps

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), enter 29 From Job Specifications Setup (G08J4),choose **Pay Grade Step Table**

After you set up pay grade steps, you can easily update their pay rates when you need to enter a cost-of-living increase or other pay adjustment. When you need to apply the same rate change to multiple pay grade steps, you can enter the new amount or a percentage change once, and the system automatically applies the change to all of the steps in the group.

To update pay rates for pay grade steps

On Pay Grade Step Table



1. To locate the pay grade steps you need to update, complete any of the following fields and press Enter:
   - Pay Class
   - Union Code
   - Locality
   - Effective Date
   - Pay Grade
2. Complete the following field:
   - Effective Date
3. Complete either of the following fields:
   - Percent
   - Amount
4. To cause the system to calculate the new pay rate for each pay grade step, choose the Calculation Update function.

Field	Explanation
Percent	An abbreviation for percentage. *Form-specific information* On this form, the percentage is the percent increase you want to apply.

Field	Explanation
Amount	This field represents a monetary amount increase that the system will apply to the selections on the form.

Processing Options

See Pay Grade/Step WW (P082003).

Review the Employee Salary Analysis Report

Reviewing the Employee Salary Analysis Report

	From Human Resources (G08), choose **Wage and Salary Administration** From Wage and Salary Administration (G08W2), choose **Employee Salary Analysis**

This section contains the following:

- Reviewing the Grade/Step and Next Grade/Step Values Report
- Reviewing the Pay Grade/Step and Quartile Values Report

Before you enter pay changes for employees, you can print the Employee Salary Analysis report to review employees' salary histories and proposed salary changes. Supervisors can use this report to verify that the proposed salary changes are correct before you update employee records with those changes. You can print this report for a specific:

- Home business unit
- Job type
- Employee
- Supervisor

The following sample shows Employee Salary Analysis by Business Unit.

082400 JD Edwards World Page - 7

Employee Salary Analysis by Home BU Date - 7/02/17

Employee	Name	Bus. Unit	Description	Hire Date	Pay Grade	Grad Step	Compa- Ratio	User Code	Description	. . . . Salary History . . . . Annual Salary	Expcted Bn/Comm	Expected Income	Yr	Salary	Bonus/ Comm	Total	Remarks
7500	McDougle, Cathy	90	Administrative Depa	03/03/17	S6	0.90				50,000		50,000	95				
													94				
													93				
7503	Kraton, Ralph	90	Administrative Depa	07/27/17						56,000		56,000	95				
													94				
7504	Meade, Jane	90	Administrative Depa	08/03/06	S4	0.92				35,000		35,000	95				
													94				
													93				
7505	Mastro, Robert	90	Administrative Depa	01/03/16	S4	0.99				37,750		37,750	95				
													94				
													93				
7506	Mayeda, Donald	90	Administrative Depa	03/03/17						15,600		15,600	95				
													94				
													93				
7510	Moralez, Jesus	90	Administrative Depa	12/01/17						13,520		13,520	95				
													94				
													93				
	Home Business Unit	90	Administrative Depar			0.47				207,870		207,870					

What You Should Know About

Job and salary reports

In addition to the Salary Analysis report, you can print a variety of World Writer reports to review salary information for employees.

See *Reviewing Job Reports*.

Processing Options

See Employee Salary Analysis by Home BU (P082400).

Reviewing the Grade/Step and Next Grade/Step Values Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
From Pay Grade/Step Administration (G08J2), choose **World Writers**

To review the pay grade and pay step progression within your organization, print the Grade/Step and Next Grade/Step Values report. You can use this report to verify the step progression within your organization.

Pay Grade/Step & Next Pay Grade/Step Values — Page - 2 — Date - 06/25/17

Union Code	Description	Loc	Description	Src	Pay Grade	Grad Step	Step Rate	Effective Date	Next Pay Grade	Next Pay Grade Step	Hrs Day	Days Year
			Headquarters (defa		H5			01/01/17				
			Headquarters (defa		H6			01/01/17				
			Headquarters (defa		H7			01/01/17				
			Headquarters (defa		H8			01/01/17				
			Headquarters (defa		H9			01/01/17				
			Headquarters (defa		M			01/01/17				
			Headquarters (defa		M	1	38,000.000	01/01/17	M	2	8.00	185
			Headquarters (defa		M	2	40,000.000	01/01/17	M	3	8.00	185
			Headquarters (defa		M	3	42,000.000	01/01/17			8.00	185
			Headquarters (defa		S2			01/01/17				
			Headquarters (defa		S3			01/01/17				
			Headquarters (defa		S4			01/01/17				
			Headquarters (defa		S6			01/01/17				
			Headquarters (defa		S7			01/01/17				
			Headquarters (defa		S8			01/01/17				
			Headquarters (defa		S9			01/01/17				

Reviewing the Pay Grade/Step and Quartile Values Report

From Human Resources (G08), choose **Job Specifications**
From Job Specifications (G08J1), choose **Pay Grade/Step Administration**
From Pay Grade/Step Administration (G08J2), choose **World Writers**

To review salary information for the pay grades within your organization, print the Pay Grade/Step and Quartile Values report. Use this report to verify the salary range for each pay grade and pay grade step.

Print Pay Grade/Step & Quartile Values

Page - 3
Date - 06/25/17

Union Code	Locality	Src	Pay Grade	Grad Step	Step Rate	Minimum	2nd Quartile	Midpoint	4th Quartile	Maximum	Effective Date
	WEST		H6			16.600		18.200		19.800	01/01/17
	WEST		H7			19.000		20.800		22.600	01/01/17
	WEST		H8			21.700		24.400		26.200	01/01/17
	WEST		S1			14,600.000		18,100.000		21,600.000	01/01/17
	WEST		S2			20,100.000		25,350.000		29,000.000	01/01/17
	WEST		S3			25,600.000		31,600.000		37,600.000	01/01/17
	WEST		S4			39,100.000		47,600.000		56,100.000	01/01/17
	WEST		S5			39,100.000		47,600.000		56,100.000	01/01/17
	WEST		S6			47,100.000		56,350.000		65,600.000	01/01/17
	WEST		S7			55,600.000		67,080.000		77,850.000	01/01/17
	WEST		S8			67,600.000		79,100.000		90,600.000	01/01/17
	WEST		S9			80,100.000		92,600.000		105,600.000	01/01/17

11 Organizational Structure

Overview to Organizational Structure

Objectives

- To define an organizational structure
- To review and print organizational structures

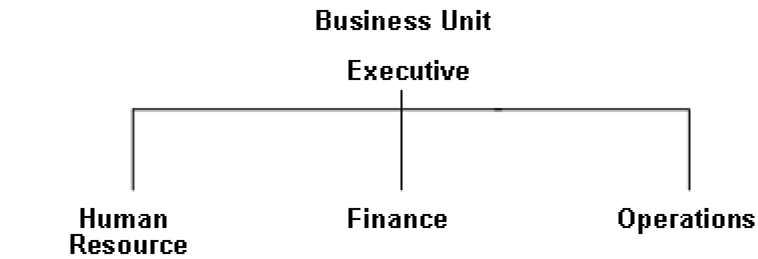
About Organizational Structure

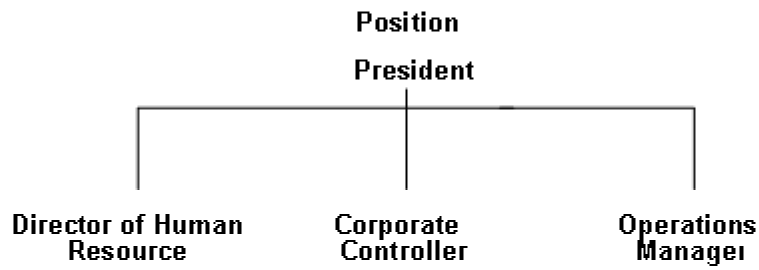
To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure. An organizational structure shows the flow of information within your organization.

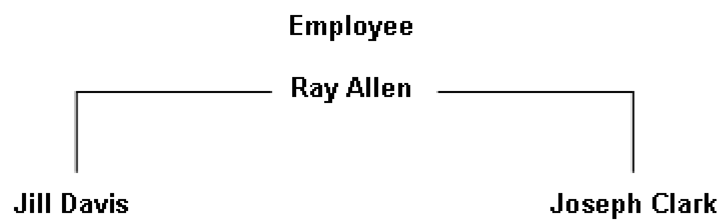
The organizational structure that you define can vary from business to business, or even from department to department within your business. You can define an organizational structure by:

- Business unit
- Positions in the company
- Individual employee

The following graphic illustrates each type of organizational structure that you can define.







To meet the needs of different people, you can define multiple organizational structures and use them for different business purposes.

To satisfy the needs of different people in your organization, you can create multiple organizational structures that provide varying levels of detail. For example, top management might require a broad organizational structure that shows branch offices that report to the main headquarters. Directors of individual departments might need an organizational structure that shows each employee who reports to a single manager.

After you define an organizational structure, you can periodically review and revise it to reflect staff additions or turnover. You can print organizational structures and distribute them to members of your organization.

Working with organizational structure includes:

- Defining organizational structures
- Reviewing organizational structures
- Printing organizational structures

Define Organizational Structures

Defining Organizational Structures

To illustrate reporting relationships within your organization, you can define organizational structures. Depending on the needs of your organization, you can define a structure by:

- Business unit
- Position
- Employee

When you define organizational structures, you create hierarchies of parents and children. For example, a large business might have headquarters (the place where the main business functions are performed) in one city and several regional offices, which are subsidiaries of the headquarters. You can define an organizational structure in which you set up the regional offices as children, or subsidiary business units, of the headquarters. The regional offices can in turn be parents, or higher-level business units, of local offices. For each office you can set up an organizational structure by employee, with upper-level managers as parents of mid-level managers, and employees as grandchildren of the middle-level managers.

After you define an organizational structure, you can revise it as necessary to reflect changes within your organization.

Defining organizational structures includes:

- Defining an Organizational Structure by Business Unit
- Defining an Organizational Structure by Position
- Defining an Organizational Structure by Employee

Defining an Organizational Structure by Business Unit

From Human Resources (G08), choose **Organizational Structure**
From Organizational Structure (G08O2), choose **Business Unit**
From Organizational Structure by Business Unit (G08O20), choose **Structure Revisions**

To show the reporting relationships between different parts of your organization, you can define an organizational structure by business unit. For example, you can create an organizational structure with the administrative office at the top level, and major departments, such as the Manufacturing or Accounting department, as children business units of the top-level office.

To define a structure by business unit, use either of the following methods:

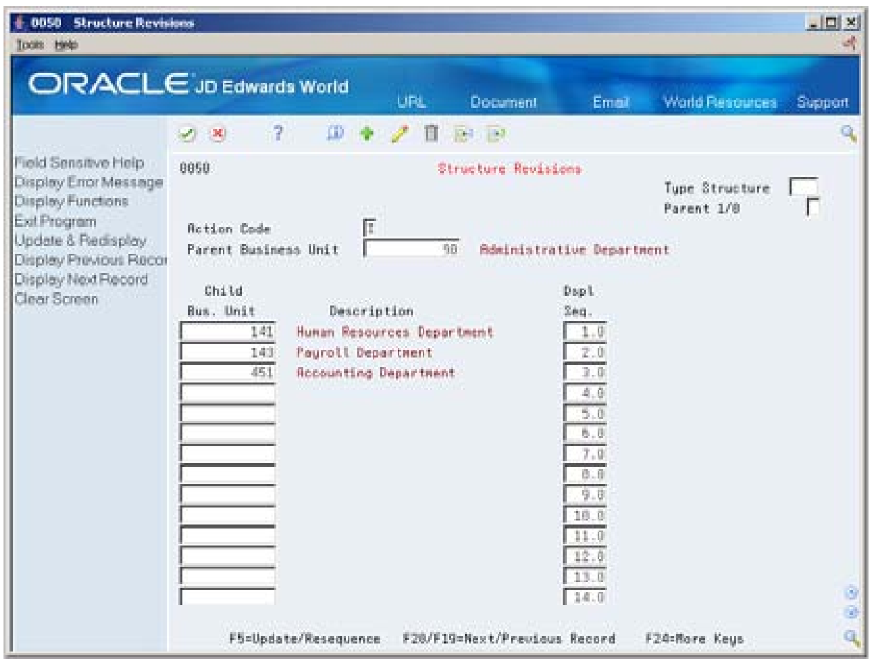
- Enter the children business units for a higher-level parent business unit
- Enter the parent business units under which you define the children

Before You Begin

- In some situations, the organizational structure by business unit might have been set up in the General Accounting system along with the Chart of Accounts. Verify that the organizational structure has not yet been set up in the General Accounting system.

To define an organizational structure by business unit

On Structure Revisions



1. Complete one of the following fields, depending on which mode of entry you use:
   - Parent Business Unit
   - Child Business Unit
   - Display Sequence
2. Complete the following optional fields:
   - Type Structure
   - Parent 1/0

Field	Explanation
Parent Business Unit	The primary level in a business unit hierarchy. A parent in one hierarchy can be a child in a different hierarchy. *Form-specific information* This could be a company or branch with several departments or jobs subordinate to it.
Child Bus. Unit	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant. You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. **Note:** The system uses this value for Journal Entries if you do not enter a value in the AAI table. *Form-specific information* A child business unit is subordinate to a parent business unit. For example, this could be one of several departments subordinate to a branch or plant.
Dspl Seq	The order in which child business units appear when listed under their parent. If you leave this field blank when you set up the organization structure, the system assigns the sequence number.
Type Structure	A user defined code (00/TS) that identifies the type of organizational structure, such as financial or responsibility. Each type of structure can have a different hierarchy.
Parent 1/0	A code that determines whether the system displays child business units for a parent or parent business units for a child. Valid codes are: 0 Displays children for selected parent 1 Displays parents for selected child If you leave this field blank, the system uses 0.

Defining an Organizational Structure by Position

	From Human Resources (G08), choose **Organizational Structure** From Organizational Structure (G08O2), choose **Position** From Organizational Structure by Position(G08O21), choose **Structure Revisions**

To show the reporting relationships between different positions within your organization, you can define an organizational structure by position. For example, you can organize a reporting structure in which you define group leaders as parent positions to programmer/analysts. The group leaders are, in turn, child positions to a department manager.

Defining an organizational structure by position eliminates the need to continually revise an organizational structure when individual employees change jobs.

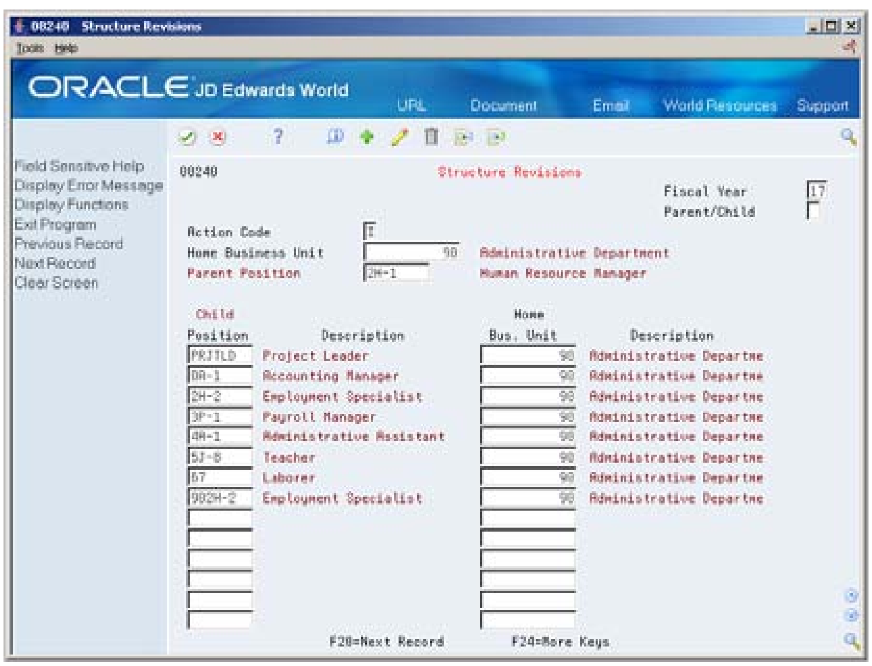
To define a structure by position, use either of the following methods:

- Enter child positions for a higher-level parent
- Enter a parent position for subordinate child positions

You can define your organizational structure at any time that your management needs require it. For example, if your organization is resizing, you might need to define an organizational structure that shows the number of positions reporting to the first-level managers, and distribute that structure to all of the managers.

To define an organizational structure by position

On Structure Revisions



1. Complete the following fields:
   - Fiscal Year

- Parent Position
- Child Position
- Home Business Unit

2. Complete the following optional field:
   - Parent / Child

Field	Explanation
Parent Position	A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID. **Note:** The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.
Child Position	A code that you use for budgetary (position) control purposes. The position ID consists of: ▪ Position (position code and its description) ▪ Fiscal year ▪ Home business unit For example, you can identify position A0-1 as Accounting Manager for fiscal year 2017-2018, for home business unit 41.
Home Business Unit	The number of the business unit in which the employee generally resides. *Form-specific information* The number of the business unit to which this position reports, for example, the HR Director's business unit.

Defining an Organizational Structure by Employee

From Human Resources (G08), choose Organizational Structure
From Organizational Structure (G08O2), choose Employee
From Organizational Structure by Employee (G08O22), choose Structure Revisions

To show the reporting relationships between specific employees within your organization, you can define an organizational structure by employee. For example, you can create an organizational structure that shows the employees who report to each supervisor, the supervisors who report to each manager, and so on.

Each employee can have only one immediate supervisor for a primary job. The system prevents you from entering a manager as a subordinate of an employee. You use one of the following modes to define an organizational structure by employee:

- Enter employees for a supervisor
- Enter a supervisor for an employee

When you create an organizational structure by employee, the system updates the following tables with primary reporting relationships as defined in the employee record:

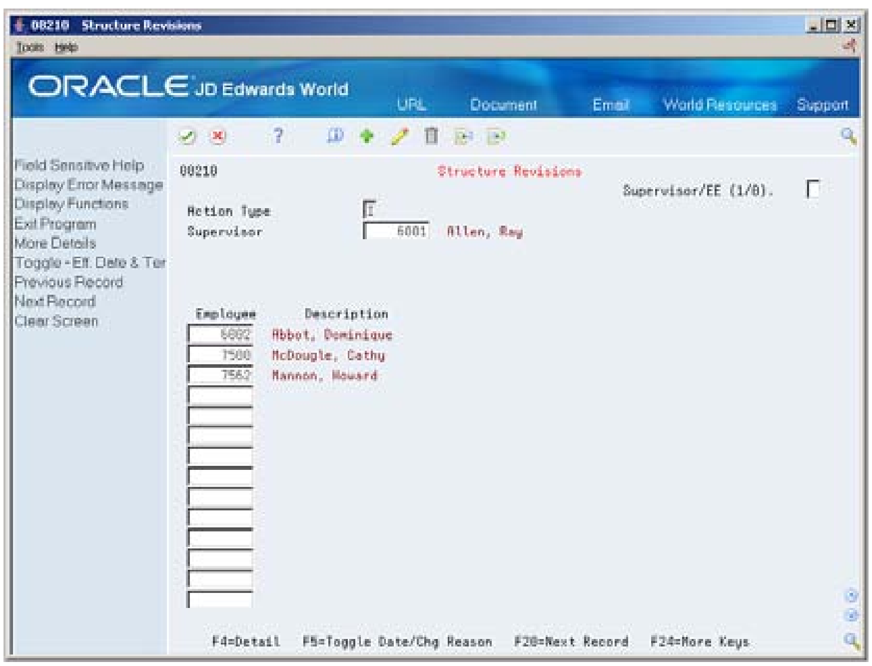
- Employee Master (F060116)
- HR History (F08042)
- Employee Multiple Job (F060118)
- Employee Multiple Job History (F060119)

Before You Begin

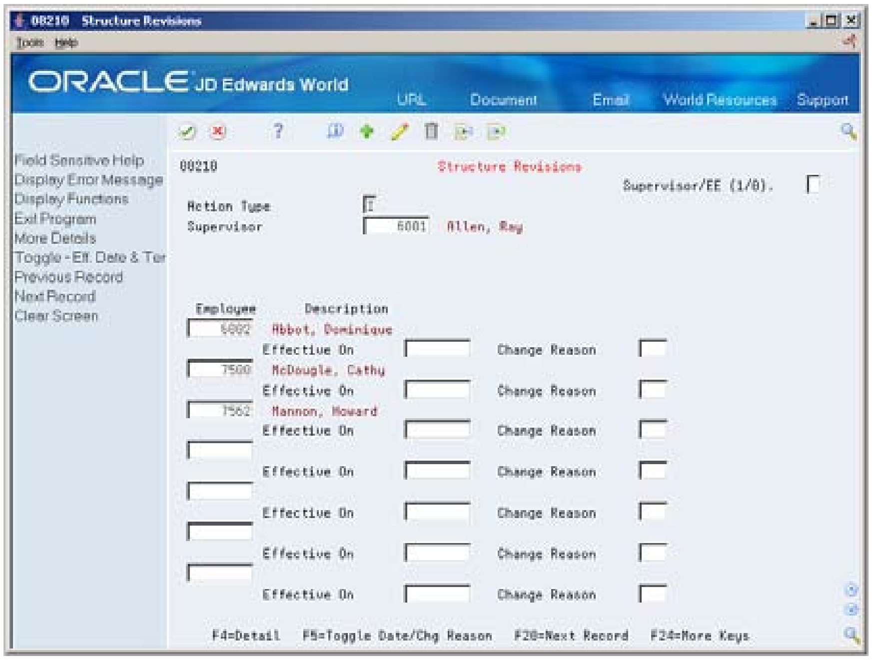
- If you want the job titles associated with the organizational structure to be more descriptive than the job type description, you can enter a job title for each employee on the Basic Employee Data form. For example, for an employee whose job type description is Director, you could enter the job title, Director of Customer Support.

To define an organizational structure by employee

On Structure Revisions



1. Complete the following fields:
   - Supervisor
   - Employee
   - Supervisor / EE (1 / 0)
2. Access the detail area.



3. Complete the following optional fields:

   - Effective On
   - Change Reason

Field	Explanation
Supervisor	The address book number of the supervisor. Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.
Supervisor/EE (1/0)	A code that determines whether the organization structure displays employees for a supervisor or a supervisor for an employee. Valid codes are: 0 Display employees for selected supervisor 1 Display supervisor for selected employee If you leave this field blank, the system uses 0.
Effective On	The date that you want all the changes to take effect, or the date that the changes went into effect. If you are entering data and you do not enter a date in this field, the system uses the current date as the effective date.

Field	Explanation
Change Reason	To record a reason for the change in the Employee Turnover Analysis table (F08045) and the HR History table (F08042), enter a value in this field. Completing this field also updates the Employee Master table (F060116) and the Employee Multiple Job table (F060118) with the new change reason. The change reason code indicates the following: ▪ Why an active employee's master table record was changed ▪ Why an employee was terminated When the HR Monitor reads the information on this form, it creates a turnover record only if you enter a change reason in this field. If you do not want to create turnover records for a data change, leave this field blank.

What You Should Know About

Maintaining history and turnover for changes to an organizational structure	To change the supervisor to whom an employee reports, enter an effective date and change reason.

Processing Options

See Organizational Chart Revisions - EE / Supervisor (P08210).

Review Organizational Structures

Reviewing Organizational Structures

After you define organizational structures, you can review them to determine whether they need to be updated or adjusted.

Reviewing organizational structures includes:

- Reviewing an Organizational Structure by Business Unit
- Reviewing an Organizational Structure by Position
- Reviewing an Organizational Structure by Employee

Reviewing an Organizational Structure by Business Unit

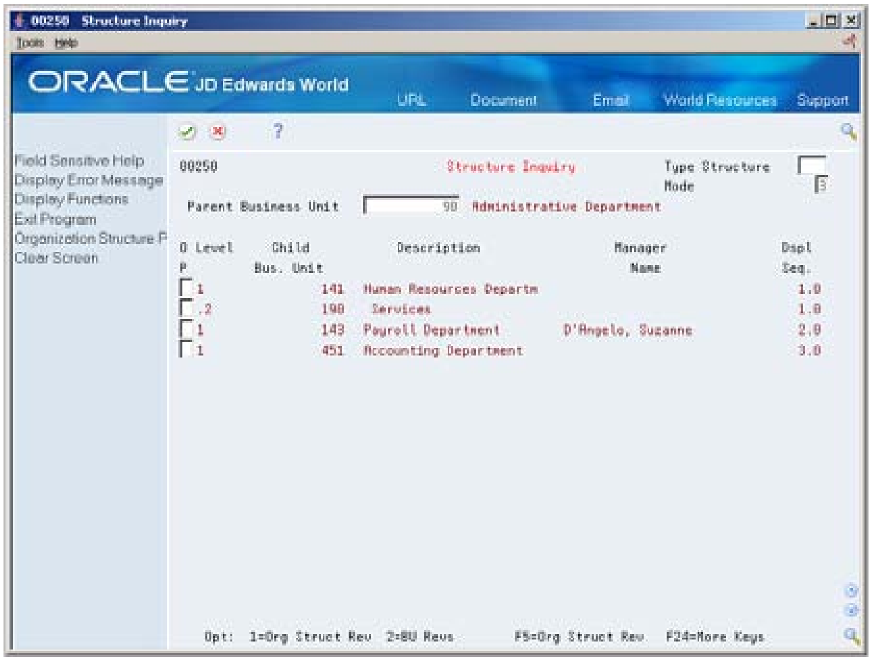
> From Human Resources (G08), choose **Organizational Structure**
> From Organizational Structure (G08O1), choose **Business Unit**
> From Organizational Structure by Business Unit (G08O20), choose **Structure Inquiry**

After you define an organizational structure by business unit, you can review it to analyze the reporting relationships between the business units in your organization. You can review:

- A single-level structure that shows only the immediate children for a parent business unit
- A multiple-level structure that shows all of the children for a parent business unit and their level in the hierarchy
- A multiple-level structure that shows all of the children for a parent business in an indented format

To review an organizational structure by business unit

On Structure Inquiry



Complete the following fields:

- Type Structure
- Mode
- Parent Business Unit

Field	Explanation
Mode	A code that indicates the mode or style in which you want to view the business unit structure. Valid codes are: 1 Single-level structure - shows only the immediate children for a parent business unit, such as the Human Resources and Finance offices, which might be immediate children of the business unit Office of the President. 2 Multi-level structure - shows all descendants for a parent business unit, displaying the numbered level of the child below the parent in a non-indented format. The display can have a maximum of 25 levels. For example, the Human Resources business unit might have child business units of Benefits or Internal Training. 3 Multiple-level indented structure - shows all descendants for a parent business unit, displaying the numbered level of the child below the parent in an indented format with a maximum of five levels of indentation. This shows the same information as code 2, but the indented format might make the display easier to read with a complex organizational structure. The following codes apply to Employee / Supervisor Organization Charts only: 4 Displays all employees reporting to a supervisor up to a maximum of two levels. 5 Displays all employees reporting to a supervisor up to three levels.
Parent Business Unit	The primary level in a business unit hierarchy. A parent in one hierarchy can be a child in a different hierarchy.

Processing Options

See Business Unit Org. Structure Review (P00250).

Reviewing an Organizational Structure by Position

From Human Resources (G08), choose **Organizational Structure**
From Organizational Structure (G08O2), choose **Position**
From Organizational Structure by Position(G08O21), choose **Structure Inquiry**

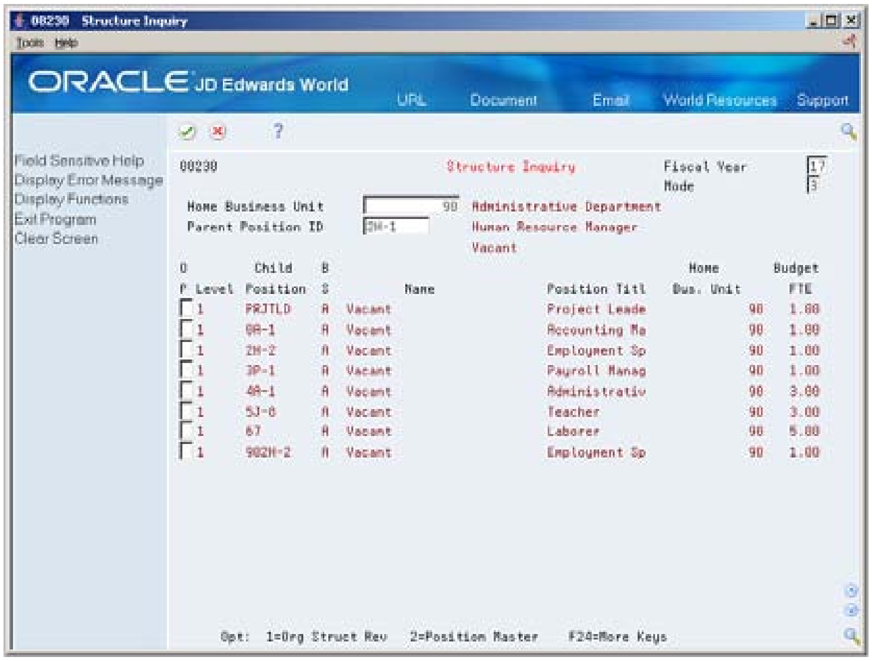
After you define an organizational structure by position, you can review it to analyze the reporting relationships between the positions in your organization. You can review:

- A single-level hierarchy that shows only the subordinate positions directly under a parent position.

- A multiple-level hierarchy that shows all of the subordinate positions directly under a parent position, but also all of the positions that report to each subordinate.
- An indented multiple-level hierarchy. You can view a maximum of five levels.

To review an organizational structure by position

On Structure Inquiry



Complete the following fields:

- Fiscal Year
- Mode
- Home Business Unit
- Parent Position ID

Processing Options

See Position Organization Charts (P08230).

Reviewing an Organizational Structure by Employee

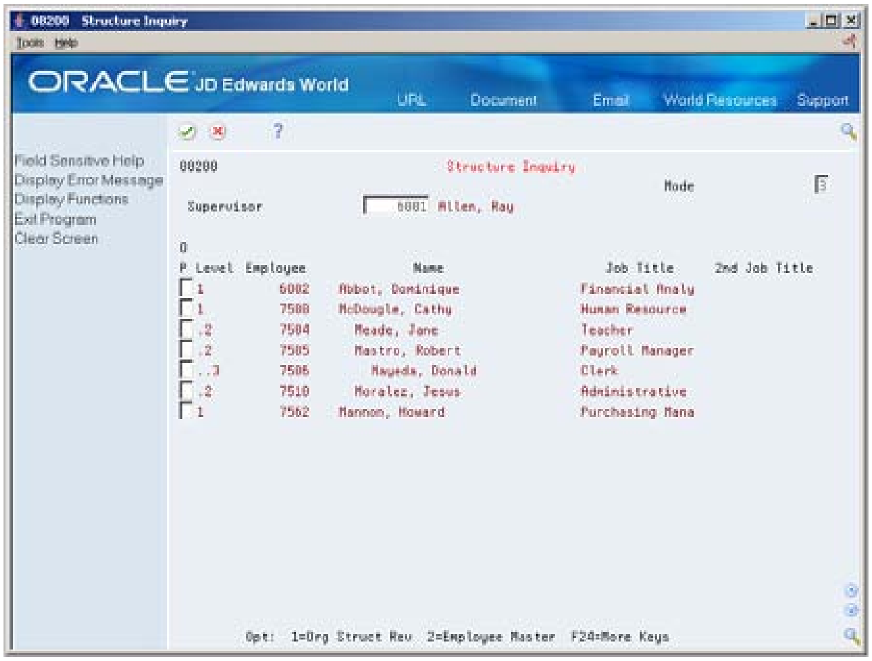
	From Human Resources (G08), choose **Organizational Structure** From Organizational Structure (G08O2), choose **Employee** From Organizational Structure by Employee (G08O22), choose **Structure Inquiry**

After you define an organizational structure by employee, you can review it to analyze the reporting relationships between the employees in your organization.

You can review multiple hierarchies of employees. These hierarchies can be independent of each other.

To review an organizational structure by employee

On Structure Inquiry



Complete the following fields:

- Supervisor
- Mode

Processing Options

See Organization Chart Inquiry - EE/Supervis (P08200).

Print Organizational Structures

Printing an Organizational Structure

When managers or other employees need to review the reporting relationships within your organization, you can print organizational structures.

Printing organizational structures includes:

- Printing an Organizational Structure by Business Unit
- Printing an Organizational Structure by Position
- Printing an Organizational Structure by Employee

When you print an organizational structure, you can use processing options to specify the number of levels that you need to review. The structure formats include:

- Single level
- Multi-level
- Multi-level indented
- Indented up to level 2
- Indented up to level 3

For example, you can print the report at a single level, to show only the parents, such as managers or regional offices, or you can print the report to show all children of all parents.

Printing an Organizational Structure by Business Unit

From Human Resources (G08), choose **Organizational Structure**
From Organizational Structure (G08O1), choose **Business Unit**
From Organizational Structure by Business Unit (G08O20), choose **Structure Print**

After you define an organizational structure by business unit, you can print it and distribute it to managers or other employees. You can print the entire hierarchy or just the top-level parents. The printed structure is similar to the structure that you can review online using Structure Inquiry. You can include as many as nine levels in your structure.

```
 00425                                           JD Edwards World                           Page. . . .         2
                                           Organization Structure Report                    Date. . . .   6/17/17
                                                    3035 Only
  Parent Cost Center .        3035 Elmer's Wood & Plastic          Type Structure. .
  Level     Child           Description               Manager            Seq
         Cost Center                                    Name             No.
  ----- ------------  -----------------------   ------------------------  -----
  1              132   Chicago                  Martin, John               1.0
  .2             CHI    Chicago Warehouse       Chicago Warehouse          1.0
  ..3         48-200     Assembly Department                               1.0
  1                3   Denver Branch                                       2.0
  .2             DEN    Denver Warehouse        Denver Warehouse   (#10)   1.0
  ..3         48-200     Assembly Department                               1.0
  1                5   San Francisco Branch                                3.0
  .2       WAREHOUSE    Warehouse Storage                                  1.0
  ..3           YARD     Yard                                              2.0
```

What You Should Know About

Subordinate business units If you print an organizational structure that includes all business units, some business units might appear more than once, depending on their relationships within the company.

Processing Options

See Structure - Organizational - Top Only (P00425).

Printing an Organizational Structure by Position

From Human Resources (G08), choose **Organizational Structure**
From Organizational Structure (G08O2), choose **Position**
From Organizational Structure by Position(G08O21), choose **Structure Print**

After you define an organizational structure by position, you can print it and distribute it to managers or other employees. The printed structure is similar to the structure you can review online using Structure Inquiry.

You can print your organizational structure by position in the following modes:

- Print the subordinate positions directly under a parent position.
- Print all of the subordinate positions directly under a parent position, but also all of the positions that report to each subordinate.
- Print an indented multiple-level hierarchy that shows the same information as in mode two, but also indents each level below the parent position. You can print a maximum of five levels.

```
 08435                                           JD Edwards World                        Page. . . .         2
                                             Organization Structure                      Date. . . .   6/22/17
                                            Parent Position/Position
 Parent Position ID . 1            HR Director
 Home Cost Center . .         141  Human Resources Department
        Child    P                                                          Parent
 Level Position S Name                          Position Title             Cost Center      FTE
 ----- -------- - ----------------------------- ------------------------------ ------------ ---------
 1     2          Stone, Russel                 Compensation Manager                141      1.00
 1     3          Smith, Sandy                  Recruitment Manager                 141      1.00
 .2    4           Jones, Larry                 HR Specialist                       141      1.00
 .2    5           Vacant                       HR Specialist                       141      1.00
```

Data Selection

Printing the entire structure

When you print the entire organizational structure, rather than selecting only certain supervisors, the report shows the whole structure for the supervisor or supervisors at the top of the structure. On the DREAM Writer selection form, enter *ALL for Supervisor.

Selecting parent positions to print

To print the structure descending from a certain supervisor or range of supervisors that are not at the top of the organizational structure, enter the Address Book number of the supervisor, or a range of supervisors.

Printing an Organizational Structure by Employee

From Human Resources (G08), choose **Organizational Structure**
From Organizational Structure (G08O2), choose **Employee**
From Organizational Structure by Employee (G08O22), choose **Structure Print**

After you define an organizational structure by employee, you can print it and distribute it to managers or other employees. The printed structure is similar to the structure you can review online using Structure Inquiry. You can format the report to print:

- Only the employees directly under a supervisor.
- A multiple-level structure, with all employees under the supervisor.
- A multiple-level indented structure, which shows all employees under a supervisor, but with each level indented. You can print up to nine levels below the supervisor.
- An indented structure with a maximum of two levels.
- An indented structure with a maximum of three levels.

```
08425                                          JD Edwards World                       Page. . . .        7
                                            Organization Structure                    Date. . . . 12/13/17
                                             Supervisor/Employee
Supervisor . . . . .     6001  Allen, Ray
Level    . . . Employee . . .
       Number                 Name                        Job Title              2nd Job Title         Category Code 2
----- -------- ----------------------------------- ------------------------ ------------------------ --------------------
1         6002 Abbot, Dominique                    Financial Analyst
1         7562 Mannon, Howard                      Purchasing Manager
```

Data Selection

Printing the entire structure

When you print the entire organizational structure, rather than selecting only certain supervisors, the report shows the whole structure for the supervisor or supervisors at the top of the structure. On the DREAM Writer selection form, enter *ALL for Supervisor.

Selecting parent positions to print

To print the structure descending from a certain supervisor or range of supervisors that are not at the top of the organizational structure, enter the Address Book number of the supervisor, or a range of supervisors.

12 System Setup

Overview to System Setup

Objectives

- To select and activate the needed software features in the Human Resources system
- To enter system-wide default information that allows your organization to process and track accurate information
- To understand how the system uses the data

About System Setup

Before you can use any features of the Human Resources system, you need to define critical information that the system uses for processing. You also specify information that you will use when you enter data throughout the system.

This information consists of:

Item	Description
User defined codes	Set up user defined codes to customize your system to your specific business needs. You can customize a wide variety of information using user defined codes.
Profile information	Set up profile information to track detailed information about employees, applicants, requisitions, jobs, and health and safety cases.
Human resources constants information	Set up constants information to specify default information and to activate processes such as: ▪ History and turnover tracking ▪ Position control ▪ Pay grade step progression ▪ Requisition integration ▪ Pay sources
History and turnover tracking information	Set up history and turnover tracking to create historical records of employee information.
Job information	Set up job information to track complete information about the jobs within your organization.

Item	Description
Employee information	Set up employee information to: ▪ Track information that is unique to your organization or your industry ▪ Specify the fields for which you will allow future changes
Contract calendar information	If your organization has employees who work under yearly contracts that specify the number of days that employees work, you can set up contract calendars.
AAIs for position budgets	To specify the accounts in the general ledger to which you post position budget information, set up automatic accounting instructions (AAIs) for position budgets.
Safety and health information	Set up safety and health information to print government-required health and safety reports.
Canadian employment equity information	If your organization is Canadian and does business with the Canadian government, set up the information you need to comply with Canadian employment equity legislation.
Tax area information	If you are using the JD Edwards World Payroll system, set up tax area information so that you can process payroll for employees.

Complete the following tasks:

- Set up user defined codes for Human Resources
- Set up profile data
- Set up employee history and turnover tracking
- Set up Human Resources constants
- Work with HR subsystem and monitor
- Set up job information
- Set up employee information
- Set up contract calendar information
- Set up AAIs for position budgets
- Set up safety and health administration
- Set up Canadian employment equity information

Set Up User Defined Codes for Human Resources

Setting Up User Defined Codes for Human Resources

	From Human Resources (G08), choose Employee Information From Employee Information (G08E1), enter 29 From Employee Information Setup (G08E4), choose an option under the User Defined Codes heading

Alternatively, from any setup menu, choose *General User Defined Codes.*

Many fields throughout the Human Resources system accept only user defined codes. You can customize fields in your system by setting up user defined codes to meet the needs of your business environment.

User defined codes are stored in tables that relate to a specific system and code type. For example, 08/JG represents system 8 (Human Resources) and user defined code list JG (Job Groups). User defined code tables determine which codes are valid for the individual fields in your system. If you enter a code that is not valid for a field, the system displays an error message. For example, in the Job Group field, you can enter only those codes included in user defined code table 08/JG.

You can access all user defined code tables through a single user defined code form. After you choose a user defined code form from a menu, you can change the system code and user defined code type to access another user defined code table. The system stores user defined codes in the User Defined Codes table (F0005).

Caution: User defined codes are central to JD Edwards World systems. You must be thoroughly familiar with user defined codes before you change them.

You can define user defined codes for each of the following:

- Jobs
- Employees
- Position control
- Health and safety administration
- Requisitions
- Applicants
- Wage and salary administration

- Canadian Employment Equity

User defined codes for jobs include:

Code	Description
Job type (07/G)	Use these codes to specify job classifications. The job type is then used to determine pay rates and benefit plans.
Job step (07/GS)	Use these codes to identify a specific step, grade, or salary level within a particular job type.
Job groups (08/JG)	Use these codes to group similar jobs to form a unit. For example, you can organize all your managers into a manager group.
EEO job code (07/J)	Use these codes to specify classifications established by the Equal Employment Opportunity Commission (EEOC). These codes print on EEO reports. Do not change any of the EEOC codes provided by JD Edwards World. You can add to them, if necessary.
Workers compensation codes (00/W)	Use these codes to identify the workers compensation insurance (WIC) code for the job type. These codes should correspond to the codes on your periodic workers compensation insurance reports.
Union code (07/UN)	Use these codes to identify the union or plan in which the employees or group of employees participates.
Job evaluation methods (08/EM)	Use these codes to define the method used for evaluating the job type.

User defined codes for employees include:

Code	Description
Employment status codes (07/ES)	Current employee status, such as full or part time.
Pay status (07/PS)	Use these codes to indicate whether an employee is active or inactive. Codes for active employees are numeric, and codes for inactive employees are alphabetic. The system omits all alphabetic codes from payroll runs.
Salary comparison localities (07/SL)	Use these codes to identify a region of the world that might require a salary level that varies from the standard salary for a job. Salary levels typically vary based on the cost of living for each salary locality.
Ethnic codes (07/M)	Use these codes to designate minority classifications. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.

Code	Description
Termination / change reasons (07 / T)	Use these codes to indicate the reason that an active employee's record was changed. For example, the change reason could include why you are recommending a change in the employee's salary or rate. Numeric codes identify changes for an active employee, and alphabetic codes identify reasons why an employee is no longer active.
Country codes (00 / CN)	Use these codes to indicate the country in which the employee resides.
Language preference codes (01 / LP)	Use these codes to indicate the language that the employee speaks most often.

User defined codes for position control include:

Code	Description
Position status (08 / PL)	Use these codes to identify the current activity level of a position.
Budget status (08 / PC)	Use these codes to identify the current activity level of a position budget.
Contract calendar codes (05 / CT)	Identify each contract calendar by name and code.
Contract calendar holidays (05 / HL)	Identify holidays and non-standard workdays on a contract calendar.

User defined codes for safety and health administration include:

Code	Description
Occupational illness (08 / H5)	Use these codes to identify the exact nature of an occupational illness. The occupational illness codes that JD Edwards World provides correspond to those that must appear on the OSHA 300 reports that you submit to the Department of Labor.
Day of the week (08 / WD)	Use these codes to identify the day of the week on which an occupational illness or injury occurred.
Case status (08 / CS)	Use these codes to identify the current status of the occupational injury or illness case. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.
Parts of body (08 / H4)	Use these codes to identify the body part affected by the occupational injury or illness. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.

User defined codes for requisitions include:

Code	Description
Requisition status (08/RS)	Use these codes to identify the status of a requested position. JD Edwards World recommends that you do not change codes Approved (AA) and Filled and Closed (99). The system uses these codes to process requisitions.

User defined codes for applicants include:

Code	Description
Applicant status (08/AS)	Use these codes to classify the current status of an applicant. Each time you change the status of an applicant on the Applicant Entry form, the system adds a record to the profile data type for applicant status. To verify applicant status history, review this profile data type. To track applicant status history, you must set up these user defined codes correctly.

User defined codes for wage and salary administration include:

Code	Description
Salary comparison localities (07/SL)	Use these codes to identify a region of the world that might require a salary level that varies from the standard salary for a job. Salary levels typically vary based on the cost of living for each salary locality.
Performance appraisals (08/AP)	Use these codes to identify the results of employee performance appraisals. Each code represents a different evaluation of an employee's performance.
Appraisal types (08/TY)	Use these codes to identify the nature of the performance appraisal, such as 6 month review, probationary review, and so on.
Bonus reasons (08/BN)	Use these codes to identify the reason that an employee receives a lump-sum payment in addition to their salary.
Salary comparison sources (08/SS)	Use these codes to identify the source of the information you use to derive salaries for pay grades.

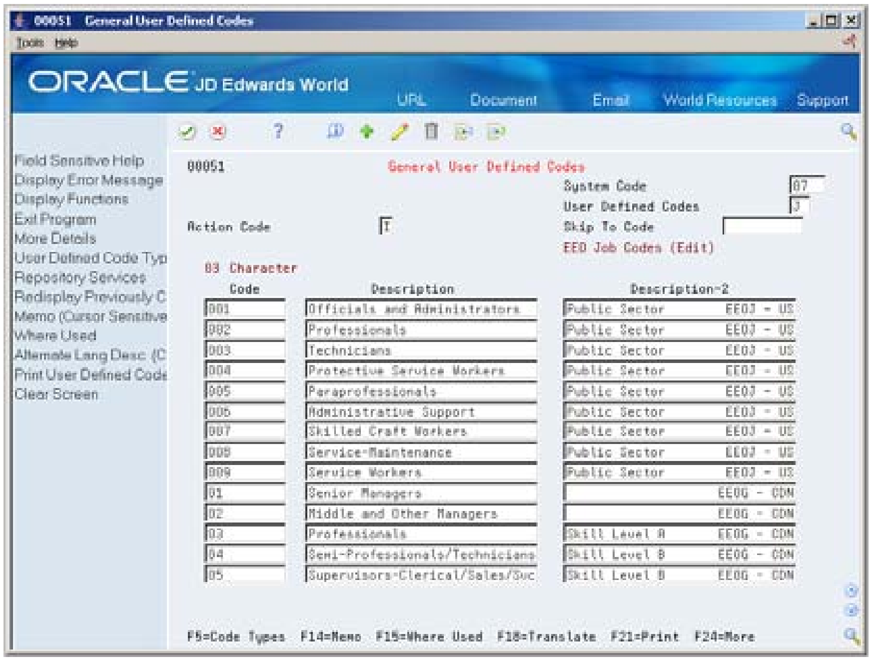
User defined codes for Canadian Employment Equity include:

Code	Description
NOC codes (05/NC)	Use these national occupation codes to specify the types of occupations in which employees work. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.

Code	Description
CMAs code (05/CM)	Use these census metropolitan area codes to indicate the area where the employee works. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.
Employment status (07/ES)	Use these codes to identify the employee’s status within the company. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.
Ethnic codes (07/M)	Use these codes to designate minority classifications. You should not change any of the codes that JD Edwards World provides, but you can add to them as necessary.
SIC codes (05/SI)	Use these sector industrial codes to identify the specific industry in which the employee works. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.
Statutory code (07/SC)	Use these codes to identify the employee’s province of employment. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.
Province of work cross-reference (08/PX)	Use these codes to define different salary localities within the organization. You can use these codes for comparison purposes. You should not change any of the codes provided by JD Edwards World, but you can add to them as necessary.

To set up user defined codes for human resources

On any user defined codes form



1. To locate the user defined code table that you want to revise, complete the following fields:
   - System Code
   - User Defined Codes
2. To revise the user defined code table, complete the following fields:
   - Code
   - Description
3. Access the detail area.
4. Complete the following optional fields:
   - Description - 2
   - Special Handling Code
   - Hard Coded Y/N

Field	**Explanation**
System Code	A user defined code (98/SY) that identifies a JD Edwards World system.
User Defined Codes	Identifies the table that contains user defined codes. The table is also referred to as a code type.

Field	Explanation
Code	This column contains a list of valid codes for a specific user defined code list. The number of characters that a code can contain appears in the column title.
Description	A user defined name or remark.
Description-2	Additional text that further describes or clarifies a field in JD Edwards World systems.
Special Handling Code	A code that indicates special processing requirements for certain user defined code values. The particular value you enter in this field is unique for each user defined code record type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify if the language is double-byte or if the language does not have uppercase characters. Programming is required to activate this field. *Form-specific information* If a “P” is in the second position, the system identifies that unit of measure as a potent unit of measure.
Hard Coded Y/N	A yes/no flag indicating whether a user defined code is hard coded or not.

What You Should Know About

Showing all codes	Use the Code Types function to display all user defined codes for a specific system. Review system 05, 07, and 08 to become familiar with all the user defined code lists that are the basis for your system.
Updating user-defined codes for job type	A processing option for Job Entry and Evaluation allows you to add job types to the appropriate user defined code tables directly from this form. Therefore, you do not need to set up user defined code tables 07/G before you define jobs.
Setting up new user defined code tables	In some cases, you might need to set up a new user defined code table. For example, you can set up user defined code tables for code format profile data types. When you create a new user defined code table, you must use system codes 55 through 59 (inclusive).

Set Up Profile Data

Setting Up Profile Data

Profile data is broad categories of information that you can define to accommodate your own unique business requirements. It can include additional information about employees, such as their education or experience, or information unique to your business requirements, such as types of foreign languages spoken.

Profile data includes any type of data that you want to track for:

- Employees
- Jobs
- Applicants
- Health and safety
- Requisitions
- Dependents (beneficiaries)

When you set up profile data, you specify the types of profile information that you want to track for each of the items listed above. For each of these items, the system stores profile data types in a separate database.

You can track different types of profile information in each database. For example, in the job database, you can track job descriptions. For employees and applicants, you can track job skills, education, and work experience.

To make it easier to work with profile information, you might choose to make some types of profile data consistent across multiple databases. For example, if you track job skills for employees, you can also track job skills for applicants. Making these profile data types consistent allows you to:

- Simultaneously search for both applicants and employees that have specific job skills
- Seamlessly transfer a hired applicant's profile data to the employee database

To set up profile data, complete the following tasks:

- Defining Types of Profile Data
- Setting Up Security for Profile Data
- Setting Up the Cross-Reference Table for Profile Data
- Generating the Title Search Table
- Transferring Profile Data

Defining Types of Profile Data

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), enter 29 From Employee Information Setup (G08E4), choose **Define Types of Data**

To specify categories of profile information, and the specific information that you want to track for each category, you define types of profile data. Typical types of profile information include:

- Employee skills and education levels
- Job responsibilities
- Applicant qualifications
- Health and safety case histories
- Requisition requirements
- Dependent and beneficiary contacts

Depending on your specific requirements, you can choose to set up a profile data type in any of the following formats, or modes:

Format	Description
Narrative format	Narrative format allows you to enter information in free form text. You might want to use the narrative format for: ▪ Employee appraisal overviews ▪ Emergency contacts
Code format	Code format requires you to enter information in specific fields on the form. You might want to use the code format for: ▪ Language skills ▪ Training completed ▪ Employee appraisal details To standardize data entry and make it possible to report on profile data, you can associate the following columns in a code format data type with a user defined code table: ▪ Code Title ▪ Remark 1 Title ▪ Remark 2 Title You can use either existing user defined code tables (such as 08/SK, Skills) or you can create a new user defined code tables. When you create new tables, you must use system codes ranging from 55 to 59 (inclusive). You cannot create a new table for system codes 05, 07, or 08. You can also associated narrative text with a code format data type.

Format	Description
Program format	Program format allows you to access a specific program and version number from a profile data type. Instead of customizing menus, you can set up profile data types to access the forms that you use most often. Setting up profile data types in this manner allows you to access these forms from a single menu selection, which saves you time and streamlines your data entry tasks.

Defining types of profile data includes:

- Defining profile data types in narrative format
- Defining profile data types in code format
- Defining profile data types in program format

Caution: Before you can track any applicant information, you must define a profile data type for applicant status. Attach this data type to user defined code table 08/AS.

Example: Setting Up a Code Format Data Type

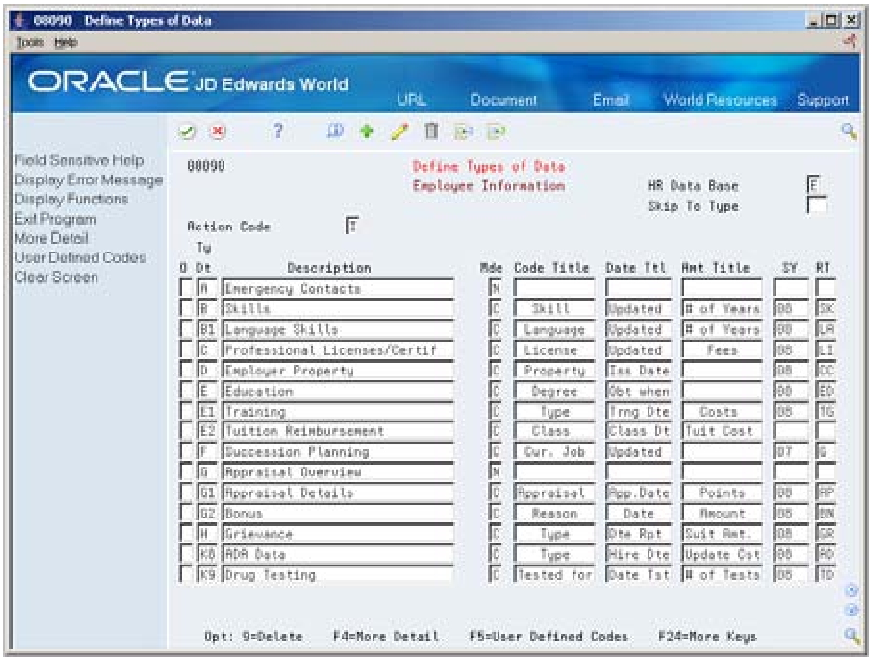
When you define a code format data type, you specify a code title and, typically, a related date or amount. You also associate the code title with a user defined code table. The following example shows how to set up a code format data type that you use to track employee training. The data type is associated with a user defined code table that you have already set up.

Define the information:

- Code title - Type (types of training you track)
- Date title - Trng Dte (date training was completed)
- Amt title - Costs (amount of training costs)
- Sy - 55 (system code for the user defined code table that you set up for the training type
- RT - TG (record type for the user defined code table that you set up for the training type)

To define profile data types in narrative format

On Define Types of Data



1. Complete the following fields:
   - HR Data Base
   - Type Data
   - Description
2. Enter N in the following field:
   - Mode

Field	Explanation
HR Data Base	A user defined code (08/RC) that specifies a particular database within the Human Resources system. The letter in this field indicates that the database from which the program is drawing information. The databases are: A Applicant Information E Employee Information J Job Description H Injury/Illness Case Number P Dependent/Beneficiary Information R Requisition Information

Field	Explanation
Ty Dt	A code you define and use to categorize data within a specific database. The code is often an abbreviation for the data it represents. For example, CC could represent company cars, and EC could represent emergency contacts. You define these codes using Define Types of Data (P08090). *Form-specific information* Enter the code for the type of data you want to track in the Human Resources and Payroll systems.
Mde	The format of a data type. This code determines the display mode for supplemental data. Valid codes are: C Code format, which displays the form for entering code-specific information. These codes are associated with User Defined Codes table (F0005). N Narrative format, which displays the form for entering narrative text. P Program exit, which allows you to exit to the program you specified in the Pgm ID field. M Message format, which displays the form for entering code-specific information. However, the system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.

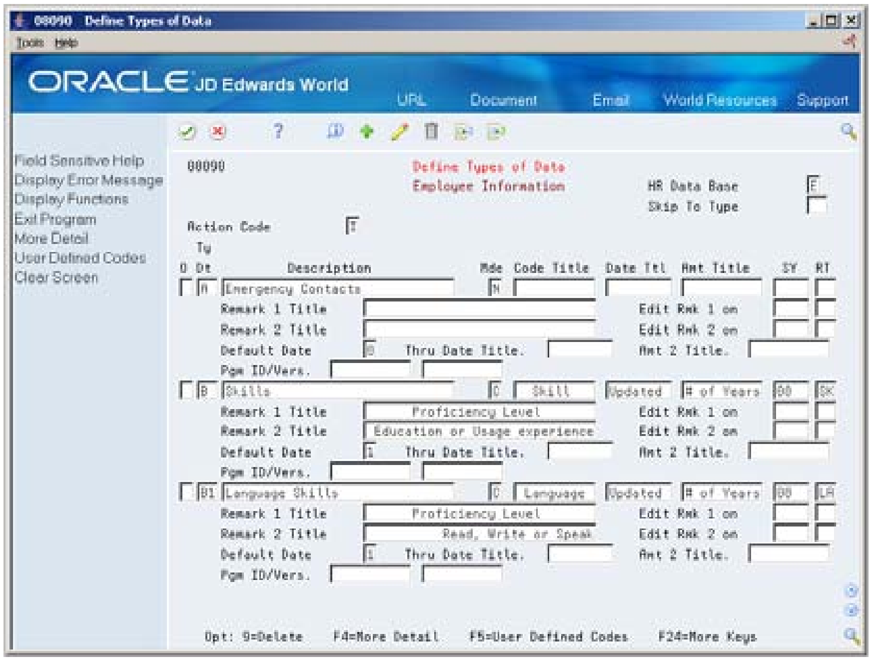
To define profile data types in code format

On Define Types of Data

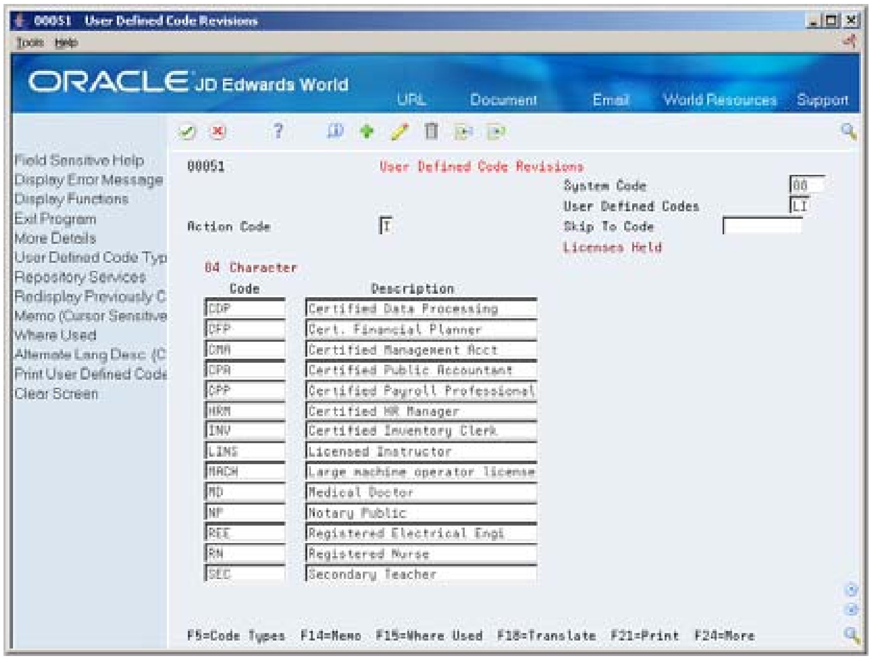
1. Complete the following fields:
   - HR Data Base
   - Type Data
   - Description
2. Enter C in the following field:
   - Mode
3. To specify the information you want to track for this data type, complete the following fields:
   - Code Title
   - Date Title
   - Amount Title
4. To associate a user defined code table with the code title, complete the following fields:

- System Code
- Record Type

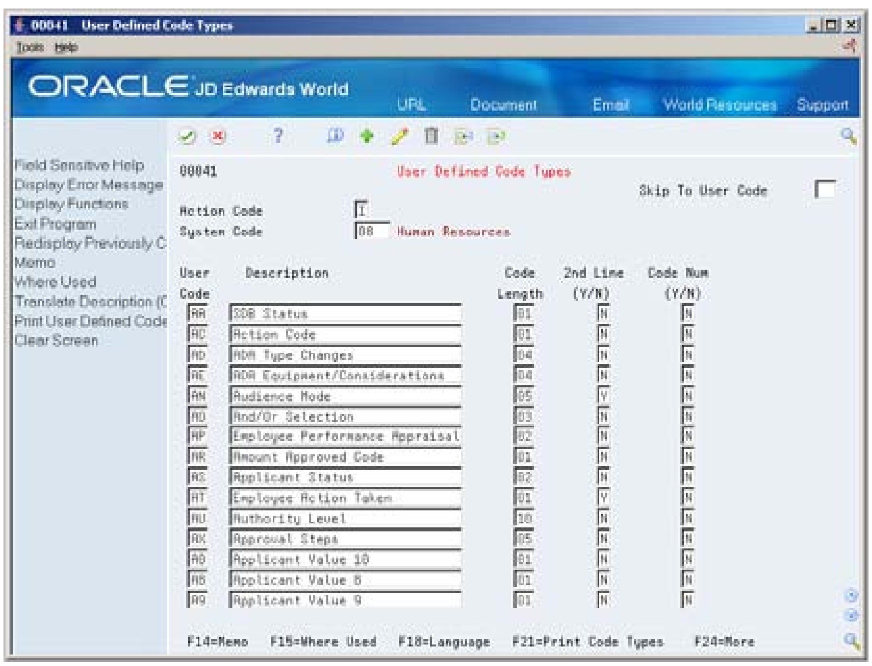
5. To enter additional information for the data type, access the detail area.



6. Complete any of the following optional fields:
   - Remark 1 Title
   - Edit Remark 1 on
   - Remark 2 Title
   - Edit Remark 2 on
   - Default Date
   - Through Date Title
   - Amount 2 Title
7. To create a new user defined code table for this data type, choose the User Defined Codes function.



8. On User Defined Code Revisions, choose the Code Types function.



9. On User Defined Code Types, complete the following fields:
   - System Code
   - User Code
   - Description
   - Code Length
10. Complete the following fields, if appropriate:

- 2nd Line
- Code Number

11. To specify the codes to include on the new table, return to User Defined Code Revisions.

12. To locate the new table, complete the following fields:

- System Code
- User Defined Codes

13. Complete the following fields:

- Code
- Description
- Description 2

14. To attach the new user defined code table to a code field for a data type, return to Define Types of Data and complete the following fields:

- SY
- RT

Field	Explanation
Code Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. Enter the user defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree. *Form-specific information* Enter the heading you want to display for a column on Profile Data Entry. For example, in Human Resources Benefits this could indicate the COBRA plan, option, type, and so forth.
Date Ttl	The title of a supplemental data column heading for the Date field (EFT). For example, a possible column heading for the date field linked to the education data type might be Graduation.
Amt Title	The heading for a column on Supplemental Data Entry that relates to an amount. This column contains statistical or measurable information. For example, if the data type relates to bid submittals, the heading could be Bid Amounts.

Field	Explanation
SY	A user defined code (98/SY) that identifies a JD Edwards World system. *Form-specific information* The system for the user defined code that is related to the data type. This field works with the RT field to identify the code type table against which the system verifies the data type. If the SY and RT fields are blank, the system does not verify the data type. For example, a valid code for data type SKILL (skills) must exist in the table for system 08 and code type SK. If you enter a skill code that is not in the table, the system displays an error message. This field applies only to the code format (C).
RT	Identifies the table that contains user defined codes. The table is also referred to as a code type.
Remark 1 Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. This heading describes the first Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to bid submittals, the heading could be Subcontractor.
Remark 2 Title	The heading for a column on Supplemental Data Entry that relates to user defined codes. This heading describes the second Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to the educational degrees of employees, the heading could be College or University.
Default Date	This flag enables you to control the type of date to allow the system to use in the date field. Valid codes are: 0 Do not use the system date as the default. Require manual entry of date. 1 Use the system date as the default when the date is left blank. 2 Do not display the Date field.
Thru Date Title	The title of a row heading you can use to describe the Date field (EFTE). For example, if you set up a record type for professional licenses, a possible row title for the date field might be Expires. *Form-specific information* Enter the title you want to display on Profile Data Entry as an end or through date. For example in Human Resources Benefits, you might use this for the title of the field that indicates when the COBRA coverage expires.

Field	Explanation
Amt 2 Title	The title of a row heading which appears next to the Amount 2 field (AMTV). For example, if you set up a record type for stock options, a possible row title for the second amount field might be Strike Price. *Form-specific information* The title you want to appear for Amount 2.
System Code	A user defined code (98/SY) that identifies a JD Edwards World system.
User Defined Codes	Identifies the table that contains user defined codes. The table is also referred to as a code type.
Code Length	The length of the user defined code. It cannot be greater than 10 characters. *Form-specific information* The length of the user defined code. It cannot be greater than 10 characters. Do not change the code length without a program change.
2nd Line (Y/N)	A response of Y or M will allow the entry of two lines of User Defined Codes in the revisions screen. A Y will also enable the User Defined Codes window to display a second line of description. M is for maintenance only for second line display. This capability is seldom used, but has applicability in areas such as inventory product codes. The M value will not display the second line of description in the User Defined Codes window.
Code Num (Y/N)	Determines whether a user defined code is numeric or alphanumeric. Valid values are: Y Indicates that the code is numeric should be right-justified. N Indicates that the code is alphanumeric should be left-justified.

To define profile data types in program format

On Define Types of Data

1. Complete the following fields:
   - HR Data Base
   - Type Data
   - Description
2. Enter P in the following field:

- Mode

3. Access the detail area.
4. To specify the program that you want this data type to access, complete the following fields:
   - Program ID
   - Version

Field	Explanation
Member ID	The identification, such as program number, table number, and report number, that is assigned to an element of software.
Version	For World, identifies a group of items that the system can process together, such as reports, business units, or subledgers. *Form-specific information* The DREAM Writer version of the program that you want this data type to access.

Processing Options

See Employee Resume Data Types (P08090).

Setting Up Security for Profile Data

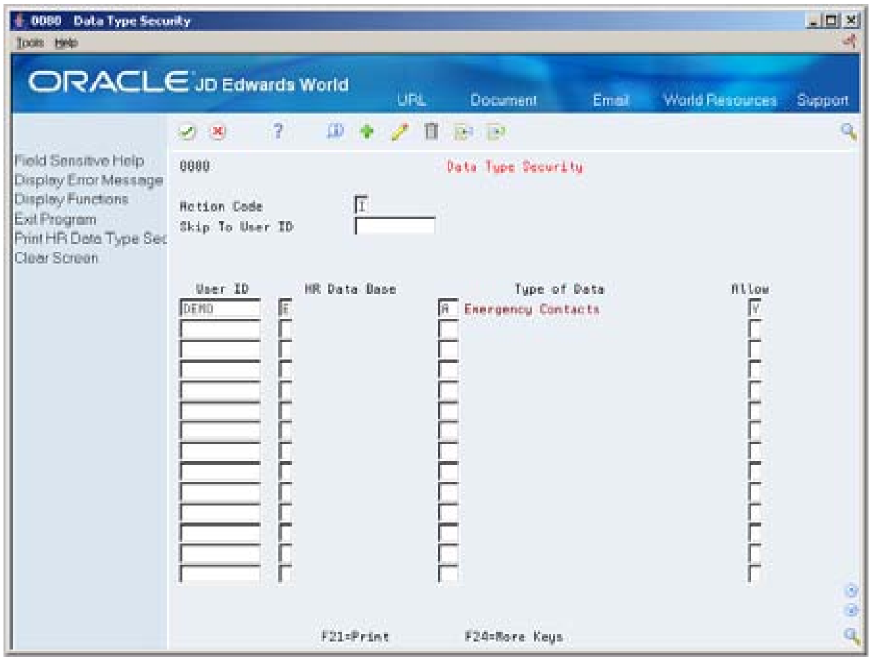
	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), enter 29 From Employee Information Setup (G08E4), choose **Data Type Security**

You might set up a data type for tracking confidential information that only a few users need to access. For example, you might want to allow your OSHA administrator to access only the profile database for safety and health administration. Typically, users have access to all profile data types unless you set up security to restrict their access. (JD Edwards World system security also applies.)

You can restrict access to profile data by database or by data type within a database. For example, you can restrict one user from the entire applicant profile database and another user from only two of the data types (drug testing and employment references) within the applicant database.

To set up security for profile data

On Data Type Security



1. For each user for whom you want to allow or restrict access to profile data, complete the following fields:
   - User ID
   - HR Data Base
   - Allow
2. To limit the restriction or inclusion to a specific data type within the profile database that you specified, complete the following field:
   - Type of Data

Field	Explanation
User ID	The IBM-defined user profile. *Form-specific information* For the Skip to User ID field, to display information on the screen beginning with a specific user ID, enter a full or partial user identification code in this field. For the User ID field, enter the user identification code of the employee to whom you are assigning data type security.

Field	Explanation
HR Data Base	A user defined code (08/RC) that specifies a particular database within the Human Resources system. The letter in this field indicates that the database from which the program is drawing information. The databases are: A Applicant Information E Employee Information J Job Description H Injury/Illness Case Number P Dependent/Beneficiary Information R Requisition Information *Form-specific information* The database to which you are restricting access.
Allow	A code that indicates whether a user is allowed access to the function key or selection. Valid codes are: Y Yes, allow access N No, prevent access blank Yes, allow access (default).

What You Should Know About

Excluding all users from profile data	If you need to place many restrictions on profile data, you can save time by first restricting the user ID, *Public (which includes all users), from accessing any databases. Then, for users who need access to specific databases or data types, you need to enter only the information that each user is allowed to access.

See Also

- The *Technical Foundations Guide* for information about JD Edwards World system security.

Setting Up the Cross-Reference Table for Profile Data

From Human Resources (G08), choose Employee Information
From Employee Information (G08E1), enter 29
From Employee Information Setup (G08E4), choose Transfer of Data on Hire/Term

To save you time and reduce keying errors, you can set up your system to automatically transfer applicant profile data to the employee database when you hire an applicant. You can also set up the system to transfer a terminated employee's profile data to the applicant database. An example of a terminated employee whose profile data you might want to transfer is a seasonal employee who you terminate at the end of the season and intend to rehire next season.

Transferring profile data in this manner makes it easy to maintain consistent data throughout the processes of hiring applicants and terminating employees.

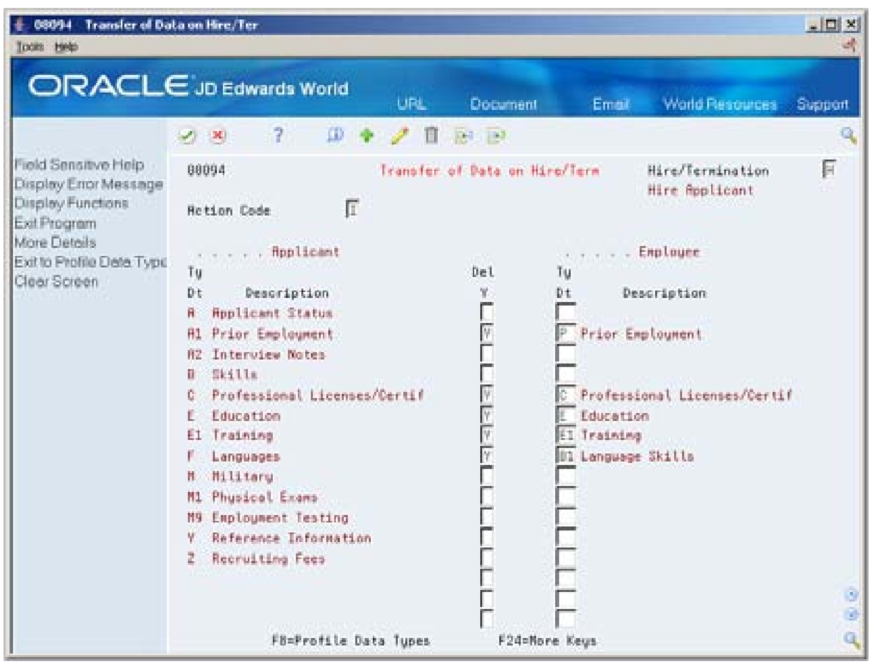
When you set up the cross-reference table, follow these guidelines:

- The format (code or narrative) of each data type that you want to transfer must be the same in both databases
- For code format data types, the corresponding column headings should be the same or very similar
- The user defined code tables that are associated with code format data types must be the same in both databases

For example, if you have a data type, Prior Employment, in the applicant database that is associated with table 07/G, you can cross reference it with the data type, Prior Employment, in the employee database, provided that that data type also uses table 07/G. When you transfer profile data for a person, you can choose to save a copy of the data in the applicant database, or delete the information from the applicant database and store it only in the employee database.

To set up the cross-reference table for profile data

On Transfer of Data on Hire/Termination



Complete the following fields:

- Hire/Termination
- Delete (Yes)
- Type Data

Field	Explanation
Hire/Termination	The type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases. Valid codes are: H When you hire an applicant, transfer applicant profile data to the employee supplemental database. T When you terminate an employee, transfer employee profile data to the applicant supplemental database.
Delete (Y)	A code that defines whether supplemental data should be deleted from the applicant database when it is moved to the employee database. Valid codes are: Y Yes, move the applicant supplemental data to the employee database and delete the data from the applicant database. N No, do not delete the supplemental data from the applicant database. Instead, make a copy of the supplemental data and move the copy to the employee database. Blank The same as N.
Ty Dt	A code you define and use to categorize data within a specific database. The code is often an abbreviation for the data it represents. For example, CC could represent company cars, and EC could represent emergency contacts. You define these codes using the Define Types of Data screen. *Form-specific information* When you hire an applicant, the code in the Employee Ty Dt field tells the system the employee data type code to which you want the applicant data transferred. When you terminate an employee, the code in the Applicant Ty Dt field tells the system the applicant data type code to which you want the employee data transferred.

What You Should Know About

Transferring profile data

After you set up the cross-reference table for profile data, you must set the appropriate processing options on the Applicant Entry form and the Termination/Rehire form to indicate that you want the system to transfer profile data.

See *Entering Applicant Information and Terminating an Employee.*

Processing Options

See Transfer - Hires / Terminations (P08094).

Generating the Title Search Table

	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), enter 29 From Employee Information Setup (G08E4), choose **Build Word Search File**

When you review profile data by data type or search profile data for people who meet multiple criteria, you can use the Help function to search for a data type by its title. For example, if you are using Profile by Data Type to review prior employment information, and you cannot remember the data type for prior employment, you can use the Help function to search for the data type by its description.

Before you can search for data types in this manner, you must run a program that generates the title search table. When you set up your system, you generate the table after you have defined the types of profile data that you will use. To keep your system up-to-date, you must also generate the title search table after you change profile data types or descriptions.

Transferring Profile Data

After you have defined the types of profile data you will use, you can transfer data from one data type within the same database to another. If you change the data type code for a type of profile data, you can use this program to transfer data from the old data type to the new one. For example, if you have a data type S, for skills, that contains employee information, and you need to change its data type code to SK, you can use this program to move employee information from data type S to data type SK.

Transferring profile data saves you time and reduces keying errors. You can set processing options to transfer data by:

- Copying the information, which retains it in one data type and transfers it to another
- Moving the information, which deletes it from one data type and transfers it to another

Before You Begin

- Verify that the data type in the database you are copying from is set up the same in the database that you are copying to.
- Set up a version that you use to copy data, and another that you use to move data. If you do not set up separate versions, you must reset the processing options each time you transfer data.

From Profile Data Copy / Move, select the type of transfer operation you want to run.

```
080840                                         JD Edwards World                                  Page No. . .        2
                                       Applicant Profile Data - Copy/Move                        Date - . . .  1/30/17
                                   HR Data Base . . . . A   Applicant Information
                                   From Type of Data. . B   Skills
                                   To   Type of Data. . B   Skills  Applicant
  Number              Name                      Type         Description             App Date           Comment
----------- ------------------------------ ---------- -------------------------- -------- -------------------------------
       5320  Jorganson, Terri               COACH      Coaching experience        04/01/17 Record already exists
       8000  Bates, Richard T.              LOTUS      Lotus 1-2-3 or equivalent  03/15/17 Record already exists
       8000  Bates, Richard T.              PCUSE      PC Usage                   03/15/17 Record already exists
       8001  Hogan, Betsy                   PCUSE      PC Usage                   01/01/17 Record already exists
       8001  Hogan, Betsy                   WDPROC     Word Processing            01/01/17 Record already exists
       8004  Torres, Elizabeth M.           WDPROC     Word Processing            09/24/17 Record already exists
       8007  Tucker, Steve                  LOTUS      Lotus 1-2-3 or equivalent  01/01/17 Record already exists
       8015  Temple, Martin                 DEST       Dexterity Tests            01/01/17 Record already exists
       8300  Smith, Mary                    LOTUS      Lotus 1-2-3 or equivalent  03/02/17 Record already exists
       8300  Smith, Mary                    PCUSE      PC Usage                   03/02/17 Record already exists
       8500  Thomas, Suzanne                LOTUS      Lotus 1-2-3 or equivalent  10/19/17 Record already exists
       8500  Thomas, Suzanne                PCUSE      PC Usage                   10/19/17 Record already exists
```

Processing Options

See Applicant Profile Data - Copy / Move (P080840).

Set Up Employee History and Turnover Tracking

Setting Up Employee History and Turnover Tracking

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

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

You can use history and turnover information to:

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

You can track history and turnover for any of the information that the system stores in the Employee Master table (F060116).

To set up your system to track history and turnover, you must complete the following tasks in the order that they are listed:

- Setting Up History and Turnover Constants
- Choosing Data for History Tracking Purposes
- Setting Up Turnover Columns
- Activating History and Turnover Tracking

You set up history and turnover constants to indicate that you want to track history and turnover records.

To specify the types of employee information for which you want to track historical information, you choose data for tracking purposes.

You set up turnover reports so that you can analyze the reasons for employee movement within your organization.

You activate history and turnover tracking to create an initial history record for each of the current records in the Employee Master table. You can review these initial history records to determine when you began tracking history and turnover.

What You Should Know About

Starting the subsystem and monitor	After you complete the tasks for setting up employee history and turnover tracking, you must start the Human Resources (HR) subsystem and monitor so that the system can convert changes to employee information into history and turnover records. See *Starting the Subsystem and Monitor*.

Setting Up History and Turnover Constants

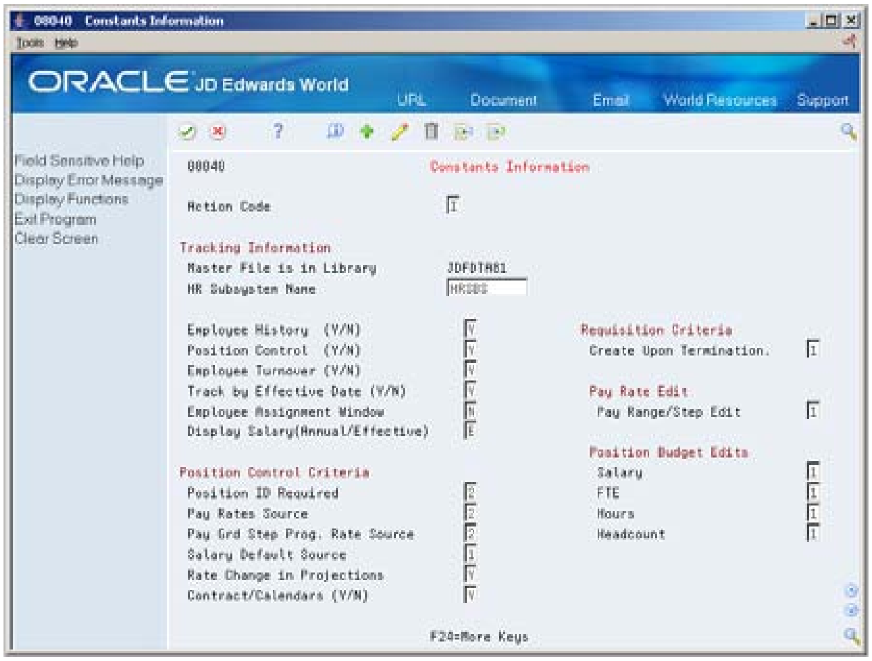
From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose Constants Information

You set up history and turnover constants to indicate that you want the system to store history and turnover records. You can choose to track history only, turnover only, or both.

Caution: Attention payroll users: Before you can perform many important payroll functions, such as processing interim checks, you must access the human resources constants and use the Change action. You must perform this action regardless of whether you need to enter or change any of the information on the form. When you access these constants, the system locates the data file library in which your Employee Master table (F060116) resides. To process correctly, many programs require this library information.

To set up history and turnover constants

On Constants Information



1. Review the value in the following field:
   - Master File is in Library
2. Complete the following fields:
   - Human Resources Subsystem Name
   - Employee History
   - Employee Turnover
   - Track by Effective Date

Field	Explanation
Master File is in Library	The name of the data file library in which the data queue exists. When you change any of the history constants, the system automatically determines which library the Employee Master table (F060116) is in and creates the data queue in the same library. This library is normally called the Production Library.
HR Subsystem Name	Enter the name of the Human Resources subsystem. A subsystem is the portion of the overall processing capacity of the computer that is used for a specific purpose. The system creates the subsystem (if it doesn't already exist) when you run the program that starts the Human Resources subsystem. Because the Human Resources subsystem provides a place for the monitor to run, it is important to know the name of the subsystem so you can determine if the monitor is running.

Field	Explanation
Employee History (Y/N)	A code that determines whether to track employee history. Valid codes are: Y Yes, track history and create employee history records N No, do not track history or create employee history records Before the system can create history records, you must start the Human Resources subsystem and monitor.
Employee Turnover (Y/N)	A code that determines whether to create employee turnover records when you change employee information. Valid codes are: Y Yes, create employee turnover analysis records N No, do not create employee turnover analysis records Turnover information consists of any records in the Employee Turnover Analysis table (F08045) with a change reason that is not blank. Before the system can create turnover records, you must start the Human Resources subsystem and monitor.
Track by Effective Date (Y/N)	A code that indicates the date on which the system creates employee history and turnover records, in relation to the date of the change. Valid codes are: Y Yes, use the effective date of the change (data item EFTO) to track employee history and turnover N No, instead of using the effective date of change, use the date on which you entered changes into the system If you enter a Y in this field, the system prompts you to enter an effective date each time you change any employee information for which you are tracking history or turnover. **Note:** If you enter a Y in this field, you must also choose to track employee history, employee turnover, or both.

Choosing Data for History Tracking Purposes

From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose Select Data for Tracking

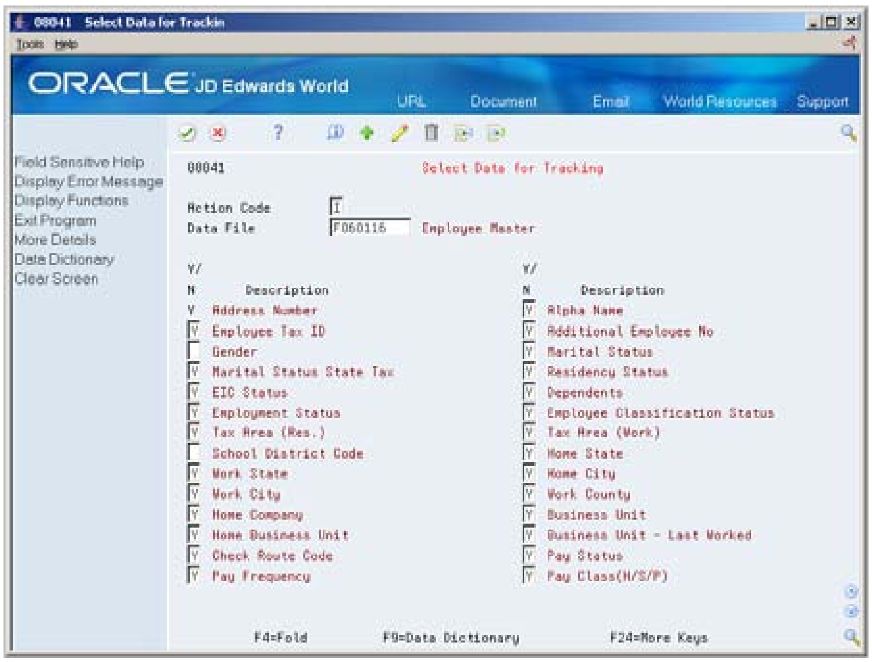
After you set up history and turnover constants, you must specify the data items for which you want to track history. You have the option to track history for some data items and not others. For example, you might choose to track history for marital status, employment status, salary, and pay status, but not for gender or tax ID. Limiting the data items for which you track history makes it easier to locate information when you review history records.

To track historical records of employee information, you must specify the data items for which you want to track employee history. You can track history for some data items and not others. For example, you might choose to track history for marital status, employment status, salary, and pay status, but not for gender or tax ID. Limiting the data items for which you track history makes it easier to locate information when you review history records.

All of the data items that you select for tracking must be included in the Employee Master table (F060116).

To choose data for history tracking purposes

On Select Data for Tracking



1. Review the value in the following field:
   - Data File (Member ID)
2. For each data item for which you want to track history, enter Y in the following field:
   - Yes / No

Field	Explanation
Member ID	The identification, such as program number, table number, and report number, that is assigned to an element of software. *Form-specific information* The table number for the Employee Master table (F060116). You can track history for only those data items that are included in the Employee Master table.

Field	Explanation
Y/ N	A code that indicates whether the system creates historical records for the corresponding data item. Valid codes are: Y Yes, track history for this data item N No, do not track history for this data item N is the default value for all data items except Address Number (AN8). You must track history for Address Number if you track history for any other data item. **Note:** For each data item, history tracking begins when you change this code from N to Y. The system cannot retrieve information for changes that occurred when the code in this field was N.

What You Should Know About

Changing the data items for which you track history	When you need to change any data items for which you track history, you must stop and restart the monitor before you make any changes to employee information. See *Working with the HR Subsystem and Monitor*.

Setting Up Turnover Columns

From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose Define Turnover Columns

If you have set up your system to create turnover records, you must set up turnover columns for your reports. You use turnover reports to analyze the reasons for employee movement within your organization, such as when an employee changes jobs or business units, as well as movement resulting from new hires and terminations. Setting up multiple turnover columns makes it possible to create a variety of turnover reports.

When you set up turnover columns, you specify:

- The headings that appear on the turnover reports
- The change reason codes that you want to include under each column heading

For example, you can create a turnover column called Dept Change that includes the following change reason codes:

- Demotion
- Promotion
- Department Change

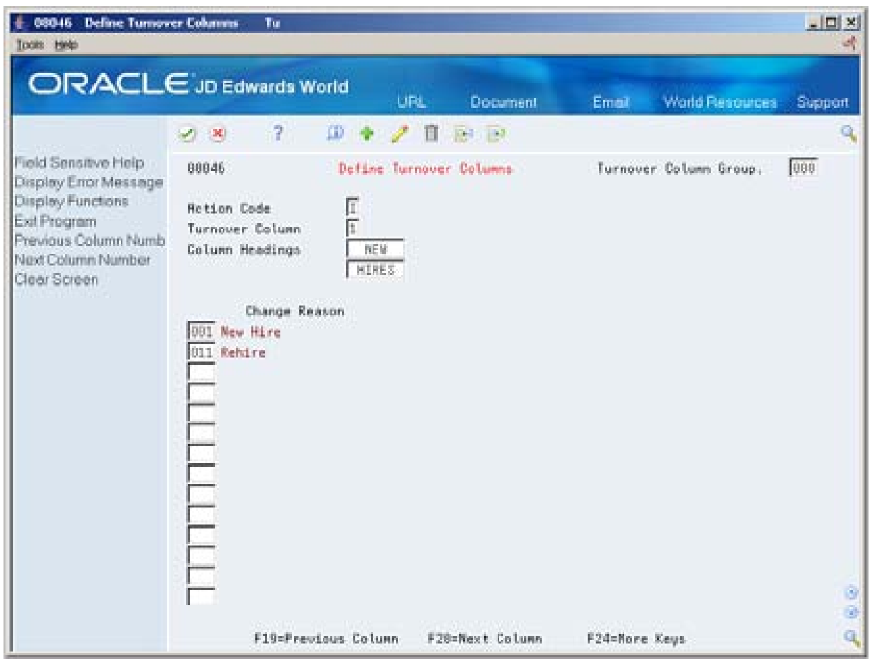
When you print a turnover report, the value in the Salary Increase column includes all records that have the above change reason codes.

Before You Begin

- Verify that you have set up your system to track employee turnover. See *Setting Up History and Turnover Constants.*
- Set up the user defined code table for change reasons (07/T). See *Defining User Defined Codes for Employees.*

To set up turnover columns

On Define Turnover Columns



1. To define a turnover column, complete the following fields:
   - Turnover Column
   - Column Headings
2. Enter one or more codes in the following field:
   - Change Reason
3. Complete the following optional field:
   - Turnover Column Group
4. To define another turnover column, repeat steps 1 through 3.

Field	Explanation
Turnover Column	The number of a column to define for your employee turnover analysis reports. You can define up to seven columns. The columns are numbered from left to right.

Field	Explanation
Column Heading 01 - Turnover	This field, in conjunction with the second Column Heading field (data item TCH2), allows you to specify the title of one of the seven columns available on the employee turnover analysis reports. You use this first field to either enter the first word or an abbreviation of the column heading. You can enter a maximum of seven characters in this field. For example, to title a column New Hire, enter the word New in this field and enter Hire in the field below this one. On the reports, this column title would look like this: New Hire You do not have to define all seven available column headings.
Column Heading 02 - Turnover	This field, in conjunction with the first Column Heading field (data item TCH1), allows you to specify a title for one of the seven available columns on the employee turnover analysis reports. When the title that you want to enter is longer than 7 characters, use this field to enter a second word or an abbreviation. You can enter a maximum of seven characters in this field. For example, to title a column New Hire, enter the word Hire in this field and enter New in the field above this one. On the reports, the column title would look like this: New Hire You do not need to define all seven available column headings.
Turnover Column Group	You can define up to 999 sets of column headings for your turnover analysis reports. Use the Turnover Column Group field to number each set of column headings. For example, the first group of column headings might be Turnover Column Group 000. To define an additional set of column headings, enter 001 in this field and then define as many of the seven available column headings as you need.

Activating History and Turnover Tracking

From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose Initialize History & Turnover

After you set up history and turnover constants and specify the data items for which to track history, you might need to run a program that populates the history and turnover tables with current employee records. Run this program if you activate history and turnover after you have been using the system for a while. You can use these initial records to determine when you began tracking history and turnover.

If you set up your history and turnover constants and started the subsystem and monitor before you began entering employee records, you do not need to activate history and turnover tracking. In this case, the system automatically creates history and turnover records when you add new employee records.

After you activate history and turnover tracking, the system creates history and turnover records each time you change any of the employee information for which you are tracking history or turnover.

Before You Begin

- Enter all employee records into your system. See *Adding New Employee Records.*

Processing Options

See Initialize History-Include all Active EE (P080810).

Set Up Human Resources Constants

Setting Up Human Resources Constants

To define default information that applies to your entire system, you set up human resources constants. These constants control the types of information that you track and the rules that the system uses to perform certain calculations. For example, you can use a constant to specify whether you want to activate position control. When you activate position control, the system verifies information related to employee positions and position budgets.

You use constants to control the following types of information:

Type	Description
History and turnover	You use constants to indicate whether you want to track history and turnover information for employees. For information about this topic, see *Setting Up History and Turnover Constants*.
Salary display	To standardize the salary information in your system, you can choose the type of salary, annual or effective, that the system displays for all employees.
Position control	To establish, monitor, and control position budgets, you must set up position information.
Requisition information	To automate the process of creating and maintaining requisitions, you set up requisition information.
Pay rate verification	To ensure that you enter acceptable pay rates for employees, you can set up the system to verify that the pay rates that you enter are appropriate for the employee's pay grade or pay grade step.

To set up constants information, complete the following tasks:

- Setting Up the Default Salary Display
- Setting Up Position Control Information
- Setting Up Requisition Information
- Setting Up Pay Rate Verification

Before You Begin

- Review *About Salary and Hourly Rate Calculations* for information about how the Human Resources constants affect salary and hourly rate information.

Setting Up the Default Salary Display

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose **Constants Information**

To standardize the salary information that appears on review forms and reports, you can set up your system to display either annual or effective salaries for employees. An employee's effective salary is the employee's pay rate multiplied by the employee's standard hours per year. An employee's annual salary is the effective salary divided by the number of pay periods for which the employee is paid, multiplied by the pay frequency. You typically choose to display effective salaries when many of the employees in your organization have standard hours per year that vary from the default standard hours per year for their pay grade steps.

To set up the default salary display

On Constants Information

Complete the following field:

- Display Salary (Annual/Effective)

Setting Up Position Control Information

From Human Resources (G08), choose **Employee History**
From Employee History (G08H1), enter 29
From Constants &History/Turnover Setup (G08H4), choose **Constants Information**

To use position budgets to establish, monitor, and control budgets for employee assignments, you must activate position control. To make it easier to track salaries and pay rates for the employees in a position, you can set up default pay information for positions.

You can also select the types of verifications that you want the system to perform when you enter or change position information for an employee. For example, you can set up the system to determine whether the information you enter causes the position budget to be exceeded, and if so, to generate either an error or a warning message.

To set up position control information

On Constants Information

1. To activate position control, complete the following fields:

- Position Control (Y / N)
- Position ID Required

2. To set up default pay information for positions, complete the following fields:
   - Pay Rates Source
   - Pay Grade Step Progression Rate Source
   - Salary Default Source
   - Rate Change in Projections
3. To set up position budget verifications, complete the following fields:
   - Salary
   - FTE
   - Hours
   - Headcount
4. To activate contract calendars, complete the following field:
   - Contract / Calendars

Field	Explanation
Position ID Required	This code determines whether you are using the position control feature and, if so, whether all employees are required to have a position ID. Valid codes are: 1 Position ID is required. 2 Position ID is optional. The Position ID field appears on the HR Employee Entry form. 3 Position ID is not required, and the Position ID field does not appear on the HR Employee Entry form. If you leave this field blank, the system assumes that the Position ID is optional (code 2).
Pay Rates Source	This constant specifies the default source for employee pay rates. When you add or change employee information, the system uses this constant to locate a pay rate for an employee when you leave the salary and hourly rate fields blank. Pay Rate Source 1 Pay Rate Tables 2 Pay Grade Step Table 3 None To calculate a salary for the employee, the system multiplies the employee's standard hours per year by the hourly rate from the table.

Field	Explanation
Pay Grd Step Prog. Rate Source	This field specifies the default pay grade step that the system uses to locate a pay rate for employees who have a salary forecast change date. The system uses this rate to calculate annual position budget amounts that are based on employee records. Step Progression Rate: 1 Same Grade Step 2 Next Grade Step
Salary Default Source	This field specifies the default source for salary (pay rate) that the system uses to create new positions or to define vacancies when you run the Create Next Year's Position program (P081820). Allowed values are: blank None 1 Pay Grade Minimum 2 Pay Grade Midpoint 3 Pay Grade Maximum 4 Pay Grade Step Amount When the salary default source is the Pay Grade Step table, that table's calculated hours per year (hours per day multiplied by days per year) is the default standard hours per year for the position. If standard hours per year do not exist in the table, the system uses the following default sequence to determine the standard hours per year for the position: ▪ Home Company Standard Hours Per Year ▪ Default Company Standard Hours Per Year ▪ Data Dictionary ▪ 2080
Rate Change in Projections	This constant indicates whether the system uses future rate changes, based on an employee's salary forecast change date, to calculate projected year-end values for position budgets. Valid values are: Y Yes N No

Field	Explanation
Salary	This field specifies whether the system verifies that, when you associate an employee with a position, the employee's salary is within the budgeted effective salary for the position. Allowed values are: Blank No Edit 1 Warning message if over budget, but allowed to continue. 2 Hard error if over budget, processing stops, no table updates.
FTE	This field specifies whether the system verifies that, when you associate an employee with a position, the employee is within the budgeted Full-time equivalents (FTE) for the position. Allowed values are: Blank No Edit 1 Warning message if over budget, but allowed to continue. 2 Hard error if over budget, processing stops, no table updates.
Hours	This field specifies whether the system verifies that, when you associate an employee with a position, the employee's work hours are within the budgeted effective hours for the position. Allowed values are: Blank No verification 1 Warning message if over budget, but allowed to continue. 2 Hard error if over budget, processing stops, no table updates.
Headcount	This field specifies whether the system verifies that, when you associate an employee with a position, the employee is within the budgeted effective headcount for the position. Allowed values are: Blank No Edit 1 Warning message if over budget, but allowed to continue. 2 Hard error if over budget, processing stops, no table updates.
Contract/Calendars (Y/N)	A field that specifies whether you are using contract calendars to identify the work days for a group of employees.

Setting Up Requisition Information

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter **29** From Constants &History/Turnover Setup (G08H4), choose **Constants Information**

To save you time and reduce data entry, you can set up your system to automatically update requisition information when you terminate an employee or change assignment information for an employee.

To set up the requisition information

On Constants Information

Complete the following fields:

- Employee Assignment Window
- Create Upon Termination

Field	Explanation
Employee Assignment Window	This field specifies whether the system displays the Employee Assignment window when an employee changes to a new job, position, or home business unit. You use the employee assignment window to update requisition information for the requisitions affected by the change.
Create Upon Termination	This field specifies whether the system automatically creates a requisition for the position when you terminate an employee. Valid codes are: Blank No, do not automatically create a requisition 1 Yes, automatically create and display a new requisition

Setting Up Pay Rate Verification

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter **29** From Constants &History/Turnover Setup (G08H4), choose **Constants Information**

When budgetary restrictions require you to closely monitor employee pay rates, you can set up your system to verify that the pay rates you enter for employees are within the established pay range for the employee’s pay grade. If you are using pay grade step progression, this constant causes the system to verify that the pay rate you enter matches the pay rate for the employee’s pay grade step.

To set up pay rate verification

On Constants Information

Complete the following field:

- Pay Range / Step Edit

Field	Explanation
Pay Range / Step Edit	This field specifies whether the system displays an error or warning message when you enter a pay rate for an employee that is not within the pay range for the employee's pay grade. If you are using pay grade step progression, the system displays an error or warning message when you enter a pay rate for an employee that does not match the rate for the employee's pay grade step. Allowed values are: Blank No Edit 1 Warning message if the rate is out of range for the pay grade, or if it is not the rate for the pay grade step. Processing continues. 2 Hard error if the rate is out of range for the pay grade, or if it is not the rate for the pay grade step. Processing stops, and the system does not update any tables.

Work with the HR Subsystem and Monitor

Working with the HR Subsystem and Monitor

You use the Human Resources (HR) subsystem and monitor to:

- Track changes to data items in the Employee Master table
- Track the reasons for the changes

A subsystem is a portion of the overall processing capacity of the computer that is used for a particular purpose. One example of a subsystem is the batch subsystem where most batch jobs are run.

The purpose of the HR subsystem is to provide a place for the monitor to run. The monitor is a program that converts the changes that you make to employee information into history and turnover records. When active in the HR subsystem, the monitor processes changes to the data items that you selected for history tracking. The subsystem must be active for the monitor to run.

When the monitor is active, the system immediately converts changes into history and turnover records.

When the monitor is inactive, the system uses a data queue to store the changes that you make to any information for which you are tracking history. The next time that you start the monitor, the system processes any changes that are in the data queue. To prevent you from losing historical information when the subsystem and monitor are inactive, the data queue remains active at all times.

> **Caution:** The data queue can become full unless you activate the subsystem and monitor on a regular basis. When the data queue is full, you will lose any unprocessed changes.

For periodic maintenance, or before you install an upgrade to your JD Edwards World software, you must process all of the changes in the data queue. After the changes process, you must delete the data queue. When you restart the subsystem and monitor, the system recreates the data queue. The command that you use to delete the data queue is DLTDTAQ F060116.

Working with the HR subsystem and monitor consists of the following tasks:

- Starting the Subsystem and Monitor
- Stopping the Subsystem and Monitor
- Stopping the Monitor Only
- Starting the Monitor Only
- Reviewing the Status of the Monitor

After you complete the steps for setting up history and turnover tracking, you must start the subsystem and monitor so that the system can begin storing changes to employee information.

When you perform some system maintenance procedures, such as backups or software updates, the subsystem and monitor must be inactive. You can run a program that stops the subsystem and monitor. Programs for routine procedures such as backups typically stop and start the subsystem and monitor automatically.

In some instances, the subsystem can remain active, yet you work only with the monitor. For example, you must stop the monitor before you can make changes to history setup. As you work with the monitor, you might want to review its status before you perform certain functions. For example, if you want to change constant information or specify additional data items for history tracking, you review the monitor status to verify that it is not active. After you complete these tasks, restart the monitor.

Before You Begin

- Complete the process for setting up you system to track employee history and turnover See *Setting Up Employee History and Turnover Tracking.*
- Complete the process for setting up you system to track employee history. See *Setting Up System Options and Choosing Data for History Tracking Purposes.*

Starting the Subsystem and Monitor

From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 27
From History and Turnover Advanced and Technical Operations (G08H3), choose Start Subsystem & Monitor

After you complete the steps for setting up history and turnover tracking, you must run the Start Subsystem and Monitor program so that the system can convert changes to employee information into history and turnover records. When you run this program for the first time, the system:

- Creates the subsystem
- Creates a data queue
- Starts the monitor

Depending on the number of changes that need to be processed, the monitor might require a lot of computer resources. To speed computer processing time for users who are working on the system, you can start and stop the monitor when necessary.

When the monitor is active, the system immediately converts changes into history and turnover records.

When the monitor is inactive, the system uses the data queue to store the changes that you make to any information for which you are tracking history. The next time that you start the monitor, the system processes any changes that are in the data queue.

Typically, after you start the subsystem for the first time, you do not need to run this program again. However, if a machine or power failure terminates the subsystem abnormally, you might need to restart the subsystem and monitor.

What You Should Know About

System backups	When you back up your system, the backup program automatically stops the subsystem and monitor before the backup begins and restarts them when the backup is completed. If a backup program terminates abnormally, you might need to manually start the subsystem and monitor. See *Stopping the Subsystem and Monitor* for more information about backups.
Multiple environments	If you have multiple software environments on your system, such as a test environment and a production environment, you need only one subsystem for all environments. However. you must have a separate monitor for each environment. When you run the program to start the subsystem and monitor, you can specify the number of monitors that you need in the processing options. You must start the monitor in each environment. The default value is one monitor.

Stopping the Subsystem and Monitor

From Human Resources (G08), choose Employee History
From Employee History (G08H1), enter 27
From History and Turnover Advanced and Technical Operations (G08H3), choose Stop Subsystem & Monitor

When you perform certain system maintenance procedures, such as backups or software updates, the subsystem and monitor must be inactive. When you need to change its status to inactive, you can run a program that stops the subsystem and monitor.

To save you time, most backup programs automatically stop the subsystem and monitor before the backup process begins and restart the subsystem and monitor after the backup process completes. However, if a backup program terminates abnormally, you might need to manually stop the subsystem and monitor.

You must also stop the subsystem and monitor whenever the system is shut down for any reason, such as a hardware upgrade. After you restart the system, run the program to start the subsystem and monitor.

See Also

- *Starting the Subsystem and Monitor*

Stopping the Monitor Only

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter 27 From History and Turnover Advanced and Technical Operations (G08H3), choose **Stop Monitor Only**

In some instances, you need to stop the monitor and leave the subsystem active. For example, to speed computer processing time for users who are working on the system, you can stop the monitor during peak working hours.

To save you time and automate your workflow, you can use the program, Unattended Night Operations, to automatically stop and start the monitor at times that are convenient for your organization. For example, you could set up your system to start the monitor at 5:00 p.m. each evening and stop it at midnight.

You can run the monitor depending on the space requirements of your system and policies of your company. For example, you might run the monitor:

- 24 hours a day
- Only during the day
- Only at night to process changes that you make during the day

You must also stop the monitor when you need to make changes to history setup. You must stop the monitor when you change:

- History and turnover constants information
- The selection of data items that you want to track

To avoid overloading the data queue, you should restart the monitor after you complete these changes.

See Also

- The *Technical Foundation Guide* for more information about Unattended Night Operations

Starting the Monitor Only

	From Human Resources (G08), choose **Employee History** From Employee History (G08H1), enter 27 From History and Turnover Advanced and Technical Operations (G08H3), choose **Start Monitor Only**

To provide better computer response time for users who work on the system, you can stop and start the monitor at times that are convenient for your organization. When the monitor is inactive, the system uses a data queue to store the changes that you make to any information for which you are tracking history.

To avoid overloading the data queue, and potentially losing information, you should regularly run the monitor. The monitor converts the information in the data queue into history and turnover records.

To save you time and automate your workflow, you can use the program, Unattended Night Operations, to automatically stop and start the monitor at times that are convenient for your organization. For example, you could set up your system to start the monitor at 5:00 p.m. each evening and stop it at midnight.

When you need to make changes to history setup, you must stop the monitor. To cause the setup changes to take effect, you must restart the monitor.

See Also

- The *Technical Foundation Guide* for more information about Unattended Night Operations

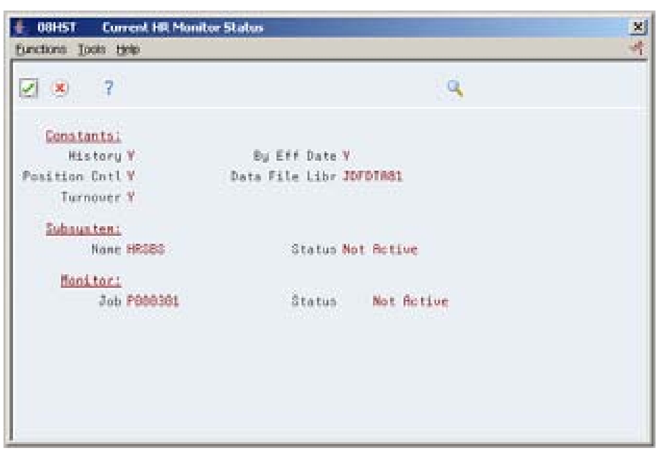
Reviewing the Status of the Monitor

	From Human Resources (G08), choose Employee History From Employee History (G08H1), enter 27 From History and Turnover Advanced and Technical Operations (G08H3), choose Review Monitor Status

When you work with the monitor, you might need to review its status before you perform certain functions. For example, to change constants or the selections of data items to track, you review the monitor status to verify that it is not active. To review the status of the monitor, you must have the authority to view the status of job queues.

To review the status of the monitor

On Current HR Monitor Status



Review the information.

What You Should Know About

Libraries	The data queue and the Employee Master table must be in the same data file library. If they are in different libraries, the system displays an error message when you review the status of the monitor. If the library for the data queue is different than the library for the Employee Master table, ask someone in your operations department to move them to the same library.
Changing the monitor status	When you review, you cannot change the status of the monitor or any other information. It is for display purposes only.

See Also

- The *Technical Foundations Guide* for information about system security

Set Up Job Information

Setting Up Job Information

Before you can use your system to define the jobs within your organization, you must define pay and job evaluation information. You define pay information to establish the pay ranges or amounts associated with each job.

To specify the methods that you use to evaluate jobs, you define job evaluation information. You use job evaluations to determine equitable pay ranges for jobs. To specify default job information for employees in a specific business unit, you also can set up a cross-reference table by business unit.

Setting up job information includes:

- Setting Up Pay Grades
- Setting Up Pay Grade Steps
- Setting Up Pay Range Formulas
- Defining Job Evaluation Factors
- Setting Up a Cross-Reference Table by Business Unit

Before You Begin

- Set up the user defined codes for jobs. See *Setting Up User Defined Codes for Human Resources*.

What You Should Know About

Setting up profile data for jobs	You can also set up your system to track categories of job information that you can define to meet your business needs. This type of information is called profile data. For example, you can set up a profile data category for job descriptions. See *Setting Up Profile Data.*

Setting Up Pay Grades

	From Human Resources (G08), choose Job Specifications From Job Specifications (G08J1), enter 29 From Job Specifications (G08J4), choose Pay Grades by Class

To establish categories for grouping employees according to pay ranges, you can define pay grades for each pay class within your organization. A pay class indicates how an employee is paid, such as salary, hourly, and so on. For example, within the pay class, salaried, you can define pay grades 1 through 10. For each of these pay grades, you define a minimum, midpoint, and maximum salary amount. These amounts define the pay range for the pay grade. For example, the pay range for pay grade 1 might be:

- Minimum = 20,000.00
- Midpoint = 25,000.00
- Maximum = 30,000.00

This means that the annual salary for an employee in pay grade 1 can be any amount between 20,000.00 and 30,000.00.

For each pay grade, you can define separate pay ranges for each of the following:

- Locality
- Union
- Salary data source
- Effective date

For example, if your organization has three locations in different areas of the country, you might want the pay ranges for employees in the same job to vary according to the location where the employees work. When you create a pay grade, you can define the following pay range for each of the three locations:

Location	Pay Range
West Area	Minimum = 25,000 Midpoint = 30,000 Maximum = 35,000
Midwest Area	Minimum = 28,000 Midpoint = 33,000 Maximum = 38,000
East Area	Minimum = 31,000 Midpoint = 36,000 Maximum = 41,000

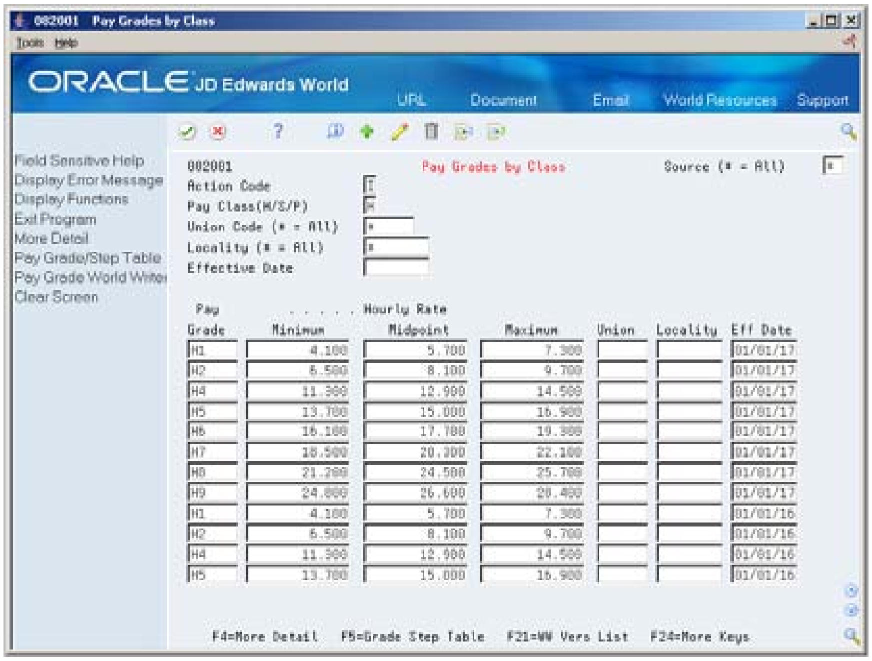
When you define pay grades by class, you establish a permanent record of the pay ranges for your organization’s pay grades. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to these pay grades. When you enter employee information, the system displays either an error or a warning message when you enter a rate that is not within the pay range for the employee’s pay grade.

The type of message that appears depends on how you set your system constants.

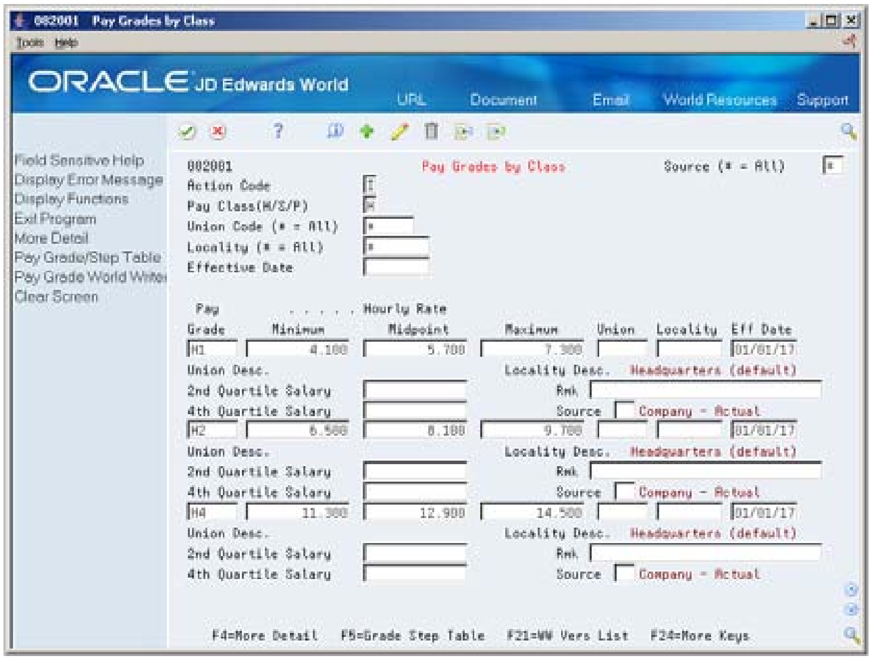
This program updates the Pay Grade and Salary Range Table (F082001).

To set up pay grades

On Pay Grades by Class



1. Complete the following field:
    - Pay Class (H/S/P)
2. To specify information that applies to all (or most) of the pay grades in this pay class, complete any of the following fields:
    - Source
    - Union Code
    - Locality
    - Effective Date
3. To define a pay grade, complete the following fields:
    - Pay Grade
    - Minimum
    - Midpoint
    - Maximum
4. To enter information that varies from the information that you entered for the pay class, complete the following optional fields:
    - Union
    - Locality
    - Effective Date
5. Access the detail area.



6. Complete any of the following optional fields:
   - Second Quartile Salary
   - Fourth Quartile Salary
   - Remark
   - Source

Field	Explanation
Pay Class(H/S/P)	A code that indicates how an employee is paid. Valid codes are: " " Blank H Hourly S Salaried P Piecework
Source	A user defined code (08/SS) that identifies the source of the salary information. To display all pay grades regardless of the source, place an asterisk (*) in this field.
Union	A user defined code (07/UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest. *Form-specific information* This field appears in following two sections of this form: ▪ In the header section, use this field to limit the information to pay grades in a specific locality. If you leave this field blank, the system displays all pay grades regardless of locality. ▪ In the detail section, this field shows the salary locality for a particular pay grade.
Effective Date	The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, change in well status, or whatever is appropriate.
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays an error or warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade. To set up pay grades, use Pay Grades by Class (P082001).
Minimum	The minimum salary or hourly rate allowed for a pay grade. The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is lower than the minimum rate for the pay grade.
Midpoint	The midpoint salary or hourly rate for a pay grade or pay range. For job IDs with a defined pay grade, you enter the midpoint amount in the Pay Grade table (F082001). For job IDs that you evaluated by points, the system calculates the midpoint amount using a Pay Range Formula table (F08290). The system calculates a compa-ratio (data item #CRA) for an employee by dividing the employee's salary or rate by the midpoint for the employee's pay grade.

Field	Explanation
Maximum	The maximum salary or hourly rate for a pay grade. The system displays a warning or error message (depending on processing options) when you enter a pay rate for an employee that is higher than the maximum rate for the pay grade.
Rmk	A generic field that you use for a remark, description, name, or address.

Processing Options

See Pay Grade/Salary Range Information (P082001).

Setting Up Pay Grade Steps

	From Human Resources (G08), choose **Job Specifications** From Job Specifications (G08J1), enter **29** From Job Specifications (G08J4), choose **Pay Grade Step Table**

To ensure that all of the employees working in a job receive the same rate of pay, and to establish progression within a pay grade, you can set up pay grade steps. For example, you might have a pay grade, A, that contains pay steps A1, A2, and A3. Employees in step A1 receive 15.00 per hour, employees in step A2 receive 15.50 per hour, and employees in step A3 receive 16.00 per hour.

Setting up pay grade steps lets you automate the process of:

- Tracking pay information for employees. When you enter employee information, the system automatically calculates the employee's salary or hourly rate, based on the pay grade step that you enter for the employee.
- Advancing employees from one pay grade step to the next.
- Updating pay rates for multiple pay grades and pay steps.

When you define pay grade steps, you can save time and reduce calculation errors by having the system automatically calculate the pay rates for a group of steps. You enter a base pay rate that applies to the group of steps, and then enter a pay rate multiplier for each step. The system automatically calculates the rate for each step by multiplying the base pay rate by each step's pay rate multiplier.

Setting up pay grade steps includes:

- Setting up pay grade steps individually
- Setting up pay grade steps using a pay rate multiplier

When you set up pay grade steps individually, you enter a pay rate for each pay grade step. When you set up pay grade steps using a pay rate multiplier, you enter a base pay rate, and apply a pay rate multiplier to each pay grade step.

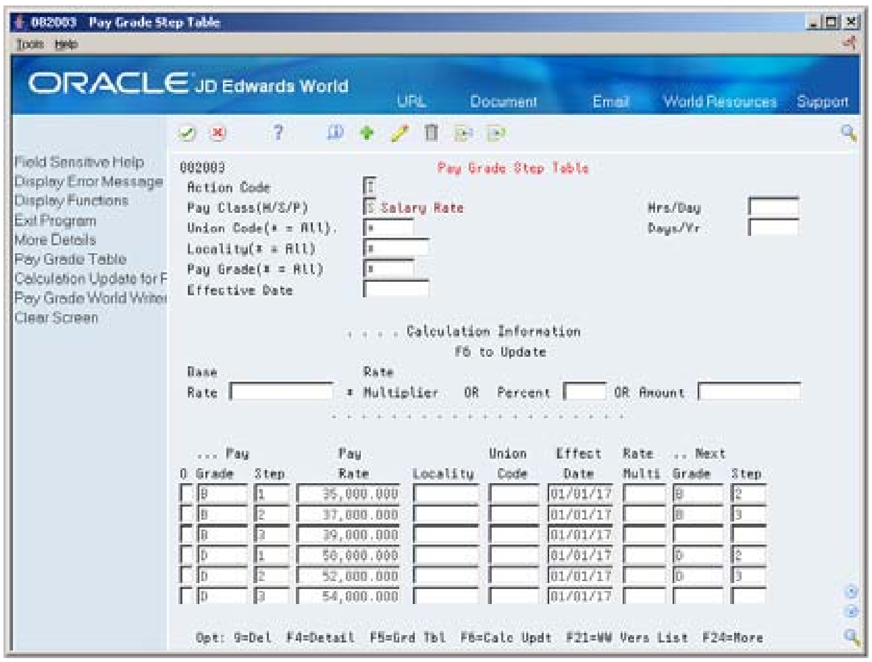
This program updates the Pay Grade and Salary Range Table (F082001).

What You Should Know About

Setting up pay grades in the Pay Grade/Step table	You can define the pay grades at the same time that you define pay grade steps. You do not need to define a pay grade in the Pay Grade and Salary Range table (F082001) to set up pay grade steps.

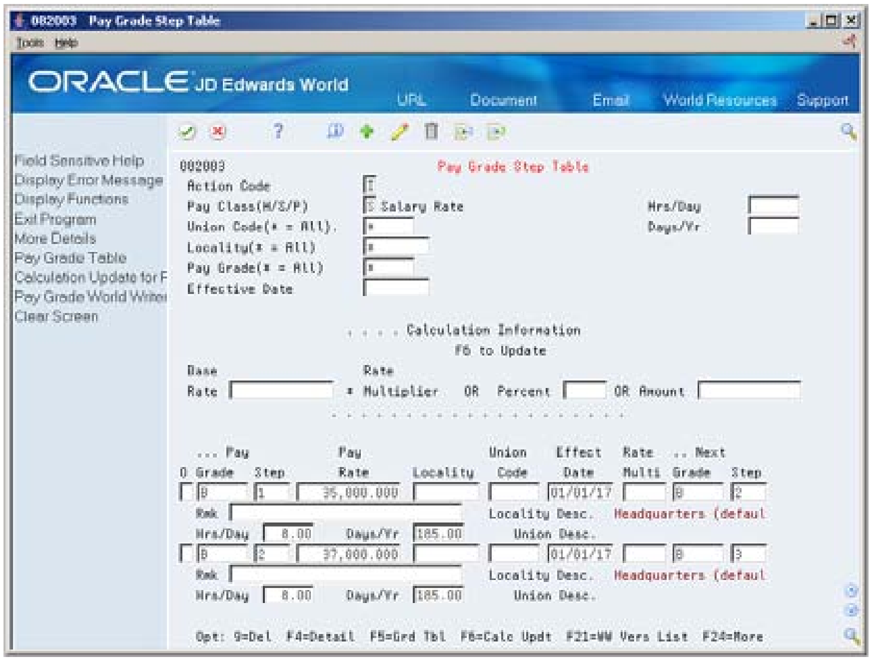
To set up pay grade steps individually

On Pay Grade Step Table



1. Complete the following field:
   - Pay Class
2. To specify information that applies to all (or most) of the pay grade steps, complete any of the following fields:
   - Union Code
   - Locality
   - Hours / Days
   - Days / Year
   - Effective Date
3. For each step that you need to set up, complete the following fields:
   - Pay Grade
   - Pay Grade Step
   - Pay Rate

4. Complete the following optional fields:
   - Next Pay Grade
   - Next Pay Grade Step
5. Access the detail area.



6. To specify information for this step that varies from the information that you entered for the pay class, complete the following fields:
   - Locality
   - Union Code
   - Effective Date
   - Hours / Day
   - Days / Year

Field	Explanation
Pay Class(H / S / P)	A code that indicates how an employee is paid. Valid codes are: " " Blank H Hourly S Salaried P Piecework
Union Code	A user defined code (07 / UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
Locality	A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.
Hrs/Day	The number of hours in a day that the employee's normal work schedule is different from the standard. If you leave this field blank, the default is the standard number of hours per day as defined in the payroll company constants. For example, if the standard number of hours in a day is 8 and an employee is scheduled for 7 hours per day on a regular basis, enter 7 in this field.
Days/Yr	The number of work days in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you have set up the human resources constants to use the pay grade step table as the default pay rate source, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate.
Effect Date	The date on which this transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, change in well status, or whatever is appropriate.
Pay Grade	A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays an error or warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade. To set up pay grades, use Pay Grades by Class (P082001).

To set up pay grade steps using a pay rate multiplier

On Pay Grade Step Table

1. Complete the following field:

- Pay Class

2. To specify information that applies to all (or most) of the pay grade steps, complete any of the following fields:

- Union Code
- Locality
- Hours/Days

- Days / Year
- Effective Date

3. Complete the following field:
   - Base Rate
4. For each step that you need to set up, complete the following fields:
   - Pay Grade
   - Pay Grade Step
   - Rate Multiplier
5. Complete the following optional fields:
   - Next Pay Grade
   - Next Pay Grade Step
6. Access the detail area.
7. To specify information for this step that varies from the information that you entered for the pay class, complete the following fields:
   - Locality
   - Union Code
   - Effective Date
   - Hours / Day
   - Days / Year
8. To cause the system to calculate the pay rate for each pay grade step you entered, choose the Calculation Update function.

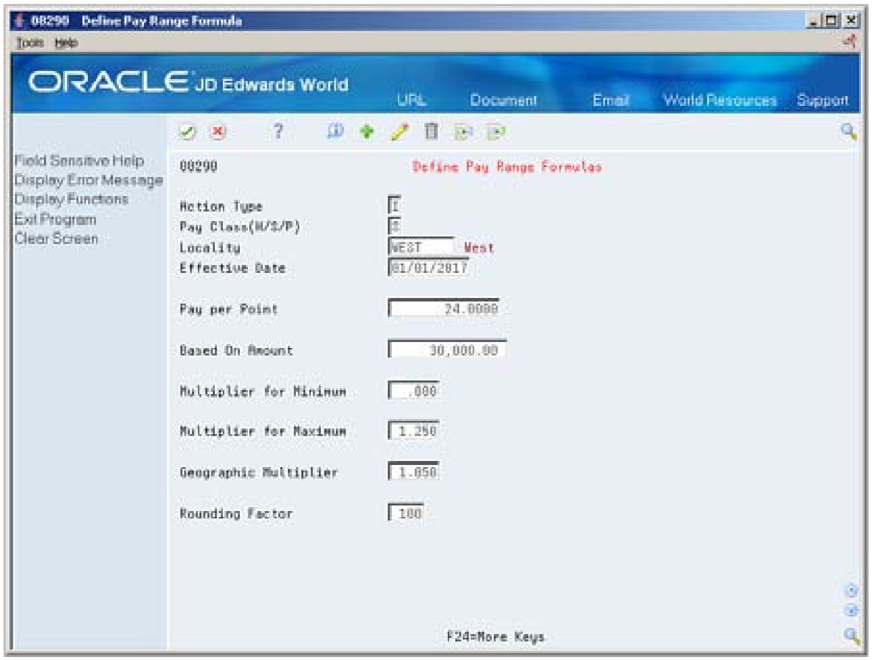
Setting Up Pay Range Formulas

	From Human Resources (G08), choose Job Specifications From Job Specifications (G08J1), enter 29 From Job Specifications (G08J4), choose Define Pay Range Formulas

When the pay ranges for your organization's pay grades are based on variable factors, you can set up pay range formulas that the system uses to automatically calculate pay ranges for each pay grade. These formulas are based on the job evaluation points. For example, if a job pays more in one region of the country than in another, you can enter a geographic multiplier in the pay range formula. The system calculates different minimums, midpoints, and maximums for the different areas, based on the geographic multiplier.

To set up pay range formulas

On Define Pay Range Formulas



1. Complete the following fields:
   - Pay Class
   - Locality
   - Effective Date
   - Pay Per Point
   - Based On Amount
   - Multiplier for Minimum
   - Multiplier for Maximum
   - Geographic Multiplier
2. Complete the following optional field:
   - Rounding Factor

Field	Explanation
Pay per Point	The amount to be paid for each evaluation point that a job receives. For example, if a job is evaluated to have 150 points and the pay per point is 8, then the total pay from points is 1200 of the currency being used. This amount is added to the Based on Amount to determine the job's pay range midpoint/control point.

Field	Explanation
Based On Amount	The baseline amount from which salary pay ranges are calculated. Enter debits with a plus sign (+) and credits with a minus sign (-). Enter a credit, for example, as 5000.01-. You can enter decimals, dollar signs, and commas. The system ignores non-significant characters. The Human Resources system uses this field for the Hay Points Evaluation Method. It is the basic salary from which salary ranges are calculated. The amount in this field is added to the pay per point to determine the job's pay range midpoint/control point.

What You Should Know About

Defining formulas	To use pay range formulas, you must evaluate the jobs within your organization. See *Entering Job Evaluation Information.*

Defining Job Evaluation Factors

From Human Resources (G08), choose Job Specifications
From Job Specifications (G08J1), enter 29
From Job Specifications (G08J4), choose Compensable Factors Tables

To determine equitable pay ranges for the jobs within your organization, you can evaluate jobs. Before you can evaluate jobs, you must define evaluation methods. Typical evaluation methods include:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Point factor

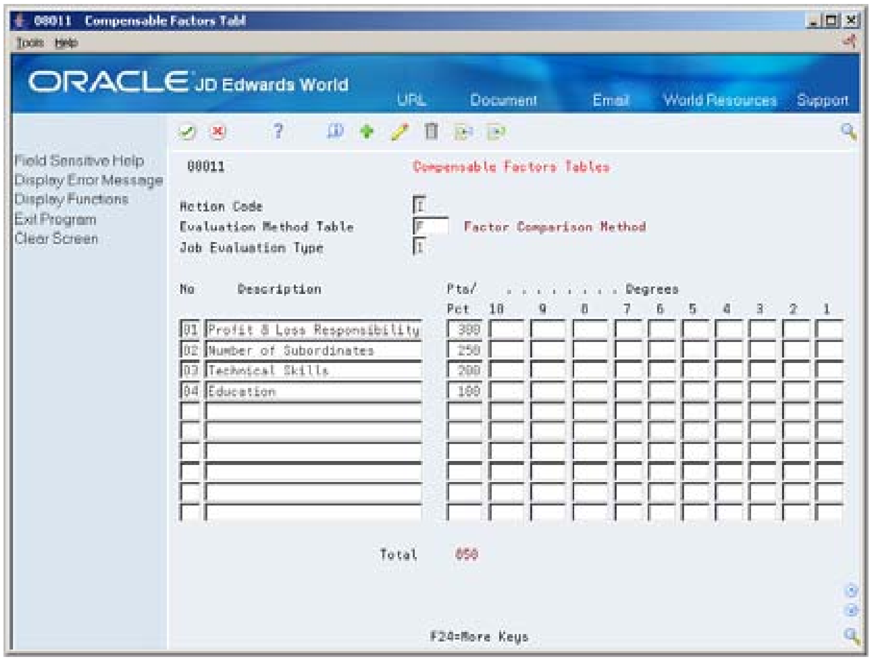
For each evaluation method, you must define the factors that you use to gauge the scope of each job. Typical evaluation factors include:

- Problem-solving abilities
- Technical skills
- Working conditions
- Leadership qualities

To make it possible to rate and compare jobs, you assign points or degrees to each evaluation factor.

To define job evaluation factors

On Compensable Factors Tables



1. Complete the following fields:
   - Evaluation Method Table
   - Job Evaluation Type
   - Number
   - Description
   - Points/Percentage
2. If you are using the Factor Comparison method, complete the following field:
   - Degrees

Field	Explanation
Evaluation Method Table	A user defined method or grouping (08/EM) that is used for the evaluating this job. Suggested values are: Blank Simple Subjective Point System E Evalucomp Method F Factor Comparison Method P Point Factor Method H Hay Method

Field	Explanation
Job Evaluation Type	A numeric code that determines whether job information is recorded using degrees or points. Valid codes are: 1 Simple, subjective assignment of job points by each of the ten user defined evaluation factors. 2 Detailed specifications of degree of difficulty or value to each of ten evaluation factors.
Job Evaluation Factor Number	A sequential number that identifies each job evaluation factor. Each job evaluation factor should: ▪ Distinguish differences between jobs. ▪ Be common to most of the jobs that you are rating. A factor should exist in greater to lesser amounts so that it is easier to measure factors within a job. ▪ Have a maximum allowable number of points for each of the 10 levels of degree. ▪ Not overlap any other factor. ▪ Be accepted by employees and managers. ▪ Be clearly and objectively defined so that all of the people who rate jobs interpret the factor in the same way. For each job evaluation method, define enough factors to ensure that a person can adequately rate the job without being overwhelmed by a large number choices. For example, you might set up the following job evaluation factors for the method, Degree: ▪ Experience ▪ Problem solving ▪ Accountability
Pts / Pct	The number of points calculated for a specific job using any job evaluation method. A job is defined as the combination of job type and job step. You can calculate the points manually and enter them at the Job Master Information level, or you can assign points to each individual factor that has been defined within the evaluation method.

Field	Explanation
Degrees	For the Compensable Factors Table (P08011), enter the maximum evaluation points allowable within this degree for this factor. For the Factor Comparison Method window (P080011), if permitted, enter the degree corresponding to this particular job. The points calculation program automatically determines the points associated with the degree you enter. For Job Comparisons By Factor (P08012), the degree you awarded the job for this factor displays with the associated points. A degree only display for the degree (type 2) evaluation method.

Setting Up a Cross-Reference Table by Business Unit

From Human Resources (G08), choose Job Specifications
From Job Specifications (G08J1), enter 29
From Job Specifications (G08J4), choose BU/Job ID Cross-Reference

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

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

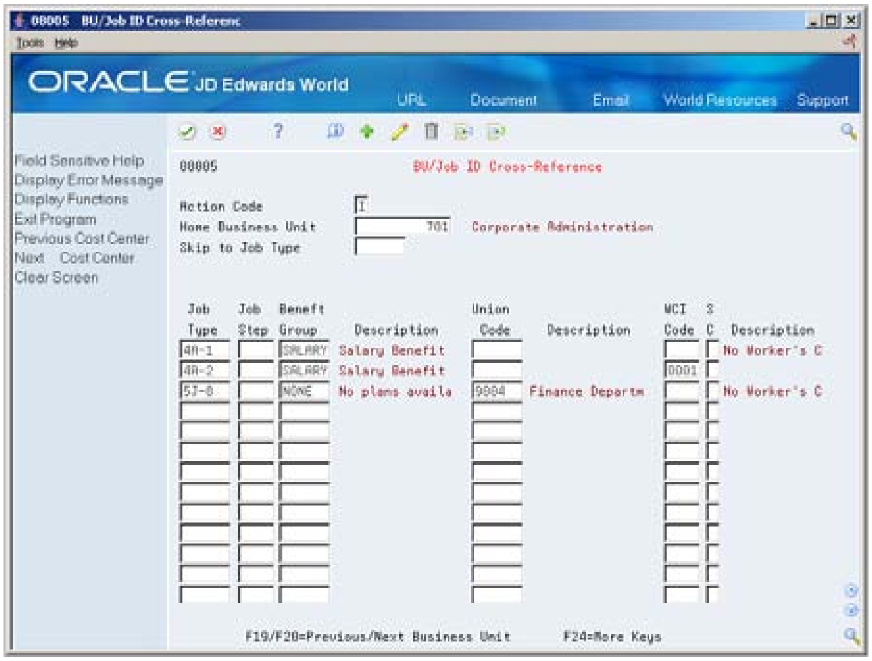
- Your organization has 5000 machinists.
- Of those machinists, 4,500 work in business unit 5, union 1000, and benefit group 100.
- The remaining 500 machinists work in business unit 6, union 1100, and benefit group 200.

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

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

To set up a cross-reference table by business unit

On Business Unit / Job ID Cross-Reference



1. Complete the following fields:
   - Home Business Unit
   - Job Type
   - Job Step
2. To specify the information that applies to this job only for employees who work in the business unit you specified, complete any of the following fields:
   - Benefit Group
   - Union Code
   - Worker’s Compensation Insurance Code
   - Subclass (Worker’s Compensation Insurance)

Set Up Employee Information

Setting Up Employee Information

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

To set up employee information, complete the following tasks:

- Defining Category Codes for Human Resources
- Choosing Fields for Future Data Revisions

Before You Begin

- Set up the user defined codes for employees. See *Setting Up User Defined Codes for Human Resources.*

What You Should Know About

Setting up profile data for employees	You can also set up your system to track categories of employee information that you can define to meet your business needs. This type of information is called profile data. For example, you can set up a profile data category for job skills. See *Setting Up Profile Dat*a.

Defining Category Codes for Human Resources

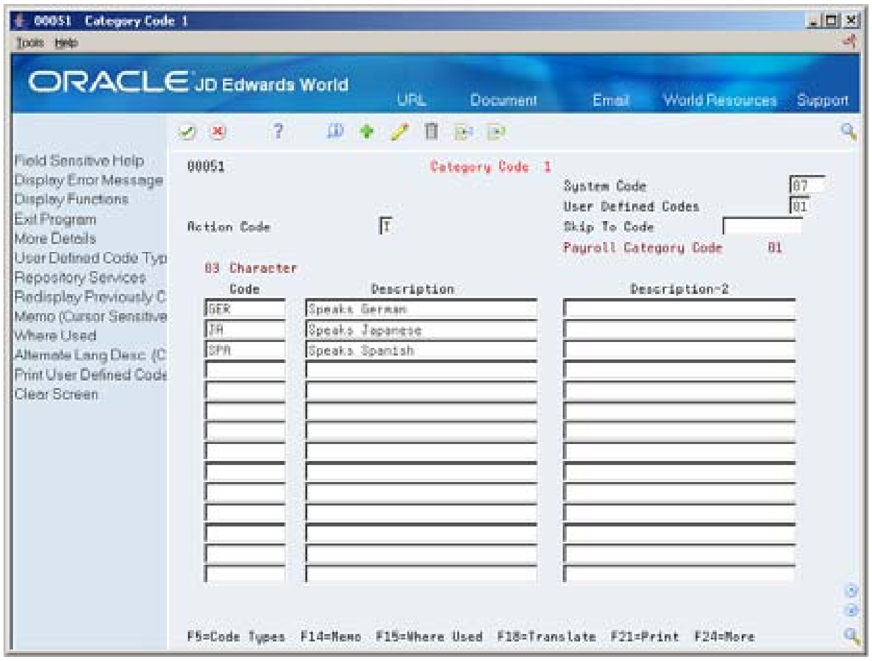
From Employee Information (G08E1), enter 29
From Employee Information Setup (G08E4), choose Employee Category Codes
From Employee Category Codes Setup (G08E41) choose an option

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

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

To define category codes for Human Resources

On Category Codes



1. Complete the following fields:
   - Code
   - Description
2. Complete the following optional field:
   - Description-2

Choosing Fields for Future Data Revisions

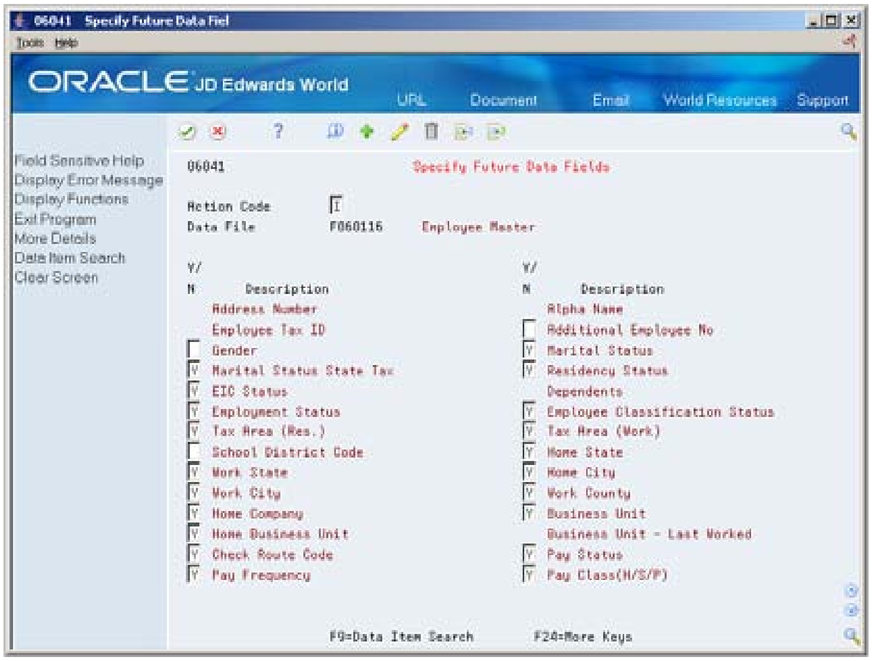
	From Human Resources (G08), choose **Employee Information** From Employee Information (G08E1), enter 29 From Employee Information Setup (G08E4), choose **Specify Future Data Fields**

You choose fields for future data revisions to activate data items in the Employee Master table that can be updated using the future data functions. For example, you activate the Marital Status field so that, in the event of marriage, you can change the employee’s marital status in the Employee Master table using the future data function.

Note: You cannot change the activation value in some of the fields.

To choose fields for future data revisions

On Specify Future Data Fields



1. In the following field, enter a Y for each data item for which you want to allow revisions:
   - Yes / No
2. To review the data item code associated with the data item description, access the detail area.


06041 Specify Future Data Fiel
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Data Item Search
Clear Screen
06041
Specify Future Data Fields
Action Code
Data File F060116 Employee Master
Y/N Description
Address Number
Data Item AN8
Employee Tax ID
Data Item SSN
Gender
Data Item SEX
Marital Status State Tax
Data Item MSTI
EIC Status
Data Item EIC
Employment Status
Data Item EST
Tax Area (Res.)
Data Item TARR
Alpha Name
Data Item ALPH
Additional Employee No
Data Item OEMP
Marital Status
Data Item MSTX
Residency Status
Data Item WSPS
Dependents
Data Item NDEP
Employee Classification Status
Data Item ECNT
Tax Area (Work)
Data Item TARA
F9=Data Item Search
F24=More Keys

Set Up Contract Calendar Information

Setting Up Contract Calendar Information

Many public service organizations, such as schools and public safety agencies, work under yearly contracts that specify the number of days employees will work. You can set up a calendar that identifies each date in the contract.

If your organization uses different contracts for different types of employees or locations, you can set up more than one contract calendar. When the system creates the contract calendar, it assigns each date a day value of one standard working day. (A day value is a multiple of a standard working day.) You must identify the dates that are not standard working days, for example, holidays, so that the calendar will assign the correct value for each day in calendar.

Because contract days vary from year to year, you must update contract calendar information each year. To update this information, you can either create a new contract calendar each year, or you can revise an existing calendar to reflect the appropriate information for the new year. You can also revise an existing calendar for the current year if you need to correct information.

When you create a new calendar for the next year or revise an existing calendar, you can run a program that automatically updates the employee records for the new or revised calendar.

This section contains the following:

- Identifying Non-Standard Dates for All Contract Calendars
- Creating Contract Calendars
- Updating Employee Records for Contract Calendars

Before You Begin

- Activate contract calendars in your human resources constants. See *Setting Up Position Control Information*.

Identifying Non-Standard Dates for All Contract Calendars

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose **Contract Calendar Master**

If your organization uses contract calendars, you can set up a user defined code table that identifies all of the days that are not standard working days. When you identify a non-standard workday, you also identify its day value. When the system creates the contract calendar, it uses this user defined code table.

If you need to set up several contract calendars with the same non-standard dates, you can save time by defining them in the user defined code table. You can override any information from the user defined code table on the contract calendar.

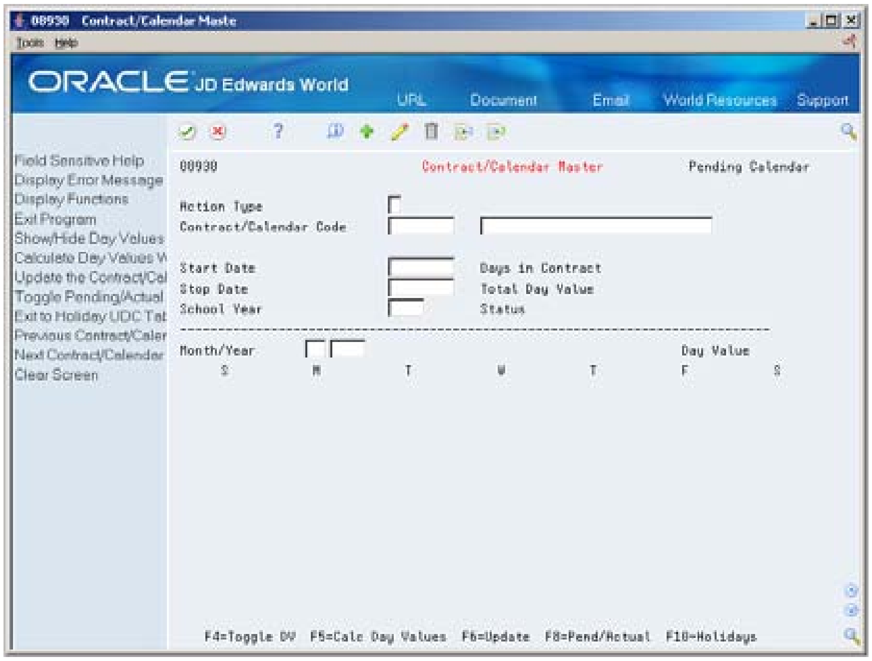
If you need to set up several calendars that have different non-standard dates, you can set up the user defined code table with the non-standard dates that are common to all of the calendars. Before you set up each calendar, you can revise the user defined code table to add the non-standard dates that are specific to that calendar.

Frequently, this user defined code table is called the holiday calendar. You can also use it to define other non-standard workdays. Include the following types of non-standard dates in the user defined code table:

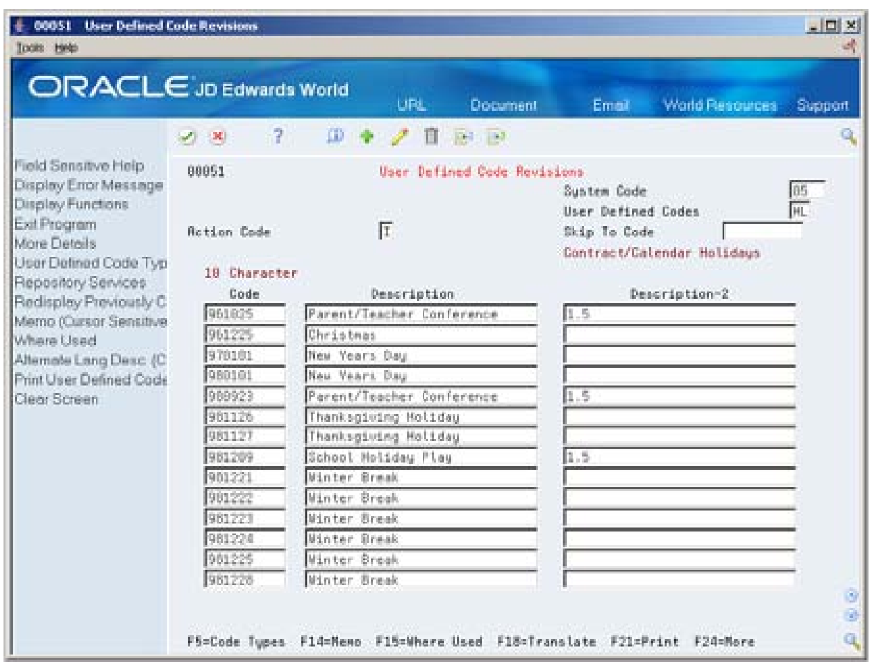
Dates	Description
Holidays	When holidays do not count as a working day in the contract, you should enter them in the user defined code table. Do not enter a day value for a holiday.
Workdays longer than standard	Some contracts specify dates that count as more than one standard workday. You can enter these dates and values in the user defined code table. For example, some contracts for school systems stipulate that a parent conference date is equivalent to 1.5 standard workdays.
Workdays shorter than standard	Some contracts specify dates that count as less than one standard workday. You can enter these dates and values in the user defined code table. For example, some contracts for school systems stipulate that a date when classes are not held is equivalent to .5 standard workdays.

To identify non-standard dates for all contract calendars

On Contract Calendar Master



1. Choose the Holiday Table function.



2. On User Defined Code Revisions for each non-standard day in the contract, enter the date as YYMMDD in the following field:

   - Code

3. To define the day, complete the following field:
   - Description
4. If the date has a positive (greater than 0) day value, complete the following field:
   - Description 2

See Also

- *Creating Contract Calendars (P08930)*

Creating Contract Calendars

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose **Contract Calendar Master**

For employees whose work days are specified by contract, you must create a contract calendar that you attach to the employees' records. The contract calendar:

- Creates and maintains the workdays and non-standard days for the duration of the contract
- Identifies the workday value for each date in the calendar
- Identifies how many days remain in the contract from any date

The contract calendar applies the information from the user defined code table 05/HL to assign the day value for each date that is included in that table. For all other dates within the beginning and ending range of the contract (except weekends), the contract calendar assigns each date a day value of 1.

To override these day values, you can:

- On the contract calendar, manually enter a different day value for a specific date
- Specify in the processing options that weekends are to be assigned a day value

After you create a contract calendar, you can revise it if you need to change day values. For example, you can:

- Change a working day to a holiday
- Extend a one day-value to more than one day, for example, 1.5
- Decrease a one-day value to less than one day, for example, 0.5

Because contract days vary from year to year, you must set up contract calendar information each year. To create a calendar for next year, you can either revise an existing calendar or create a new one.

Typically, you can save time by creating a new calendar. However, if you choose to revise an existing calendar that has employee records attached to it, you can create a pending calendar. The pending calendar allows you to analyze and adjust calendar information before you apply that information to the employee records that are attached to the calendar. When you update the existing calendar with the pending information, the system automatically updates the employee records, based on the new day values.

Creating contract calendars includes:

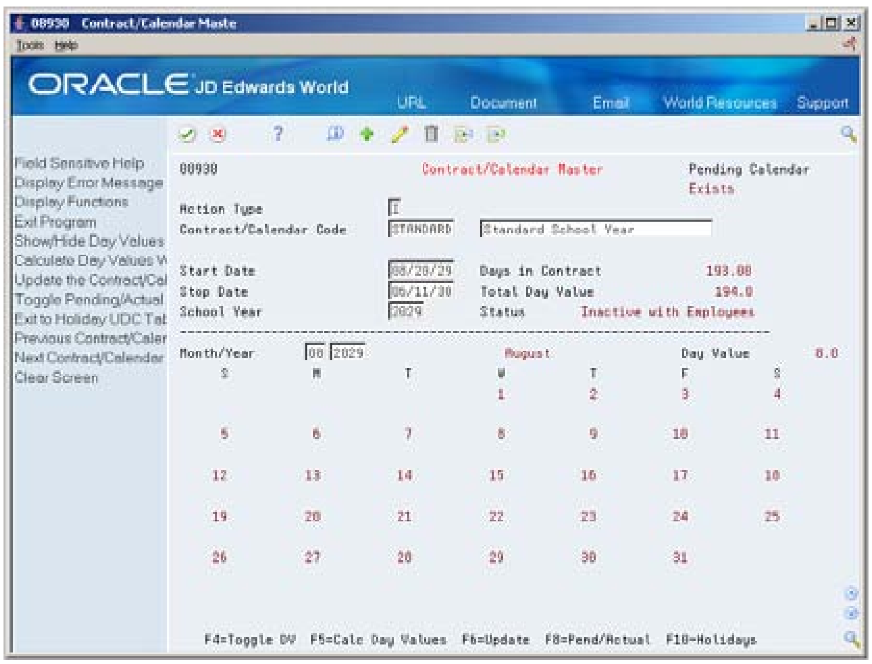
- Creating an initial calendar
- Revising a calendar

Before You Begin

- Set up user defined code table 05/HL to identify the holidays and other non-standard working days for all of your organization's contract calendars. See *Identifying Non-Standard Dates for All Contract Calendars.*

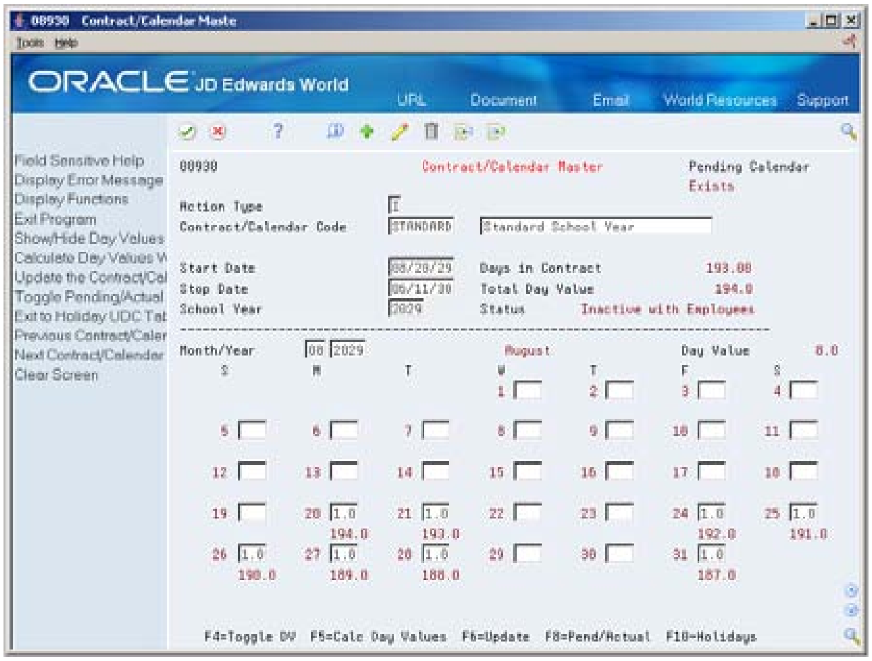
To create an initial calendar

On Contract/Calendar Master



1. Complete the following fields and press Enter:
   - Contract Calendar Code
   - Description
   - Start Date
   - Stop Date
   - School Year
2. Review the information in the following fields:
   - Days in Contract
   - Total Day Value

3. Access the detail area.



4. For the first month in the calendar, review the values in the following fields:

   - Day Value
   - Sum of Day Values Remaining

   (On the form, these fields are unlabeled.)

5. If necessary, for any of the days in the month, change the value in the following field:

   - Day Value

6. When you have finished changing day values for a month, press Enter.
7. Choose the Roll Up function to move to the next month in the calendar.
8. For each month in the calendar, repeat steps 4 through 7.
9. To save the information you entered, choose the Update function.

   The system recalculates the calendar and updates the following fields:

   - Total Day Value
   - Sum of Day Values Remaining

Field	Explanation
Contract/Calendar Code	A code that identifies a yearly contract that specifies the number of days that employees work. After you create a contract calendar, you can attach it to employee and position records.

Field	Explanation
Start Date	The date that an employee may begin participating in the company's benefits plans or may be included in payroll processing. You can also use this field to provide a beginning date for seasonal employees or for employees who work only part of the year (such as a teacher who works only nine months of the year). *Form-specific information* The date on which a contract calendar begins. When you enter a zero day value for the date that corresponds to the start date for a contract calendar, the system automatically updates the start date to the next date that has a positive day value. For example, assume that: ▪ You enter 01/01/17 as the start date for a contract calendar ▪ The day value for 01/01/17 is 0 ▪ The day value for 01/02/17 is 1 When you update the calendar, the system updates the value in the Start Date field to 01/02/06.
Stop Date	The date that an employee's pay stops. This date is used to provide for employees who are seasonal or for employees who work only part of the year (such as a teacher who works only nine months of the year). See also data item PSDT. It may also be the date that a deduction, benefit, or instruction stops. *Form-specific information* The date on which a contract calendar ends. When you enter a zero day value for the date that corresponds to the stop date for a contract calendar, the system automatically updates the stop date to the next date that has a positive day value. For example, assume that: ▪ You enter 12/26/17 as the stop date for a contract calendar ▪ The day value for 12/26/17 is 0 ▪ The day value for 12/27/17 is 1 When you update the calendar, the system updates the value in the Stop Date field to 12/27/06.
School Year	A field denoting the school year for a contract calendar. If you leave this field blank, the default value is the start date for the contract calendar.

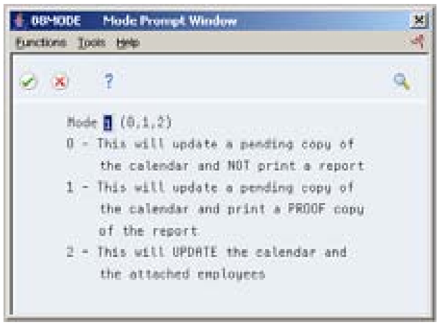
Field	Explanation
Days in Contract	The number of work days in a year. The number of standard days per year multiplied by the number of hours per day equals the standard hours per year. When you have set up the human resources constants to use the pay grade step table as the default pay rate source, the system calculates the salary for an employee by multiplying the standard days per year by the employee's hourly rate. *Form-specific information* The total number of work days included in a contract calendar.
Day Value	The equivalent number of days of pay that a contract calendar work date is worth. For example, on a contract calendar for teachers, a regular work day typically has a day value of 1, while a day on which teachers have parent conferences might have a day value of 1.5.
Total Day Value	The sum of the day values in a contract calendar. A day value is the equivalent number of days of pay that a contract calendar work date is worth.
Sum of Day Values Remaining	The sum of the day values in a contract calendar from a given date to the end of the contract calendar. A day value is the equivalent number of days of pay that a contract calendar work date is worth.

To revise a calendar

On Contract / Calendar Master

1. To locate a calendar that you want to revise, complete the following field:
   - Contract Calendar Code
2. Change the information in the following field:
   - Description
3. To specify the dates associated with the revised calendar, change the values in the following fields:
   - Start Date
   - Stop Date
   - School Year
4. For each month in the calendar, change as many of the dates in the following field as necessary, and press Enter:
   - Day Value
5. Choose the Update function.

   If employee records are attached to the current calendar, the Mode Prompt Window appears.



6. On the Mode Prompt Window, complete the following field:

- Mode

What You Should Know About

Revising calendars	When you revise a contract calendar, you can change day values for only those dates that are after the pay period ending date for the last payroll cycle. You can specify the pay period ending date in the processing options.
Attaching employee records to a contract calendar	When you create an initial contract calendar, you must manually attach the calendar to the appropriate employee records. If you are creating a new contract calendar for next year, and the employees whose records you need to attach to the calendar are currently attached to a calendar for the previous year, you can run a program that automatically transfers those employee records to the new calendar and recalculates their pay information. See: ▪ *Attaching a Contract Calendar to an Employee Record* ▪ *Updating Employee Records for Contract Calendars*
Reviewing previous day values	When an employee is hired or receives a pay change in the middle of a contract, you can use the Calculate Day Values function to review the day values that were in effect before the employee was hired or received a pay change. You can use this information to verify that the employee is receiving the correct pay rate.
Correcting keying errors	If you discover an entry error after you press Enter but before you choose the Update function, you must clear the fields before you enter the correct information.
Deleting a contract calendar	To delete a contract calendar, use the Delete action and then choose the Update function.
User defined codes	When you create a contract calendar, the system updates user defined code table 05/CT.

Processing Options

See Contract/Calendar Master (P08930).

Updating Employee Records for Contract Calendars

	From Human Resources (G08), choose **Position Control** From Position Control (G08P1), enter 27 From Position Control Advanced and Technical Operations (G08P3), choose **Recalculate C/C Salary**

When you create a contract calendar for a new year, and the employee records that you need to attach to this calendar are currently attached to a calendar for a previous year, you can run a program that transfers those employee records to the new calendar. You run this program only if you created a new calendar that is not based on the previous year's calendar. When you revise an existing calendar, the system runs this program automatically.

When you run this program, the system recalculates the following information for each employee, based on the values you entered for the new calendar:

- Daily rate of pay
- Current salary
- Annualized salary
- The salary an employee was paid before the employee received a pay change

To verify information before you update employee records, you can run this program in proof mode.

Processing Options

See Recalculate Contract/Calendar Salary (P08936).

Set Up AAIs for Position Budgets

Setting Up AAIs for Position Budgets

	From Human Resources (G08), enter 29 From General Accounting System Setup (G0941), choose Automatic Accounting Instructions

Depending on the way in which your organization determines position budgets, you might need to set up automatic accounting instructions (AAIs) for position budgets. If your accounting department determines the salary budgets for your organization, you must set up these AAIs. If your human resources department determines position budgets, do not set up these AAIs. Instead, create your position budgets in the Human Resources system and then transfer that information to either the Account Balances (F0902) table or the Account Ledger (F0911) table.

You set up AAIs to specify the accounts in the general ledger that contain position budget information. Your accounting department transfers salary budget information to the Human Resource system so that you can determine how to allocate the budget.

You, or someone in your accounting department, must set up AAIs in the General Accounting system. You cannot set up these AAIs from the Human Resources system.

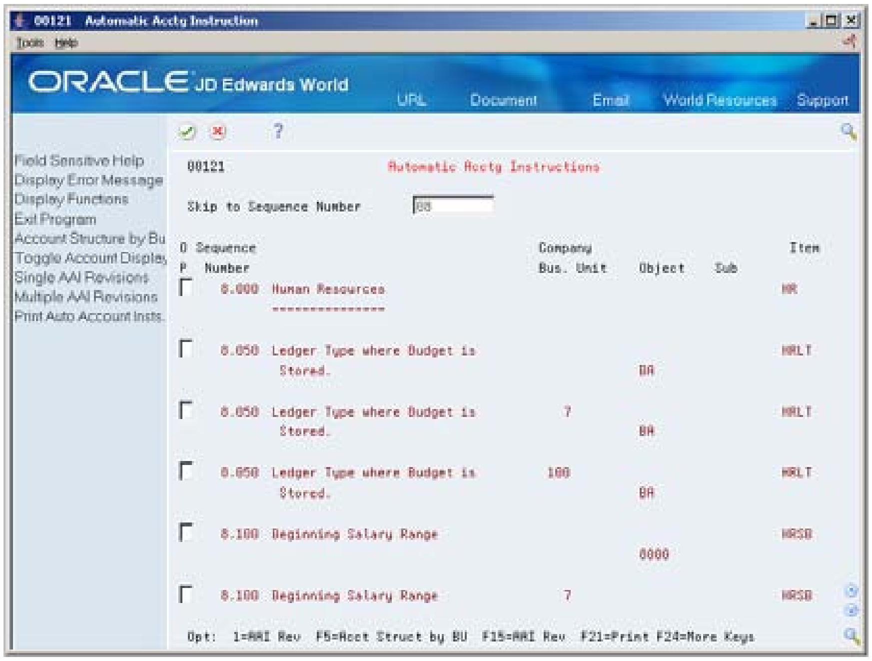
The following table lists AAIs for position budgeting. These AAIs determine which accounts in the general ledger are debited when the accounting department creates position budgets.

AAI	Description
HRLT	The ledger type where budget information is stored.
HRSB	Journal entry debited for beginning salary range
HRSE	Journal entry debited for ending salary range

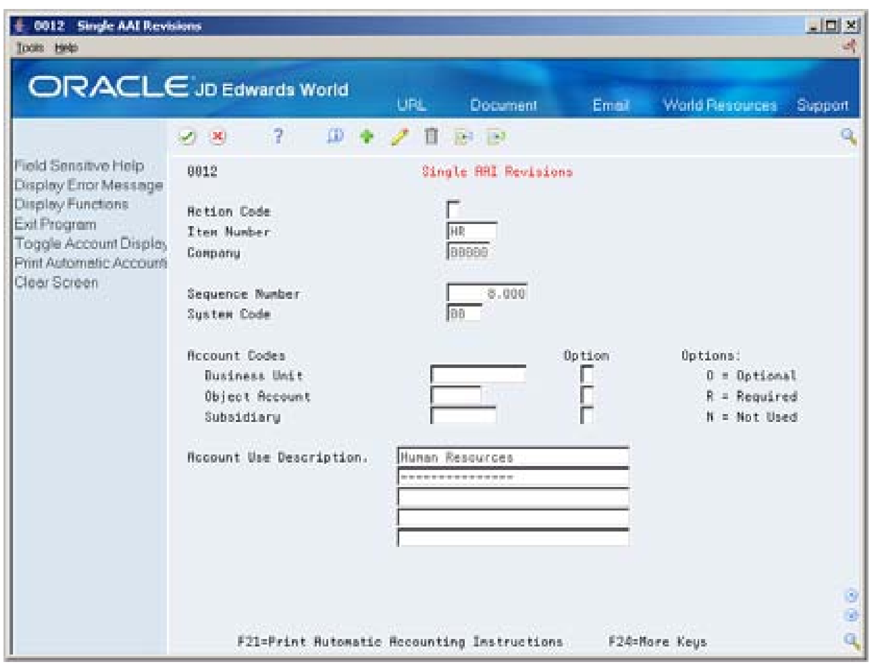
The system stores AAIs in the Automatic Accounting Instructions Master table (F0012).

To set up AAIs for position budgets

On Automatic Accounting Instructions



1. Choose the Single AAI Revisions function.



2. On Single AAI Revisions, complete the following field to locate the account that you need to set up:
   - Item Number

3. Complete the following fields:

- Company
- Object Account

4. Complete the following optional field:

- Subsidiary

Field	Explanation
Item Number	A hard-coded field that defines an account or range of accounts used for a particular function. For example, item GLG4 defines the retained earnings account, which is used for annual close purposes. During processing, programs use the item number and company number to find the correct account to debit or credit. Along with company, the item (or range) is the key to the AAI table.
Company	A code that identifies a specific organization, fund, entity, and so on. This code must already exist in the Company Constants table (F0010). It must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions. **Note:** You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries. *Form-specific information* This field is used to distinguish automatic accounting instructions from company to company. Company 00000 always indicates the standard defaults to be used if you have not set up a company-specific instruction. This field and the Item Number field form the key to the AAI table. Set up AAI item PX only for company 00000.
Object Account	The object account portion of a general ledger account. The term “object account” refers to the breakdown of the Cost Code (for example, labor, materials, and equipment) into subcategories (for example, dividing labor into regular time, premium time, and burden). If you are using a flexible chart of accounts and the object is set to 6 digits, JD Edwards World recommends that you use all 6 digits. For example, entering 000456 is not the same as entering 456, because the system enters three blank spaces to fill a 6-digit object.

Field	Explanation
Subsidiary	A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account. *Form-specific information* This number identifies the general ledger subsidiary account for the AAI when one is required. Defining a subsidiary code can be optional, depending on the type of AAI. Use 99999999 to express the end of a range of subsidiary accounts. This field is not relevant to the Contract Management system.

See Also

- *Transferring Position Budget Information to the General Ledger (P0902, P0911)* if your human resources department determines position budgets.

Set Up Safety and Health Administration

Setting Up Safety and Health Administration

	From Human Resources (G08), choose **Safety and Health** From Safety and Health Administration (G08S1), enter 29 From Safety and Health Administration Setup(G08S4), choose **Establishments**

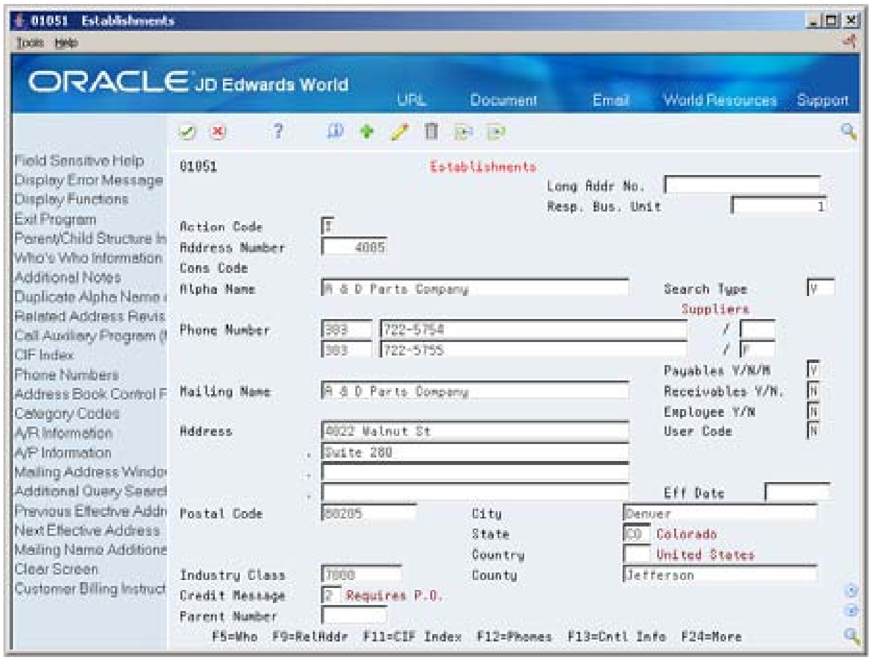
Before you can begin recording safety and health incidents for Occupational Safety and Health Administration (OSHA) 200 and OSHA 300 reporting purposes, you must set up in the Address Book system the types of establishments that you have in your organization. Establishments are the places where your employees report for work or perform their duties, or are the business units from which they are paid. For example, your organization might have two establishments, an office building and a factory. When an occupational injury or illness occurs, you must report the establishment in which the incident occurred.

Before You Begin

- Set up the user defined codes for safety and health administration. See *Setting Up User Defined Codes for Human Resources*.

To set up safety and health administration

On Establishments (Address Book Revisions)



1. Complete the following fields:
   - Address Number
   - Alpha Name
   - Responsible Business Unit
   - Mailing Name
   - Search Type
   - Payables
   - Receivables
2. Complete the following fields as necessary:
   - Phone Number
   - Mailing Number
   - Address
   - Postal Code
   - Employee
   - User Code
   - Effective Date
   - City
   - State

- Country
- County

Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members. *Form-specific information* If you leave this field blank, the system assigns a number using the Next Numbers program.
Long Addr No	A user defined name or number that is unique to the address book number. You can use this field to enter and locate information. You can use it to cross-reference the supplier to a Dun & Bradstreet number, a lease number, or other reference. *Form-specific information* On this form, it is the address book number of the establishment.
Resp. Bus. Unit	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch / plant. You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. **Note:** The system uses this value for Journal Entries if you do not enter a value in the AAI table.

What You Should Know About

Setting up profile data for safety and health administration	You can also set up your system to track categories of safety and health information that you can define to meet your business needs. This type of information is called profile data. For example, you can set up a profile data category for tracking medical expenses associated with safety and health incidents. See *Setting Up Profile Data.*
Additional information entry	Set up processing options to automatically enter additional information.

Set Up Canadian Employment Equity Information

Setting Up Canadian Employment Equity Information

	From Employee Information (G08E1), choose **International Data** From International Information/Procedures (G08E13), enter **29** From International Information Setup(G08E43), choose **Canadian Employee Setup**

If your organization is Canadian, you might need to set up the information that you use to meet the requirements for Canadian Employment Equity. Canadian organizations that have 100 or more employees must comply with Canadian Employment Equity legislation to be eligible for government contracts of 200,000.00 (Canadian) or more.

To help federal contractors maintain the information that they need to comply with employment equity rules, the Canadian government provides the Federal Contractors Program Computer Software (FCPCS). This software shows the specific information that you must track for each of your employees.

To use the FCPCS with your Human Resources system, JD Edwards World provides a cross-reference table between the following types of codes that you enter in the Human Resource system and the information that the FCPCS tracks:

- Ethnic Code
- Change Reason
- Employment Status

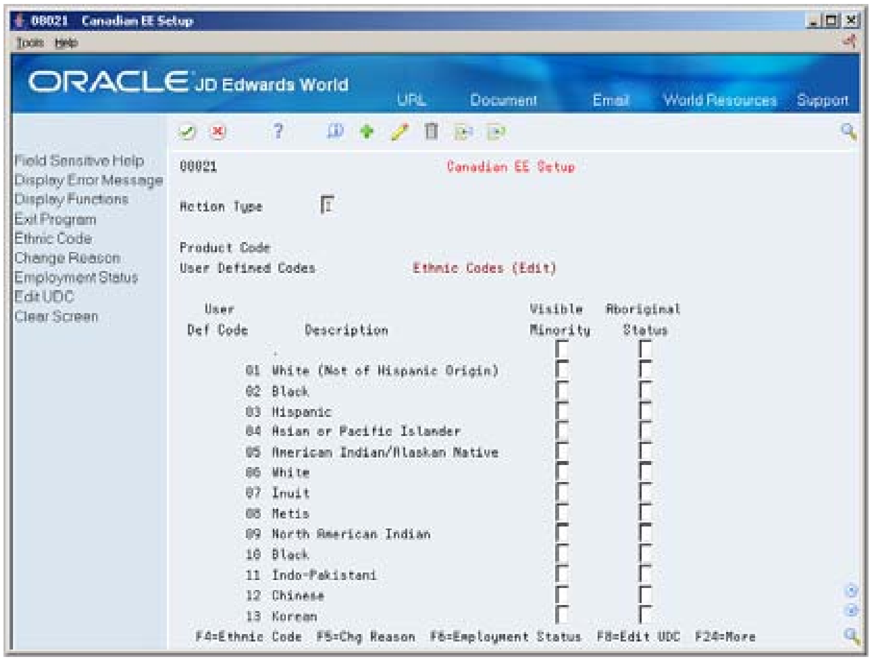
These cross-references are set up and provided by JD Edwards World. Follow these procedures only if you need to update or change the codes or their cross-references.

Before You Begin

- Set up user defined codes for Canadian Employment Equity. See *Setting Up User Defined Codes for Human Resources.*

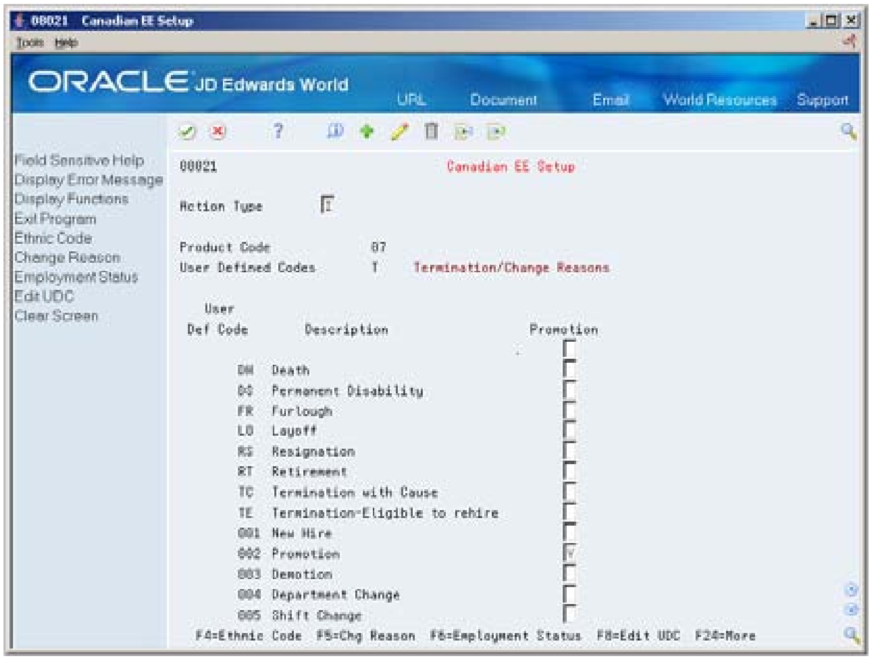
To set up Canadian employment equity information

On Canadian Employee Setup



1. For each code for which you need to track employment equity information, enter a Y in either of the following fields:
   - Visible Minority
   - Aboriginal Status

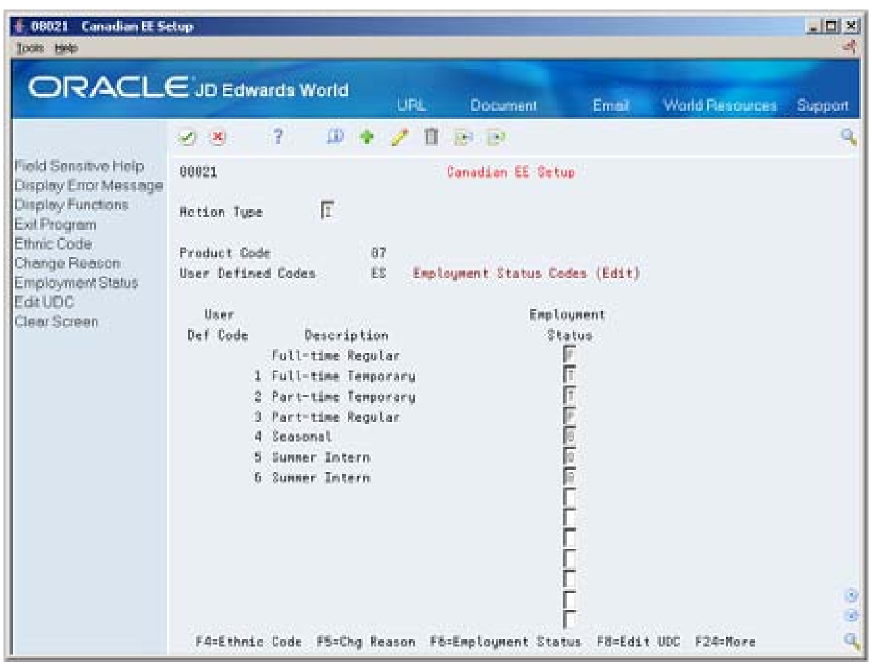
2. To identify a change reason code as a promotion code, access the Change Reason function.



3. For each code that you need to identify as a promotion code, complete the following field:

   - Promotion

4. To identify employment status cross-references, access the Employment Status function.



5. For each code for which you need to track Canadian Employment Equity information, complete the following field:
   - Employment Status

13 **Processing Options**

Employee Information Processing Options

Human Resources Employee Master (P0801)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTIONS: 1. Enter your display preference for the Salary and Hourly Rate: ' ' or '1' = Always Display '2' = Do Not Display on Inquiry '3' = Never Display 2. Display Tax ID (Social Security) Number on Inquiry and Change. Enter '1' for Yes Enter ' ' for 'No'. 3. Enter a '1' next to each to suppress its display: Workers Comp. . . . . FLSA Exempt . . . . Benefit Group . . . . Union Code. . . . . EEO Category. . . . . Ethnic Code . . . . Shift Code. . . . . Job Step. . . . . Hourly Rate . . . . Tax Area (Res. & Work). . . 4. Do you wish to display the Address Book Additional Individual Tax Id Number in the Address Book window? Enter '1' for Yes Enter ' ' for No	

Processing Option	Processing Options Requiring Further Description
5. Enter the method for assigning Tax Areas ' ' = manually enter Work and Res. Tax Areas. (Default) '1' = allow Work and Res. Tax Areas to be left blank. '2' = use GeoCoder to update Work and Res. Tax Areas. *Note: For values (1-2), you must first install the Vertex GeoCoder system. If you do not install the system, the default value ' ' will be used for assigning Tax Areas.	
EDIT / DEFAULT OPTIONS: 6. The Job Information file (F08001) EDITS the Job Type and Step and DEFAULTS the Job Information and Category Codes on ADDS or CHANGES, depending on which of the following options are selected. ' ' = Edit Job Type / Step against UDC's and use DD for defaults. '1' = Default Job Info ONLY when blank '2' = Default Job Info and Category Codes ONLY when blank. '3' = Always default Job Information. '4' = Always default Job Info and Category Codes. 7. Enter '1' when you are using the Job Information File, as specified in processing option 6, and want to override the default of the Benefit Group, Union Code, Worker's Comp Code and Subclass when changing the Business Unit with Job or Job only with those values defined in the Business Unit - Job Cross Reference File (F08005). If processing option 6 is set to 'Default Only When Blank', then the cross reference file values will 'Default Only When Blank'. Likewise, if processing option 6 is set to 'Always Default', the Cross reference File values will 'Always default'.	

Processing Option	Processing Options Requiring Further Description
8. Enter a '1' if you want F18 to exit to Canadian Payroll Employee Entry program (P070101). Default of blank will exit to US Payroll Employee Entry program (P060101).	
WHEN ADDING AN EMPLOYEE: 9. When adding new employees through the Employee Master screen, enter the default format for the Mailing Name in the Address Book. (Optional) ' ' = Name entered using Employee Entry Screen will not be used in the address book window. You must also enter the name in the address book window. '1' = John Doe (No middle initial) '2' = John R. Doe '3' = Doe, John R. (Alpha Name value) Note: For users who have the double byte flag turned on in the JDE System Values, a default of ' ' is used. 10. Security Business Unit will be updated to the employee's Address Book record. (NOTE: This must be set the same as P060101.) Enter '1' for Yes Enter ' ' for No 11. All new employees will be added to the COBRA Dep / Beneficiary file. Enter '1' for Yes Enter ' ' for No	
12. Enter a '1' to automatically go to EEO Dates & Eligibility on an add from HR Employee Entry. Default of blank will not take you to Dates, Eligibility & EEO.	Per SAR 3451165, processing option 12 does not take you to Dates, Eligibility and EEO. AND needs to include new phrasing for Human Resources, Human Resources Benefits.
13. For an Add, enter the default value for the Benefit Status field which displays on the Dates, Eligibility & EEO screen. (NOTE: This code is used for Batch Enrollment in Benefits.)	

Processing Option	Processing Options Requiring Further Description
WHEN DELETING AN EMPLOYEE: 14. The profile data is to be deleted when an employee is deleted. Enter '1' for Yes Enter ' ' for No	
WHEN CHANGING AN EMPLOYEE: 15. Enter a '1' to automatically redisplay the information.	
FOR "INTERNATIONAL" EMPLOYEES: 16. Enter a '1' to prevent the Employee Number from being used as a default for the EE Tax ID Number. A default of blank will allow its use. 17. When adding an employee whose name is longer than the predefined name fields, enter a '1' to open the Address Book window. This suppresses the name fields on the screen. Leave this field blank if the employee's name is not longer than the predefined name fields.	

Employee Job Entry (P060118)

Processing Option	Processing Options Requiring Further Description
SET VIDEO DISPLAY: 1. Enter your display preference for the Salary and Hourly Rate. ' ' or '1' = Always Display '2' = Do not Display on Inquiry '3' = Never Display	

Processing Option	Processing Options Requiring Further Description
2. Enter a '1' next to each to suppress its display: Workers Comp / Sub FLSA Exempt Union Code EEO Job Category Shift Code Job Step Hourly Rate 3. To display the Address Book European Tax ID Number in the Address Book window select '1' for Yes. Enter '1' for Yes. Enter ' ' for No.	
EDIT / DEFAULT OPTIONS: 4. The Job Information file (F08001) EDITS the Job Type and Step and DEFAULTS the Job Information and Category Codes on ADDS or CHANGES, depending on which of the following options are selected. ' '=Edit Job Type / Step against UDC's and use DD for defaults. '1'=Default Job Info ONLY when blank '2'=Default Job Info and Category Codes ONLY when blank. '3' Always default Job Information. '4' Always default Job & Cat. Codes 5. Enter '1' when you are using the job Information File, as specified in processing option 4, and want to override the default of the Benefit Group, Union Code, Worker's Comp Code and Subclass when changing the Business Unit or Job with those values defined in the Business Unit - Job Cross Reference file (F08005). If processing option 4 is set to 'Default Only When Blank', then the Cross Reference file values will 'De- fault Only When Blank'. Likewise, if processing option 4 is set to 'Always Default', the Cross Reference file values will 'Always Default'.	

Processing Option	Processing Options Requiring Further Description
6. Enter a '1' if you want F18 to exit to Canadian Payroll Employee Setup program (P070101). Default of blank will exit to US Payroll Employee Setup program (P060101).	
WHEN CHANGING AN EMPLOYEE JOB: 7. Enter a '1' to automatically redisplay the information.	

Employee Pay & Tax Information (P060121)

Processing Option	Processing Options Requiring Further Description
1. Enter the method for assigning Tax Areas. ' ' = manually enter Work and Res. Tax Areas. (Default) '1' = allow Work and Res. Tax Areas to be left blank. '2' = use GeoCoder to update Work and Res. Tax Areas. NOTE: For values (1-2), you must first install the Vertex GeoCoder system. If you do not install the system, the default value ' ' will be used for assigning Tax Areas. 2. Enter '1' to receive a warning message if Std Hrs / Day and the Std Days / Year is equal to Blank.	

Compa-Ratio Batch Calculation (P082501)

Processing Option	Processing Options Requiring Further Description
EMPLOYEE HISTORY AND TURNOVER: 1. Enter a valid change reason code for all new records. 2. Enter an Effective Date or blank will default to the system date.	
PAY RANGE EFFECTIVE DATE:	

Processing Option	Processing Options Requiring Further Description
3. Enter the Effective Date for the pay range. Blank will default to the system date.	

Applicant Information (P08091)

Processing Option	Processing Options Requiring Further Description
Enter the Profile Data Base name for the type of information you wish to revise, as follows: A = Applicants E = Employees (default value) J = Jobs H = Health & Safety Cases P = Dependents/Beneficiaries R = Requisitions	

Profile by Employee (P080200)

Processing Option	Processing Options Requiring Further Description
1. Enter the Record Code for the type of information that you wish to review as follows: A = Applicants E = Employees (default value) H = Injury/Illness Case Number J = Jobs P = Dependents/Beneficiaries R = Requisitions	
2. For Detailed Employee Inquiry Only: Enter a '1' if you do not wish to display the employee's salary information. (Default of blank will display the information.)	

Processing Option	Processing Options Requiring Further Description
3. For Detailed Employee Inquiry Only: Enter a '1' if you do not wish to display the employee's Social Security Number. (Default of blank will display the number.)	

Inquiry by Employee (P080210)

Processing Option	Processing Options Requiring Further Description
1. Enter the Profile Data Base name for the type of information you wish to review as follows: A = Applicants E = Employees (default value) J = Jobs H = Case Number P = Dependents / Beneficiaries R = Requisitions 2. Enter the specific Type of Data on which to inquire within the chosen database. 3. Enter a '1' to see inactive employees (Employee Pay Status not numeric) in addition to active employees. Default of blank will show active employees only (Pay Status numeric).	

Employee Profile Multiskills Search (P080250)

Processing Option	Processing Options Requiring Further Description
INITIAL SEARCH CRITERIA:	

Processing Option	Processing Options Requiring Further Description
1. Enter the search criteria code you want to direct your search: A = Search for Applicants E = Search for Employees B = Search for both types. A default of blank will display both Applicants and Employees	
ACTIVE EMPLOYEE CRITERIA: 2. To limit the search to only active employees, enter the Pay Statuses, separated by commas, that define an active employee. A blank will search for all employees.	
EMPLOYMENT STATUS CRITERIA: 3. To limit the search to specific employment statuses, enter the employment statuses, separated by commas, or *ALL for all employment statuses. The typical default for full time regular is a blank, so a blank followed by a comma must be entered to include this in the search.	
APPLICANT STATUS CRITERIA: 4. To limit the search to specific application statuses, enter the application statuses, separated by commas, or blank for all application statuses. Since this field is two characters wide, you should always enter two characters between commas including a blank if necessary. For example, to search for 5 and 99, the entry would be: 5 ,99 (NOT 5,99).	
APPLICATION DATE CRITERIA: 5. Enter the earliest application date to limit the search. Only applications on or after this date will be included in the list. A blank will search through all applications, regardless of date.	

Batch File Purge (P00PURGE)

Processing Option	Processing Options Requiring Further Description
SAVE PURGED RECORDS: 1. Enter a '1' to save the purged records to a special purge library. (Default of blanks will NOT save any purged records.)	
REORGANIZE FILE: 2. Enter a '1' to reorganize the purged file. (Default of blanks will NOT reorganize the file.)	

Extended Employee - Termination/Rehire (P060161)

Processing Option	Processing Options Requiring Further Description
1. Enter the candidate requisition status, with a status of type 'DET', for the system to use when you terminate an employee. This will detach the employee from all reqs that the employee has a candidate requisition status type of 'FIL'. (The candidate requisition status type is defined in the special handling code of the user defined code 08/CN) 2. Enter the default value for Requisition Status when an employee is terminated and a requisition is created. (F1 for valid values) 3. Enter a '1' to have the termination date default into the date pay stops field. Leave this blank if the termination date should not default into the date pay stops field. **Note:** If FSA claims are being used, leave this field blank so that the employee will not have a date in the date pay stops field and will still be included in the payroll.	

Create FCPCS Workfile (P08022)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' if you would like the last and first name of the employee copied to the workfile. A default of blank will not copy name information to the workfile. 2. Enter the Category Code Data Item Name that maps between business units and divisions when defining business units in P0006A.	

Download FCPCS Workfile to PC (P08023)

Processing Option	Processing Options Requiring Further Description
1. Enter the PC drive letter assigned to the AS400 through Client Access where file folders exist. 2. Enter the full pathname (including drive letter) where the file will be copied onto the PC. Path must already exist, or error will occur. 3. Enter the file name that you would like the data copied into. If a file already exists with the same name, it will be overwritten.	

Employee Master Labels (P080414)

Processing Option	Processing Options Requiring Further Description
1. Enter the report type. (1,2,3,4) All report types print name and address. Report types 2, 3, and 4 print additional information: 2 - Address number 3 - Phone number 4 - Address number and phone number	

Employee Master Labels - Laser (P08041L)

Processing Option	Processing Options Requiring Further Description
1. Enter the report type. (1,2,3,4) All report types print name and address. Report types 2, 3, and 4 print additional information: 2 - Address number 3 - Phone number 4 - Address number and phone number	

Employee Profile - Alphabetical Sequence (P080410)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to bypass printing text information on the report. (Default of blank will print the text.) 2. Enter a '1' if you wish to bypass printing the employee's salary information. (Default of blank will print the information.) 3. Enter a '1' if you wish to bypass printing the Social Security number. (Default of blank will print the number.)	

Employee Info by Data Type - Alpha Seq (P080400)

Processing Option	Processing Options Requiring Further Description
1. Enter '1' to bypass printing text information on the report.	

EEO-4 Report (P068514)

Processing Option	Processing Options Requiring Further Description
1. Please enter starting salary for each salary range below. Enter real dollars, i.e., 8000 instead of 8,000 or 8.0. Beginning Salary for Range 1 " Range 2 " Range 3 " Range 4 " Range 5 " Range 6 " Range 7 " Range 8	
2. Enter Beginning Date of Report Period Enter Ending Date.	
3. Enter address book number of jurisdiction being reported.	
4. Enter Jurisdiction Control Number.	
5. Enter the Employment Status Code(s) to identify full time employees. (Enclose in quotes and separate with a space. Ex: ' ' '1' '2')	
6. Enter the data item for the payroll category code (ex. P001 - P020) that contains the employee's function code	
7. Enter address book number of EE0-4 Contact Person.	
8. Enter address book number of Company EE0-4 Contact Person reports to.	
9. Enter address book number of Certifying Official.	

EEO-1 Employment Data (P068515)

Processing Option	Processing Options Requiring Further Description
1. Enter the Beginning and Ending Date for the Pay Period being reported. Pay Period Beginning Date Pay Period Ending Date	

Processing Option	Processing Options Requiring Further Description
2. Enter the number representing the type of report to be created. Single Establishment - '1' Consolidated Worksheet - '2' Headquarters Report - '3' Individual Est. - '4'	
3. Enter the number of establishments covered by this report if option number 2 is = '2'.	
4. Enter the Parent Company Number with the leading zeros, i.e. 00001.	
5. Enter the Establishment Address Book Number for this report. Leave blank if same as option number 4.	
6. Enter a '1' if the company employs 100 people or more.	
7. Enter '1' if affiliated with another company in a venture that employs 100 or more people.	
8. Enter '1' if Gov't Contracts are involved as in Section C question number 3.	
9. If '1' is entered for option number 8, then enter the 9 digit Dunn and Bradstreet ID number.	
10. Enter the Certifying Official's Employee Number.	
11. Enter the Contact Person's Employee Number.	
12. Enter the Contact Person's Phone Extension number.	
13. Enter the Company number assigned to the company by the EEOC.	
14. Enter the Unit number assigned to the company by the EEOC.	
15. Enter '1' if this company employs apprentices.	
16. Enter a brief description of your company's major business activity. (The description should include whether the business activity involves manufacturing, retail or wholesale trade, services etc.)	

Processing Option	Processing Options Requiring Further Description
17. Enter a Y if you would like the F05850 file to be updated. (Default is ' ', no update)	

EEO Staff Utilization Report (P068900)

Processing Option	Processing Options Requiring Further Description
1. Enter From date:	
2. Enter To date:	
3. Enter non-ethnic code: 4. To select only one business unit, enter the business unit number. (It must be right adjusted in the first twelve characters.) Leave blank to print all business units.	

Workforce Analysis by B.U. & Company (P080435)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to count white females as non-ethnic employees. Default of blank will include these employees and all others with non-white EEO Ethnic Groups in the Total Minority Employees figure. 2. Enter a '1' to retrieve job descriptions from the UDC tables. A 'Blank' will retrieve the job descriptions from the job master file. Generally, the UDC table will be used by those not using the JD Edwards World human resources system.	

Veterans' Employment by B.U. & Company (P080434)

Processing Option	Processing Options Requiring Further Description
Enter the Beginning and Ending dates for the reporting period. Beginning Date - Ending Date - Enter the 9 digit Dun and Bradstreet ID number.	

New-Hire Reporting Processing Options

Extended Employee - Dates, Eligibility (P060190)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTIONS: 1. Enter your display preference for Ethnic Code: Enter '1' for Yes. Enter ' ' for No. 2. Enter the candidate requisition status, with a status of type 'DET', for the system to use when you terminate an employee. This will detach the employee from all reqs that the employee has a candidate requisition status type of 'FIL'. (The candidate requisition status type is defined in the special handling code of the user defined code 08/CN) 3. Enter a '1' to have the termination date default into the date pay stops field. Leave this blank if the termination date should not default into the date pay stops field. **Note:** If FSA claims are being used, leave this field blank so that the employee will not have a date in the date pay stops field and will still be included in the payroll.	

Employee History Turnover Processing Options

Employee History Inquiry (P08042)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to see inactive employees (Employee Pay Status not numeric) in addition to active employees. Default of Blank will show active employees only (Employee Pay Status numeric). DATA ITEM SECURITY: 2. Enter data items not to be displayed for security reasons. 1 - Data Item 2 - Data Item 3 - Data Item 4 - Data Item 5 - Data Item	
SELECT DATA: 3. Enter a '1' to display selected data for tracking with values in history. Default of blank will display all selected data items.	

History Record Maintenance (P080420)

Processing Option	Processing Options Requiring Further Description
SELECT DATA:	

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to display selected data for tracking with values in history. Default of blank will display all selected data items.	

Employee History Snapshot (P08043)

Processing Option	Processing Options Requiring Further Description
1. Enter '1' if you wish to see Salary and Hourly Rate information. Default of blank will not display these fields.	

All Companies (P080430)

Processing Option	Processing Options Requiring Further Description
1. Enter the From Date to begin tracking turnover. 2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today's date. 3. Enter the Turnover Column Group which contains the Column Headings you wish to have appear on this report.	

Purge Employee Multiple Job File (P0601182)

Processing Option	Processing Options Requiring Further Description
Enter a date. Records with a pay stop date prior to this date will be deleted.	

All Employees by Home Business Unit (P080423)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to see inactive employees (Employee Pay Status not numeric) in addition to active employees. Default of blank will show active employees only (Employee Pay Status numeric). 2. Enter the Reporting Period to restrict inclusion of history data by date: From Date Thru Date 3. Enter the data item you wish to see history on (i.e. SAL for Salary). Default of blank will include history on all tracking items.	

Salary History Analysis (P080424)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to see inactive employees (Employee Pay Status not numeric) in addition to active employees. Default of blank will show active employees only (Employee Pay Status numeric). 2. Enter the Reporting Period to restrict inclusion of history data by date: From Date Thru Date 3. Enter a '1' to include all employees even if they fall outside the reporting period range of dates.	

Most Recent Change Work File Build (P0804500)

Processing Option	Processing Options Requiring Further Description
REPORT OPTIONS: 1. Enter data item used to create work file. 2. Enter a '1' to clear the work file and then write new records. Enter a '2' to add records to the work file and not clear the file. (Default = '2') 3. Enter the name of the Production library to be used where workfile T08042W will reside. (Default is JDFOBJ)	

All Business Units by Company (P080431)

Processing Option	Processing Options Requiring Further Description
1. Enter the From Date to begin tracking turnover. 2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today's date. 3. Enter the Turnover Column Group which contains the Column Headings you wish to have appear on this report.	

All Job IDs by Job Group (P080432)

Processing Option	Processing Options Requiring Further Description
1. Enter the From Date to begin tracking turnover. 2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today's date.	

Processing Option	Processing Options Requiring Further Description
3. Enter the Turnover Column Group which contains the Column Headings you wish to have appear on this report.	

All Check Routes (P080433)

Processing Option	Processing Options Requiring Further Description
1. Enter the From Date to begin tracking turnover.	
2. Enter the Thru Date when calculations are to cease. Default of blank will calculate through today's date.	
3. Enter the Turnover Column Group which contains the Column Headings you wish to have appear on this report.	

Job Information Processing Options

Job Data & Evaluation Points (P08001)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' if you want to clear the Evaluation Points / Degrees when the Evaluation Method has been changed. A default of blank will not change the Points / Degrees.	
2. Enter a '1' to automatically call the Category Codes Window when adding a Job. Default of blank will not call the window.	
3. Enter a '1' next to each to suppress its display: Workers Comp. . . . . FLSA Exempt . . . . Benefit Group . . . . Union Code. . . . . EEO Category.	
4. Enter a '1' if you do NOT want to automatically update the user defined codes for Job Type on an add or change. Default of blank will add and update Job Type data in user defined codes.	

Job Type & Step Revisions (P081810)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to see inactive employees (Employee Pay Status not numeric) in addition to active employees. Default of Blank will show active employees only (Employee Pay Status numeric). 2. Enter a '1' to use the Job Information file (F08001) to edit Job Type and Step. Default of blank will edit against user defined codes. 3. Enter the method you wish to use for updating the job information in the employee master file. ' ' = Do NOT default Job Info '1' = Default only if blank '2' = Always default Job Info 4. Enter the method you wish to use for updating the category codes in the employee master file. ' ' = Do NOT default category codes '1' = Default only if blank '2' = Always default category codes (NOTE: The processing options for the Employee Master have NO effect on these)	

Job Comparisons by Factor (P08012)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to display job evaluations in job type and step order. A default of blank will display the information by points in descending order.	

Pay Grade/Salary Range Information (P082001)

Processing Option	Processing Options Requiring Further Description
1. Enter a "Skip to" query name to be used when the World Writer versions list function key is pressed to call the World Writer versions list. Blank will display the entire list for Wages and Salary World Writers, (Grp Q082). 2. Enter a '1' to allow the effective dates in the subfile to change by changing the effective date in the header of the video.	

Update Employees With Job Information (P08801)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to UPDATE the employee master file and produce a report of all employees affected by any job changes. Default of blank will not update the file, but will produce the report. . . . . 2. Enter the value for the method you wish to use for defaulting Category Code values: ' ' = Do NOT default category codes '1' = Default only when blank '2' = Always default category codes (NOTE: The processing options for the Employee Master have NO effect on this) 3. Enter the Change Reason. 4. Enter the Effective Date. If left blank, the system date will default. 5. Enter a '1' to OMIT terminated employees from being processed. Default of blank will process terminated employees.	

Print Job Descriptions (P080412)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Job Information by Data Type (P080402)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Pay Ranges by Job (P082450)

Processing Option	Processing Options Requiring Further Description
DATA OPTIONS: 1. Enter Pay Range - As of Date.	

Requisitions Processing Options

Position Requisitions (P081021)

Processing Option	Processing Options Requiring Further Description
1. Enter '1' to override a History Constants value of '2' for Position ID and require a Position ID to be entered for "Approved" requisitions. History Constants will be followed in all other cases. ' ' = Use History Constants (Default) '1' = Override History Constants	
2. Enter a '1' to use the Job Information File to edit Job Type and Step and to default the Job Information. Default of blank will edit with User Defined Codes.	
3. Enter a "Skip to" query name to be used when the Print Function Key is pressed to call the World Writers Version List. Blank will display the entire list of Position Control World Writers (Q081).	
4. Enter a '1' to automatically bring up the Requisition Category Code Window on an add. The default of blank will NOT bring up the window automatically on an add.	

Requisition Activity (P08105)

Processing Option	Processing Options Requiring Further Description
PROFILE DATA SELECTION EXITS:	

Processing Option	Processing Options Requiring Further Description
1. Enter the Profile Data Type to be displayed from the Applicant (A) database when selection option 5 for an applicant is used. A default of blank will use the first data type for applicants	
2. Enter the Profile Data Type to be displayed from the Applicant (A) database when selection option 6 for an applicant is used. A default of blank will use the first data type for applicants	
CANDIDATE REQUISITION STATUS: 3. Enter the Candidate Requisition Status to be entered when a candidate is no longer associated with the requisition, such as when they change jobs or are terminated. (The status entered MUST have the constant 'DET' entered in the Special Handling Code field of the user defined code.)	

Requisition Review (P08102)

Processing Option	Processing Options Requiring Further Description
1. Enter the candidate requisition status you would like to go with an applicant that is going to be attached to a Requisition. (The candidate requisition status type is defined in the special handling code of the user-defined code 08/CN)	

Requisition Profile - Alphabetical Order (P080416)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Requisition Info by Requisition - Alphabetical (P080406)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Applicant Information Processing Options

Applicant Information (P08401)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTIONS: 1. Enter a '1' next to each option you wish to suppress on the screen: Date of Birth Gender Ethnic Code 2. When adding new applicants, enter the default format for the first line of the Mailing Address (Optional): ' ' = Name entered will not be used in the address book window. You must also enter the name in the window. '1' = John Doe (No middle initial) '2' = John R. Doe '3' = Doe, John R. (Alpha Name) Note: For users who have the double byte flag turned on in the JDE System Values, a default of ' ' is used. 3. Enter a '1' to display the Additional Individual Tax ID Number in the Address Book window. Default of blank will NOT display the Additional Individual Tax Id Number.	
DELETION OF APPLICANT: 4. Enter a '1' to automatically delete the Profile Data when an applicant is deleted. Default of blank will not delete this data.	

Processing Option	Processing Options Requiring Further Description
DEFINITION OF FUNCTION KEYS: 5. Enter two Profile Types of Data on which to inquire using F15 & F16. Default of blank will display the first Type of Data for Applicants.	
EDIT JOB TYPE AND STEP: 6. Enter a '1' to use the Job Information File (F08001) to edit Job Type & Step and EEO Job Codes. Default of blank will edit with User Defined Codes.	
WHEN HIRING AN APPLICANT: 7. Enter a '1' to require entry in mandatory fields on the Employee Set Up screen. Default of blank will not require entry. 8. Enter the Applicant Status Code that indicates the applicant is "hired". 9. Enter a '1' to transfer the applicant's Profile Data to the Employee Profile upon hiring the applicant. 10. Enter a '1' to use the Security Business Unit, Position ID, Home Business Unit and Job Type / Step from the Requisition Master file to update those fields in the Applicant Master. Default of blank will not update these fields in the Applicant Master when a requisition is assigned.	
WHEN TERMINATING AN EMPLOYEE: 11. Enter the Applicant Status to be given to employees who are terminated and placed back into the applicant pool. 12. Enter a '1' to transfer the Employee Profile Data to the Applicant Profile when an employee is terminated and returned to the applicant pool.	
WHEN SENDING A NOTICE: 13. Enter the name of the Document. 14. Enter the name of the Folder which contains the Document.	

Processing Option	Processing Options Requiring Further Description
SECURITY BUSINESS UNIT: 15. Enter '1' to update Security Business Unit to the employees Address Book record. Leave blank NOT to update and on an add, default to Security Business Unit 1.	

Applicant Purge (P080814)

Processing Option	Processing Options Requiring Further Description
1. Purge Date 2. Omit Applicant Status 1 3. Omit Applicant Status 2 4. Omit Applicant Status 3 5. Save instruction 6. Save Library 7. Save Device 8. Reorganize option 9. Omit hired applicants 10. Report purged applicants 11. Next Number for File Reorganization	

Applicant Profile - Alphabetical Sequence (P080411)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Applicant Info by Type - Alphabetical Seq (P080401)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Hired Applicants by EEO Job Category (P084400)

Processing Option	Processing Options Requiring Further Description
Enter the Beginning and Ending Date for the Reporting period. Beginning Date Ending Date	

Application Flow by Business Unit (P084411)

Processing Option	Processing Options Requiring Further Description
APPLICANT DATE RANGE: Enter the date range of applicants to consider during creation of this report. A default of blank will use Jan. 1 thru Dec. 31 of the current year: 1. From - 2. Thru -	
APPLICANT STATUS CODE RANGES: Enter the range of Applicant Status codes that represent the following conditions. Ranges should not overlap each other. No defaults apply. 3. Offers: From - 4. Thru - 5. New Hires: From - 6. Thru -	

Processing Option	Processing Options Requiring Further Description
7. Rejections: From - 8. Thru -	
EEO JOB CATEGORY PRINT CONTROL: 9. Enter '1' to print all Job Categories for which there are Applicants. A default of blank will not print an EEO Job Category if there are no counts for the requested dates.	

All Employees by Business Unit (P084412)

Processing Option	Processing Options Requiring Further Description
1. Enter the range of Application Dates that will be included in the report. The Thru date, if left blank, will default to the run date of the report. The From date, if left blank, will default to January 1 of the year of the Thru date. From: Thru: 2. Enter range of Applicant Status codes that indicate new hires: From: Thru:	

Position Control Processing Options

Position Master Information (P08101)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to use the Job Information File (F08001) to edit Job Type and Step. Default of blank will edit against user defined codes. 2. Enter '1' to force entry of Job Type. Blank will issue warning if Job Type is left blank. If Position Control Criteria in Constant is not set to 1, the program will ignore this processing option.	

Single Position Revisions (P081011)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to use the Job Information File (F08001) to edit Job Type and Step. Default of blank will edit against user defined codes. 2. Enter a '1' to force entry of Job Type. Blank will issue a warning if Job Type is left blank. If Position Control Criteria in the Constants is not set to 1, the program will ignore this processing option.	

Build Position Control Files (F08101/11) (P081800)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to Clear the Position Master File (F08101) and the Position Detail File (F08111). This should be done when this program is run for a second time or more. Default = ' '	

Position Account Information (P081012)

Processing Option	Processing Options Requiring Further Description
1. Enter the Salary Ledger Type for account validation. Example: Salary Budget Ledger = BA 2. Enter the Units Ledger Type for account validation. Example: Units Budget Ledger = BU	

Update Position Budgets - Requested (P08902)

Processing Option	Processing Options Requiring Further Description
UPDATE OPTIONS: 1. Enter a "1" to update the account balances file and print a report showing summarized information update to GL by account. A default of blank will only produce report with both position and account summary information.	
LEDGER TYPE:	

Processing Option	Processing Options Requiring Further Description
2. When entering budgets to the actual and units ledgers, the ledger type "BA" and "BU" is assumed. If you wish to enter to a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger types. Salaries Budget Ledger: Hours Budget Ledger:	
Note: The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also, the following ledger types cannot be updated by this program: AA, CA, XA, YA, ZA, AC.	
FISCAL YEAR: 3. Enter the fiscal year (CCYY).	
BUDGET CYCLE: 4. Enter a '1' next to each item you wish to update in the Account Balances file (F0902). If all items are left blank, the default will only update the Final Budget. Requested Budget: Approved Budget: Final Budget:	

Update Position Budgets to Acct. Ledger (P08911)

Processing Option	Processing Options Requiring Further Description
DESCRIPTION: 1. Enter the transaction description:	
TRANSACTION DATE: 2. Enter the date to be posted for this transaction. A default of blank will use the system date.	
LEDGER TYPE:	

Processing Option	Processing Options Requiring Further Description
3. When entering budgets to the actual and units ledgers, the ledger type "BA" and "BU" is assumed. If you wish to enter a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger types. Salaries Budget Ledger:	
Note: The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also, the following ledger types cannot be updated by this program: AA, CA, XA, YA, ZA, AC.	
FISCAL YEAR: 4. Enter the last two digits of the fiscal year.	

Positions by Business Unit (P081210)

Processing Option	Processing Options Requiring Further Description
1. Enter the default screen format as follows: 1 = Full Time Equivalents 2 = Hours Worked 3 = Open Amounts (Budget,FTE,Hours) 4 = Status Messages 5 = Headcount Default = '1'	

Review Activity by Position (P08111)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to initially display the screen with Hours Worked information, a '2' to initially display the screen with FTE information or a '3' to initially display the screen with Headcount. Default of blank will initially display Hours.	

Review Activity by Employee (P081220)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to initially display the screen with Hours Worked information. Default of blank will initially display FTE information.	

Create Next Year's Position Budgets (P081820)

Processing Option	Processing Options Requiring Further Description
1. Enter the fiscal year from which you want the positions calculated. (This figure must be in your DREAM Writer Data Selection to calculate these budgets.)	
2. Enter the fiscal year to which you want the positions calculated.	

Processing Option	Processing Options Requiring Further Description
3. Enter a '1' to generate all position budgets from the Position Master table (F08101). An exception report will be generated. (More selections for 3 available) Enter a '2' to generate position budget values from the Position Master table (F08101) when current activity exists for one employee in that position within the Position Detail table (F08111). An exception report will be generated. Enter a '3' to generate position budget values from the Position Detail table (F08111) that had activity for the year. Vacant positions will be calculated. An exception report will be generated. (More selections for 3 available) Enter a '4' to generate position budget values from the Position Detail table (F08111) that have only current activity for the year. An exception report will be generated.	
4. Enter the percentage for calculating the new budget amount. (Enter 5 for 5% increase, -5 for 5% decrease.)	
5. Enter the percentage for calculating the new budget full time equivalent (FTE), hours, and headcount. (Same rule as above.)	
6. Enter the effective date from which pay rates or pay grade step will be based on for next year's budget. (Only if you use these methods for salary calculation.)	
7. Enter '1' to create position budgets for positions that have effective thru dates that are prior to the beginning of the next FY. The exception report will list those positions that are created in this manner. ' ' will default to NOT create.	
8. Enter a '1' to create the position accounts for the next year.	

Cross-Year Compare, All BUs (P081430)

Processing Option	Processing Options Requiring Further Description
1. Enter the first fiscal year (two digits) to be displayed. 2. Enter the second fiscal year (two digits) to be displayed.	

Cross-Year Effective Budget - All BUs (P081431)

Processing Option	Processing Options Requiring Further Description
1. Enter the first fiscal year (two digits) to be displayed. 2. Enter the second fiscal year (two digits) to be displayed.	

Current vs. Fiscal - All Positions (P081440)

Processing Option	Processing Options Requiring Further Description
Enter the fiscal year (two digits) whose budgeted FTE will be compared to the current FTE.	

Current vs. Fiscal - All Positions (P081441)

Processing Option	Processing Options Requiring Further Description
Enter the fiscal year (two digits) whose budgeted headcount will be compared to the current headcount.	

Safety and Health Administration Processing Options

Case Entry (P08601)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to automatically call the Additional Case Information program (P086011) when adding an Injury/ Illness Case. Default of blank will not call the program. 2. Enter a '1' to automatically delete the Profile Data when a Case is deleted. Default of blank will not delete the Profile Data. 3. Enter in the date that the OSHA 300 rules begin to take affect. If left blank, the default value will be January 1, 2002.	

Case Entry - Additional Information (P086011)

Processing Option	Processing Options Requiring Further Description
Enter a '1' to use the Job Information File (F08001) to edit Job Type and Step. Default of blank will edit against User Defined Codes.	

OSHA 301 Injury/Illness (P080413)

Processing Option	Processing Options Requiring Further Description
1. Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

OSHA 300 Log (P086430)

Processing Option	Processing Options Requiring Further Description
PROCESSING OPTIONS: 1. Please enter the calendar year for which this report is being executed. (Example... 2006)	

OSHA 300A Summary (P086431)

Processing Option	Processing Options Requiring Further Description
PROCESSING OPTIONS: 1. Please enter the calendar year for which this report is being executed. (Example... 2006)	

Case Information by Data Type (P080403)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Wage and Salary Administration Processing Options

Create Review Groups All Salaried Emp. (P082800)

Processing Option	Processing Options Requiring Further Description
1. Enter the name of the Review Group to be assembled (six characters maximum). Default of blank will be today's date in MMDDYY format.	
2. Enter Global Increases in the following categories by amount or percent (%10 = ten percent). Any increases will be applied to the group but can be changed upon review (see helps): Base Rate or Salary Cost of Living Local Cost of Living Merit Increase Promotion	
3. Enter an Amount Approved code for all employees. Default of blank will add employees to the work file with a blank Amount Approved code.	
4. If employee exists in review group: a) Enter '1' to replace data with employee master values. b) Enter '2' to replace some fields with employee master values. Fields NOT replaced are: Pay Grade, Raise Effective Date, Date of Next Review, Job Type, Job Step, and Employment Status. c) Blank for no changes.	

Processing Option	Processing Options Requiring Further Description
5. If processing option 4 is not blank, enter a '1' to NOT replace recommended salary, % and amount increase, and other calculated fields. (See helps for complete list.) 6. Enter the Effective Date for all raises given to this Review Group as it is created. Default of blank will use today's date. 7. Enter a Date of Next Review for the group to represent the next time each member will be reviewed. 8. Enter a Change Reason to be applied to every member in the Review Group being created. For example, Change Reason = 009 would be for Annual Raises. A default of blank will give every member in the Review Group a blank Change Reason. 9. Enter a '1' to CLEAR the work file prior to building this Review Group. Default of blank will NOT Clear the work file. **CAUTION**: A '1' CLEARS THE ENTIRE WORK FILE. 10. By default, only employees with a status of '0' to '9' will be included. To exclude a pay status value from this group, enter the values separated by a comma.	

Upcoming Salary Reviews (P082200)

Processing Option	Processing Options Requiring Further Description
SELECTION OPTIONS: 1. Enter '1' to display only employees with an active Pay Status (numeric), or enter '2' to display only employees with an active Employment Status (numeric), or leave blank to display all employees	

Review & Rank Employees - Salary Format (P08201)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to display data in the Hourly Rate format. Enter a '2' to display data in the Salary format. Default of blank will display data in the format appropriate for each Review Group.	
2. Enter a '1' to use the Job Information File (F08001) to edit Job Type and Step. Default of blank will edit with User Defined Codes.	
3. Enter a value as listed below to specify how to treat the case when an employee's Recommended Pay falls outside Pay Grade boundaries: Blank = Ignore condition (default) 1 = Issue a warning message 2 = Issue an error message	
4. Enter a '1' to display the employee's address number in the fold area. Default of blank will display the employee's Tax ID Number.	

Update Salary Actuals - All Groups (P082810)

Processing Option	Processing Options Requiring Further Description
1. Enter the name of the Review Group to be updated into the Payroll system. A default of blank will update all Review Groups. Records from the work file will be deleted as they are processed.	
2. Enter the greatest Amount Approved code to be chosen for update. Employees with codes beyond this will not be processed. Default of blank will process all Approved codes.	

Processing Option	Processing Options Requiring Further Description
3. Enter a '1' to update NEW salary and rate. Default of blank updates CURRENT salary and rate. Contract / Calendar and secondary jobs will always have CURRENT salary updated. (See help instructions.)	
4. For Contract / Calendar jobs, enter Remaining Periods to Pay.	
5. For Contract / Calendar jobs, enter a '1' to retrieve Salary Paid to Date from JDE Payroll.	

Delete a Review Group (P082801)

Processing Option	Processing Options Requiring Further Description
Enter the name of the Review Group to be deleted (six characters maximum). Default of blank or invalid name will not delete any records.	

Build Grade Progression Work Group. (P082005)

Processing Option	Processing Options Requiring Further Description
1. Enter the Name of the Work Group to be assembled (six characters max). If left blank, today's date, in MMDDYY format, will default.	
2. Enter up to a 25 character description for your Work Group.	
3. Enter a '1' to update the employee's Pay Grade / Step and Pay Rate based on the "New" Pay Grade / Step. Enter a '2' to update the employee's Rate from the existing Grade / Step. Default = '1'.	

Processing Option	Processing Options Requiring Further Description
4. Enter the effective date for the Pay Grade / Step to be used for building the new rates. This is a required entry field (the system date will not default; a job log will be generated if the date is blank).	
5. Enter a '1' to generate a report. A blank will not generate a report. An exception report of records not added to the workgroup or outside the position budget is always produced.	

Grade Step Progression Work Group Update (P082008)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to run in "update" mode. A blank will run in "proof" mode and no updates will be made.	
2. Enter a '1' to generate a report of updated records. A blank will not generate a report. An exception report will always be generated.	
3. Enter the change reason to be written to the employee history and / or turnover files (F08042 / F08045).	
4. Enter the effective date to be written to the employee history and / or turnover files (F08042 / F08045).	
IF YOU ARE PROCESSING CONTRACT / CALENDAR EMPLOYEES, COMPLETE PROCESSING OPTIONS No. 5 AND No. 6 BELOW:	
5. Enter a '1' to use Payroll History for Salary Paid Before Change.	
6. Enter the Periods Remaining to Pay.	

Pay Grade/Step WW (P082003)

Processing Option	Processing Options Requiring Further Description
1. Enter a "Skip to" query name to be used when the World Writer versions list function key is pressed to call the World Writer versions list. Blank will display the entire list for Wages and Salary World Writers, (Grp Q082). 2. Enter a '1' to allow the effective dates in the subfile to change by changing the effective date in the header of the video.	

Employee Salary Analysis by Home BU (P082400)

Processing Option	Processing Options Requiring Further Description
Bonus / Commission Information: 1. Enter the Employee Profile Data Type for the current year's EXPECTED Bonus / Commission. 2. Enter the Pay Type Table for those Pay Types that should be EXCLUDED from Bonus / Commission calculations.	
Bonus / Commission Information: 3. Enter the Pay Type Tables to be used when calculating Bonus / Commissions for the "CURRENT" Year: a. for Bonuses paid 1 year ago* b. " " " 2 years ago c. " " " 3 years ago d. " " " 4 years ago e. " " " 5 years ago * Requires a value. Will also be used for any tables left blank.	
Bonus / Commission Information:	

Processing Option	Processing Options Requiring Further Description
4. Enter the Pay Type Tables to be used when calculating Bonus / Commissions for the "PREVIOUS" Year: a. for Bonuses paid 1 year ago* b. " " " 2 years ago c. " " " 3 years ago d. " " " 4 years ago e. " " " 5 years ago * Requires a value. Will also be used for any tables left blank.	
Other Information: 5. Enter 1-5 to represent the number of prior years of salary history to print. A default of blank equals 5 years. 6. Enter the category code from the Employee Master that you would like to have appear on the report. A default of blank will use category code one (P001).	

Organizational Structure Processing Options

Organizational Chart Revisions - EE/Supervisor (P08210)

Processing Option	Processing Options Requiring Further Description
1. Enter ALL the Pay Status values which indicate an employee is active.	

Employee Organization Structure (P08425)

Processing Option	Processing Options Requiring Further Description
PRINT FORMAT: 1. Enter the format to print. The default is '1' if left blank. '1' = single level structure '2' = multi-level structure '3' = multi-level indented structure '4' = indented - up to level 2 '5' = indented - up to level 3 2. Enter a '1' to display the 2nd Description of the Job Type User Defined Code. Default of blank will NOT display the 2nd Job Description. 3. Enter a '1' to display the description of the employee's second category code. Default of blank will NOT display the employee's second category code description. . . . . . 4. Enter ALL the Pay Status values which indicate an employee is active . . .	

Business Unit Org. Structure Review (P00250)

Processing Option	Processing Options Requiring Further Description
INITIAL SELECTION VALUES: (Any value(s) entered below will be preloaded into their corresponding fields on the screen.) Organization Structure Type:	

Position Organization Charts (P08230)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to display the Job Title of the job associated with the position. Default of blank will display the Position Title. 2. Enter the effective date to be used for determining which employees are active in a position. Default of blank will use the system date.	

Organization Chart Inquiry - EE/Supervis (P08200)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to display the second Job Description. Default of blank will NOT display the second job description . . . . 2. Enter ALL the Pay Status values which indicate an employee is active. . . .	

Structure - Organizational - Top Only (P00425)

Processing Option	Processing Options Requiring Further Description
PRINT FORMAT: 1. Enter format to print: '1' = single level structure '2' = multi-level structure '3' = multi-level indented structure	
SUBSTRUCTURE SUPPRESSION: 2. Enter a '1' to suppress printing of structures for Business Units that are children of other Business Units. This will result in printing structures only for Business Unit(s) that have no parents.	

System Setup Processing Options

Employee Resume Data Types (P08090)

Processing Option	Processing Options Requiring Further Description
Enter the Human Resources Data Base that you wish to review from the following list: A = Applicants E = Employees (default value) H = Injury/Illness Case Number J = Jobs P = Dep/Beneficiaries R = Requisitions	

Transfer - Hires/Terminations (P08094)

Processing Option	Processing Options Requiring Further Description
Enter the Cross Reference Type for the table transfer you wish to process. H=Hire an applicant T=Terminate an employee	

Applicant Profile Data - Copy/Move (P080840)

Processing Option	Processing Options Requiring Further Description
1. Enter the Type of Data the information will be copied FROM. 2. Enter the Type of Data the information will be copied TO.	

Processing Option	Processing Options Requiring Further Description
3. Enter '1' if you want to delete the Original FROM data after copying. (Default of blank will copy without deleting the Original FROM Data).	
4. Enter '1' if you want to overwrite the existing TO rcds with the FROM information. (Default of Blank will not overwrite existing TO rcds).	

Initialize History - Include all Active EE (P080810)

Processing Option	Processing Options Requiring Further Description
1. Enter a date to be used as the Effective Date for all history records. Default of blank will use the date when each employee record was last changed.	When you run the initialize program, JD Edwards World recommends that you enter an effective date in this processing option. The effective date should be a day prior to the date of your first date for reporting turnover. The system considers employees active as of the initialize effective date.
2. Choose what files to initialize given the choices below: H = Initialize History only T = Initialize Turnover only B = Initialize History and Turnover	
3. To clear records from the indicated file(s) before initialization, enter one of the following values: 1 = Clear the entire selected file(s) 2 = Clear History / Turnover records for the selected employees only Default of blank will not clear any records.	
4. Enter a change reason for initial turnover and history records. A blank will default a change reason of'001' New Hire for turnover records and the window value for the history records. (F1 will display allowed values.)	Enter a numeric change reason code in this processing option.

Number of Active Monitors (P08030)

Processing Option	Processing Options Requiring Further Description
Enter the number of active monitors allowed in the subsystem. (Valid values are 1-1000.) Default of blank will create the subsystem to allow only one active monitor.	This option is useful if you need to simultaneously display more than one environment.

Pay Grade/Salary Range Information (P082001)

Processing Option	Processing Options Requiring Further Description
1. Enter a "Skip to" query name to be used when the World Writer versions list function key is pressed to call the World Writer versions list. Blank will display the entire list for Wages and Salary World Writers, (Grp Q082). 2. Enter a '1' to allow the effective dates in the subfile to change by changing the effective date in the header of the video.	

Contract/Calendar Master (P08930)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' if you would like Saturday and Sunday to be included as a work day with a Day Value of 1.0. 2. If JD Edwards payroll is installed enter the last payroll period end date. This is used to prevent calendar changes on days that have already been paid which would cause a loss of data integrity. If left blank the system date will be used. 3. Enter the version of form P08936 to use when Recalculate Contract / Calendar Salary (P08936) is executed.	

Recalculate Contract/Calendar Salary (P08936)

Processing Option	Processing Options Requiring Further Description
1. Enter the Contract / Calendar to process.	
2. If switching the employees attached to the Calendar entered in 1, enter the name of the new Calendar.	
3. Enter the number of periods left to pay.	
4. Enter a '2' to perform the file updates. Leave mode as '1' to print a proof report.	
5. Enter a '1' to change retrieve salary paid before change. This must be blank if switching calendars.	
6. If a To Calendar (PO number 2) is not entered an effective date may be entered. Enter an effective date if you want the effective date to be greater than the calendar start date. See the help text for more info.	You can enter an effective date only if you are not transferring employee records to a new contract calendar. The effective date that you enter must be greater than the start date for the contract calendar. If you enter an effective date that is less than the start date for the calendar, the system uses the calendar start date as the effective date. If you leave this processing option blank, the system uses either the system date or the start date for the calendar. whichever is greater.
7. Enter the change reason.	
8. Enter a '1' to change all attached calendars to have a record type of 'O' for omitted.	

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