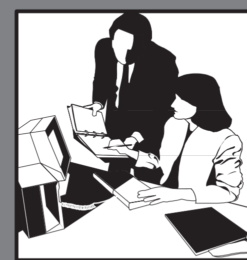
WORLDSOFTWARE

Guide
June 1996



WORLDSOFTWARE

Human Resources

Release
A7.3

JDEdwards

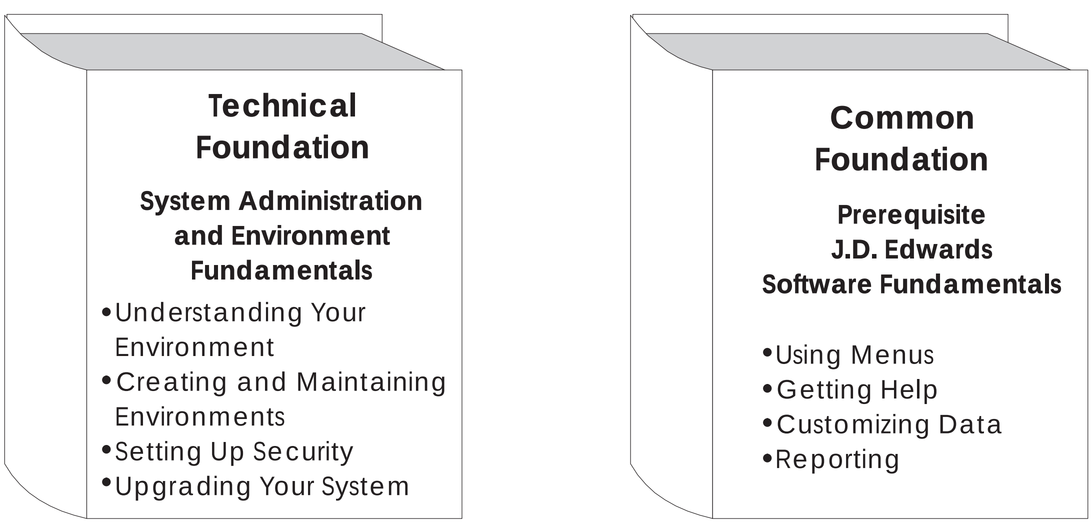
Item # A73CEAHR

J.D. Edwards & Company
8055 E. Tufts Avenue
Denver, CO 80237

Where Do I Look?

CD–ROM Guides

Guides



Important Note for Students in Training Classes

This guide is a source book for online helps, training classes, and user reference. Training classes may not cover all the topics contained here.

Welcome

About this Guide

This guide provides overviews, illustrations, procedures, and examples for release A7.3 of J.D. Edwards software. Forms (screens and windows) shown are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see on your screen.

This guide includes examples to help you understand how to use the system. You can access all of the information about a task using either the guide or the online help.

Before using this guide, you should have a fundamental understanding of the system, user defined codes, and category codes. You should also know how to:

- Use the menus
- Enter information in fields
- Add, change, and delete information
- Create and run report versions
- Access online documentation

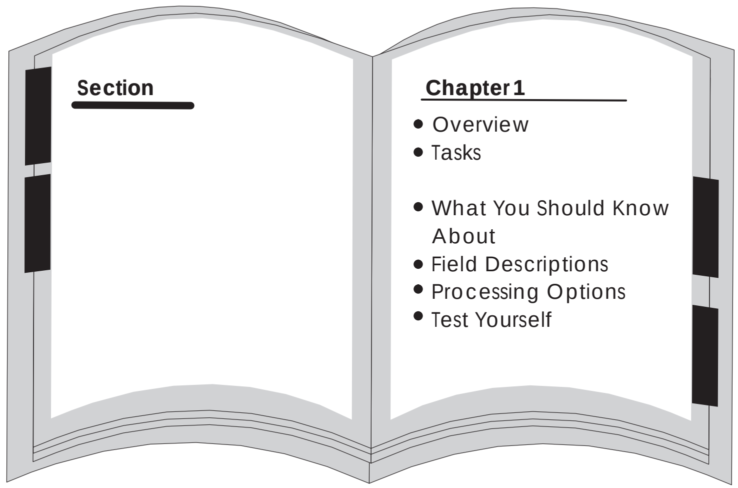
Audience

This guide is intended primarily for the following audiences:

- Users
- Classroom instructors
- Client Services personnel
- Consultants and implementation team members

Organization

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Each chapter contains the information you need to accomplish the task, run the program, or print the report. Chapters normally include an overview, form or report samples, and procedures.



When it is appropriate, chapters also might explain automatic accounting instructions, processing options, and warnings or error situations. Some chapters include self-tests for your use outside the classroom.

This guide has a detailed table of contents and an index to help you locate information quickly.

Conventions Used in this Guide

The following terms have specific meanings when used in this guide:

- *Form* refers to a screen or a window.
- *Table* generally means “file.”

We assume an “implied completion” at the end of a series of steps. That is, to complete the procedure described in the series of steps, either press Enter or click OK, except where noted.

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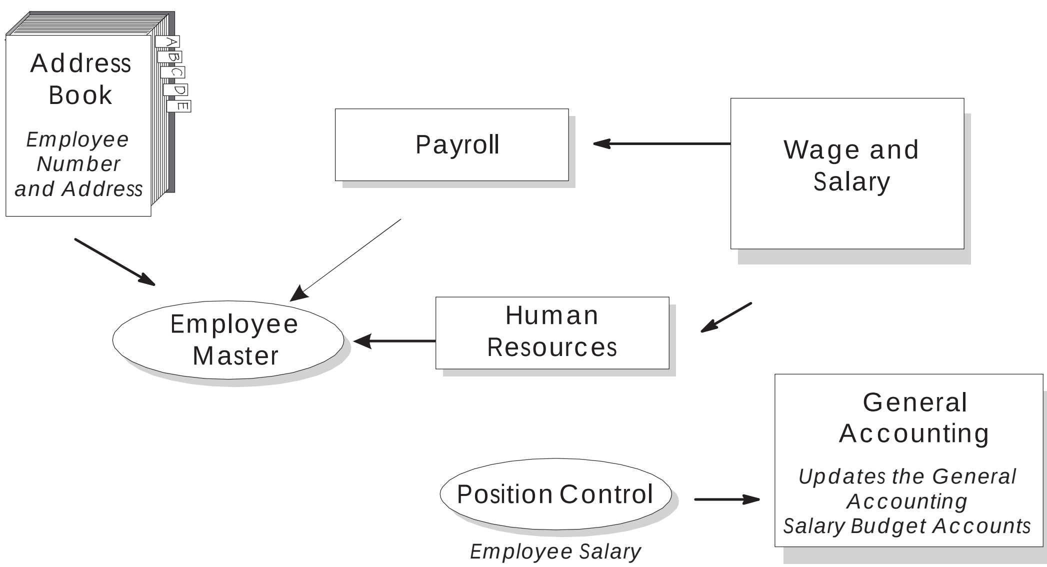
Human Resources Overview

The structure of your Human Resources department is dictated by the profile of your work force, government regulations, and industry standards, as well as your organization's policies and procedures. A "standard" Human Resources department cannot be defined. The information you need is unique and often complex. The J.D. Edwards Human Resources system allows you to gather the information that you need quickly so you can easily meet both your immediate and your long-range goals, as well as the demands of change and growth within your company and industry.

System Integration

The Human Resources system is designed to be fully integrated with other J.D. Edwards systems.

The following graphic shows the other J.D. Edwards systems that use the information provided by the Human Resources system.



The following systems integrate with the Human Resources system:

Payroll	If you also have the J.D. Edwards Payroll system, applicants who become employees are automatically added to the payroll system.
Address Book	A name, address, telephone number, and identification number record are created for each applicant and employee.
General Accounting	After salary budgets are created, the system passes the budgets by business unit from position control to the General Ledger Account Balances table (F0902).

Human Resources Features

The features of the Human Resources system include:

- 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 building

Budget Management

With comprehensive budget management, you can improve how you manage the bottom line. As part of managing your budget, you can:

- Ensure that a position is part of the approved head count before you create a requisition
- Track position effective dates and full-time equivalents (FTEs)
- Automatically update positions with changes in an employee's activities
- Analyze projected-to-budgeted variances

The system provides online access to compare your position projected through year-end salaries to the approved budget. Further, it assists you in determining year-end costs by developing projections based on hours, amounts, headcount, or FTEs. Whether you need to track positions and head count by company or department, the system accommodates requests for both, in detailed and summary forms. By managing your position budget within HR, your department can become more proactive at managing costs.

Requisition Management

After a position is budgeted and approved, the recruitment process begins. The J.D. Edwards system lets you create online requisitions that include approved status, job description, responsible recruiter, supervisor, and other requested data. The requisitions can then be used to create online internal job postings, which can be immediately available to your entire organization. Further, you can track the status of the requisitions at any point.

Because recruiting is expensive, you need to know where your efforts have been most effective. The system tracks requisition status, head count, and 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 determine the success of managing 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 J.D. Edwards Human Resources system, you can maintain extensive information on each applicant, such as education, prior experience, and foreign language proficiency. You can then search online for criteria matches. These online multi-skill searches make it simple to narrow the pool of applicants to only those you want to seriously consider. You can then provide your managers with a list of qualified candidates.

Data entered into the applicant database need not be re-entered. After you hire a new employee, the system automatically:

- Transfers the applicant’s information into the employee information file
- Closes the requisition, filling in the new employee’s name and date of hire
- Updates the position budget with the new employee’s salary and date of hire

Comprehensive Employee Information

The system provides features that allow you to create a comprehensive employee database including:

- Employee master information
- Employee profile information

Employee Master Information

The system maintains employee information in a central database, including the basic information used by both your HR and Payroll departments. This common database makes information easily accessible throughout your organization, while providing you control of how the data is distributed. Within this database, you maintain the basic data, such as employee pay status, EEO job category, department, tax area, and benefit group. The benefits of a centralized database are:

- Shared employee master information reduces duplication of data entry, and improves the accuracy of the payroll information.
- Online access to basic employee information improves communication and teamwork among departments.
- Salary and other confidential information is secured on a “need to know” basis for control of how information is distributed within your organization.

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.

Employee Profile Information

The employee profile database can contain virtually unlimited information. You determine the type of data and amount of information to keep on your employees, without system constraints. The information can be standard items, such as skills, education, and experience, or information specific to your business and industry. With online access, any approved user can search the profile for information, such as:

- Employees who have experience in a specific area
- Employees who have completed a required project
- Employees who can speak, read, or write a different language

Integrated Employee History and Turnover Analysis

Employee history is updated automatically with every change to an employee's master record. You can access the data at detail and summary levels to:

- View an employee's history online
- Generate point-in-time reporting
- Perform turnover analysis for a department or job
- Track the reason for each change

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

Complete Job Information

The system provides features that allow you to create a complete job database. The features include:

- Job descriptions
- Job evaluations

Job Descriptions

This centralized database can be shared by multiple users to ensure accuracy and consistency of job description information. By maintaining job descriptions with this system, your managers can quickly access the database to:

- Match key individuals to the appropriate job opening
- Compare job and pay ranges
- Meet the standards that support equal pay for equal work
- View job descriptions online
- Post job descriptions directly from the database to your internal job listings

Job descriptions are integrated with the employee master, applicant master, position control, and requisition information.

Job Evaluations

Quantitative analysis can be easily performed with built-in point analysis, such as defined for the HAY system. This analysis gives you the information necessary to determine job level and wage and salary ranges. Your compensation managers can compare company salary ranges to industry standards to ensure parity. The system accommodates various salary administration parameters, such as job type, geographic differential, and rounding factors.

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

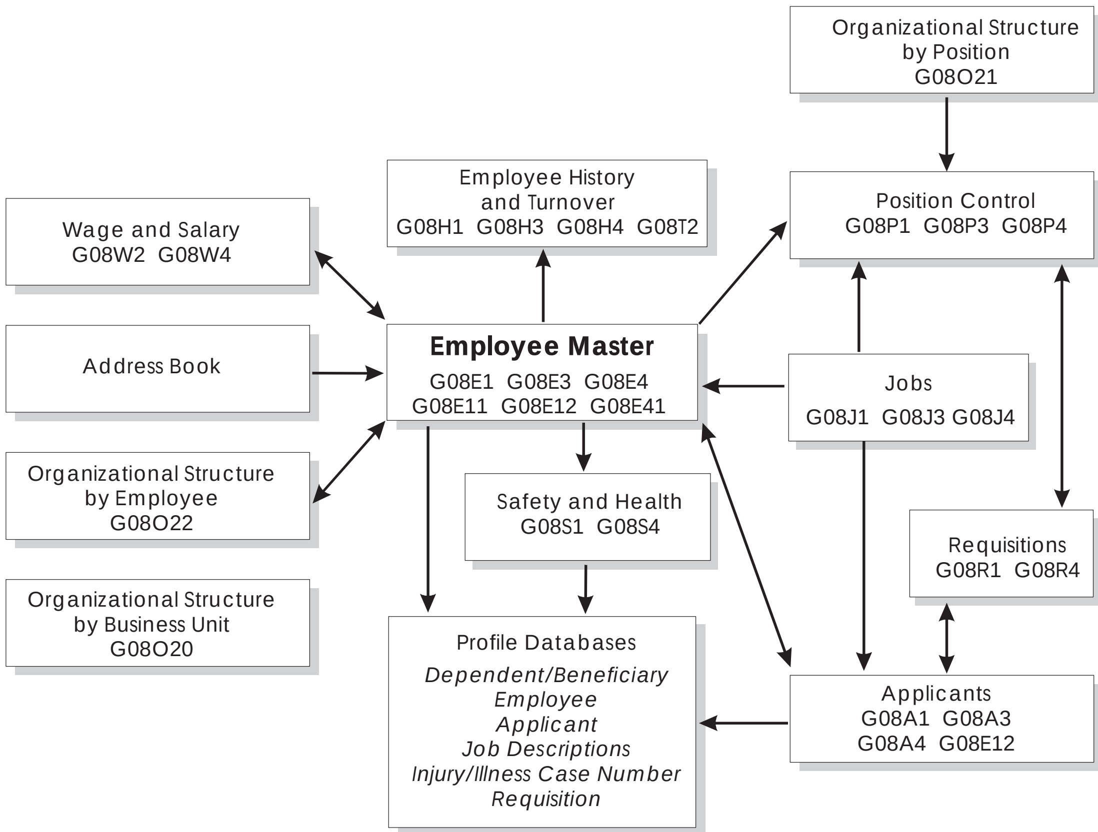
With this comprehensive database, you can maintain and report on the details of all work-related accidents, injuries, and illnesses. You can also analyze your safety record to track cost and lost time.

From the central database, you can design virtually any report that you need to include regulatory reporting. The Occupational Safety and Health Administration 200 log and summary are generated in the approved format for posting and for direct submission to OSHA.

Organizational Structure Building

Depending on the size and nature of your business, your needs for an organizational structure will vary. Top management might require a broad organizational structure that provides a “big picture” of branches offices that report to the main headquarters. Individual departments might need an organizational structure that shows each employee who reports to a single manager. You can build any organizational structure that you need. You can then generate a report that displays the structure.

Human Resources System Flow



Tables Used by Human Resources

Address Book Master (F0101)	Contains name and address information for all employees.
Employee Master (F060116)	Contains employee information needed for the Payroll and Human Resources system. Name and address information is maintained in the Address Book Master table, and has a search type of E.
Employee Multiple Job (F060118)	Contains employee multiple job information needed for the Payroll and Human Resources systems. Name and address information is maintained in the Address Book Master table and has a search type of E.
Employee Multiple Job History (F060119)	Stores and maintains employee multiple job history records.

Job Information (F08001)	Contains information for job ID data 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 used in the Employee Master for benefit group, union code, and workers compensation insurance. These codes are specific to an employee's home business unit, job type, and step.
Compensable Factors Table (F08011)	Contains evaluation methods and their assigned points or degrees for up to 10 factors. This information is then used when defining job data and evaluation points.
History Constants (F08040)	Contains the parameters used by the HR Employee Monitor program to create history records and integration updates from the Employee Master table.
HR History (F08042)	Stores and maintains employee history records.
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. These data types are used to guide input pertaining to jobs, employees, applicants, participants, dependents/beneficiaries, requisitions, or occupational injury/illness cases.
Profile Database User Defined Codes (F08092)	Contains multiple values with a specific type of data for individual applicant, employee, job, requisition, dependent/beneficiary, or occupational injury/illness cases.
Profile Narrative (F08093)	Contains narrative for specific types of data for an individual applicant, employee, job, requisition, dependent/beneficiary, or occupational injury/illness cases.

Profile Database Cross-Reference (F08094)
Contains a cross-reference table to be used when transferring profile data. Two cross-reference types must be defined:

- 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.

Position Account Information (F081012)
Contains accounting information and 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. Name and address information is maintained in the Address Book Master table, and has a search type of A.

Injury/Illness Case Master (F08601)
Contains occupational injury and illness cases used for OSHA reporting. Information tracked includes:

- 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

Menu Overview

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

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

Constants and History/Turnover Setup
G08H4

Turnover/Change Analysis

Turnover/Change Analysis
G08T2

Job Specifications

Job Specifications
G08J1

Job Specifications Advanced Operations
G08J3

Job Specifications Setup
G08J4

Pay Grade/Step Administration
G08J2

Position Control

- Position Control G08P1
- Position Control Advanced/Technical Operations G08P3
- Position Control Setup G08P4

Requisitions

- Requisitions G08R1
- Requisition Setup G08R4

Applicant Information

- Applicant Information G08A1
- Applicant Technical Operations G08A3
- Applicant Setup G08A4
- EEO/Affirmative Action Reports G08E12

Wage and Salary Administration

- Wage and Salary Administration G08W2
- Wage and Salary Administration Setup G08W4

Safety and Health Administration

- Safety and Health Administration G08S1
- Safety and Health Administration Setup G08S4

Organizational Structure

- Organizational Structure G08O2
- Organizational Structure by Business Unit G08O20
- Organizational Structure by Position G08O21
- Organizational Structure by Employee G08O22

Daily

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
- To terminate and rehire employees
- To run reports

About Employee Information

Employee information consists of the following types of information:

- Master
- Multiple job
- User defined
- Profile data
- International

Before your employees can be linked to any other part of the Human Resources system, they must have a personnel record in the Employee Master table (F060116). This record contains personal, company, job, pay, tax, benefits, and EEO information.

Multiple job information enables you to manage the pay and raises per job for employees who hold more than one job. For example, an employee might be an English teacher as well as a basketball coach.

There are many types of information that you can define as needed, such as user defined dates, category codes, and eligibility codes. You can use this information for reporting purposes or for any other business requirement.

Profile data is any auxiliary information that you want to maintain, such as the person you contact in emergency situations. This information is not required by the system.

If your company has international employees, you can record information required by other countries, including alien registration number, country code, language code, and Canadian employment equity information.

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

- Make changes, corrections, or updates that will take effect either immediately or on a future date
- Review this information as necessary
- Recalculate compa-ratio if any of the rules for calculating compa-ratio, or any of the employee components used in the calculation, change
- Terminate employment
- Reactivate employment

Several types of reports are available to review information, including:

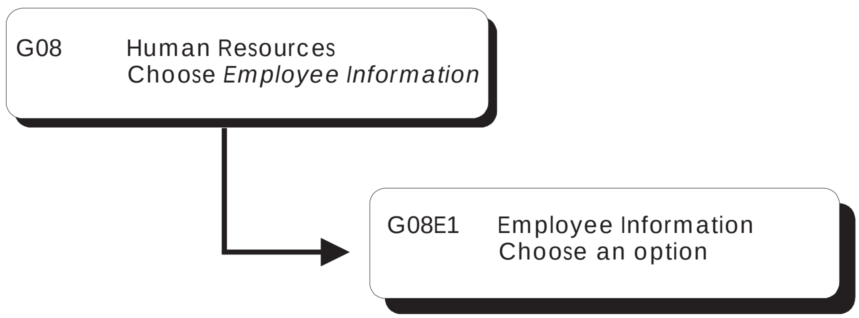
- Employee master reports
- Profile data reports
- Equal Employment Opportunity Commission (EEOC) reports

You can also print Cheshire labels.

Processing employee information includes the following tasks:

- ❑ Entering employee information
- ❑ Working with employee information
- ❑ Working with profile data
- ❑ Terminating an employee
- ❑ Rehiring an employee
- ❑ Working with Canadian Federal Employment Equity
- ❑ Running employee reports

Enter Employee Information



Entering Employee Information

Before your employees can be linked to any other part of the Human Resources system, they must have a personnel record in the Employee Master table (F060116). This table contains personal, company, job, pay, tax, benefits, and EEO information.

You can also enter multiple job information in the Employee Multiple Job table (F060118) for employees who hold more than one job or position, such as an English teacher who is also a basketball coach.

Pay and tax information defines specific pay basis and taxation data. You can also specify the annual salary and age on which an employee's life insurance premium is based.

Employee information also can consist of user defined dates, category codes, and eligibility codes. You can use this information for reporting purposes or for any other business requirement.

If your company has international employees, you can record information required by other countries, including alien registration number, country code, language code, and Canadian employment equity information.

Entering employee information consists of the following tasks:

- ❑ Entering employee master information
- ❑ Entering employee multiple job information

- ❑ Entering pay and tax information
- ❑ Entering additional employee information
- ❑ Entering international employee information

Entering Employee Master Information

Before your employees can be linked to any other part of the Human Resources system, they must have a personnel record in the Employee Master table (F060116). This table contains personal, company, job, pay, tax, benefits, and EEO information.

Entering employee master information consists of the following tasks:

- Entering basic employee information
- Entering Address Book information
- Entering history and turnover information
- Defining government information
- Defining additional payroll-specific employee information
- Entering additional employee benefit information

Before You Begin

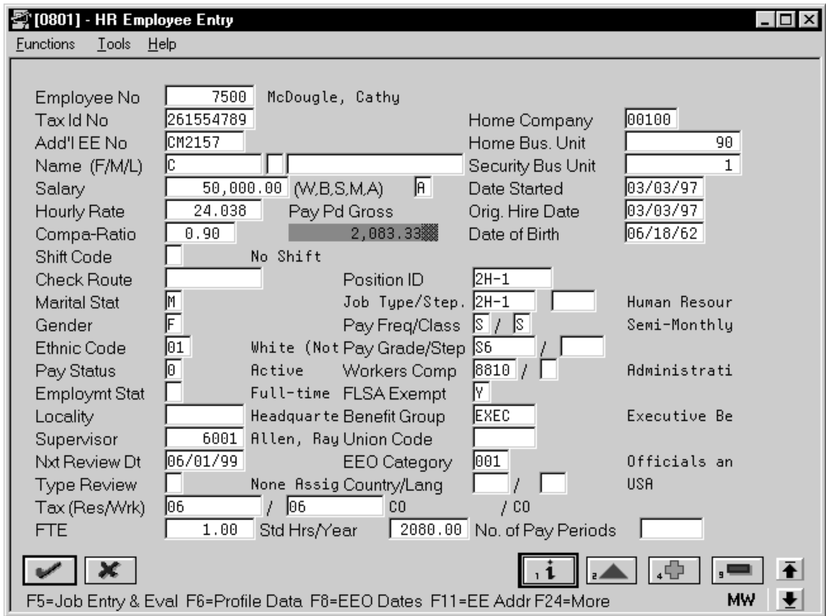
- ❑ You can set up a procesing option to automatically access a form where you can enter veteran information and user defined dates when you enter employee master information.
- ❑ You should review the constants settings before you enter employee information. Many of the entries you make are controlled by how you have set up the constants information. For example, rate entries can be edited for being outside the pay grade ranges. Review the constants settings before entering employee data.
- ❑ To bring in values from the Job Information table (F08001), review the processing options in HR Employee Entry before entering employee information.

See Also

- *Defining Jobs*
- *System Setup*
- *Setting Up the Pay Grade/Step table*

▶ To enter basic employee infomation

On HR Employee Entry



1. Complete the following field to assign a specific employee number:
   - Employee Number

   If left blank, the system automatically assigns the next available employee number.

2. Complete the following fields to enter employee identification information:
   - Tax ID Number
   - Home Company
   - Home Business Unit
   - Name
   - Security Business Unit
   - Date Started
   - Original Hire Date
   - Marital Status

- Gender
- Ethnic Code
- Pay Status
- Employee Status

3. Complete the following optional fields to include additional employee identification information:
   - Additional Employee Number
   - Date of Birth
4. Complete the following required fields for companies outside the United States:
   - Country
   - Language
5. Complete the following fields to identify job-related information:
   - Position ID
   - Job Type
   - Job Step
   - Locality
   - Supervisor
   - Full Time Equivalents
   - Standard Hours/Year
   - Number of Pay Periods

   When you enter a job type and job step (if applicable) the system automatically links the following information to the employee from the Job Master table:

   - Pay Frequency
   - Pay Class
   - Pay Grade
   - Pay Grade Step
   - Workers Compensation
   - FLSA Exempt
   - Benefit Group
   - Union Code
   - EEO Category

6. Complete one of the following fields to enter pay rate information:
   - Salary/Salary Frequency
   - Hourly rate
7. Complete the following fields to enter payroll-specific information:
   - Shift Code
   - Check Route
   - Tax (Residence)
   - Tax (Work)
8. Complete the following fields to identify the employee's benefits:
   - Benefit Group

Field	**Explanation**
Employee Number	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 9- to 8- digit "other" (alternate, old, third employee) number preceded by a slash (/).
Employee Tax ID	The tax ID (Social Security 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 (Social Security numbers). If you add an employee for a non-US or non-Canadian company, you can leave this field blank. The system automatically brings the employee number into the field. If your default company is non-Canadian, non-United States, and the international code is set to Y, you can enter a 16-character identification in the tax ID field.
Company – Home	The number of the company in which the employee generally resides.
Home Business Unit	The number of the business unit in which the employee generally resides.

Field	Explanation
Name – First	The individual's first name. When adding people 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 the Address Book Window. For names already in the Address Book, it is used to access the individual's first initial, used on various government reports. NOTE: To change a name, you must use the Address Book window.
Marital Status – Tax	A user defined code (system 06, type MS) that specifies the employees' 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.
Initial – Middle Name (Govt Rpts)	The first letter of the individual's middle name. This is primarily used to facilitate certain statutory reporting requirements.
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 for the Address Book Window.
Business Unit	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. The Business Unit field is alphanumeric. 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 A/P and A/R by business units, to track equipment by responsible department. Business unit security can prevent you from locating business units for which you have no authority. NOTE: The system uses this value for Journal Entries if a value is not entered in the AAI table.
Ethnic Code	A user defined code (system 06, type M) designating minority classifications according to EEOC standards. The predefined codes provided by J.D. Edwards are hard coded and are used by the system to generate EEO reports. Do not change these values. You can add codes if needed.

Field	Explanation
Pay Status	The code used to indicate whether an employee's pay status is active or inactive. Codes for active pay status employees are numeric, and codes for inactive pay status employees are alphabetic. The system omits all employees with alphabetic pay status codes from the payroll run. See also Employment Status (EST) and Change Reason (TRS).
Additional Employee Number	An alternate employee number, typically the number from an old payroll system from which a conversion is being performed. When you search using this number, preface the number with a slash (/).
Date – Birth	The employee's date of birth.
Country Code	A user defined code (system 06, type CN) that determines the mode in which the payroll system runs. Valid codes are: blank US payroll CA Canadian payroll
Flag – Language Preference	A flag to identify the language preference of the employee. Codes are: E English F French
Locality	A code used for comparison purposes to define the different salary localities within an organization. For example, employees on the East Coast might be paid more than employees in the Midwest. You can define the codes using user defined code system 06, type SL. • In the header section, you can use this field to limit the information that displays on the field to pay grades in a specific locality. If you leave this field blank, all pay grades display regardless of locality. • In the detail section, this field shows the salary locality for a particular pay grade.
Full Time Equivalents	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>Standard Hours per Year</td><td>The number of work hours in the year. This number is used to compute hourly rate when the annual salary is known or vice versa.

The system uses the standard number of hours for calculating the salary or hourly rate per pay period in the following order:
The hours defined at the employee level (the Standard Hours/Year field)
The standard hours in the Payroll company constants for the employee's company
The payroll company constants for the default company (company 00000)
The system default value of 2080 standard hours per year
See Program Notes for information about the Pay Grade Step Table.</td></tr>
<tr><td>Position ID</td><td>Used for budgetary (position) control purposes. The system will not create a position based on a value placed in this field. The position must already exist in the Position Master Information table (F08101).</td></tr>
<tr><td>Job Type</td><td>A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications.

A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications.</td></tr>
<tr><td>Job Type/Step</td><td>A user defined code (system 06, type GS) that designates a specific step, grade, or salary level within a particular job type. The system uses this field in conjunction with job type to determine pay rates by job.</td></tr>
<tr><td>Pay Frequency</td><td>A user defined code (system 06, type 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 to calculate the amount per pay period.</td></tr>
</table>

Field	Explanation
Pay Class (H/S/P)	The code that indicates how an employee is paid. Valid codes are: H Hourly S Salaried P Piecework H Hourly S Salaried
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated. Pay grades are set up using Pay Grades by Class (P082001).
Pay Grade Step	This field identifies the pay grade step associated with a specific pay grade.
Job Category (EEO)	A user defined code (system 06, type J) that specifies classifications established by the Equal Employment Opportunity Commission (EEOC), a Federal agency, for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards and Company. You can add codes if needed.
Union Code	A user defined code (system 06, type UN) that represents the union or plan in which the employee or group of employees work or participate.
Salary	The employee's annual salary for all payroll entries manually entered or automatically generated for the payroll period from the employee's master record. . . . . *Form-specific information* . . . . This field works in conjunction with the untitled Pay Frequency field to its right (data item #SFQ). • 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. • To calculate European annualized salaries for international employees, enter the annualized salary or pay period amount.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Salary Frequency</td><td>A code which indicates the period upon which the entered salary is based. This field works in conjunction with the Salary field to its left (data item SAL). Valid values are as follows:
W Weekly
B Bi-weekly
S Semi-monthly
M Monthly
Q Quarterly
A Annually</td></tr>
<tr><td>Hourly Rate</td><td>The employee’s hourly rate which is retrieved during time entry. (See also GRT, PWRT, BRT.) If you enter a rate in this field on any other form, that rate overrides 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.
• To calculate European annualized salaries for international employees, enter the annualized salary or pay period amount.</td></tr>
<tr><td>Shift Code</td><td>A user defined code (system 06, type SH) that identifies daily work shifts. You can use a shift code to add or percent or amount to the hourly rate on a timecard.</td></tr>
<tr><td>Check Route</td><td>A user defined code (system 06, type CR) that specifies the check routing or mail stop code. This code can be used 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.</td></tr>
</table>

Field	Explanation
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 tax terminology, this code is synonymous with GEO Code. Refer to Vertex System's "Master GEO Code List" for valid codes for your locations. See also Tax Area (Work), data item TARA.
Tax Area (Work)	A code that identifies a geographical location and the tax authorities therein for the employee's work site. Authorities include both employee and employer statutory requirements. In Vertex payroll tax terminology, this code is synonymous with GEO Code. Refer to Vertex System's "Master GEO Code 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 company providing you have your benefit plans linked to benefit categories which, in turn, are linked to benefit groups.

What You Should Know About

Displayed salaries — The displayed salary can be either the annual or effective salary.

See *Constants Setup*.

See Also

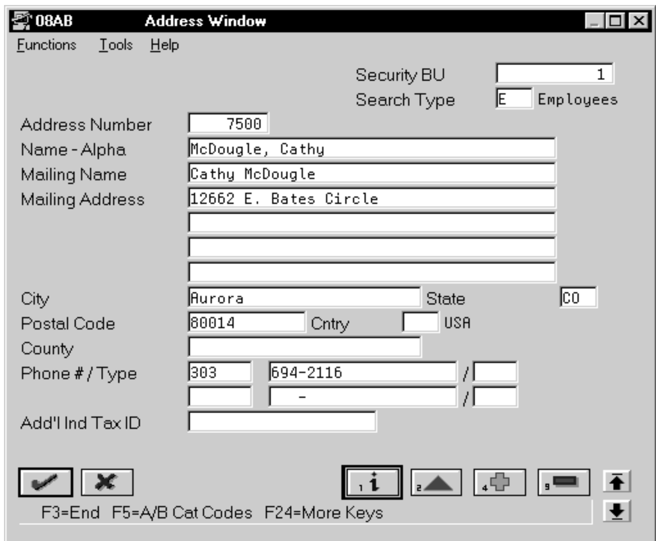
- *Defining Jobs*

▶ To enter Address Book information

On HR Employee Entry

1. Complete the steps for entering employee information.

   The system displays Address Window.



2. Complete the following fields on Address Window:
   - Address
   - City
   - State
   - Postal Code
   - Country
   - County
   - Phone 1
   - Phone Type
   - Phone 2
   - Phone Type

For year-end reporting purposes, only the mailing name and last three non-blank lines, plus the city, state, and postal code of the mailing address print on a W-2 form. For W-2s provided in magnetic media, only the last two non-blank lines are used.

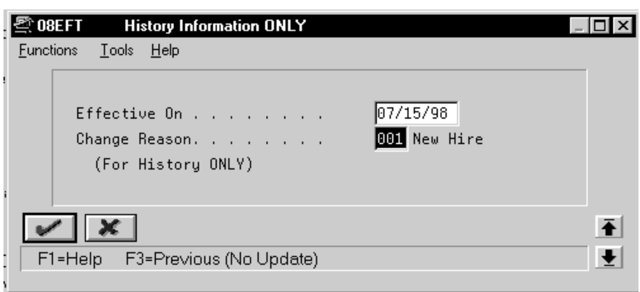
The system updates the Search Type field with an E for employee. It also updates the Employee Y/N field with a Y on Address Book Information. On HR Employee Entry, the system automatically assigns an address (employee) number from the Next Numbers feature for the Employee Master table (F060116). You can use this number or assign a different number.

▶ To enter history and turnover information

On HR Employee Entry

1. Complete the steps for entering employee master and Address Book information.

   The system displays History Information ONLY.



2. On History Information ONLY, complete the following fields:
   - Effective On
   - Change Reason

Field	Explanation
Effective On	The date you want all the changes you make on this form to take effect, or the date that the changes went into effect. If you are entering data and you do not put a date in this field, the current system date is used as the effective date. . . . . *Form-specific information* . . . . The date you want all the changes you make on this form recorded to the HR History table (F08042) and the Employee Turnover Analysis table (F08045) as the effective date. The changes you make to the Employee Master table, however, take effective immediately. If you are entering data and you do not put a date in this field, the Start Date is used as the effective date.
Change Reason	To specify that you want a record written to the Turnover table (F08045), enter a value in this field. This 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: 1. Why an active employee's master table record was changed. 2. The termination reason for an inactive employee. When the HR Monitor reads the information on this form, it writes a turnover record only if a change reason code is entered in this field. If you do not want turnover records written for a change of data, leave this field blank.

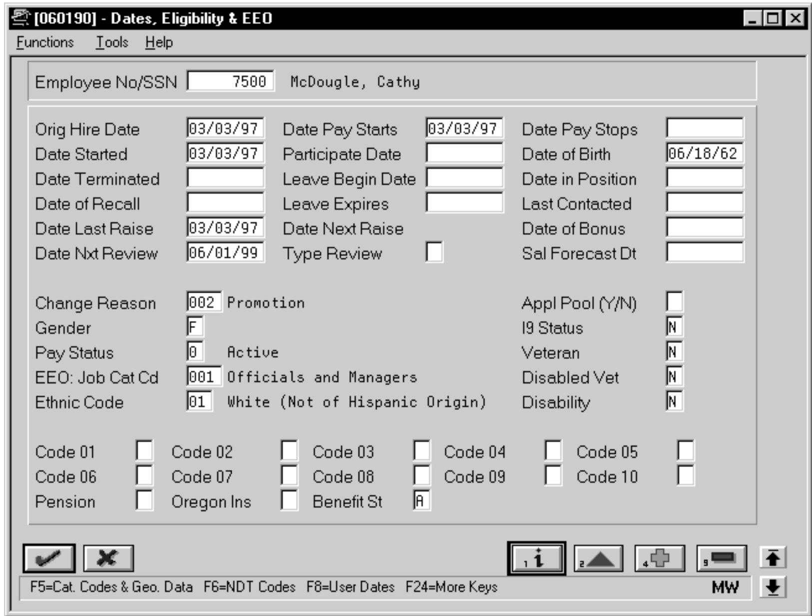
▶ To define government information

On HR Employee Entry

1. Complete the steps for entering employee master, Address Book, and history and turnover information.

   If you have the appropriate processing option set, the system displays the Dates, Eligibility, and EEO form.

   Alternatively, you can also access this form from the menu or by using a function key exit from HR Employee Entry.



2. On Dates, Eligibility, and EEO, complete the following fields:
   - I9 Status
   - Veteran
   - Disabled Veteran
   - Disability

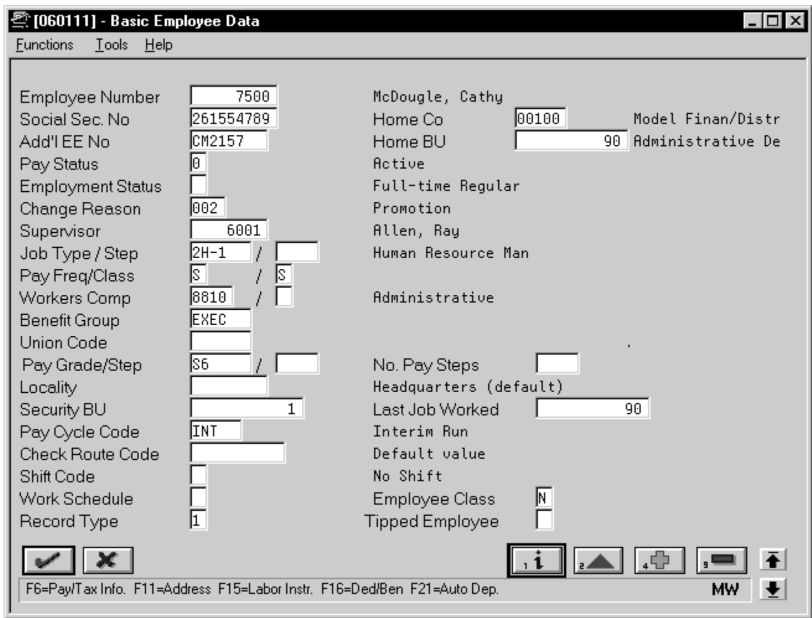
Field	**Explanation**
EEO – I9 Status	A code indicating the method used to verify that this employee is eligible to work in the United States. Valid codes are: Y I9 form on file P Passport used for verification L Driver's license and Social Security card V Visa (worker's permit) B Birth certificate N Waiting for verification
EEO – Veteran	A code indicating 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.

▶ To define additional payroll-specific employee information

On HR Employee Entry

1. Complete the steps for entering employee master, Address Book, and history and turnover information.
2. Access Basic Employee Data.

   Alternatively, you can also access this form from the menu.



3. On Basic Employee Data, complete the following field:
   - Number Pay Steps

Field	Explanation
Number of Pay Grade Steps	Indicates the number of optional pay increments, if any, available within each pay grade. . . . . *Form-specific information* . . . . This field is informational only.

To enter additional employee benefit information

On Dates, Eligibility, and EEO

1. Complete the following field:
   - Benefit Status
2. Access Pay Rate Information.

3. On Pay Rate Information, complete the following fields:
   - Annual Salary 1 (Life Insurance)
   - Annual Salary 2 (Life Insurance)
   - Employee Age (as of Jan. 1st)

Field	Explanation
Benefit Status	A user defined code (system 06, type EA) allowing the system to test an employee's eligibility for benefits and determine enrollment parameters (guidelines) for benefit administration. The code in this field specifies the employee action that the system is to search for as it tests for eligibility. Some of these codes are hard-coded and should not be changed.

Field	Explanation
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 company providing you have your benefit plans linked to benefit categories which, in turn, are linked to benefit groups.
Annual Salary 1 – Life Insurance	You can use this field 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.
Annual Salary 2 – Life Insurance	You can use this field to calculate deductions, benefits, and accruals (DBAs) for a spouse's life insurance premium. Any table method that begins with an F uses this field.
Employee Age	The age of the employee as of a certain date (for instance, August 1st) for a given year. You can manually update this field or update it each year using the future data facility.

What You Should Know About

Employee information	Entries made to employee master or employee multiple job information are immediately available for reporting and payroll processing purposes.
Multiple job information	When a record is added to the Employee Master table (F06011), a record is automatically created in the Employee Multiple Job table (F060118) for the primary job.
Life insurance annual salary	The system uses these fields to calculate deductions, benefits, and accruals (DBAs) for a life insurance premium based on the employee's life insurance salary. Any table method that begins with I (Insurance) uses this field.

Processing Options for Employee Master – HR Initial Setup

```
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, ' ' 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 European Tax Id Number in the
   Address Book window?
      Enter '1' for Yes, ' ' for No.             ____________

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 or Job with those
   values defined in the Business Unit –         ____________
   Job Cross Reference File (F08005). If
```

Employee Information

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'.

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 form, 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, ' ' for No. ____________

11. All new employees will be added to the COBRA Dep/Beneficiary file.
    Enter '1' for Yes, ' ' for No. ____________

12. Enter a '1' to automatically go to EEO Dates & Eligibility on an add. Default of blank will not take you to Dates, Eligibility & EEO. ____________

13. For an Add, enter the default value for the Employee Status field which displays on the Dates, Eligibility & EEO screen. (NOTE: This code is used for Batch Enrollment in Benefits.) ____________

When Deleting An Employee:

----

14. The profile data is to be deleted when an employee is deleted.
    Enter '1' for Yes, ' ' 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.                ____________
```

What You Should Know About Processing Options

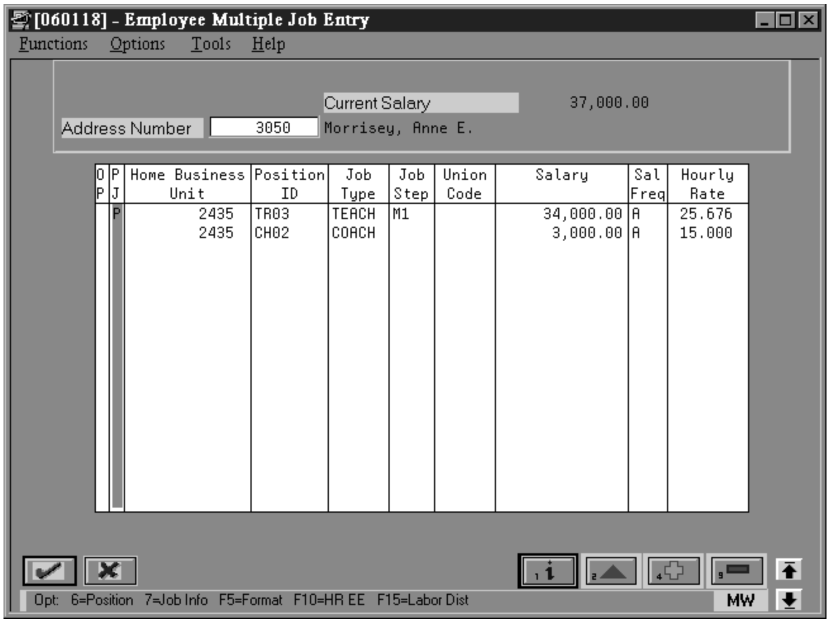
Accessing Dates, Eligibility, and EEO	If you enter a 1, the system automatically displays Dates, Eligibility & EEO on an add.
Redisplaying information	If you enter a 1, the system automatically displays the new information after you enter changes to an employee master record.

Entering Employee Multiple Job Information

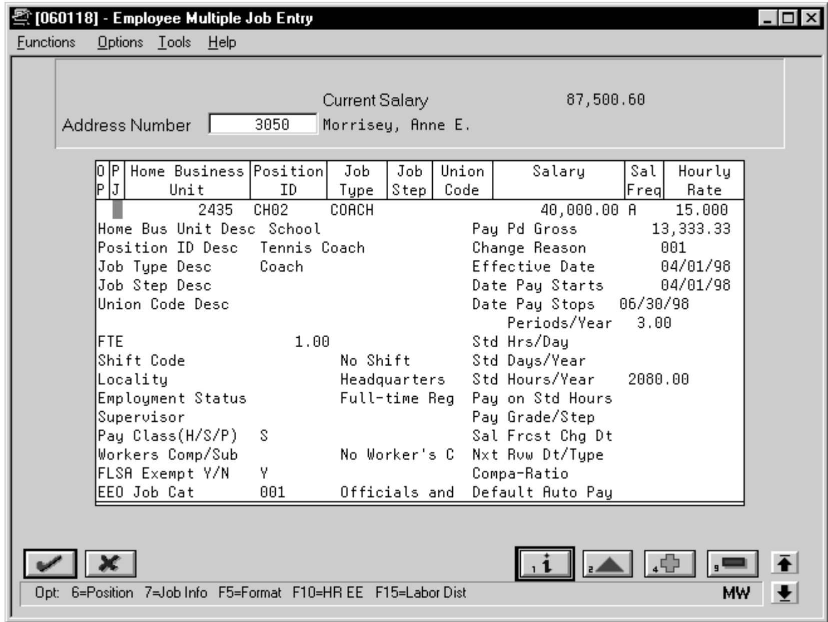
Use Employee Multiple Job Information to enter more than one job or position for an employee. You can also use it to assign an hourly employee an autopay status for more than one job.

▶ To enter employee multiple job information

On Employee Multiple Job Entry



1. Complete the following required fields:
   - Address Number
   - Home Business Unit
2. Complete one of the following fields:
   - Salary
   - Hourly Rate
3. Complete the following optional fields:
   - Position ID
   - Job Type
   - Job Step
   - Union Code
4. Choose More Detail.



5. Complete the following required fields:
   - Change Reason
   - Effective Date
   - Pay Class (H/S/P)
   - FLSA Exempt Y/N
   - EEO Job Category
6. Complete the following optional fields:
   - Periods per Year
   - Full Time Equivalents
   - Standard Hours per Day
   - Standard Days per Year
   - Standard Hours per Year

Field	Explanation
Effective Date	The date you want all the changes you make on this form to take effect, or the date that the changes went into effect. If you are entering data and you do not put a date in this field, the current system date is used as the effective date. . . . . *Form-specific information* . . . . The date you want all the primary job changes you make on this form recorded to the HR History table (F08042) and the Employee Turnover Analysis table (F08045) as the effective date. The changes you make to the Employee Master table, however, take effective immediately. If you are entering data and you do not put a date in this field, the current system date is used as the effective date.
Job Category (EEO)	A user defined code (system 06, type J) that specifies classifications established by the Equal Employment Opportunity Commission (EEOC), a Federal agency, for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards and Company. You can add codes if needed.
Periods per Year	Used to calculate an employee's pay period gross salary. If you leave this field blank, the annual salary is divided by the pay frequency to obtain the pay period gross. For example, an employee is paid over 10 monthly periods. The annual salary divided by 10 becomes the pay period gross.
Standard Hours per Day	The number of hours in a day if 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.
Standard Days per Year	Days per year multiplied by hours per day equals the standard hours per year. When the pay grade step table is used to define employee rates, this value is multiplied by the hourly rate in the calculation of salary amounts.

Field	Explanation
Standard Hours per Year	The number of work hours in the year. This number is used to compute hourly rate when the annual salary is known or vice versa. The system uses the standard number of hours for calculating the salary or hourly rate per pay period in the following order: • The hours defined at the employee level (the Standard Hours/Year field) • The standard hours in the Payroll company constants for the employee's company • The payroll company constants for the default company (company 00000) • The system default value of 2080 standard hours per year See Program Notes for information about the Pay Grade Step Table.

What You Should Know About

Date Pay Stops	For secondary jobs, position control uses this date as the position's through date, which lets the position account for a limited assignment in the calculation of projected year end values. For payroll, when the pay stop date is less than or equal to a pay period end date, the employee is paid for the period. In the next pay cycle, as part of the final update, the Purge Employee Multiple Job File program deletes this record from the Employee Multiple Job Entry table (F060118).
Current salary display	This number is the total of all the salaries displayed on Employee Multiple Job Entry.
Updates to Employee Master information	When you add information using Employee Multiple Job Entry, the information also updates the Employee Master table (F060116).

Processing Options for Employee Multiple Job Entry

```
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
```

```
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, ' ' 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' if you wish to use the
   Business Unit/Job ID X-Reference file
   (F08005).  This will default in the
   Union Code, Workers Comp Code and
   Subclass when adding and/or changing
   the Business Unit or Job.  Enter ' '
   and the Job Information file (F08001)
   will be used.                              ____________

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:

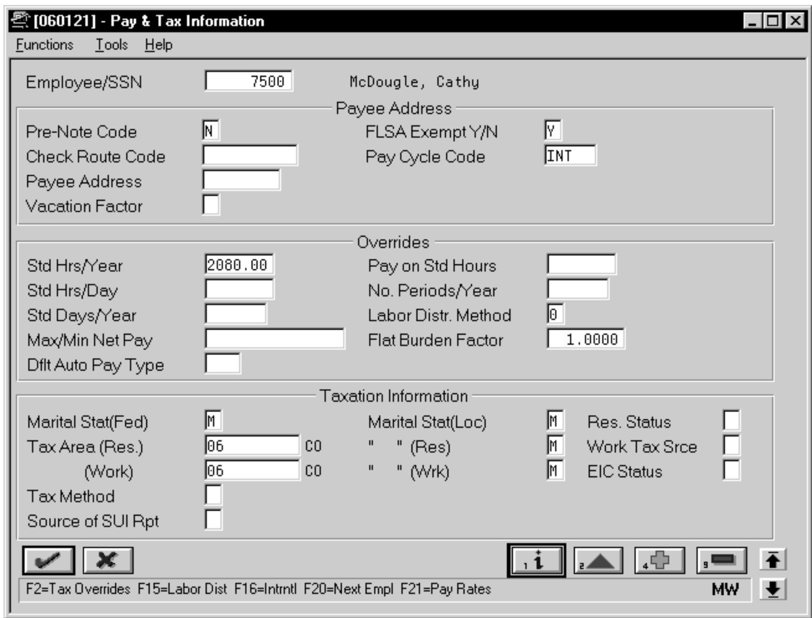
```
------------------------------
7. Enter a '1' to automatically
   redisplay the information.                 ____________
```

Entering Pay and Tax Information

You will use Pay and Tax Information to define specific pay basis and taxation data.

▶ To enter pay and tax information

On Pay and Tax Information



Complete the following fields:

- Standard Hours Per Year
- Standard Hours Per Day
- Number of Periods Per Year
- Standard Days Per Year

Processing Options for Pay and Tax Information

```
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.
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.
```

Entering Additional Employee Information

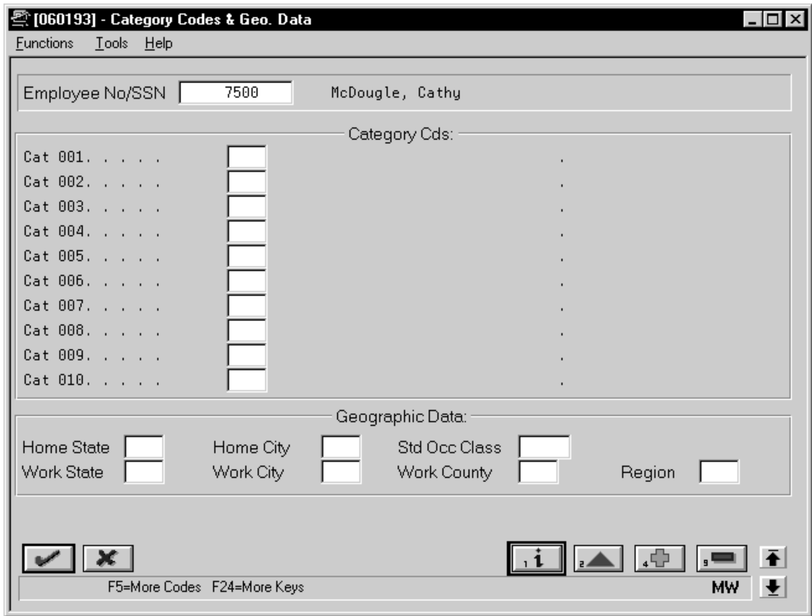
Employee information also can consist of user defined dates, category codes, and eligibility codes. You can use this information for reporting purposes or for any other business requirement.

Complete the following tasks:

- Define category codes
- Define eligibility codes
- Define user defined dates

To define category codes

On Category Codes and Geographic Data



1. Complete the following fields as appropriate:
   - Category Codes 1–10
2. Select More Codes.
3. Complete the following fields as appropriate:
   - Category Codes 11-20

Field	Explanation
Category Codes 1–20	This is a Payroll system category code. You can define the use and description of this 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 Human Resources: Coordinate the use of this category code with your payroll department.

What You Should Know About

Category codes	Category codes 1–4 are shared with time entry processing. Category codes 1–10 are shared with the Job Master table (F08001).

▶ To define eligibility codes

On Dates, Eligibility, and EEO

Complete the following fields:

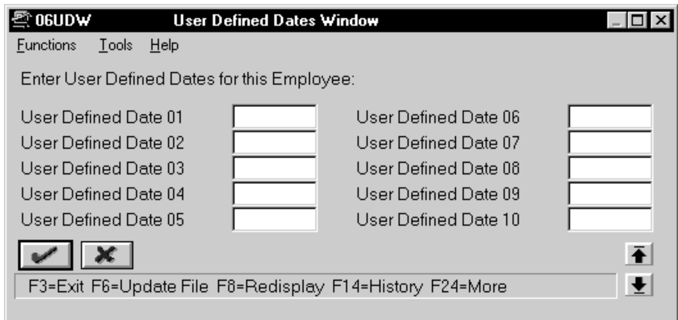
- Eligibility Codes 01–10
- Employee Benefit Status

Field	Explanation
Eligibility Codes 1–10	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 (Y/N) Overtime Call Up (Y/N) Profit Sharing (Y/N) Political Action Committee (Y/N) Coffee Fund (Y/N) U.S. Citizen (Y/N)
Benefit Status	A user defined code (system 06, type EA) allowing the system to test an employee's eligibility for benefits and determine enrollment parameters (guidelines) for benefit administration. The code in this field specifies the employee action that the system is to search for as it tests for eligibility. Some of these codes are hard-coded and should not be changed.

▶ To define user defined dates

On Dates, Eligibility, and EEO

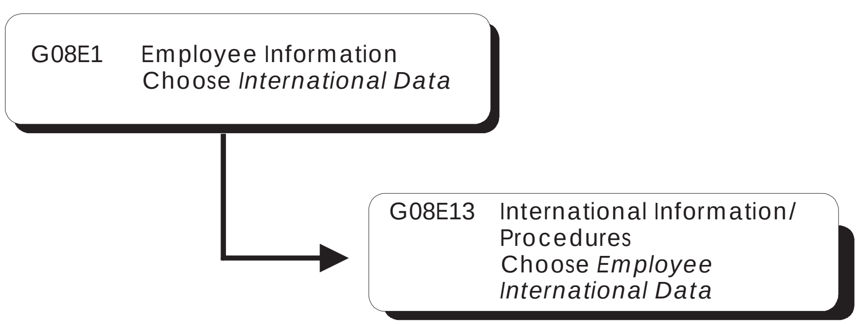
1. Locate the employee.
2. Access User Defined Dates Window.



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



If your company has international employees, you can use Employee International Data to record information, such as maiden name, alien registration number, and country code. Also, if you have Canadian employees, additional fields are available where you can record information required for Canadian employment equity.

Complete the following tasks:

- Enter Canadian employee information
- Enter Canadian employment equity data
- Enter international personal information

Before You Begin

❑ For Canadian companies, verify that the employee's home company is Canadian.

❑ Verify that the International Flag is set to Y (Yes) for the default company 00000 in the payroll company constants. This is necessary in order to track data for Canadian employment equity.

▶ To enter Canadian employee information

On Employee International Data

Complete the following fields for Canadian companies:

- Maiden Name
- Language
- Medical Plan ID

Field	Explanation
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.
Language	A user defined code (system 01/type LP) that specifies a language to use in forms and printed reports. If you leave the Language field blank, the system uses the language you specify in your user profile. If you do not specify a language in your user profile, the system uses the default language for the system. Before any translations can appear, a language code must exist at either the system level or in your user profile.
Medical Plan ID	A number to identify secondary employee numbers such as the Canadian Hospital Insurance ID.

▶ To enter Canadian employment equity data

On Employee International Data

Complete the following fields:

- National Occupation Classification
- Census Metropolitan Area
- Sector Industrial Code

Field	Explanation
National Occupational Classification	A code that identifies the National Occupational Classification (NOC) for a job or employee. NOC codes are defined by the Canadian government and can be found in the Canadian Employment Equity documentation.
Census Metropolitan Area	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.

Field	Explanation
Sector Industrial Code	A code identifying 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	Equity class aboriginals are stored in the Ethnic Code UDC table 06/M.

▶ To enter international personal information

On Employee International Data

1. Complete the following required fields for international companies (not including Canada):
   - Maiden Name
   - Language
2. Complete the following optional fields:
   - Country Code
   - Currency Code
   - Alien Registration Number
   - Extended Alpha Name
   - Preferred Name
   - Additional Name
   - Salutation
   - Suffix

Field	Explanation
Currency Code – From	A code that indicates the currency of a customer's or a supplier's transactions.
Alien Registration Number	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 green card, you could record that number in this field.

Field	Explanation
Extended Alpha Name	A 50-character alphabetical field you can use to enter an extended name for an employee. This field can be used on certain designated reports in place of the normal 40-character name.
Preferred Name	The preferred name of the employee. For instance, an employee might have the legal name of “Catherine” but might be known as “Cathy.”
Additional Name	The additional name field can be used to store middle name(s), a previous married name, or an alias associated with the employee.
Suffix	The suffix code is used to identify the credentials for a given employee. Some examples are Phd, MD, CPA, and so on.
Salutation	The salutation code is used to identify the proper title for a given employee. Some examples are Mr., Ms., Dr., and so on.

Exercises

See the exercises for this chapter.

Work with Employee Information

Working with Employee Information

After you enter employee information, you can change, correct, or update the information to take effect either immediately or on a future date.

You can change the information in the Employee Master table (F060116) whenever employee master information changes. For example, when an employee changes their marital tax status or job status (including salary, job type, and pay grade), you can update the information.

You correct employee master information if an error is made when entering information in the Employee Master table.

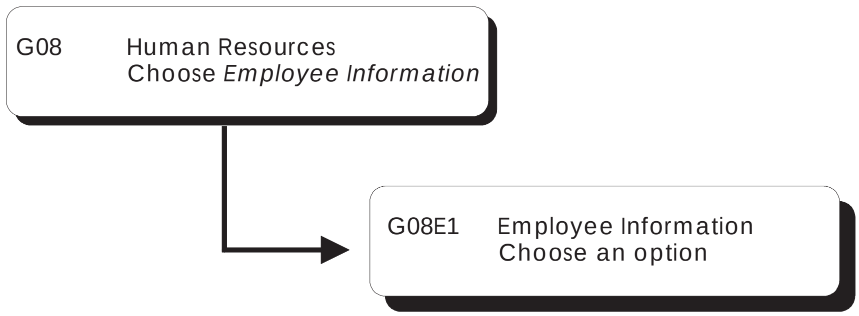
You can change the leave days if an employee is scheduled for a leave of absence and the dates change. You can also change the date that the leave of absence expires for an employee currently on a leave of absence.

You can also recalculate compa-ratio if any of the rules for calculating compa-ratio, or any of the employee components used in the calculation, change. You can recalculate compa-ratio for one employee or all employees.

Working with employee information consists of the following tasks:

- ❑ Changing employee master information
- ❑ Correcting employee master information
- ❑ Updating employee compa-ratio
- ❑ Purging employee multiple job records
- ❑ Entering leave of absence information

Changing Employee Master Information



You can change the information in the Employee Master table (F060116) whenever employee master information changes, such as a change in marital tax status or job status (including salary, job type, and pay grade).

If you change any information for which you are tracking history, the system updates the information in the Employee Master History Inquiry table (F08042).

Changing employee master information consists of the following tasks:

- ❑ Changing current employee master information
- ❑ Changing future information using the payroll cycle
- ❑ Changing future information without using the payroll cycle
- ❑ Changing information for a group of employees

See Also

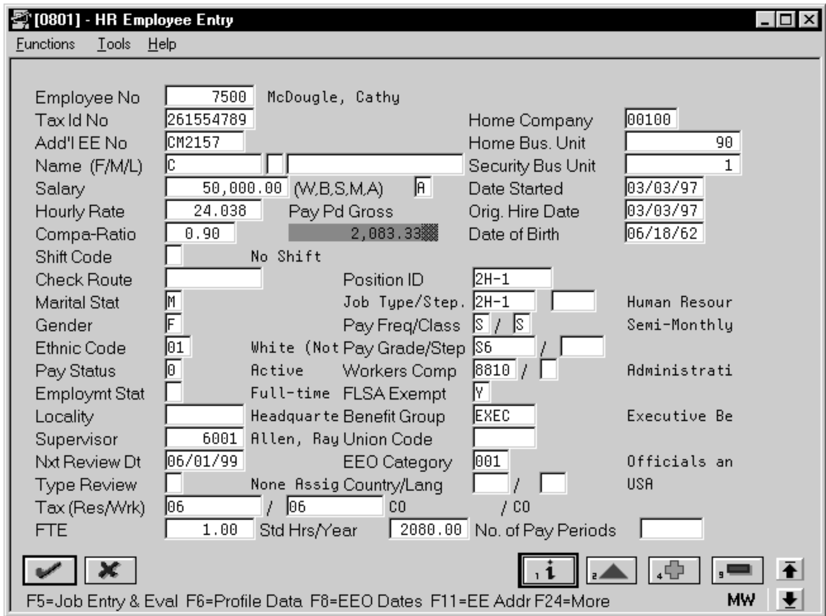
- *Working with History Records*
- *Wage and Salary Administration*

Changing Current Employee Master Information

You can change the information in the Employee Master table (F060116) whenever employee master information changes, such as a change in marital tax status or job status (including salary, job type, and pay grade).

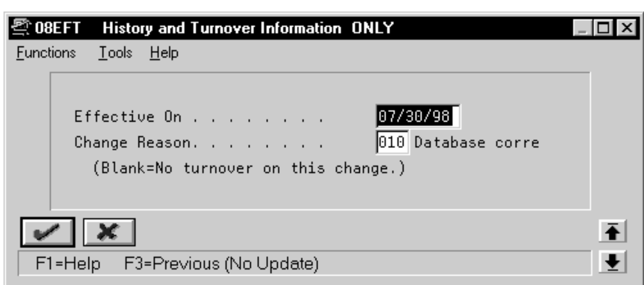
To change current employee master information

On HR Employee Entry



1. Locate the employee
2. Change the information as appropriate.

   If you change any information, the History and Turnover Information window displays.



3. Complete the following fields:
   - Effective Date
   - Change Reason

What You Should Know About

Employee name changes

To change the name displayed on the employee master form, you must access the Address Window from the HR Employee Entry form.

Pay grade step

When the constants are set to automatically bring in information from the pay grade step table, any change you make to the pay grade step will also change the information in the following fields:

- Rate
- Hours Per Day
- Hours Per Year
- Days Per Year

Pay rate table

If the pay rate table is the source of the rate, the salary or hourly field should be blank if you make a change to any of the following fields:

- Home Business Unit
- Job Type
- Job Step
- Union

Adding a pay amount from the Pay Grade Step table

To calculate a value for the employee's pay from the Pay Grade Step table, leave the following fields blank:

- Salary
- Hourly Rate
- Standard Hours/Year

The system retrieves these values from the Pay Grade/Step table and use them to calculate an hourly rate.

For hourly employees, salary displays on the Employee Multiple Job form.

Adding a salary amount using the Pay Grade Step table

To let the system override the Pay Grade/Step table in calculating standard hours per year, replace the following field:

- Standard Hours/Year

Enter a value for the following field:

- Salary

The system uses the standard hours per year you entered instead of the value from the Pay Grade/Step table.

Adding calculated standard hours per year

To let the system calculate standard hours per year without using the Pay Grade/Step table, enter values in the following fields:

- Salary
- Standard Hours per Year

To calculate standard hours per year based on the full time equivalent (FTE)

To calculate the standard hours per year using the FTE and the salary, leave the following fields blank:

- Salary
- Standard Hours per Year

The system calculates salary as follows:

FTE x Pay Grade Step

The system retrieves the value for Standard Hours per Year from the Pay Grade/Step table.

Overriding job ID information

If you enter a 3 or 4, when you change the job ID, the information linked to the new job ID overrides the existing information. The exception to this is for blank values for pay class and frequency. Blank values will not override the employee information.

See *Processing Options for HR Employee Entry (P0801)*

Using the Business Unit – Job Cross Reference table

If you choose the Edit/Default processing option to use default information from the Job Information table, you use this processing option to select other default values to override with values in the Business Unit - Job Cross Reference table (F08005).

See *Processing Options for HR Employee Entry (P0801)*

Changing Future Information Using the Payroll Cycle

G08E1 Employee Information
Enter *27*

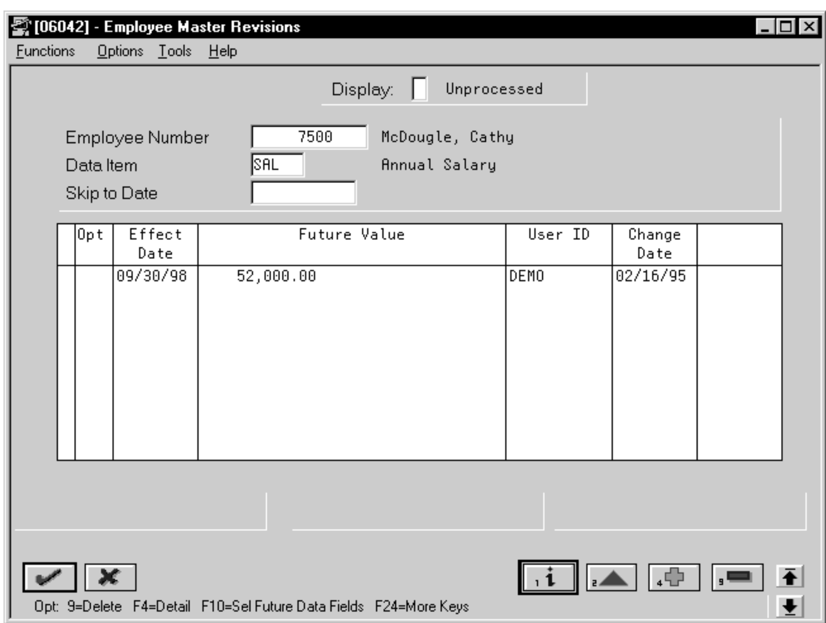
G08E3 Employee Advanced/ Technical Operations
Choose *Employee Master Revisions*

Use Employee Master Revisions to make future changes to the Employee Master table in conjunction with the payroll cycle. When you assign an effective date within a future payroll cycle, the system applies the changes to the employee master during that payroll final update, but does not use it during the prepayroll cycle.

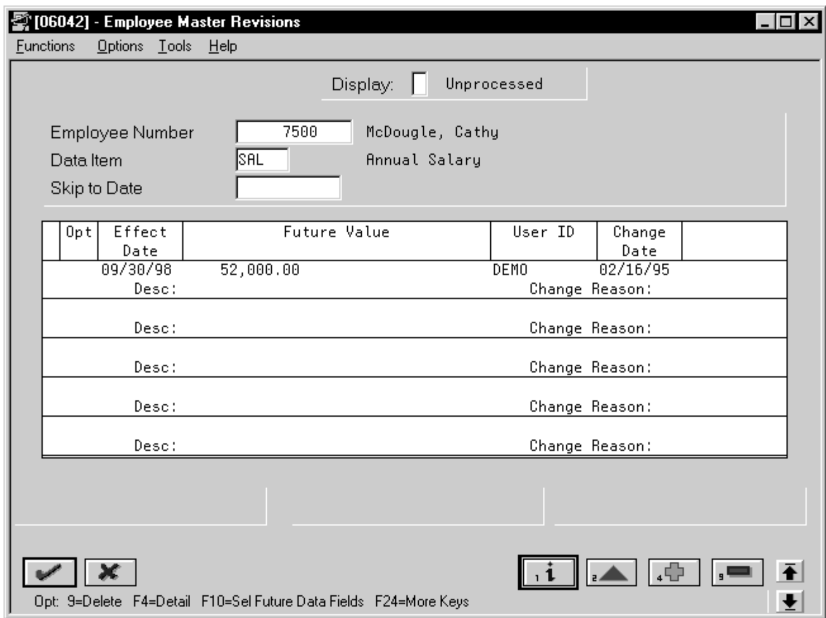
You use this method only if you are using the J.D. Edwards Payroll system.

▶ To change future information using the payroll cycle

On Employee Master Revisions



1. Complete the following fields to create a record of future changes for an individual employee:
   - Data Item
   - Effective Date
   - Future Value
2. Choose More Detail.



3. Complete the following field:
   - Change Reason

Field	Explanation
Date – Effective On	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. If you execute the update from the menu, enter a control date so the program can determine which revisions to update. Use the Skip to Date field in the header part of the Enter Future Data Revisions form to specify the first date to display in the detail area.

Field	Explanation
Future Value	A code that indicates selection or a future set of information. Based upon the program being called, the value in this field can either represent: • Future Data Revisions - An employee master value to be updated in the future based upon the effective date of the revision. • Year End Processing - A selection value that specifies the records to be processed during the workfile build. • History Payroll Reg. - A selection value that specifies the paycheck history record to be processed during the workfile build. . . . . *Form-specific information* . . . . The new information you want in the field. You can enter more than one change for the same field if you use different effective dates.

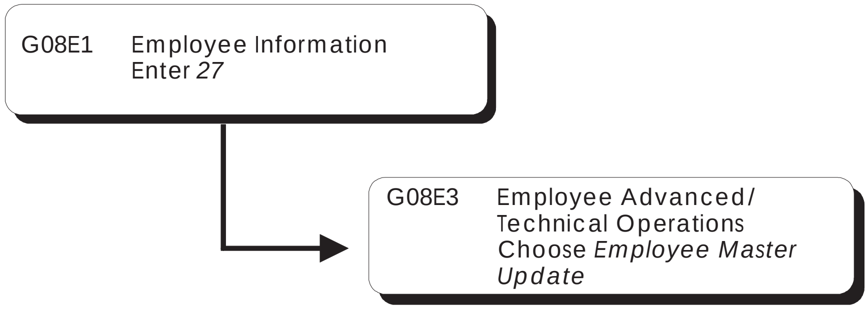
What You Should Know About

Effective date

Because future data revisions are applied during payroll final update, Effective Date refers to the date that the system applies the change to the employee master. Therefore, you should specify an effective date before the actual payroll date on which you want the changes to take effect.

For example, your company will run a payroll on July 16 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, you should enter an effective date for the changes that are between July 1 and July 15.

Changing Future Information Without Using the Payroll Cycle



Use Employee Master Update to make future changes to employee master information without running a payroll.

This DREAM Writer program updates the Employee Master table (F060116) with the future changes to the employee's primary record that you specify. The changes take effect as of the effective date you enter in the processing options. Employee Master Update does not print a report. The program updates the Employee Multiple Job and the Employee Multiple Job History tables.

What You Should Know About

Terminating an employee	J.D. Edwards does not recommend using this DREAM Writer to terminate employees. If you terminate an employee using this program, the search type does not change from E to X. Also, the employee information is not automatically moved to the applicant pool.
Budget edits	This program does not edit to verify that future changes do not exceed the budget.

Processing Options for Update Future Data to Employee Master

```
Enter the Pay Period Ending Date that
you would like the Future Values Records
(in F06042) to be "tagged" with. . . . :          ____________

(Todays Date will be used if left blank)
```

Changing Information for a Group of Employees

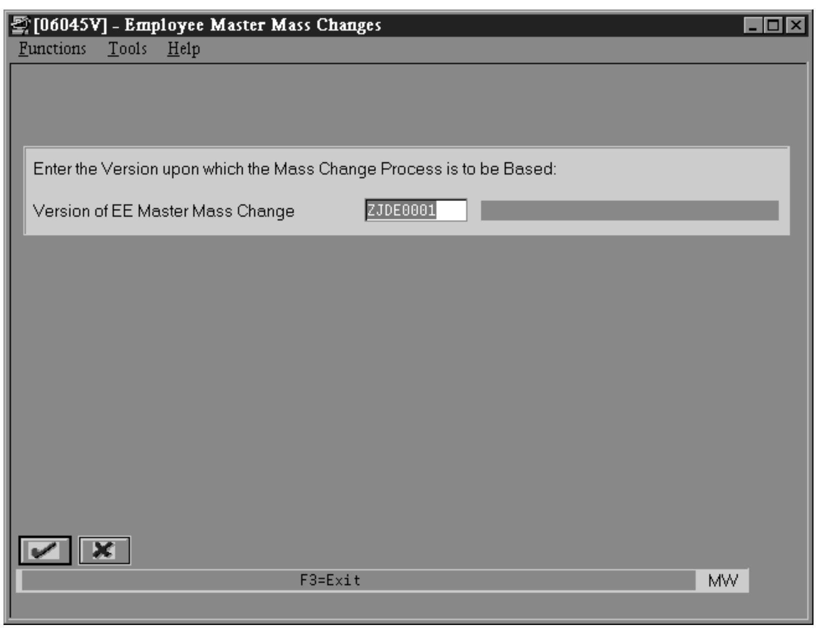
G08E1 Employee Information
Enter *27*

G08E3 Employee Advanced/
Technical Operations
Choose *Employee Master Mass Changes*

Use Employee Master Mass Changes to change employee master information for a large group of your employees immediately or during the payroll final update when you run your next payroll. This program uses the J.D. Edwards Payroll system.

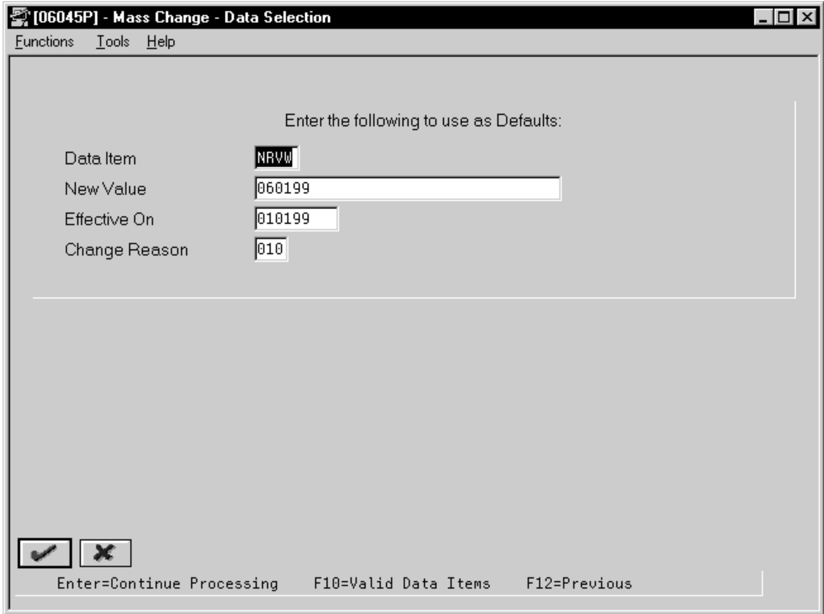
▶ To change information for a group of employees

On Employee Master Mass Changes



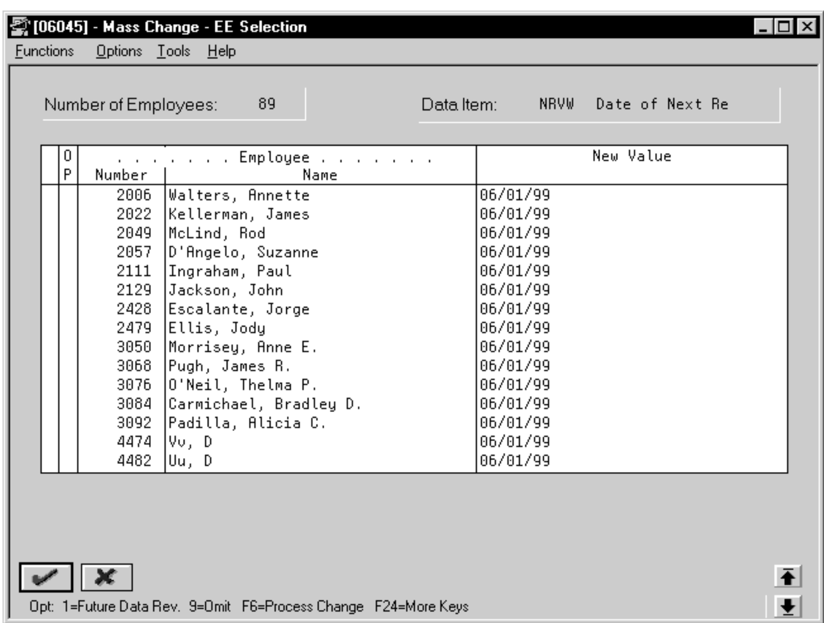
1. Enter the version number of the Employee Master Update DREAM Writer.

   The system displays Mass Change – Data Selection.

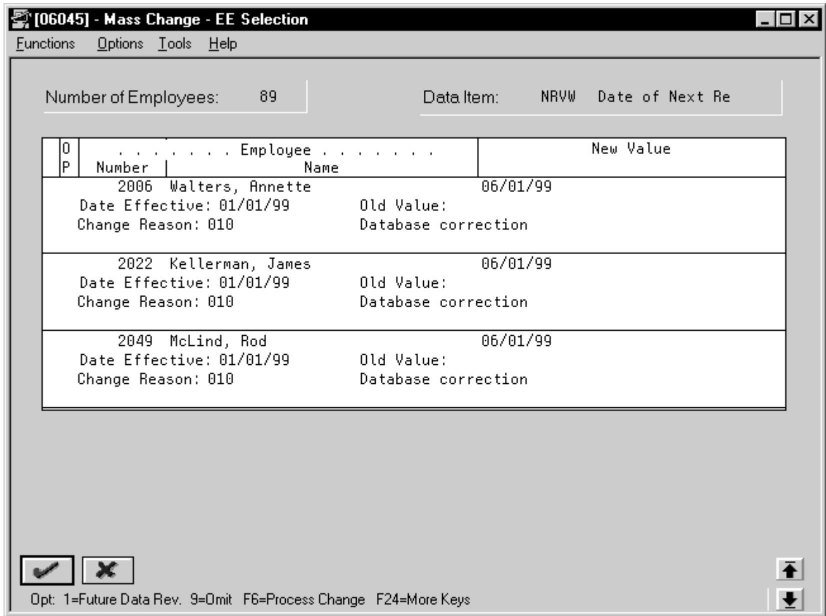


2. On Mass Change – Data Selection, complete the following fields:
   - Data Item
   - New Value
   - Effective On
   - Change Reason

   The system displays Mass Change – Employee Selection.

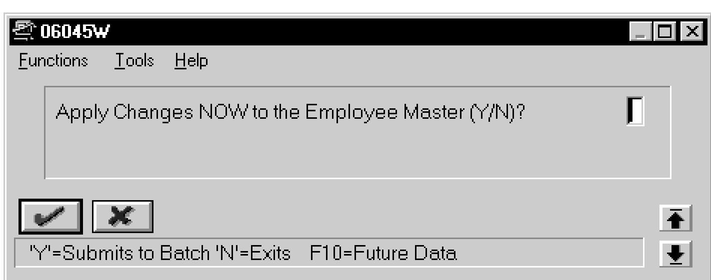


3. On Mass Change – Employee Selection, use the Omit option to eliminate selected employees from the change procedure.
4. Choose More Detail.



5. If applicable, complete the following fields to override the global effective date and change the reason for any of the employees who are displayed on this form:
   - Date Effective
   - Change Reason
6. Press the Process Change function key twice.

   The system prompts you to indicate whether you want the changes to occur immediately.



7. Complete the following field:
   - Apply Changes NOW to the Employee Master (Y/N)

One of the following occurs:

- If you choose to apply changes immediately, the system automatically sends the Apply Data Revisions to Employee Master program to batch.
  - If the change effective date is prior to or equal to today's date, the changes are applied to the Employee Master table.
  - If the change effective date is after today's date, the system creates future data records, which you can view using Future Data Revisions. The future data records are then processed on the first payroll with a pay period ending date greater than the effective date.

If you do not apply changes immediately, no changes take place and you are returned to the menu. The system adds the information to the Future Data Revisions record for processing on the specified date for the change.

Field	Explanation
Data Item	The RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2–byte table prefix, the RPG data name will not exceed 6 bytes. Within the Data Dictionary, all data items are referenced by this 4–byte data name. As they are used in database tables, a 2–character prefix is added to create unique data names in each table specification (DDS). If you are adding an error message, this field must be left blank. The system assigns the error message number using next numbers. The name appears on a successful add. You should assign error message numbers greater than 5000. Special characters are not allowed as part of the data item name, with the exception of #, @, $. You can create protected data names by using $xxx and @xxx, where you define xxx. . . . . *Form-specific information* . . . . The technical name of the field to which the change will apply. You must first specify the fields allowed to have changes using the Specify Future Data Fields form.

Employee Information

What You Should Know About

Changing the mass change DREAM Writer	If you want to change the parameters of the DREAM Writer, access the Employee Master Mass Change DREAM writer by pressing the appropriate function keys from the Employee Master Mass Changes form.

Correcting Employee Master Information

You correct employee master information if an error is made when entering information in the Employee Master table (F060116).

When you are tracking employee history, the system creates a history record every time you change employee information. Unless you want to store the errors, you must correct errors made to the history records during these changes.

Correcting employee master information consists of the following tasks:

- ❑ Correcting the employee tax ID number
- ❑ Correcting employee master history information
- ❑ Correcting employee turnover information
- ❑ Correcting employee multiple job history information
- ❑ Correcting employee position activity

See Also

- *Employee History*
- *Position Control*

Exercises

See the exercises for this chapter.

Correcting the Employee Tax ID Number

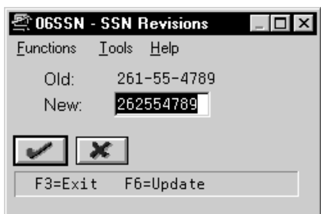
For government reporting purposes, you must correct the tax ID number if an error was made when it was initially entered.

▶ To correct employee 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:
   - New

What You Should Know About

Entering a new tax ID number	If you enter a new tax ID number in the SSN Revisions window, the system changes all payroll history for the employee.

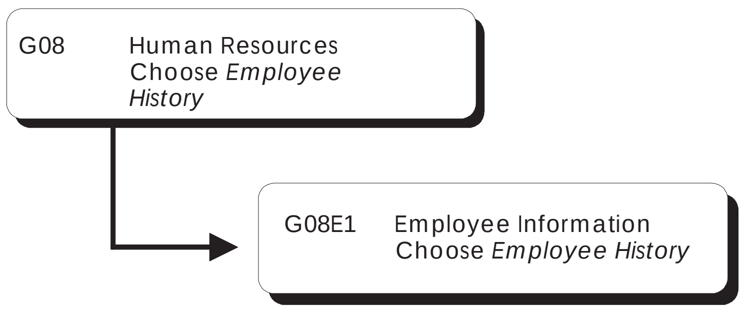
Correcting Employee Master History Information

You must correct any errors made when entering information in the Employee Master table (F060116) to keep an accurate history table. You can delete incorrect employee master information. and correct it. You can also correct employee master history information.

Complete the following tasks:

- Delete employee master information
- Enter correct employee master history information
- Correct employee master history information

▶ To delete employee master information



On Employee History

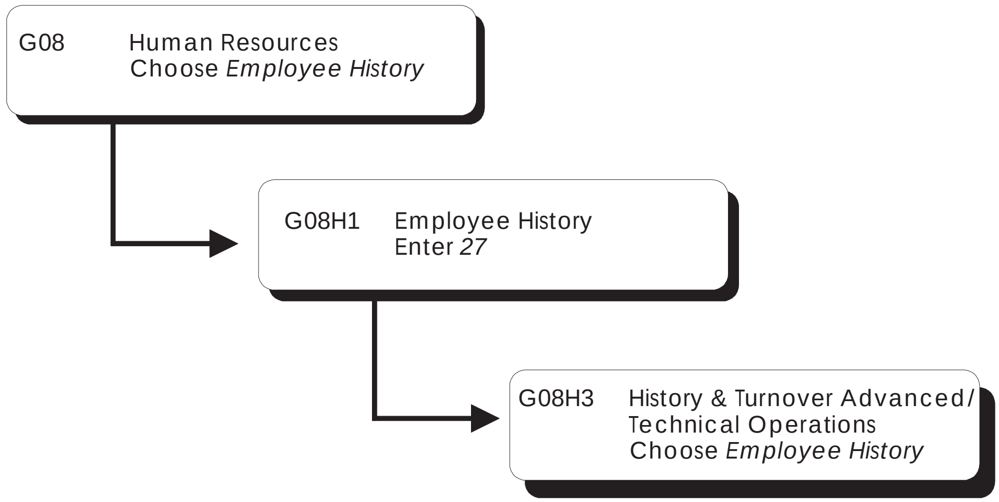
1. Locate the employee
2. Locate the incorrect history record
3. Access the form in which you want to change data

▶ To enter correct employee master history information

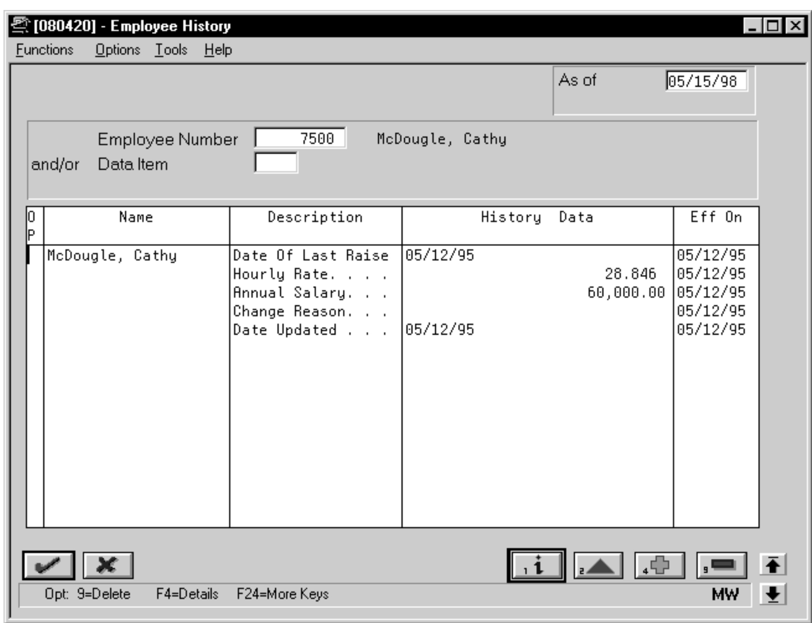
On HR Employee Entry

1. Locate the employee
2. Change the information as needed
3. Enter the appropriate effective date and change reason

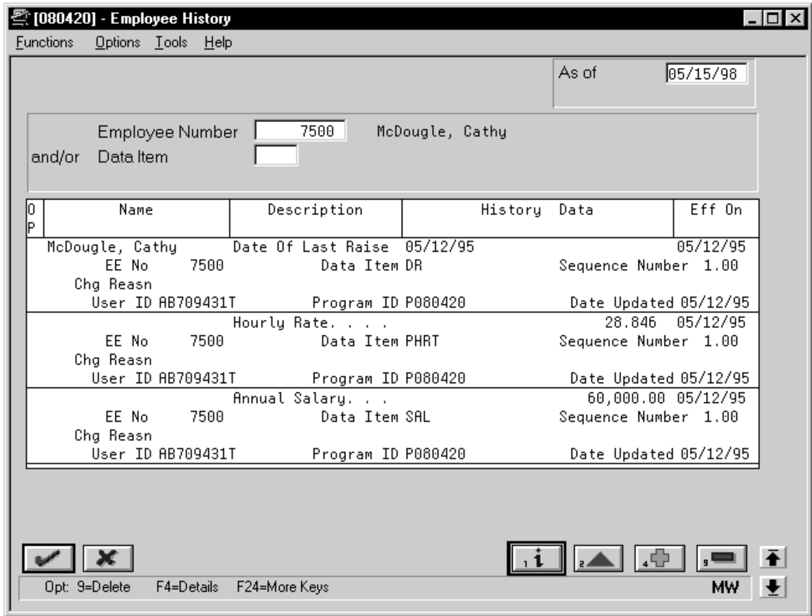
▶ To correct employee master history information



On Employee History



1. Locate the employee or data item for which you want to correct information.
2. Correct the following field:
    - Effective On
3. Choose More Detail.



4. Complete the following field to correct information:
   - Change Reason

Processing Options for Employee History

```
Select Data:
-----------
1.  Enter a '1' to display selected data        ____________
    for tracking with values in history.
    Default of blank will display all
    selected data items.
```

Correcting Employee Turnover Information

G08 Human Resources
Choose *Employee History*

G08H1 Employee History
Enter *27*

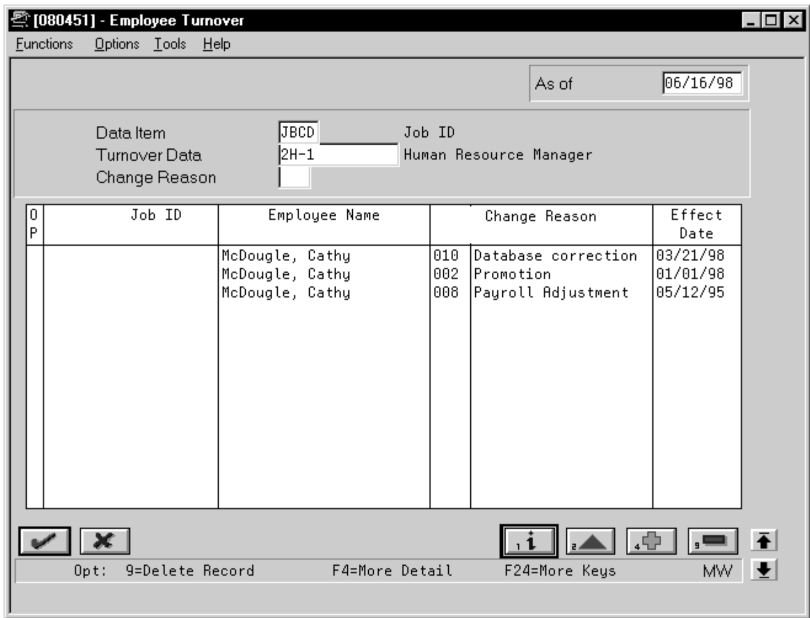
G08H3 History & Turnover Advanced/Technical Operations
Choose *Employee Turnover*

To keep an accurate turnover history table, you must correct any errors made when entering turnover information into the Employee Master Table. You must make corrections to all data items relating to turnover. These are as follows:

- Home company
- Home business unit
- Job code
- Check route code

▶ To correct employee turnover information

On Employee Turnover



1. Locate the data item for which you want to correct or delete information.
2. Correct the following field:
   - Effective Date
3. Use the appropriate option to delete the information
4. Review the information.

Field	Explanation
Turnover Data	The data specific to the type of turnover being tracked. For home business unit, this field would contain an individual business unit name. For home company, it would contain a company name. For jobs, it would contain a job type (data item JBCD) followed by a job step (data item JBST). For check route codes, the field would simply contain the code. . . . . *Form-specific information* . . . . This field is optional. You can use this field to limit the information that displays on the screen. If you do not put a code in this field, all turnover information for the data item displays.

Correcting Employee Multiple Job History Information

G08 Human Resources
Choose *Employee Information*

G08E1 Employee Information
Choose an option

When you are tracking employee history for employees with multiple jobs, changes you make to the Employee Master table create history records when your changes effect the change reason or effective date.

Use Employee Multiple Job Entry to correct any errors made during these changes.

What follows is the flow of information from Employee Multiple Job table to the Employee Master table and the history files:

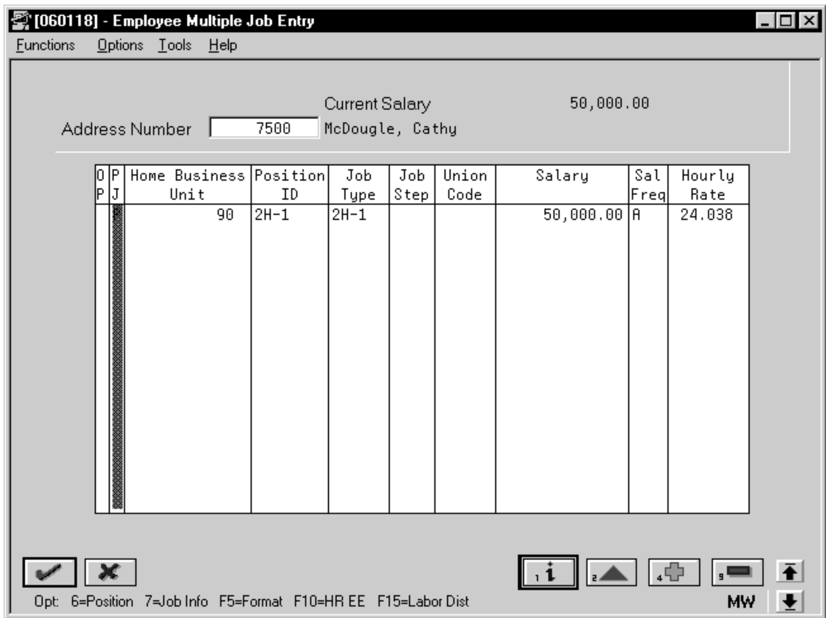
Employee Multiple Job (F060118)

Primary Job
↓
Employee Master (F060116)
↓
Data Queue
↓
Monitor
↓
History Table (F08042) | Turnover (F08045)

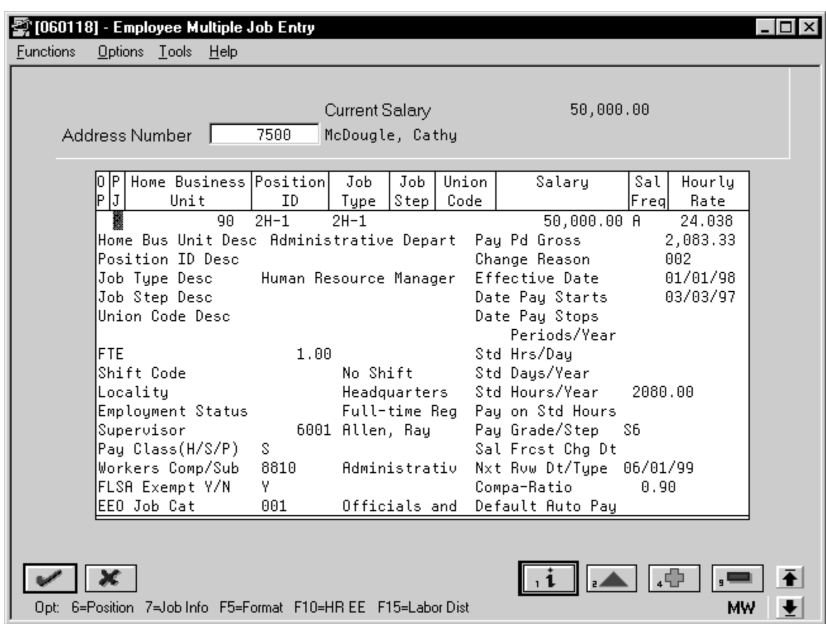
Secondary Job
↓
Employee Multiple Job History (F060119)

▶ To correct employee multiple job history information

On Employee Multiple Job Entry

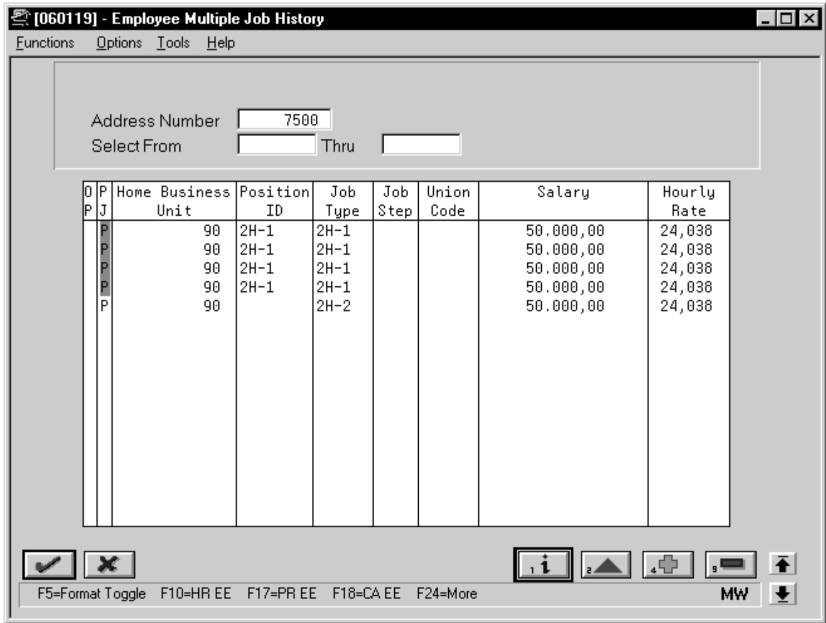


1. Correct the information in the appropriate fields.
2. Choose More Detail.



3. Correct the information in the appropriate fields.

4. Select Employee Multiple Job History.



[060119] - Employee Multiple Job History

Functions Options Tools Help

Address Number 7500
Select From Thru

O P	P J	Home Business Unit	Position ID	Job Type	Job Step	Union Code	Salary	Hourly Rate
	P	90	2H-1	2H-1			50.000,00	24,038
	P	90	2H-1	2H-1			50.000,00	24,038
	P	90	2H-1	2H-1			50.000,00	24,038
	P	90	2H-1	2H-1			50.000,00	24,038
	P	90		2H-2			50.000,00	24,038

F5=Format Toggle F10=HR EE F17=PR EE F18=CA EE F24=More MW

5. On Employee Multiple Job History, delete the incorrect record if the change reason or effective date were not changed.

What You Should Know About

Displaying different formats	When you use the Format Toggle function, only the information in the fold area displays in a different format.

Correcting Employee Position Activity

G08 Human Resources
Choose *Position Control*

G08P1 Position Control
Enter *27*

G08P3 Position Control Advanced/
Technical Operations
Choose *Revise Employee Activity*

If the constants are set appropriately, you can have the system automatically write position activity records for your employees as it creates history records. You can correct any errors you make to activity data. Because the system assigns the date and time of the change to any change you make, you can view this information, as well as who made the change.

No history is tracked on changes made on Revise Employee Activity. Information changed using this program changes only the Position Control tables.

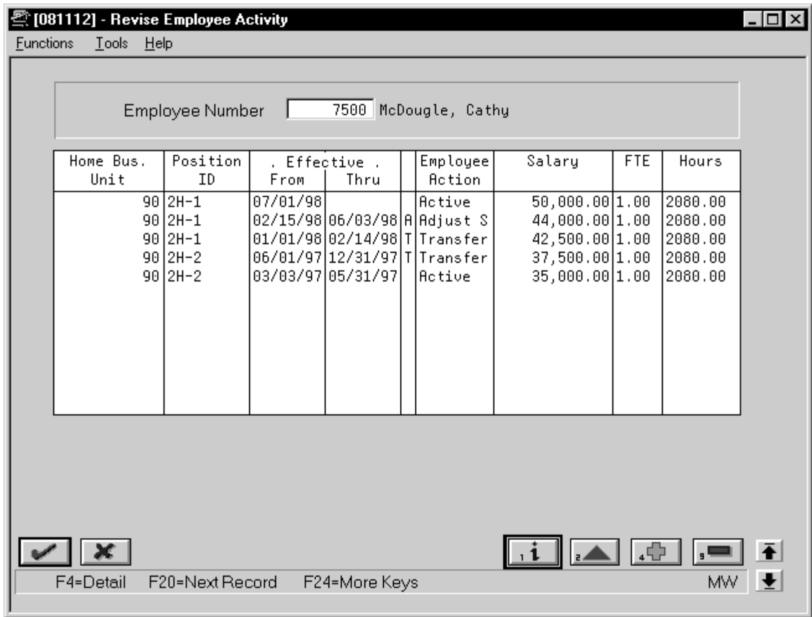
J.D. Edwards recommends assigning this program high security.

See Also

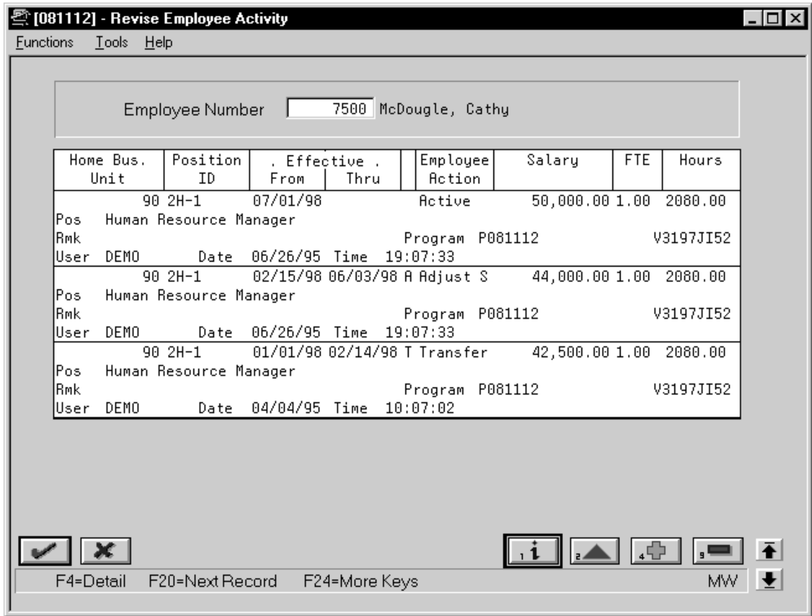
- *Setting Up History and Turnover Constants*

▶ To correct employee position activity

On Revise Employee Activity



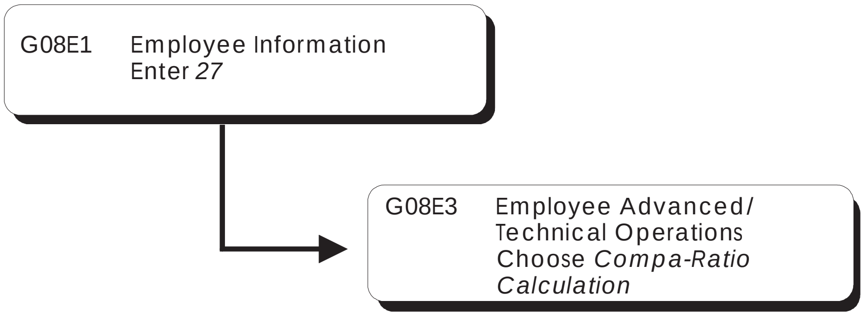
1. Complete the following fields as necessary to correct information:
   - Home Business Unit
   - Position ID
   - Effective From
   - Effective Through
   - Employee Action
   - Salary
   - Full Time Equivalents (FTE)
   - Hours
2. Choose More Detail.



3. Complete the following field to make additional comments:
   - Remark
4. Use the Field Exit function to delete each field of the incorrect record if a new record has been generated.

Field	Explanation
Date – Effective From	The date on which a requisition, a position, or activity within a position goes into effect.
Date – Effective Thru	The date on which a requistion, a position, or activity within a position is no longer in effect. In Position Actions, the default is the end of the current fiscal year for the calculation of projected figures.
Employee Action	The type of action linked to the employee. The following codes are provided by J.D. Edwards and should not be changed: blank Active A Adjust status, such as salary, FTE, hours L Leave of absence T Transfer (from one business unit to another) X Terminate E Expired You can define additional codes using user defined code table (system 08, type AT).

Updating Employee Compa–Ratio



Run the Compa-Ratio Calculation batch program to automatically recalculate compa-ratio if any of the rules for calculating compa-ratio or any of the employee components used in the calculation change. You can recalculate compa-ratio for one employee or all employees, depending on how you define the data selection. You must perform this operation if you have run a a global mass update program.

This program uses the pay ranges defined in the Pay Grades by Class table (F082001) and defined by the Pay Range Formulas table (F08290). The pay range in effect for the effective date is used to calculate the new compa-ratio.

No report prints as a result of this batch update.

What You Should Know About

History and turnover	If you set the HR Constants to track history and turnover, the program writes a history record if the new compa-ratio differs from the existing compa-ratio. The program writes a turnover record only if you enter a change reason.

Processing Options for Compa–Ratio Batch Calculation

```
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:
```

```
-------------------------
3. Enter the Effective Date for the pay          ____________
   range.  Blank will default to the
   system date.
```

Purging Employee Multiple Job Records

G08E1 Employee Information
Enter *27*

G08E3 Employee Advanced/
Technical Operations
Choose *Purge Employee Multiple Job File*

If you are not using the J.D. Edwards Payroll system, use Purge Employee Multiple Job File to delete employee multiple job entry records in the Employee Multiple Job table. This purge does not delete any information from the Employee Multiple Job History Table.

Purge Employee Multiple Job File does not print a report.

Processing Options for Purge Employee Multiple Job File

```
Enter a date.  Records with a pay stop           ____________
date prior to this date will be deleted.
```

Entering Leave of Absence Information

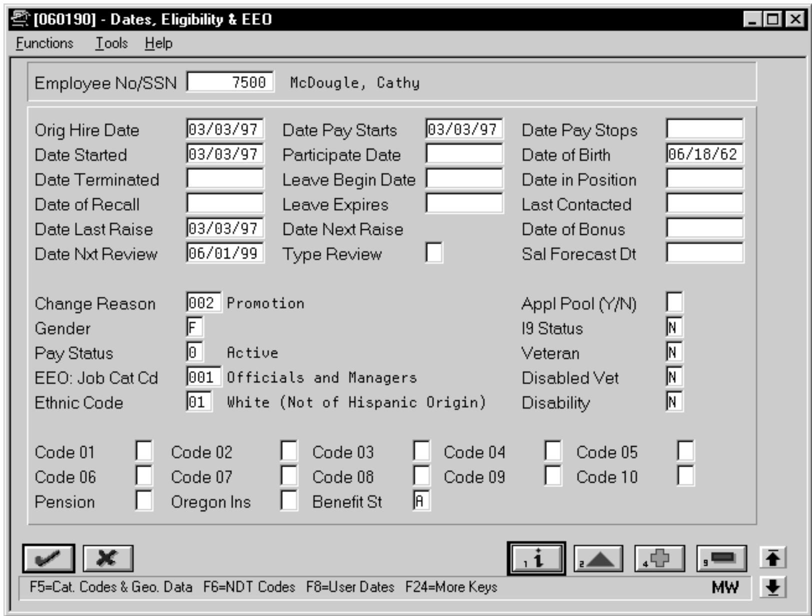
G08 Human Resources
Choose *Employee Information*

G08E1 Employee Information
Choose *Dates, Eligibility, and EEO*

Enter the beginning and expected return dates if an employee is scheduled for a leave of absence.

To enter leave of absence information

On Dates, Eligibility, and EEO

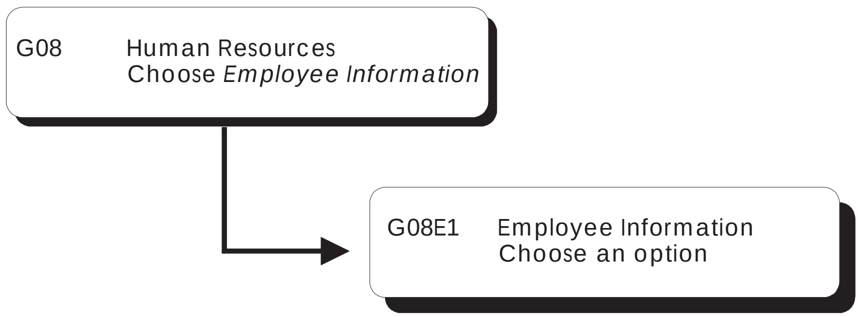


Enter the information in the following fields as needed:

- Leave Begin Date
- Leave Expires

Position Control enters a leave of absence as unpaid leave and adjusts the projected year-end calculations accordingly.

Work with Profile Data



Working with Profile Data

Profile data is any auxiliary information you want to maintain in any of the following databases:

- Employee
- Applicant
- Job
- Dependent/Beneficiary
- Requisition
- Safety and health case

For example, you can record who is to be contacted in an emergency situation. Or, you can maintain up-to-date records of any certifications or special skills for an employee.

With the exception of Applicant Status (user defined code system 08, type AS), in the applicant database, this information is not required by the system.

Working with employee information consists of the following tasks:

- ❑ Entering profile data
- ❑ Copying profile data
- ❑ Changing profile data
- ❑ Reviewing profile data
- ❑ Locating employees using multiple criteria
- ❑ Purging profile data

Entering Employee Profile Data

Enter any auxiliary information your company chooses to maintain as profile information.

Entering profile data consists of the following tasks:

- Entering general information using the narrative format mode
- Entering specific information using the code format mode

Narrative format data types are for free-form text. There are no restrictions as to what you can enter for a narrative format data type.

Code format data types can be linked to user defined codes.

Before You Begin

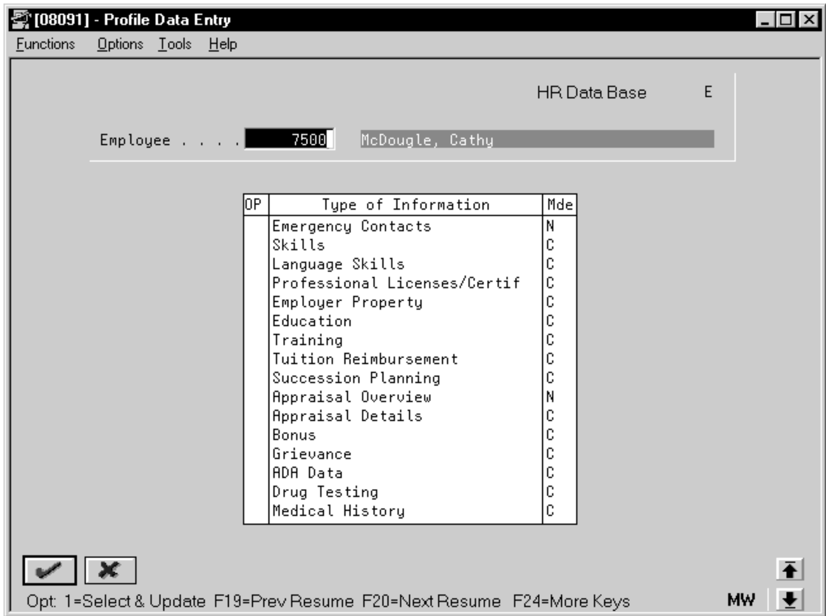
- ❑ Define the profile data types and user defined codes. See *Defining Types of Data.*

What You Should Know About

Entering multiple types of information	On Profile Data Entry, after you select more than one type of information to update, use the Field Exit key to display the form for each type of information you selected.

▶ To enter general information using the narrative format mode

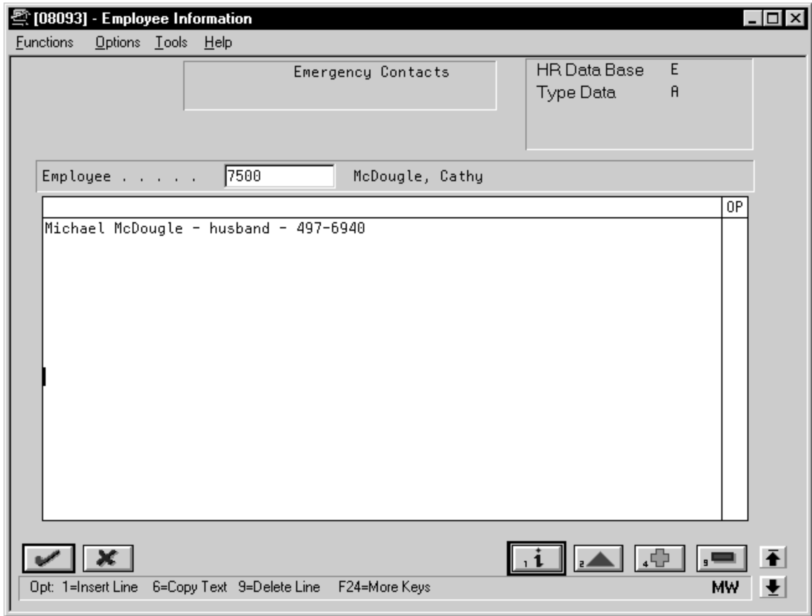
On Profile Data Entry



1. Locate the employee.
2. Choose one or more types of narrative format information.

   The Mode column indicates which types of information you can enter in narrative mode.

   The system displays the appropriate narrative mode form.



3. Enter the specific information.

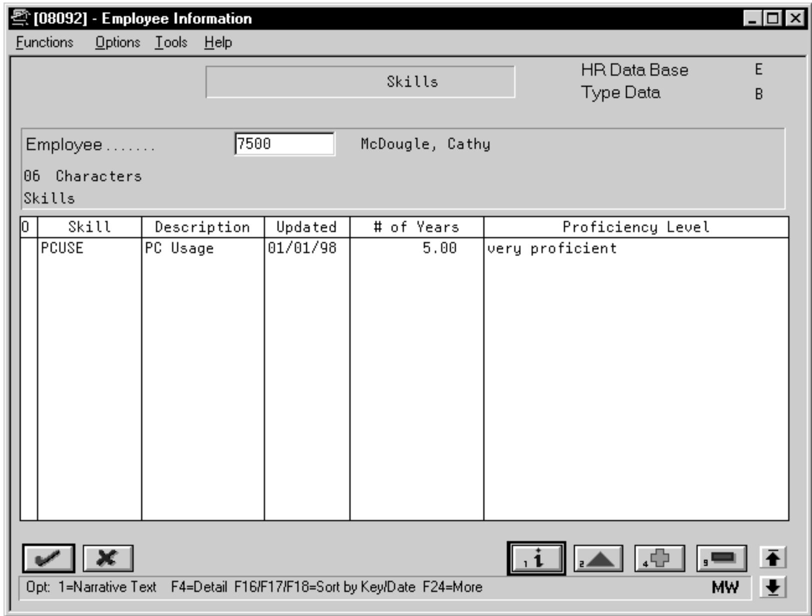
▶ To enter specific information using the code format mode

On Profile Data Entry

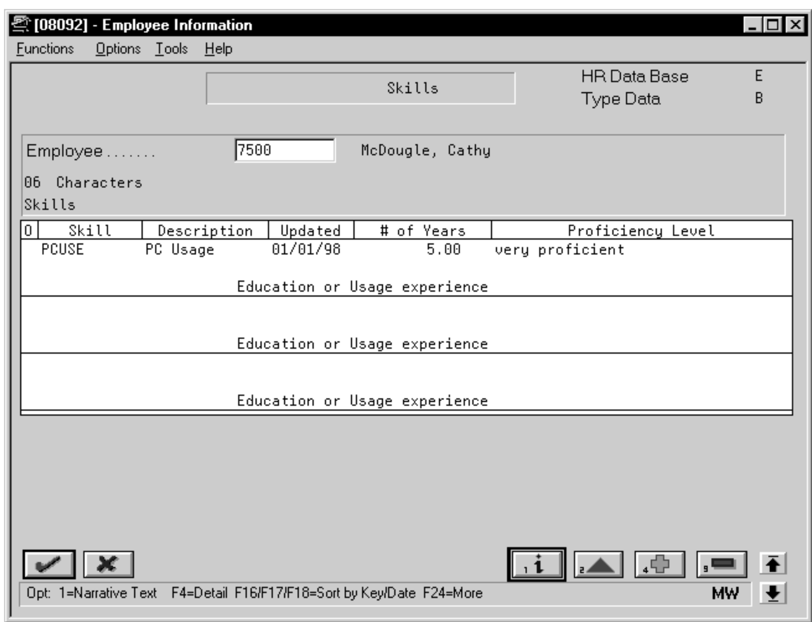
1. Locate the employee.
2. Choose one or more types of code format information.

   The Mode column indicates which types of information you can enter in code format mode.

   The system displays the appropriate form in code mode.



3. Enter the specific information.
4. Choose More Detail.



5. Enter the appropriate information.
6. Choose the Narrative Text option to add additional information in a free-form format.

What You Should Know About

Fields edited by user defined codes	On the code format form, the second column is the code title column. If the fields in this column are edited by a user defined code, the length of the field and the user defined code description display above the column.

Processing Options for Profile Data Entry

```
1.  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.
```

Copying Profile Data

You might want to use the same profile data for several employees. After you enter profile data for an employee, you can copy this information from either the narrative format data types or the narrative information that is linked to the code format data types.

For example, if a group of employees attended the same training course, you can enter this information for one of the employees and then copy it into the other employees' records.

Copying profile data consists of the following tasks:

- Copying narrative text
- Copying all profile data

▶ To copy narrative text

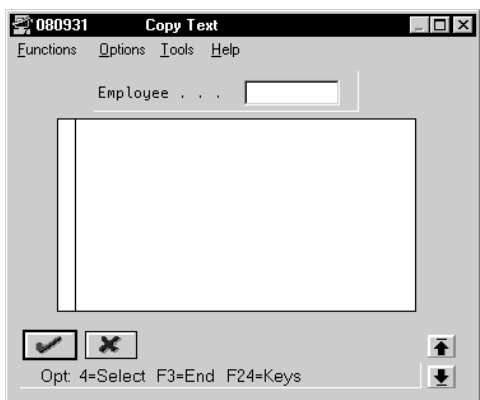
On Profile Data Entry

1. Locate the employee for whom you want to copy information.
2. Choose the type of narrative format information you want to copy.

   The Mode column indicates which data types are available in the narrative format mode.

3. On the narrative mode form, choose the Copy Text option.

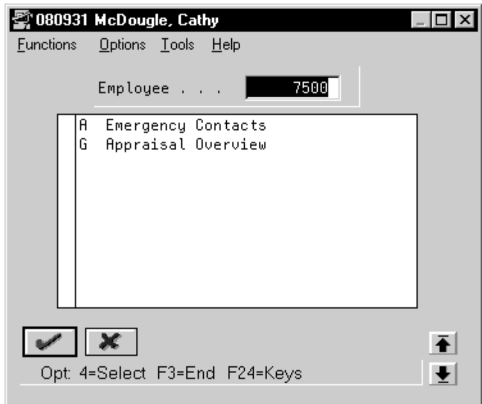
   The system displays Copy Text.



4. On Copy Text, complete the following field with the number of the employee from which you want to copy narrative text:

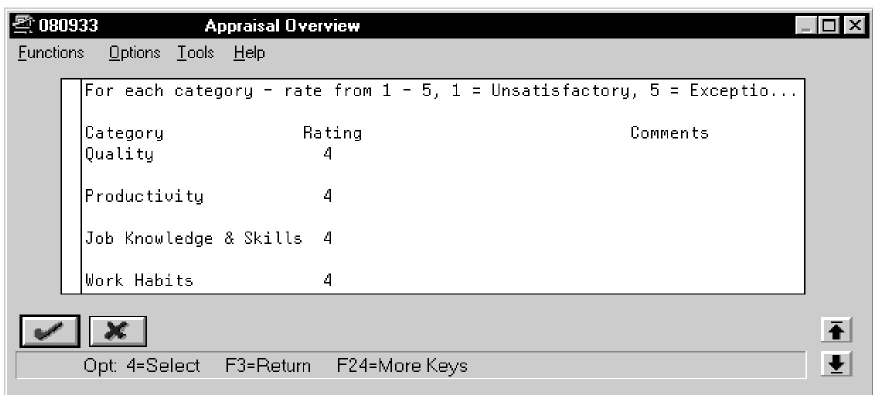
   - Employee

   The system displays Copy Text.

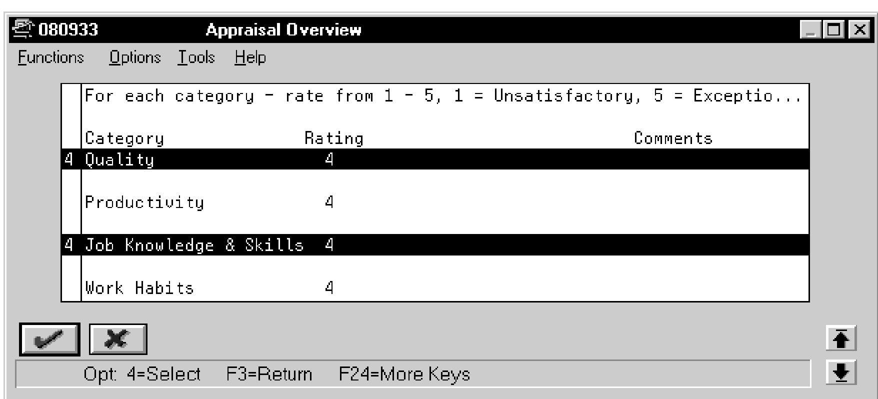


5. Select the data type from which you want to copy.

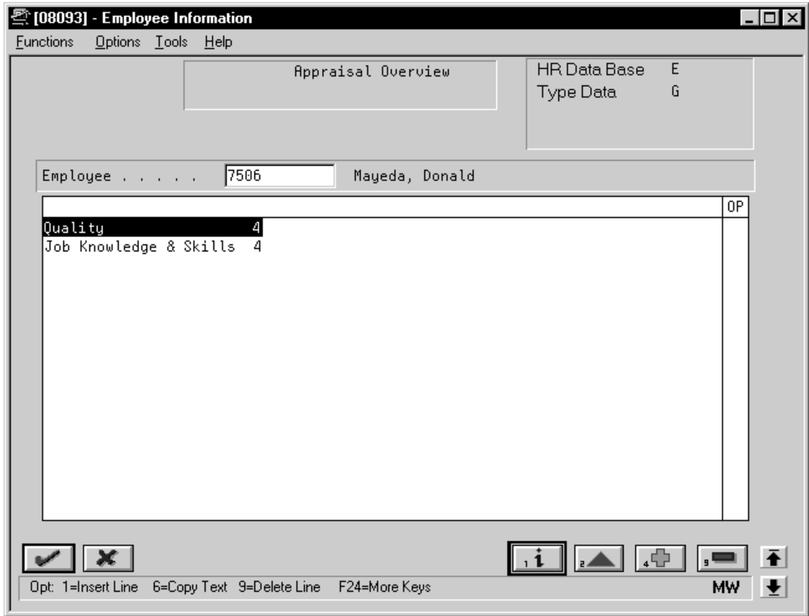
   The system displays a form for that data type.



6. On the data type form, select the lines of text you want to copy.



7. The system copies the text.

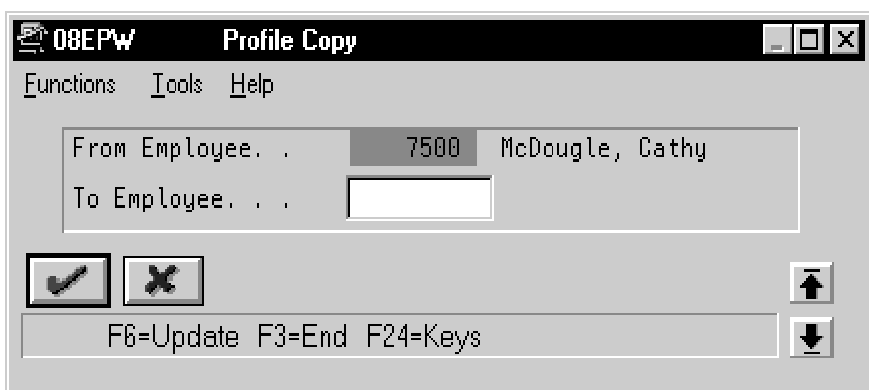


To copy all profile data

On Profile Data Entry

1. Locate the employee whose profile data you want to copy.
2. Choose the Profile Copy function.

   The system displays Profile Copy.



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

Changing Profile Data

After you enter profile data, you can change the data. For example, if an employee's profile data indicates the highest level of education reached and the employee earns an advanced degree, you can then change that information in the profile data.

To change profile data, complete the following tasks:

- Changing narrative profile data
- Changing code profile data

▶ To change narrative profile data

On Profile Data Entry

1. Locate the employee.
2. Choose the narrative type of information that you want to change.

   The system displays the appropriate form.

3. Change or delete the entire line of text using the appropriate option.
4. Enter the new information on the first blank line below the text you deleted.

▶ To change code profile data

On Profile Data Entry

1. Locate the employee on the appropriate code format form.
2. Choose the code type of information that you want to change.

   The system displays the appropriate form.

3. If you are changing code title or date, delete the information and re-enter.

What You Should Know About

Deleting information	Using the Delete action code deletes all information from the form.
Entering new information	Typing new information over the information you want to change does not delete the original information. The system retains the original information and creates a new line of information for the change.

Reviewing Profile Data

After you enter profile data for employees, you can use the information to search for employees linked to one or more data types. You can perform this search by employee, by single data type, or by multiple data types.

Complete the following tasks:

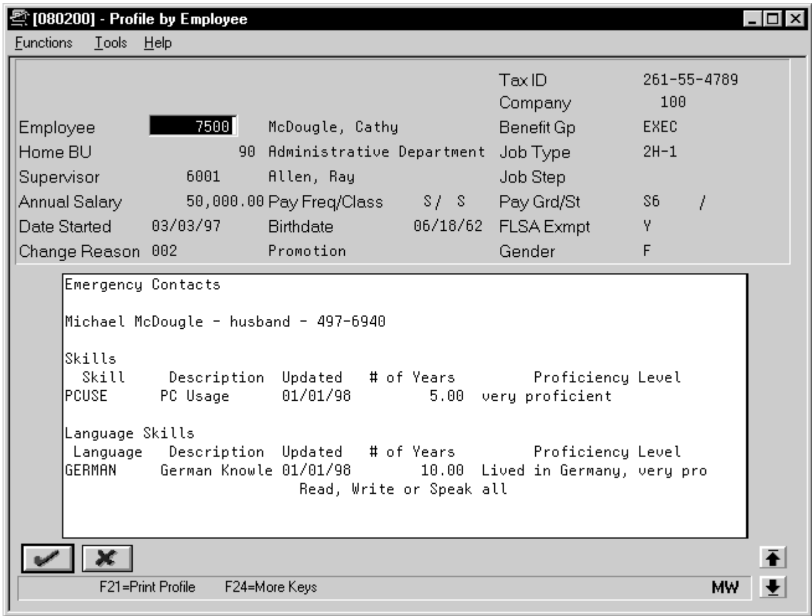
- Review profile data for a specific employee
- Review profile data by data type
- Locate employees using multiple criteria

▶ To review profile data for a specific employee

Use Profile by Employee to review the employee's master record as well as available profile information. This can be useful if you want to compare employee master information to a specific profile data type you have set up.

For example, you might set up a profile data record to track the language skills that your employees might have. You can then use Profile by Employee to research employees you are considering for a new position requiring certain language skills. You can also use Profile by Employee to print employee resumes for internal use.

On Profile by Employee



1. Locate the employee.
2. Locate the type of profile data you want to review.

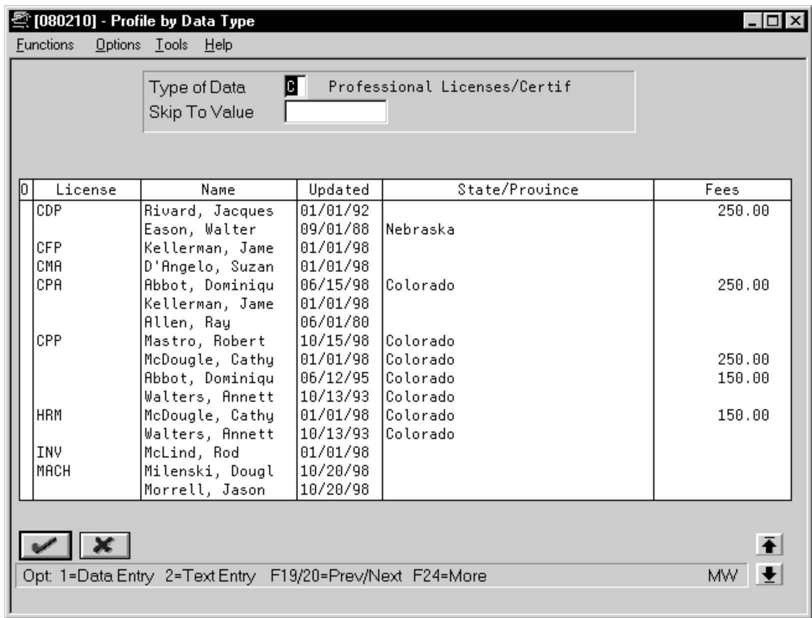
Processing Options for Profile Data Inquiry

```
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.)
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.)
```

▶ To review profile data by data type

Use Profile by Data Type to review information for all employees who are linked to a specific data type. For example, you can review training profile information to identify employees who have had management training.

On Profile by Data Type


[080210] - Profile by Data Type

Functions Options Tools Help

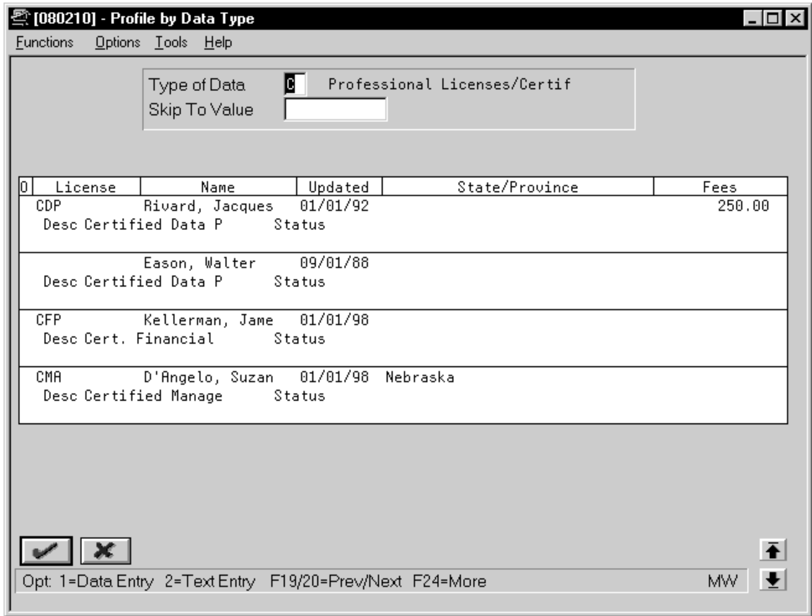
Type of Data C Professional Licenses/Certif

Skip To Value

O	License	Name	Updated	State/Province	Fees
	CDP	Rivard, Jacques	01/01/92		250.00
		Eason, Walter	09/01/88	Nebraska	
	CFP	Kellerman, Jame	01/01/98		
	CMA	D'Angelo, Suzan	01/01/98		
	CPA	Abbot, Dominiqu	06/15/98	Colorado	250.00
		Kellerman, Jame	01/01/98		
		Allen, Ray	06/01/80		
	CPP	Mastro, Robert	10/15/98	Colorado	
		McDougle, Cathy	01/01/98	Colorado	250.00
		Abbot, Dominiqu	06/12/95	Colorado	150.00
		Walters, Annett	10/13/93	Colorado	
	HRM	McDougle, Cathy	01/01/98	Colorado	150.00
		Walters, Annett	10/13/93	Colorado	
	INV	McLind, Rod	01/01/98		
	MACH	Milenski, Dougl	10/20/98		
		Morrell, Jason	10/20/98		

Opt: 1=Data Entry 2=Text Entry F19/20=Prev/Next F24=More MW

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 for Profile by Data Type

```
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
    data base.

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)
```

Locating Employees Using Multiple Criteria

You can use Profile Multiskill Search to locate employees who match many different data types and search codes to fill a position requiring a specific set of skills.

When you choose Profile Multiskill Search, the system searches one of the following:

- The applicant profile database
- The employee profile database
- Both profile databases simultaneously

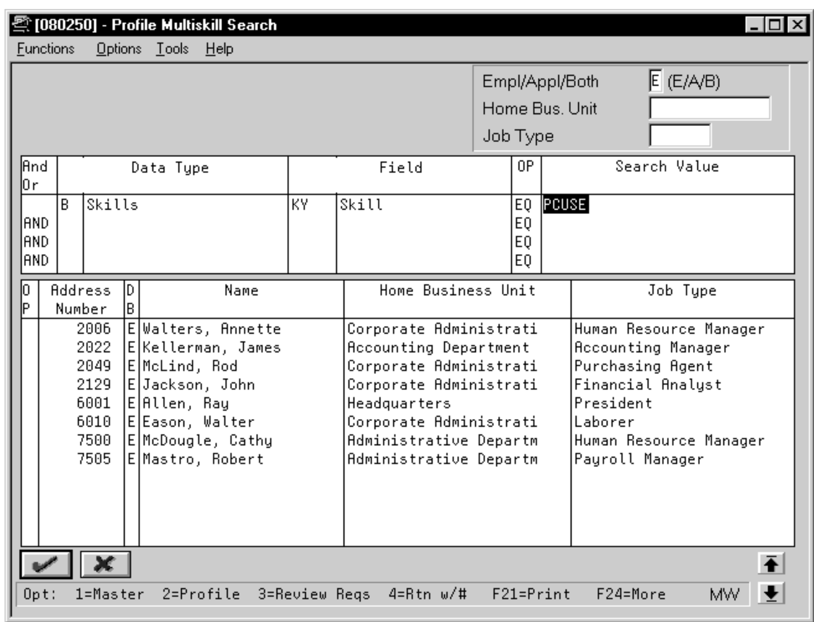
For example, you can search for all employees who:

- Have an MBA degree
- Speak French
- Are Certified Public Accountants
- Know the RPG computer programming language

The system then lists all the employees who meet these four criteria.

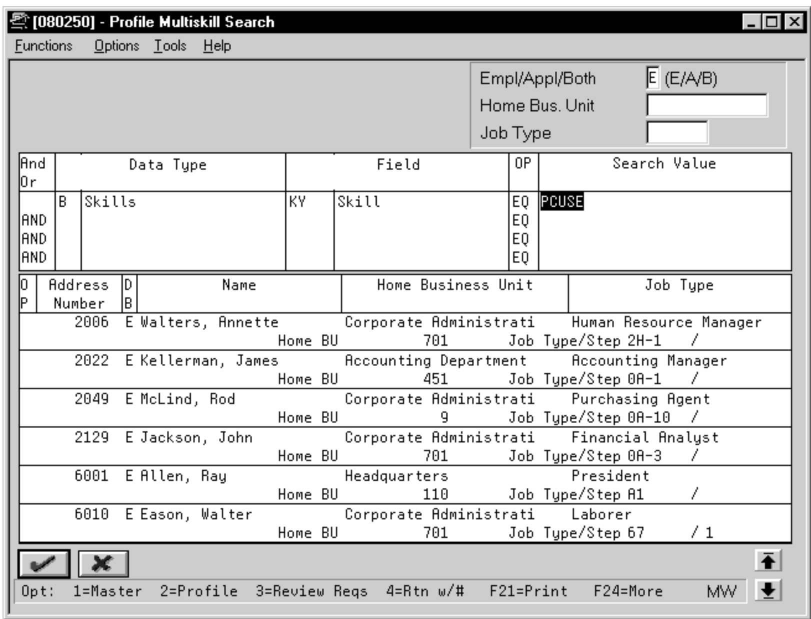
▶ To locate employees using multiple criteria

On Profile Multiskill Search



1. Complete the following field to choose the database to be searched:
   - Employee/Applicant/Both

2. Complete the following optional fields to limit the search:
   - Home Business Unit
   - Job Type
3. Complete the following fields to determine the search criteria:
   - And/Or
   - Data Type
   - Field
   - OP (Relationship)
   - Search Value
4. Choose More Detail to review additional information.



Field	Explanation
And/Or Selection 1	A code to designate 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, on the first line, type the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, type 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. As another example, to identify employees who are both CPAs and who have MBAs, on the first line, type the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, type the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by typing Or in the And/Or field of the second line.
Type Data	The Type of Data from the supplemental database that is used in a multiple information search.
Multiskill Search Data Item	Indicates which data item is to be included in the search.
Relationship	You can specify any of the following relationships: 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
Multiskill Search Data	This field does not have an associated user defined code. You must enter a search value based on the data you entered in the profile for the selected field. NOTE: This field is case sensitive. For example, 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% will display both bamboo and bachelor. • %ing will display all words ending with ing. • %BA% will display any words containing the letters B and A, such as abate, cabbage, or bachelor.

What You Should Know About

Searching both databases	If you are searching in both databases (employee and applicant), you must enter the data type, field, and search values.

Processing Options for Profile Multiskills Search

```
Initial Search Criteria:

------------------------
 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.
```

Exercises

See the exercises for this chapter.

Purging Profile Data

G08E1 Employee Information
Enter *27*

G08E3 Employee Advanced/
Technical Operations
Choose *Purge Profile Data*

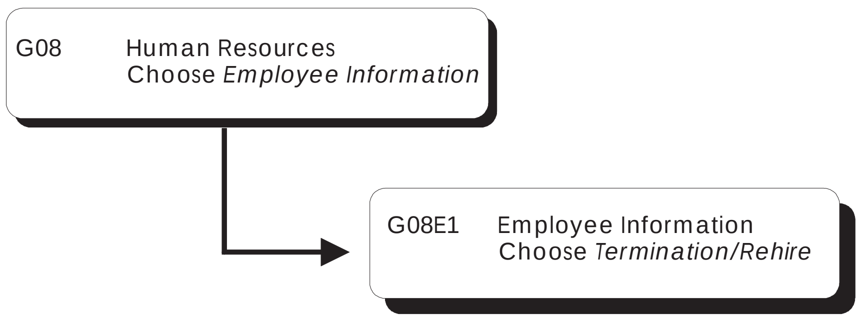
Use Purge Profile Data to delete data from the User Defined Code Entry table (F08092) and the Narrative Text Entry table (F08093). You use a processing option to determine whether the system deletes all profile data or only narrative profile data.

Purge Profile Data does not print a report.

Processing Options for Purge Profile Data

```
Enter a 'Y' to delete narrative only
 from the profile data.  Default of
 blank will delete all profile
 data.
```

Terminate an Employee



Terminating an Employee

Use Termination/Rehire to indicate that an employee's employment has ended as a result of:

- Retirement
- Resignation
- Layoff
- Termination

You can set up the system to automatically transfer all of an employee's profile data to the applicant profile data file when employment ends. You can then remove the employee's profile data from the requisition. If you rehire the employee from the applicant master, you can transfer the information back to the employee profile data file.

You can have the system automatically create a new requisition for the now-vacant position when an employee is terminated. You can also have the system automatically calculate the filled headcount for the requisition to which the employee was previously attached. This allows you to use an existing requisition to fill the vacancy.

Before You Begin

- ❑ Set up Transfer of Data on Hire/Termination for both hires and terminations if you want the system to transfer the employee's profile data to the applicant profile database and vice versa. The transfer updates the Profile Data Base, Cross Reference table (F08094). See *Processing Options for Applicant Entry*.

- ❑ 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 Constants*.

- ❑ To use an existing requisition to fill the vacancy, verify the processing options for termination/rehire, dates, eligibility, and EEO.

See Also

- *Processing Options for Requisition Entry*

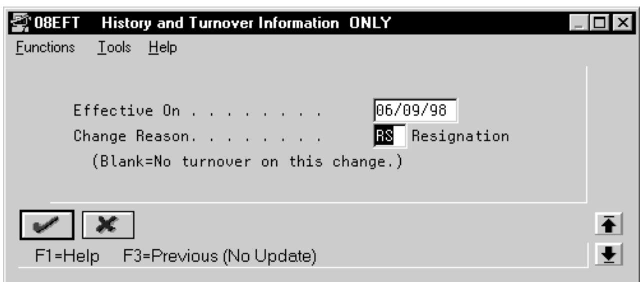
▶ To terminate an employee

On Termination/Rehire

1. Locate the employee.

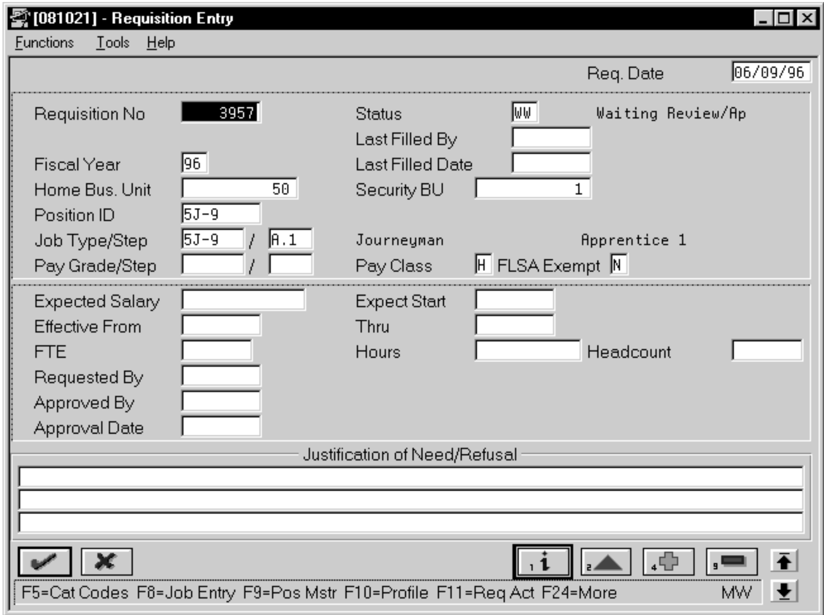
2. Complete the following fields:
    - Date Terminated
    - Expected Recall Date (if appropriate)
    - Move to Applicant Pool
    - Employment Status (if appropriate)
    - Benefit Status
3. Change the following fields from a numeric to an alphabetic code:
    - Change Reason
    - Pay Status

    The system displays the History and Turnover Information ONLY window.



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

    The system displays Requisition Entry if you set the constants appropriately.



Field	Explanation
Date – Employee Recall	The date on which the employee can be recalled for employment.
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 to an alphabetical code, and enter Y or N in the Move to Applicant Pool field. If you are reactivating an employee, remove the date from this field.
Yes or No – Move to Applicant Pool	A code indicating whether a terminated employee should be moved, by batch job, into the applicant pool. Valid codes are: Y Yes, move the employee into the applicant pool N No, do not move the employee into the applicant pool You can enter a value in this field only when you are terminating an employee (entering a termination date). NOTE: When an employee is moved to the applicant pool, the employee search type is changed to Applicant (A). If the employee is not to be moved to the applicant pool, the employee search type is changed to Terminated (X).

Field	Explanation
Employee Pay Status	The code used 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 employees with alphabetic pay status codes from the payroll run. See also Employment Status (EST) and Change Reason (TRS).
Employment Status	A user defined code (system 06, type ES) that identifies an employee's status within the company. A blank represents a full-time, regular employee. You can set up other codes to identify part-time and seasonal employees. For example: 1 Full-time temporary 2 Part-time temporary 3 Part-time regular 4 Seasonal 5 Casual
Amount – Expected Salary	The salary you expect to pay the individual filling the requisition.

What You Should Know About

Moving information into the applicant pool

If you choose to have the system move information into the applicant pool when an employee is terminated, the following occurs:

- The employee information also remains in the Employee Master table
- The system automatically generates an applicant master record for the employee

Candidate requisition status

When you terminate an employee using status type DET, the system detaches the employee for all FIL requisitions with which the employee is currently associated. The system then uses the candidate requisition status and the termination date when it updates the Requisition Activity form.

Processing Options for Termination/Rehire

```
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 req's
   that the employee has a candidate
   requisition status type of 'FIL'.
```

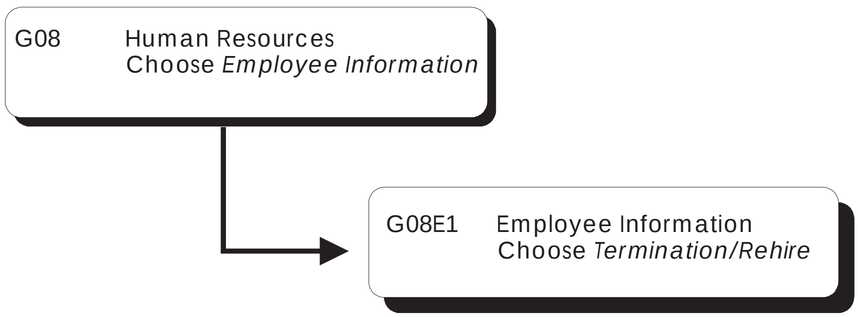
(The candidate requisition status
type is defined in the special
handling code of the user defined
code 08/CN) ____________

2. Enter the default value for
Requisition Status when an employee
is terminated and a requisition
is created. ____________
(F1 for valid values)

Exercises

See the exercises for this chapter.

Rehire an Employee



Rehiring an Employee

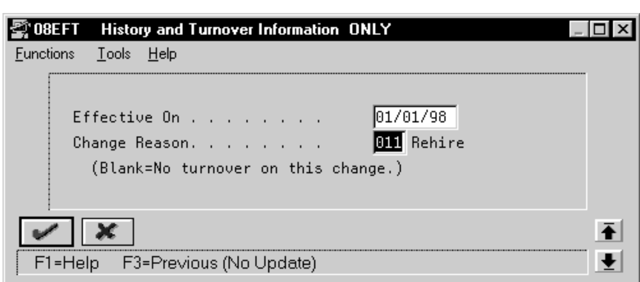
Use Termination/Rehire to indicate that an employee has been rehired. You can associate the rehire with a requisition and re-enter history and turnover information.

▶ To rehire an employee

On Termination/Rehire

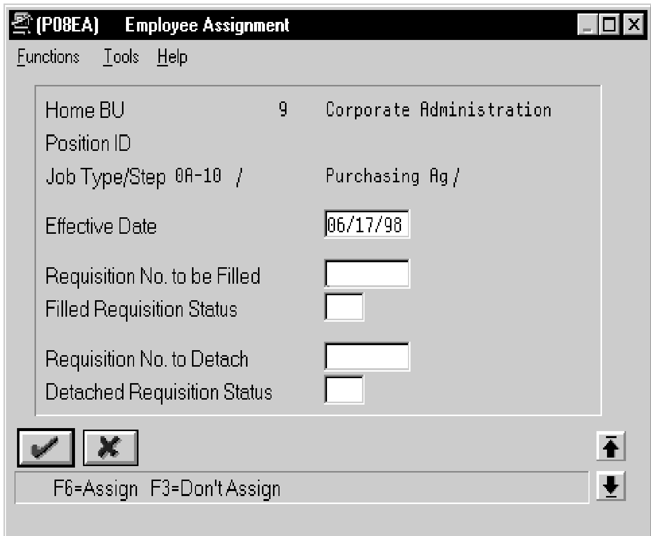
1. Locate the employee.
2. Complete the following fields:
   - Date Started
   - Employment Status
   - Benefit Status
3. Change the following fields from an alphabetic to a numeric code:
   - Change Reason
   - Pay Status
4. Clear the information in the following fields:
   - Date Terminated
   - Move to Applicant Pool

   The system displays History and Turnover ONLY.



5. On History and Turnover Information ONLY, complete the following fields:
   - 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

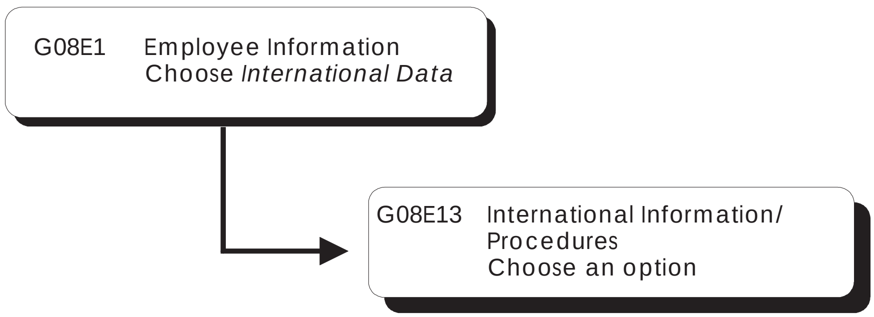
Field	Explanation
Data Item – Secondary	The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the current system date is used. This field can be used multiple times if, for example, an employee is a seasonal worker. The calculation tables in payroll and the eligibility tables and date codes in Human Resources also use this date as a start date to compute deductions, benefits, or accruals.

Field	Explanation
Employee Pay Status	The code used 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 employees with alphabetic pay status codes from the payroll run. See also Employment Status (EST) and Change Reason (TRS).
Employment Status	A user defined code (system 06, type ES) that identifies an employee's status within the company. A blank represents a full-time, regular employee. You can set up other codes to identify part-time and seasonal employees. For example: 1 Full-time temporary 2 Part-time temporary 3 Part-time regular 4 Seasonal 5 Casual
Date – Original Employment	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).
Candidate Requisition Status Date	The date that the current status of a Candidate Requisition became active.
Number – Requisition	The number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.
Candidate Requisition Status	The current activity level of a Candidate Requisition. These codes are retrieved from user defined code table system 08/type CN. The codes are further grouped 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.

Exercises

See the exercises for this chapter.

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. These rules are equivalent to the Equal Employment Opportunity rules of the United States government.

You can use the Canadian Employment Equity workfile to compile the data required by the Federal Contractors Program (FCPCS) software. You can then download this information directly into the FCP software on your personal computer where the information is available to help you maintain Canadian Employment Equity compliance.

Working with Canadian Federal Employment Equity consists of the following tasks:

- Creating the Canadian Employment Equity workfile
- Downloading the workfile to your personal computer

Creating the Canadian Employment Equity Workfile

Use Create FCPCS Workfile to create a compilation of information about selected or all employees in your company. You can use this information to establish an employee profile of your company for use in Canadian Employment Equity compliance.

This batch program compiles the following information on 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 required by the Federal Contractors Program is missing from your employee records, the workfile is not generated for any employees. Instead, the system prints an error report that identifies both the missing information and which employee is missing the information.

Processing Options for Create FCPCS Workfile

```
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.                  ____________
```

Downloading the Workfile to Your Personal Computer

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

To enter information in the processing options before running this program, enter the menu selection number and press the appropriate function key to access the processing options.

Before You Begin

- ❑ Verify that the path and filename 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 for Download FCPCS Workfile

```
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 Information

Run Employee Reports

Running Employee Reports

You can run an employee master report to review the most recent changes made to the employee master record.

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

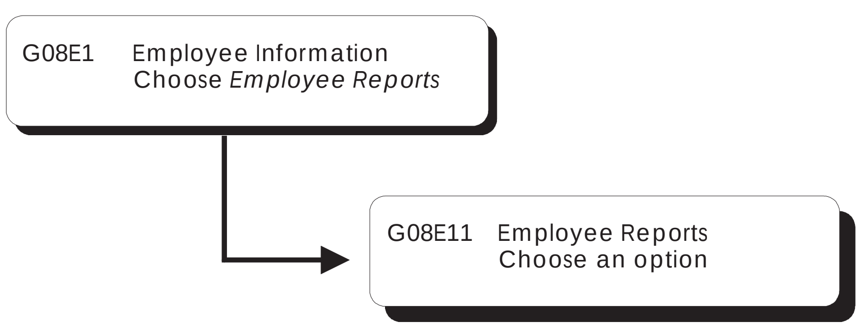
Several reports are also available to help you meet the Equal Employment Opportunity Commission (EEOC) reporting requirements for your company.

You can also print Cheshire mailing labels for all your employees.

Complete the following tasks:

- ❑ Run employee master reports
- ❑ Run employee profile reports
- ❑ Run Equal Employment Opportunity reports

Running Employee Master Reports



You can review employee master record changes. You can also print employee master labels.

Complete the following tasks:

- ❑ Run the Employee Master Record Changes report
- ❑ Print Employee Master Labels

Employee Master Record Changes Report

You can run the Information Reports World Writer (Employee Master Record Changes) to review the most recent changes made to the employee master record. The system stores these changes in the Employee History table (F08042).

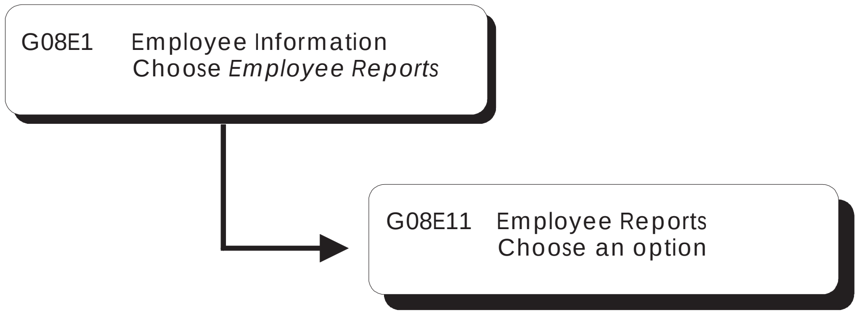
```
                                   Employee Master Record Changes                              Page     -        1
                                                                                               Date     - 02/28/98

Address         Alpha                    Data          History                      Eff      Date   Chg     Description          User
 Number          Name                    Item           Data                        On     Updated  Rsn                           ID
-------- ------------------------- ---------- ----------------------------- -------  -------  --- -------------------- ----------
    5127 Ebby, Chester A.          HMCO       00100                          01/01/98 07/12/94 098 Automated Conversion AB709431T
    5127 Ebby, Chester A.          HMCU                419                   01/01/98 07/12/94 098 Automated Conversion AB709431T
    5127 Ebby, Chester A.          SALY       S                              01/01/98 07/12/94 098 Automated Conversion AB709431T
    5127 Ebby, Chester A.          SAL                          00002500000 01/01/98 07/12/94 098 Automated Conversion AB709431T
```

Employee Master Labels

Run Employee Master Labels to print Cheshire mailing labels, a standard-sized "four-up" label. 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.

Seymour Rothermel 1637 Twin Peaks Way Golden CO 80110	Frederick C. Schwinn 119 Morton Boulevard Golden CO 80110	Clarissa Starling 2282 So. Williams Denver CO 80111	Susan Stadtlander 5890 Green Oaks Dr Littleton CO 80121
Jake Barunda 2455 Market Street Denver CO 80202	Gary Bell 633 17th St Denver CO 80202	Evan Bhuta 3080 Walnut Street Denver CO 80205	Barbara Free 1221 Bannock Aurora CO 80222
Richard Whitefeather 123 Oilpatch Dr. Denver CO 80223	William Yancy 1924 S. Navajo Street Denver CO 80233	Park Jones 1100 Dover Court Lakewood CO 80236	Horace Davis 5837 Signet Blvd. Brighton CO 80303
Peter Claymore 55 Old Dominion Blvd. San Clemente CA 94549	Frederico Nixon 1895 Union Street San Clemente CA 94549	Tonya Tesmocker 142108 Luther Blvd. San Clemente CA 94549	Nicole Uhura 1708 Fleet Creek Alley San Clemente CA 94549

Running 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

You can print the following reports:

❑ Employee Profile Data report

❑ Employees by Data Type report

❑ Employee Worktable Profile Information

Employee Profile Data Report

Run the Employee Profile report to review a summary of data stored in the following tables for each of the employees that you select:

- Define Types of Profile Data (F08090)
- User Defined Code Entry (F08092)
- Narrative Text Entry (F08093)
- Employee Master (F060116)

The information that prints on this report is the same information that you can review online using Profile by Employee.

You can list employees alphabetically by last name or numerically by employee number.

```
080410                                             J.D. Edwards & Company                             Page Number        8
                                                      Employee Profile                                Date         3/13/98
                                                  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. . . 02/19/96      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     02/15/96         Fred Pryor                                                          150.00
               She has shown impressive leadership qualities.

  PLTFRM     05/30/97         Local college                                                       150.00
                                                                                       ------------- -------------
                                                                           Total                  300.00



Appraisal Details
==============================
  Appraisal  App.Date              Overall Results               Points Earned           Yrs Wrked
  ---------- --------         ------------------------------ ------------------------------ -------------
  MR         03/15/98         Standard performance
```

Processing Options for Employee Profile Report

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.) ____________

Employees by Data Type Report

Run the Employees by Data Type report to review a list of all employees who have information in a particular profile data type category, such as language skills. The information that prints on this report is the same information that you can review online using Profile Data Entry.

The data types linked to the employee display in alphabetical order.

You can review this information in one of the following formats:

- Review employee information by data type
- Review employee information by employee

Employee Information by Data Type

The report displays employee information by data type. You can list employees under each data type either alphabetically by surname or numerically by employee number. The information on this report is from Employee Profile Entry.

```
080400                                      J.D. Edwards & Company                              Page Number       2
                                      Employee Information by Data Type                        Date         6/21/98
                                            Alphabetical Sequence
Professional Licenses/Certif
=============================
Employee       Name                     Updated                  State/Province                Status         Fees
----------- ------------------------ -------- -------- ------------------------ ----------------------- ------------
 License   . . . . . CDP        Certified Data Processing
       6010 Eason, Walter           09/01/88          Nebraska
       7704 Rivard, Jacques         01/01/92                                                                 250.00
                                                                                                        ------------
                                                  Total for: Certified Data Proce                           250.00
 License   . . . . . CFP        Cert. Financial Planner
       2022 Kellerman, James        01/01/98
                                                                                                        ------------
                                                  Total for: Cert. Financial Plan
 License   . . . . . CMA        Certified Management Acct
       2057 D'Angelo, Suzanne       01/01/98
                                                                                                        ------------
                                                  Total for: Certified Management
 License   . . . . . CPA        Certified Public Accountant
       6002 Abbot, Dominique        06/15/98          Colorado                                               250.00
       6001 Allen, Ray              06/01/80
       2022 Kellerman, James        01/01/98
                                                                                                        ------------
                                                  Total for: Certified Public Acc                           250.00
 License   . . . . . CPP        Certified Payroll Professional
       6002 Abbot, Dominique        06/12/95          Colorado                                               150.00
       7505 Mastro, Robert          10/15/98          Colorado
       7500 McDougle, Cathy         01/01/98          Colorado                                               250.00
       2006 Walters, Annette        10/13/93          Colorado
                                                                                                        ------------
                                                  Total for: Certified Payroll Pr                           400.00
 License   . . . . . HRM        Certified HR Manager
       7500 McDougle, Cathy         01/01/98          Colorado                                               150.00
       2006 Walters, Annette        10/13/93          Colorado
                                                                                                        ------------
                                                  Total for: Certified HR Manager                           150.00
```

Processing Options for Employees by Data Type

```
1.  Enter '1' to bypass printing text            ____________
    information on the report.
```

Employee Information by Employee

This report displays employee information by employee. You can choose to list employees either alphabetically by surname or numerically by Address Book number.

Employee Worktable Profile Information

To run a report that includes profile information for all your employees, you must first build the Employee Profile Worktable (T08092WF) to create records for employees with no profile data. The worktable:

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

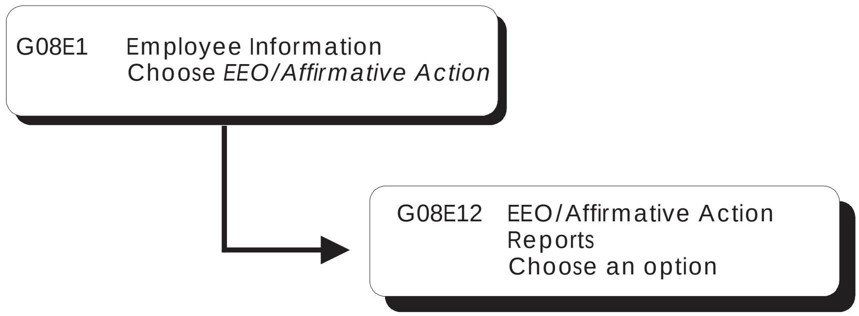
After you build the Employee Profile Workfile, you must run the associated Workfile and Report World Writer to review the workfile. For employees who have profile data, the profile data type codes appear in the User Defined Code field. For employees who have no profile data, Xs appear in the User Defined Code field.

```
82000                                         Employee Profile                          Page -        1
                                          Using Work File T08092WF                      Date -  5/11/99

Address     User    Effective    User
 Number   Def Code    Date        ID
-------- ---------- --------- ----------
    6002 XXXXXXXXXX 02/26/96  SS788627
    6002 MR         03/15/98
    6002 XXXXXXXXXX 02/26/96  SS788627
    6002 XXXXXXXXXX 02/26/96  SS788627
    6002 XXXXXXXXXX 02/26/96  SS788627
    6002 XXXXXXXXXX 02/26/96  SS788627
    6010 PCUSE      01/01/98
    6010 XXXXXXXXXX 02/26/96  SS788627
    6010 CDP        09/01/88
    6010 KEYOFC     01/10/91
    6010 XXXXXXXXXX 02/26/96  SS788627
    6010 XXXXXXXXXX 02/26/96  SS788627
    6010 XXXXXXXXXX 02/26/96  SS788627
    6010 XXXXXXXXXX 02/26/96  SS788627
    6010 ALCOHOL    10/10/91
    6010 COCAINE    10/10/91
```

See Also

- *Reviewing Profile Data*

Running Equal Employment Opportunity Reports



You can use these reports to send Equal Employment Opportunity (EEO) statistics to the Equal Employment Opportunity Commission (EEOC). You can also use these reports to review the statistics for use within your company.

You can run the following reports:

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

EEO-1 Employment Data Report

Run the EEO-1 Employment Data report to verify that you are in compliance with the reporting requirements of the EEOC.

This report separates employees into the standard EEO job categories, and then sorts employees by EEO ethnic codes and gender. The total for each job category is calculated and printed, as is the total for each home company or home business unit. The report starts a new page and prints totals for each new company.

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

068515 J.D. Edwards & Company Page - 3
EEO - 1 Employment Data Date - 5/11/99
by Company

001 A Model Core Company . .Reporting Period. .
01/01/98 thru 12/31/98

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 for Report – EEO–1 Employee Data

1. Enter the Beginning and Ending Date for the Reporting period.
   Beginning Date . . . . . . ______
   Ending Date. . . . . ______

2. Enter the appropriate number associated with the type of reporting unit. ______

   Single Establishment – '1'
   Consolidated Report – '2'
   Headquarters Report – '3'
   Individual Est. – '4'
   Special Report – '5'

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 Business Unit Address Book Number for this report. Leave blank if same as option number 4. ______

6. Enter a '1' if report was filed last year. ______

7. Enter a '1' if the company employs 100 people or more. ______________

8. Enter '1' if affiliated with another company in a venture that employs 100 or more people. ______________

9. Enter '1' if Gov't Contracts are involved as in Section C question number 3. ______________

10. If '1' is entered for option number 9, then enter the 9 digit Dunn and Bradstreet ID. number. ______________

11. Enter the Certifying Official's Employee Number. ______________

12. Enter the Certifying Official's Title. ______________

13. Enter the Contact Person's Employee Number. ______________

14. Enter the Contact Person's Title. ______________

15. Enter the Contact Person's Phone Extension number. ______________

EEO-4 Analysis Report

Run the EEO-4 Analysis report to verify the reporting requirements of the EEOC.

This report separates employees into the standard EEO job categories, and then sorts employees by EEO ethnic codes and salary ranges by gender. The total for each job category is calculated and printed, as is the total for each home company or home business unit. The report prints totals by job description and company for full-time employees.

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

```
068514                                      J.D. Edwards & Company                                  Page -        3
                                                EEO-4 Report                                        Date -  6/24/98
       A Model Financial/Distribution         Full Time Employees
       8055 East Tufts Avenue  Suite               By Company
       Denver
                       CO  80237
                                         Reporting Period:  07/01/97 thru 06/30/98
                        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. .
```

Processing Options for Report – EEO–4 Analysis

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 (more) ____________
3) Answer Yes (1) to one of the
   following formats :
   Report for Full Time Employees (1/0) ____________
   Report for New Hires (1/0) ____________
   Report for Other than Full Time(1/0) ____________
   Default of blank in all 3 fields will
   print Full Time Employees.

EEO Staff Utilization Report

Run the EEO Staff Utilization report to review the number of actual hours worked within job IDs by EEO ethnic code. If an employee works in different job IDs, the actual hours spent in each job ID are counted separately for each job ID. This report prints totals by job level, job description, and business unit. For each business unit, totals and percentages for minorities and females appear.

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                                          J.D. Edwards & Co.                                    Page      -        2
                                           EEO Staff Utilization Report                               Date      -   7/22/98
                                                                                                      Beginning -  03/01/98
                                                                                                      Ending    -  03/30/98
           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 for EEO Staff Utilization Report, Build Workfile T068901

```
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 Report

Run the Workforce Analysis report to review a summary of current employee gender and ethnic data based on job type and step. This is information available about your workforce at the time you run the report.

This report lists two totals for each company. The first is a quantity (number) total that indicates how many employees are in each category. The second total indicates the number total 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                                               J.D. Edwards & Company                                    Page Number         2
                                                     Workforce Analysis Report                                   Date          2/27/99
                                                     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
```

Data Sequence

For the report to total and print 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.

Job Type (JBCD) and Job Step (JBST) must be the highest sequence numbers in the data sequencing function.

Processing Options for Workforce Analysis

```
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 JDE human
resources system.
```

Veterans Employment (VETS-100) Report

Run the Veterans Employment (VETS-100) report to review a summary of the number of employees in each EEO job category who are disabled veterans or Vietnam veterans.

This report follows the format of the federal government's VETS-100 report. Although you can specify any valid date range, the report usually spans one year for government reporting purposes.

Separate columns display for new hires and current employees. The report 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 or Vietnam veterans. The report also indicates the number of new hires who are disabled veterans and Vietnam veterans, and the total of both veteran and non-veteran new hires.

```
080434                                            J.D. Edwards & Company                                  Page Number        2
                                                Veterans' Employment Report                               Date         2/27/99
                                                         (VETS-100)
                                                 by Cost Center and Company

                                                01/01/98  through  12/31/98

                                                     . . . 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 Cost Center . .          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
```

What You Should Know About

Defining employees

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 as a new hire only.

Data Sequence

For the report to total and print 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.

EEO Job Category item must be the highest sequence number in the data sequencing function.

Processing Options for Veterans' Employment Report

```
Enter the Beginning and Ending dates
 for the reporting period.
                       Beginning Date –           ____________
                       Ending Date    –           ____________
```

Exercises

See the exercises for this chapter.

Employee History and Turnover

Objectives

- To review history and turnover records online and in print
- To make necessary changes to history and turnover records
- To delete or archive history records
- To run reports

About Employee History and Turnover

You can set up the system so that history and turnover records are created each time you create or change employee master form.

After history and turnover records are created, you can, for example, review them 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
- Consider an employee for a promotion
- Consider an employee for another position
- Monitor employee movement within your company

You can correct history if a mistake was made when information was added to the employee master form.

To clear space on your system for storing future history and turnover records, you can move past years' history and turnover records to tape or to an alternate backup system. You can also delete all but the most recent history and turnover records for each data item for which you have no further use.

Processing employee history and turnover information includes the following tasks:

- ❑ Working with history records
- ❑ Working with turnover records
- ❑ Running history and turnover reports

What Is Employee Master History?

Within any organization, employees continually change jobs, receive raises, are promoted or change their marital status, You can set up constants to enable the system to create a log for each employee when you change employee master information. This log is known as history.

You specify the history information that you want the system to track by selecting specific employee master data items for tracking. Whenever you change employee master information, the system creates a separate history record for each employee master data item for which you are tracking history.

As you create history for the data items you selected for tracking, the system uses a data queue to process the history records. If the history monitor is active, the changes take effect immediately. If the history monitor is not active, the system stores the history records in the data queue until the monitor is activated.

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 historical employee master information that the system stores includes:

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

History information is stored in the HR History table (F08042).

What Is Employee Multiple Job History?

Within some organizations employees hold both primary and secondary job assignments. Records containing information on the primary job and all secondary assignments are stored in the Employee Multiple Job table (F060118).

When you make changes that effect these records, and the change reason code and/or effective date are different for each change, the system creates a separate record for each change in the Employee Multiple Job History table (F060119).

The Employee Multiple Job History table is the only table where changes are stored for secondary assignment record changes.

What Is Employee Master Turnover?

When an employee makes a change that pertains to movement within your organization, such as a promotion or a change in business unit, the system creates a log based on the change reason code identifying the change as movement. This includes movement outside the organization, such as termination or rehire. This log is known as turnover.

Turnover information for employee master changes is stored in the Employee Turnover Analysis table (F08045).

Why Is the Change Reason Code Important?

Whenever you change employee information, the system prompts you for a change reason code. The change reason code you enter indicates whether the system should record the change as history only or as both history and turnover. The system does not write turnover records unless you enter a change reason code. The change reason code is also saved with the history record.

You use the user defined code table for Change Reason (system 06, table T) to define change reason codes.

Because the code you specify is the only information that the system uses to determine whether to create turnover records, you should use care when defining these codes. The system uses alphabetic codes to create a negative effect on turnover. Conversely, the system uses numeric codes to create a positive effect on turnover.

See Also

- *Understanding History and Turnover Tracking*
- *Setting Up History and Turnover Constants*

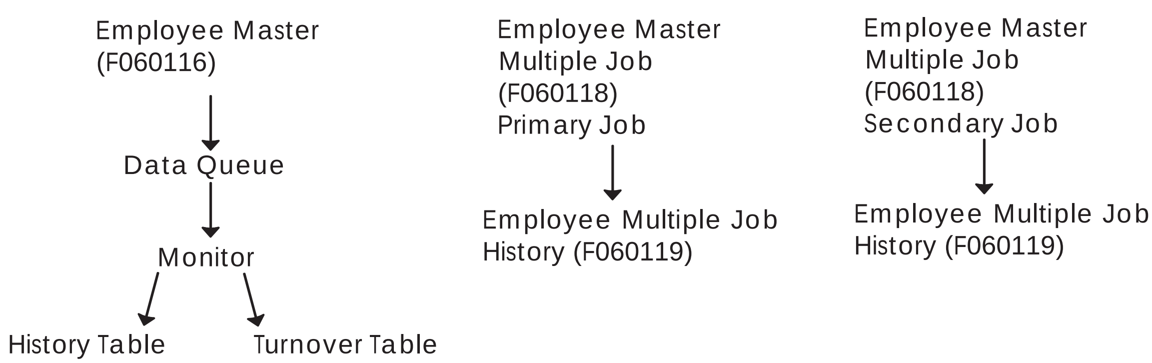
Work with History Records

Working with History Records

You can set the system so that history records are created each time that you create or change employee master records. After you enter employee information, you can review the history information to determine an employee's qualifications and work record.

When you change employee master information, the system prompts you to enter a code identifying the reason for the change and the date when the change is effective. If the change affects the employee's primary job, the change reason and effective date are also updated in the Employee Multiple Job table (F060118) and Multiple Job History table (F060119). If the change affects the employee's secondary job, the change reason and effective date are also updated in the Employee Multiple Job History table (F060119).

The flow of information is as follows:



You can also correct history information if an error was made when entering employee master or employee multiple job information. Additionally, you can purge history records to clear space on your system for future history records.

Working with history records consists of the following tasks:

- ❑ Reviewing history records
- ❑ Correcting history records
- ❑ Correcting an invalid change reason code or effective date
- ❑ Purging history records

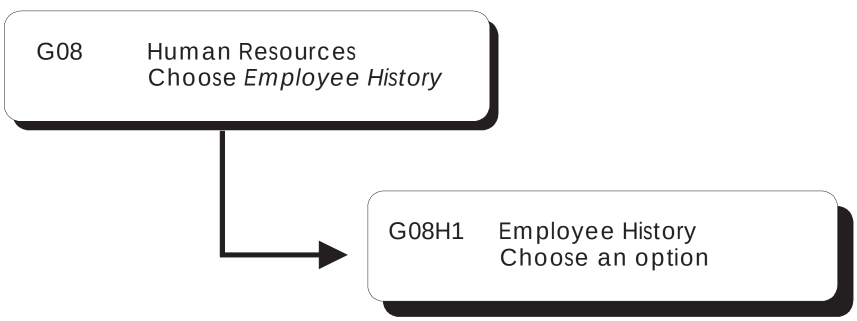
Before You Begin

- ❑ Verify that the employee master data items for which you want to track history have been selected.
- ❑ Verify that the Human Resources constants are set up to track employee master history.
- ❑ Verify that the Human Resources history subsystem and monitor are set up to run in order to save employee master changes.

See Also

- *Entering Employee Information*
- *Setting Up History and Turnover Constants*
- *Understanding History and Turnover Tracking*

Reviewing History Records



You can set up the Human Resources constants to enable the system to create a history record for an employee whenever you change employee master 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
- Monitor employee movement within your company

Reviewing history records consists of:

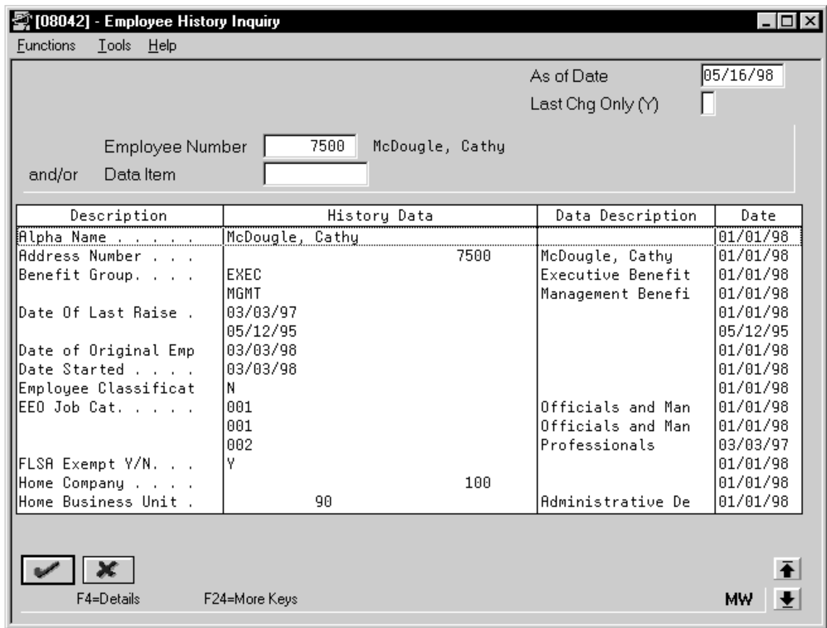
- ❑ Reviewing employee history
- ❑ Reviewing employee multiple job history

Reviewing Employee History

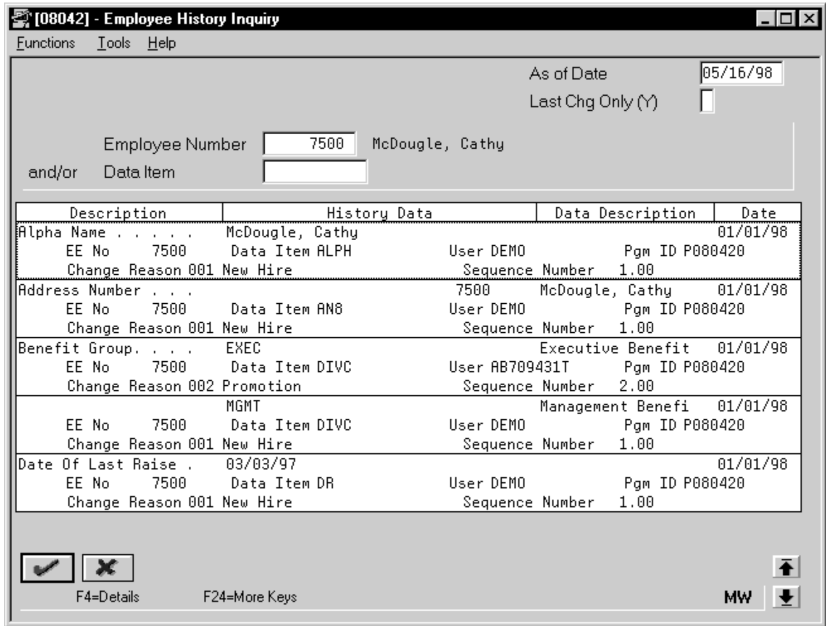
You can review all history linked to an individual employee from the first entry through the most recent entry. You can also review all history linked to a specific data item.

▶ To review employee history

On Employee History Inquiry



1. Complete the following required field:
   - Employee Number
2. Complete the following optional fields:
   - As of Date
   - Last Change (Y) (Yes or No Entry)
   - Data Item
3. Choose More Detail.



4. Review the information.

Field	Explanation
Yes or No Entry	A code that defines whether the screen 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 date effective, if two changes were made on the same date, both changes will be shown.
Date – As of	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 here will not display. If you do not enter a date, a default of the system date is used. 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 are required to enter this date.

What You Should Know About

Reviewing history for a specific date

You can review all history linked to an individual employee for one specific date by using Employee History Snapshot. Only the history in effect on the date you select appears.

Employee master field sensitive history

You can review employee master history for every field on HR Employee Entry by pressing the Field Sensitive History function key. The cursor must be in the field for which you want to review history.

For example, if you want to review an employee's job history, you would press the appropriate function key with the cursor in the Job Type and then Job Step fields.

Processing Options for Employee History Inquiry

```
1. Enter a '1' to see inactive employees                      ____________
  (Employee Pay Status not numeric) in
   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.
```

Exercises

See the exercises for this chapter.

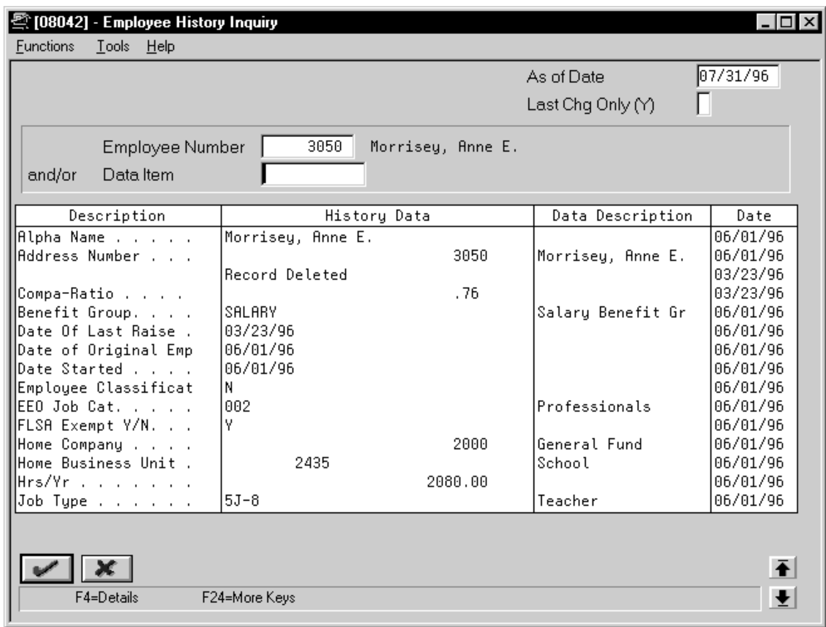
Reviewing Employee Multiple Job History

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:

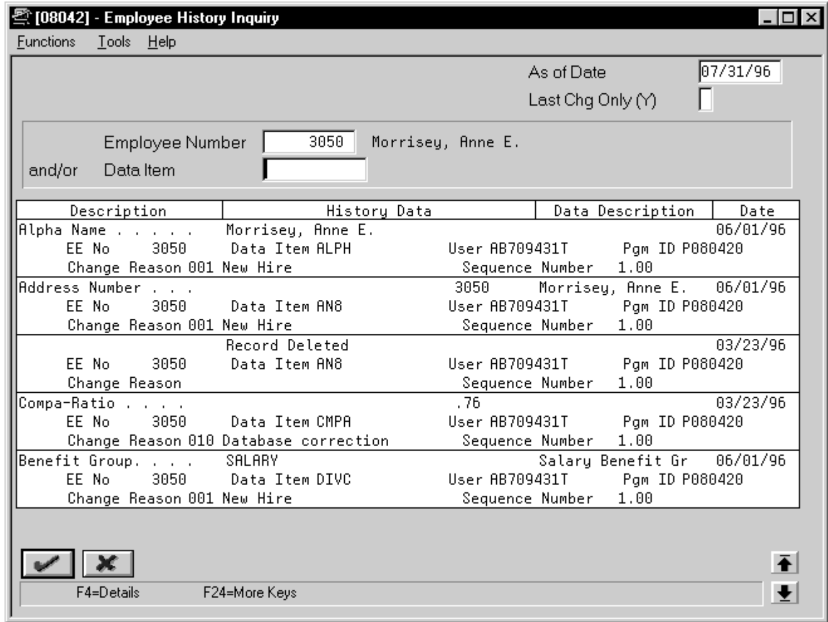
- Determine which jobs the employee is holding
- Verify that the employee's pay is appropriate for each job held
- Review the employee's multiple job record

▶ To review employee multiple job history

On Employee Multiple Job History



1. Complete the following required field:
   - Address Number
2. Complete the following optional fields to narrow the search:
   - Select From
   - Select Through
3. Choose More Detail.



4. Review the information.

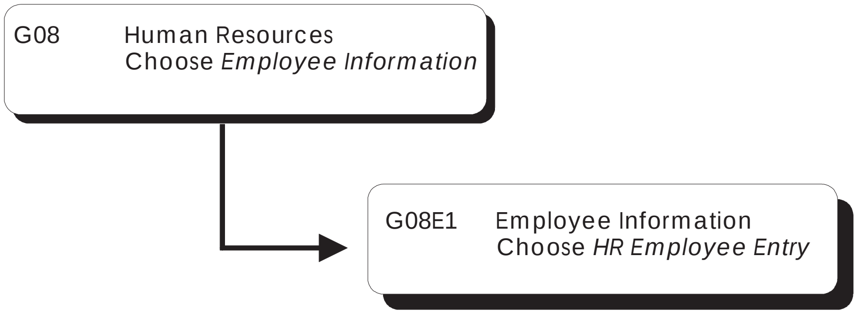
Correcting History Records

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 change an employee record and then correct the error, you must also correct the corresponding history table to maintain an accurate history trail.

Correcting history records consists of the following tasks:

- ❑ Correcting an employee master history record
- ❑ Correcting a multiple job history record

Correcting an Employee Master History Record



You can set up the Human Resources constants to enable the system to create a record in the corresponding history table each time you make an entry in the employees master record. When you change information in an employee record, the system creates a new history record reflecting the change. This creates an audit trail for each employee's record.

If you make a mistake when you change an employee's master record, the corresponding history record is also incorrect. After you correct the employee master record, you must delete the incorrect history record to maintain an accurate history audit trail.

To correct an employee history record, complete the following:

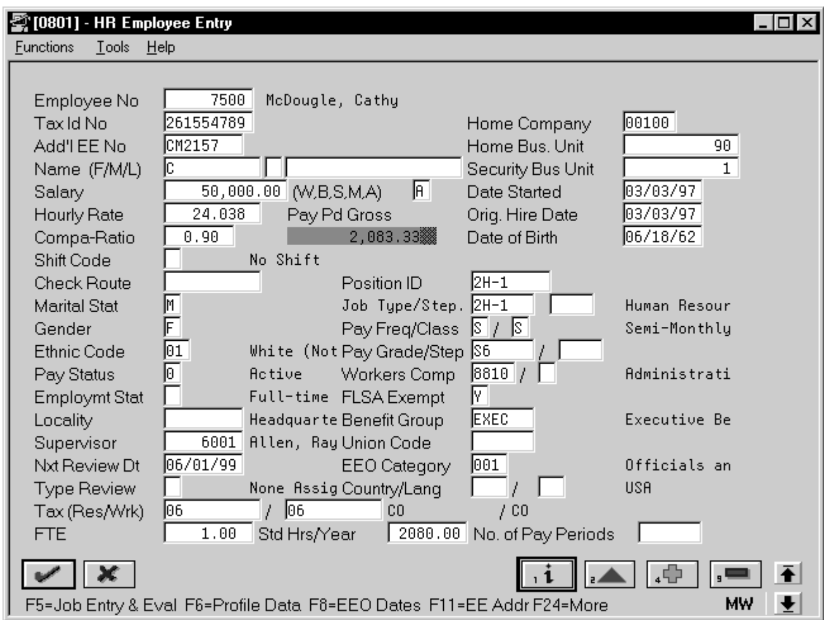
- Correct the employee master record
- Delete the incorrect employee history record

▶ To correct the employee master record

G08 Human Resources
Choose *Employee Information*

G08E1 Employee Information
Choose *HR Employee Entry*

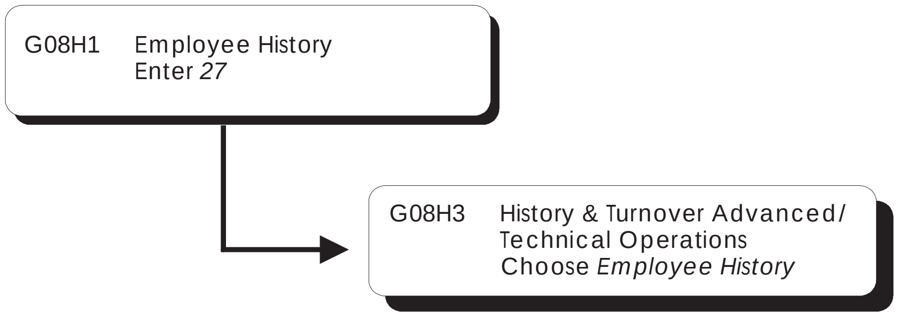
On HR Employee Entry



1. Locate the employee.
2. Make the necessary corrections.

   The system automatically creates a new record in the Employee Master History table and, if appropriate, the Employee Multiple Job History table.

▶ To delete the incorrect employee history record



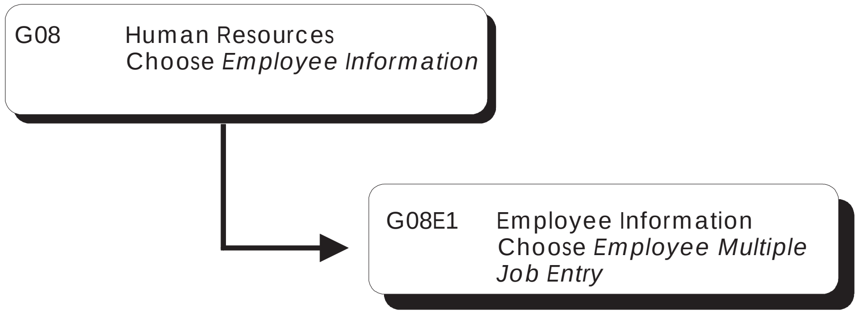
On Employee History

1. Locate the incorrect employee history record.
2. Delete the record.

What You Should Know About

Employee master table	Changes to employee history tables do not change data in the Employee Master table.

Correcting a Multiple Job History Record



When you correct the record, and the change reason and effective date are the same, no action is required. But you will have to correct the employee master history. When the change reason and effective date are different, you must delete the entire record in employee multiple job history and make changes to the Employee Multiple Jobs History table (F060118).

To correct a multiple job history record, complete the following tasks:

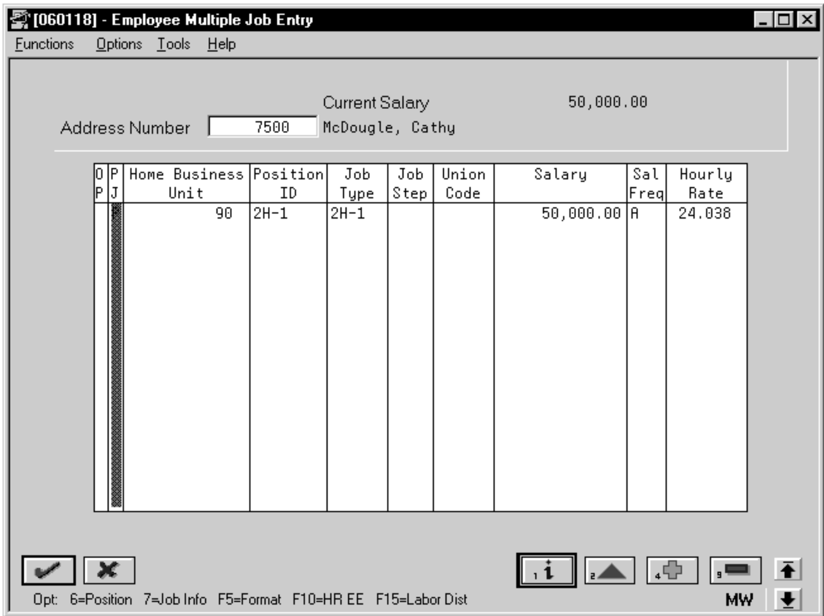
- Correct a primary job history record
- Correct a secondary job history record

See Also

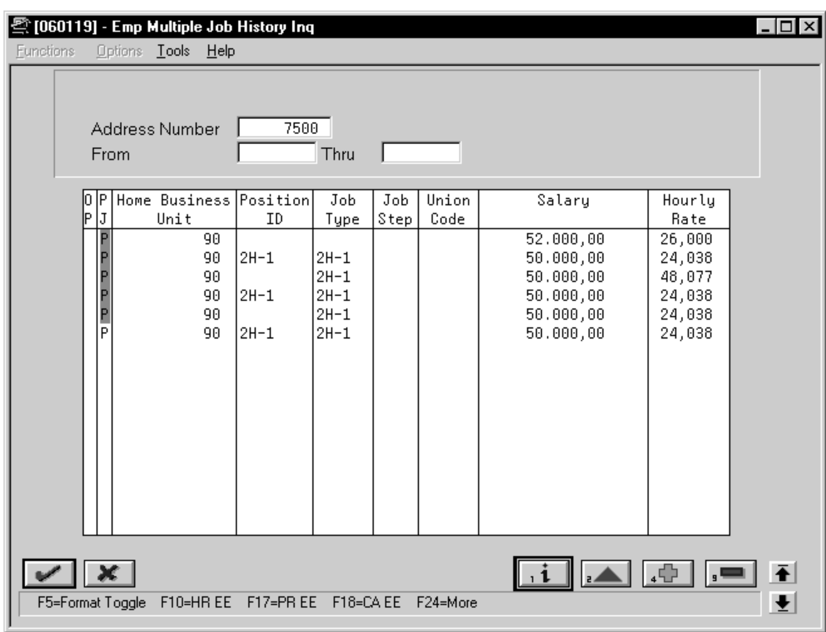
- *Employee Master History*

To correct a primary job history record

On Employee Multiple Job Entry



1. Locate the employee.
2. Make the necessary corrections.
3. Access Employee Multiple Job History.



4. If the correction included a change to the effective date or change reason, delete the prior record.

   If you did not change the effective date or change reason, skip this step.

5. Make the necessary corrections to the data that you want to change.

▶ To correct a secondary job history record

On Employee Multiple Job Entry

1. Locate the employee.
2. Delete the incorrect history record.

What You Should Know About

Correcting errors	Errors in an employee's secondary job history record can only be corrected using Employee Multiple Job Entry.
Deleting an incorrect employee multiple job history record	On Employee Multiple Job History Inquiry, you can also delete an incorrect employee multiple job history record.

Correcting an Invalid Change Reason Code or Effective Date

If you make a mistake when entering the change reason code or the effective date, you should correct the error to maintain an accurate history trail.

To correct an invalid change reason code or effective date, complete the following tasks:

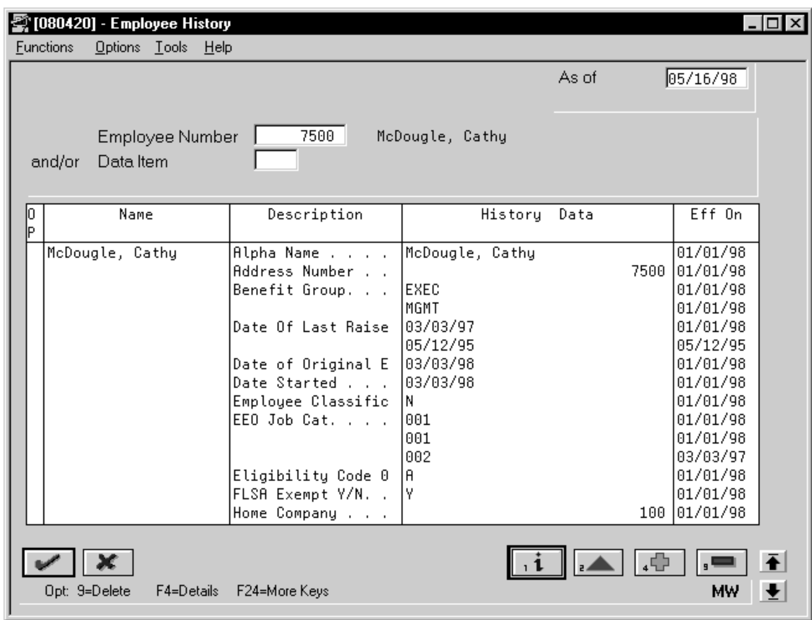
- Correct an Employee Master change reason code or effective date
- Correct a primary or secondary change reason or effective date

To correct an Employee Master change reason code or effective date

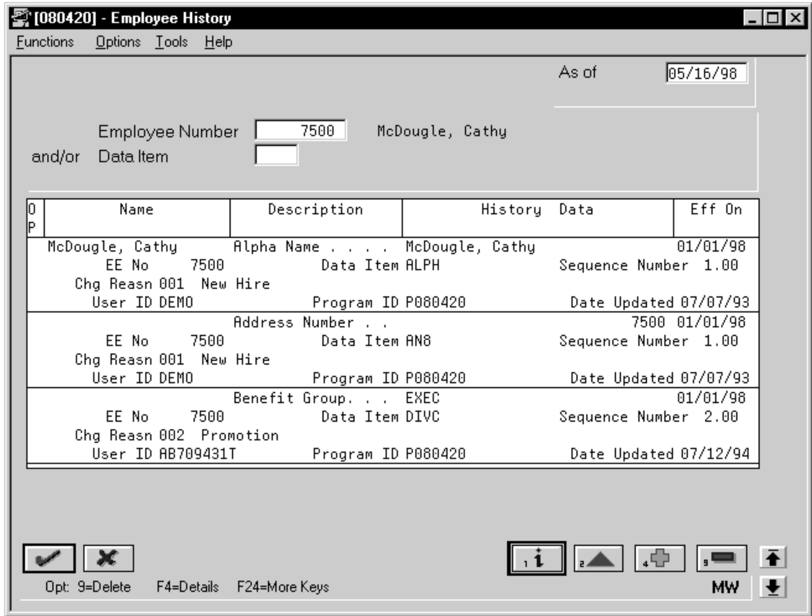
G08H1 Employee History
Enter *27*

G08H3 History & Turnover Advanced/ Technical Operations
Choose *Employee History*

On Employee History

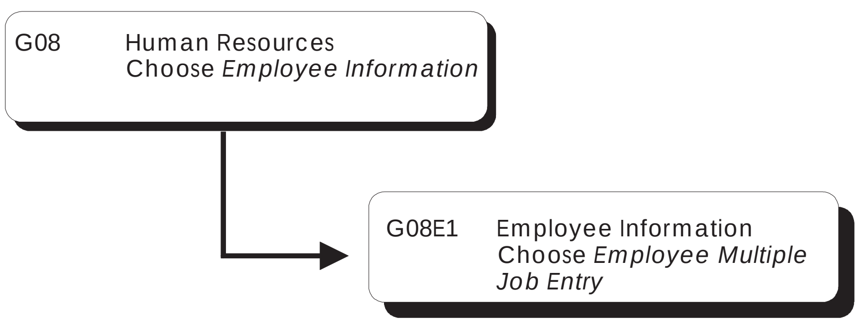


1. Locate one or both of the following:
   - Employee
   - Data Item
2. Correct the following field:
   - Effective On
3. Choose More Detail.

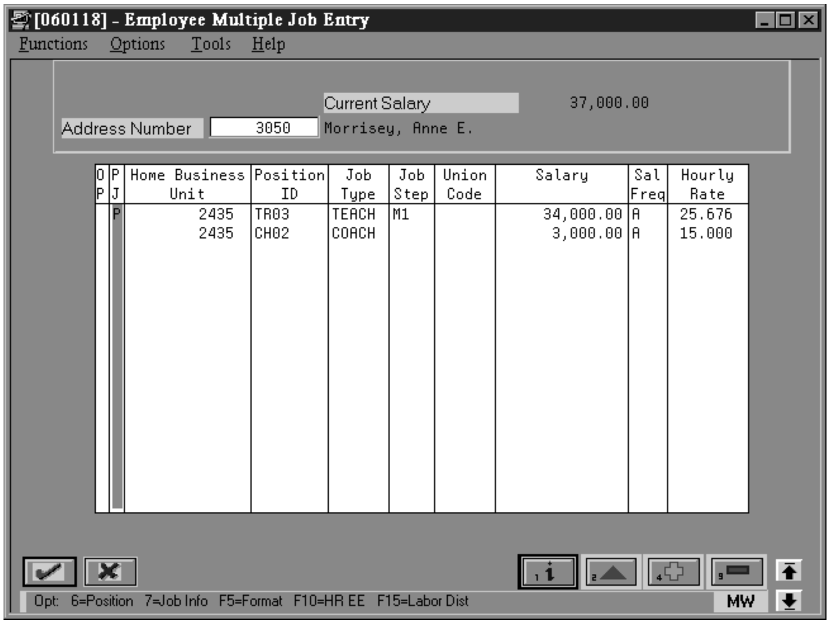


4. Correct the following field:
   - Change reason

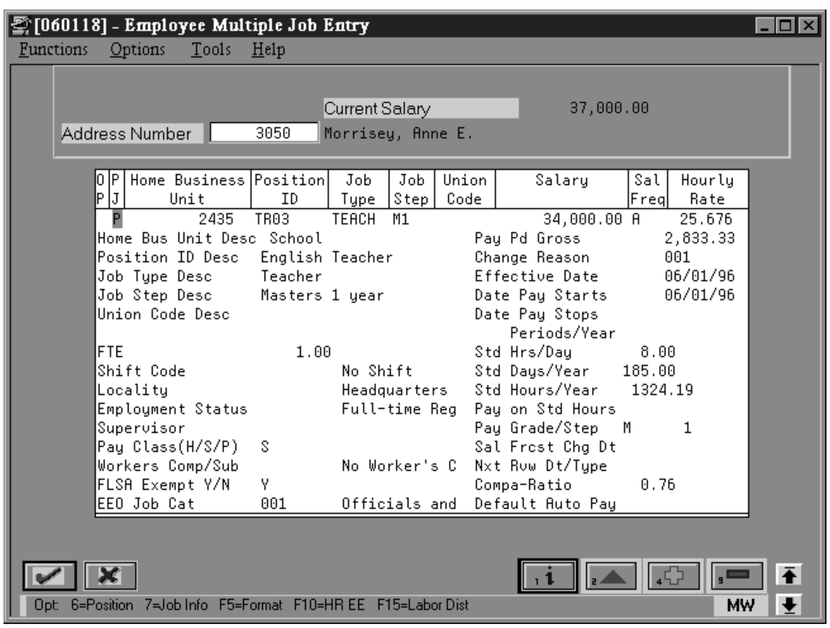
▶ To correct a primary or secondary change reason or effective date



On Employee Multiple Job Entry



1. Locate the employee.
2. Choose More Detail.



3. Correct the following fields:
   - Change Reason
   - Effective On
4. Access Employee Multiple Job History.
5. Delete the incorrect record.

Purging History Records

You can purge employee history records that you no longer need so that you can clear space on your system for storing future history records.

Complete the following tasks:

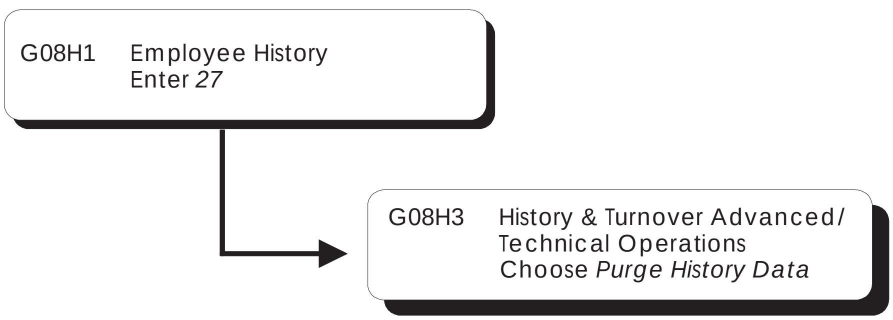
❑ Purge employee master history

❑ Purge employee multiple job record

Before You Begin

❑ Run and review the history reports before purging history files. See *Running History Reports*.

Purging Employee Master History



To free disk space, you can run Purge History Data to remove data from your system that you no longer need. Processing options enable you to specify whether you want to archive purged data to tape or an alternate backup system when you run the purge program. You can also delete history records for a specified date or for selected employees.

You can run the purge in either proof or update mode:

- If you run the purge in proof mode, no records are purged.
- If you run the purge in update mode, the records that you specify using the processing options are purged from the system.

The program prints a report for either mode.

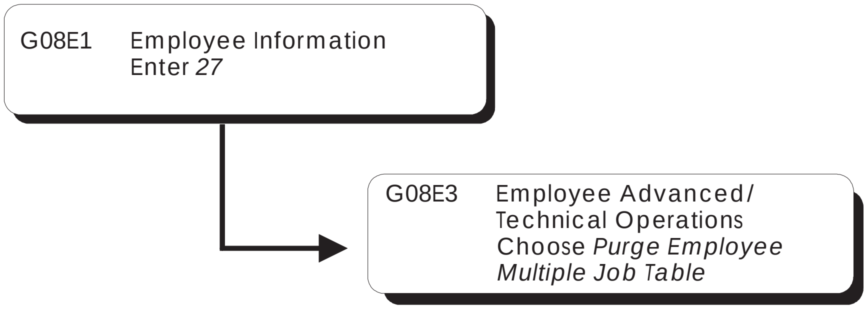
What You Should Know About

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 for Purge Employee History

```
You have chosen to purge Employee
History Information.  Enter the desired
values for the following options.

========================================

1) Enter a '1' if you wish to run this
report in update mode. A default of
blank will run in proof mode. No records
will be deleted.                              ____________

2)  Enter a date to be used to purge
History information.  All records that
are effective on or before this date
will be purged.                               ____________

3)  If you wish to copy the purged data
to tape or other storage medium, enter
the storage device name. Leave this
blank if you are purging without saving
data to device.                               ____________

4)  Enter a '1' if you wish to delete
all history records for the selected
employees.  A default of Blank will
leave the most recent history record
for each data item.                           ____________
```

Purging Employee Multiple Job Record



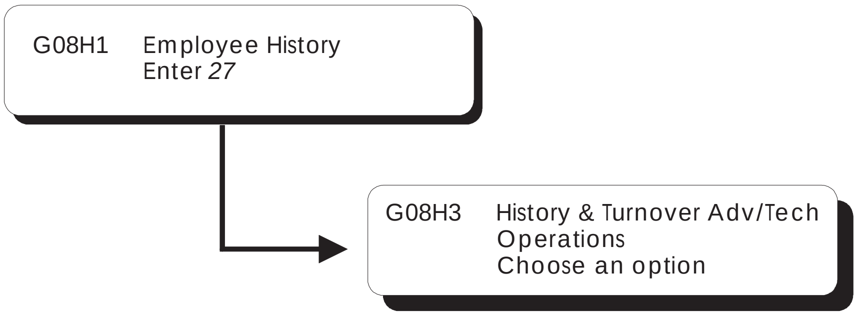
To free disk space and speed processing time, you can run Purge Employee Multiple Job Table to remove inactive data from your system.

You purge multiple job records based on the date that the employee's pay stops.

Processing Options for Purge Employee Multiple Job Table

```
Enter a date.  Records with a pay stop            ____________
date prior to this date will be deleted.
```

Work with Turnover Records



Working with Turnover Records

You can set the system so that turnover records are created whenever an employee makes a change within your organization that involves movement, such as a promotion or a change in business unit. Movement also includes employees leaving your company for any reason. The system identifies the change as turnover by the change reason code to which it is linked.

You review turnover records to verify that no duplicate records, incorrect change reason codes, or incorrect effective dates exist.

If an error is made when entering the change reason code or effective date, you must correct the turnover record to maintain an accurate trail. Additionally, you can purge turnover records to clear space on your system for future turnover records.

Turnover information for employee master changes is stored in the Employee Turnover Analysis table (F08045).

Working with turnover records consists of the following tasks:

- ❑ Reviewing turnover records
- ❑ Correcting turnover records
- ❑ Purging turnover records

Before You Begin

- ❑ Verify that the employee master data items for which you want turnover tracked have been selected.
- ❑ Verify that the Human Resources constants are set to track turnover.
- ❑ Verify that the history subsystem and monitor are set to run.

See Also

- *Setting Up History and Turnover Constants*

Reviewing Turnover Records

The system writes the following four records to the turnover table each time:

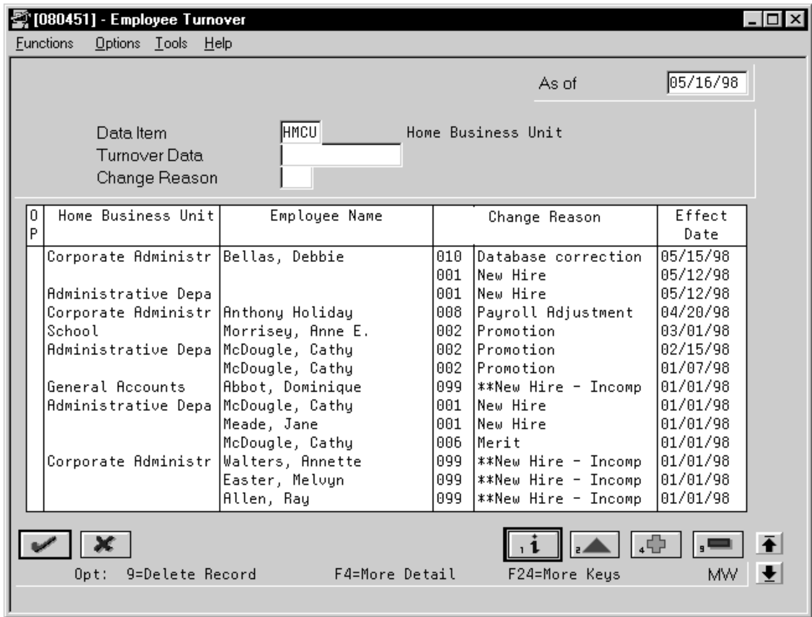
- Home company
- Home business unit
- Job identification number
- Check route

You review turnover records to check for:

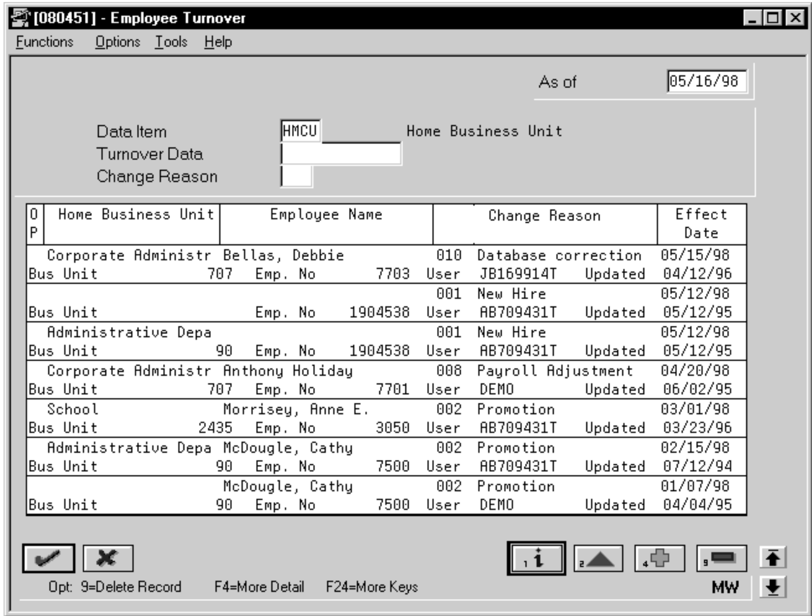
- Duplicate turnover records
- Incorrect effective dates
- Incorrect change reason codes

To review turnover records

On Employee Turnover



1. Complete the following required field:
    - Data Item
2. Complete the following optional fields to limit the search:
    - As of
    - Turnover Data
    - Change Reason
3. Choose More Detail.



4. Review the information.

Field	Explanation
Data Item – Turnover Analysis	The data item category through which employee turnover is tracked. Employee turnover is tracked for categories such as home business unit, home company, and so forth. You can define this code using user defined code table 08/TF. JDE provides four codes, and, if necessary, you can change the description of these codes. However, do not change the 4-letter code. In other words, one of the codes provided is HMCO (Home Company). You can change the 'Home Company' description, but do not change the letters HMCO.
Turnover Data	The data specific to the type of turnover being tracked. For home business unit, this field would contain an individual business unit name. For home company, it would contain a company name. For jobs, it would contain a job type (data item JBCD) followed by a job step (data item JBST). For check route codes, the field would simply contain the code. . . . . *Form-specific information* . . . . This field is optional. You can use this field to limit the information that displays on the screen. If you do not put a code in this field, all turnover information for the data item displays.

What You Should Know About

Turnover change reason codes

To identify turnover as movement within your company, the change reason code must be numeric.

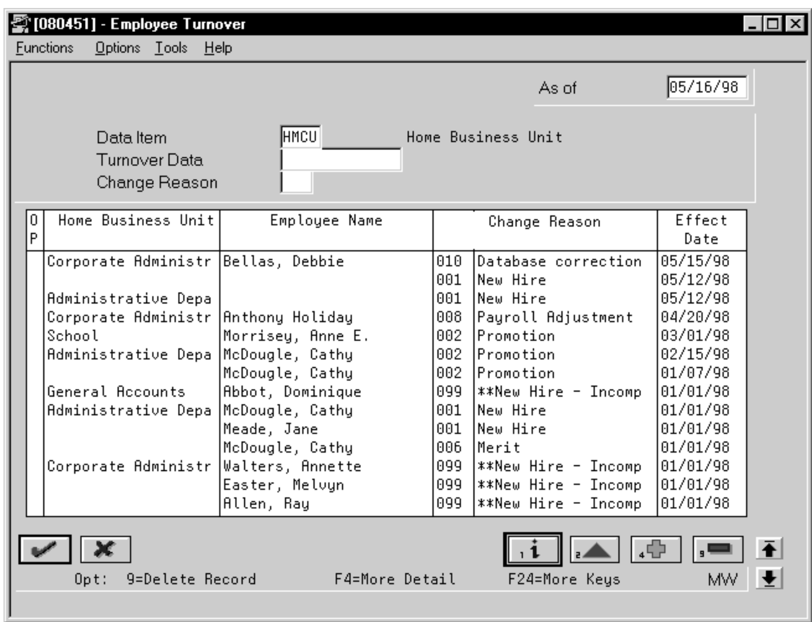
To identify turnover as movement resulting from an employee leaving the company, the change reason code must be alphabetic.

Correcting Turnover Records

When you change employee information, the system prompts you to enter a code identifying the reason for the change and the date when the change is to take effect. If you make a mistake when entering the change reason code or the effective date, you should correct the error to maintain an accurate audit trail.

▶ **To correct turnover records**

On Employee Turnover


[080451] - Employee Turnover

Functions Options Tools Help

As of 05/16/98

Data Item HMCU Home Business Unit

Turnover Data

Change Reason

OP	Home Business Unit	Employee Name	Change Reason		Effect Date
	Corporate Administr	Bellas, Debbie	010	Database correction	05/15/98
			001	New Hire	05/12/98
	Administrative Depa		001	New Hire	05/12/98
	Corporate Administr	Anthony Holiday	008	Payroll Adjustment	04/20/98
	School	Morrisey, Anne E.	002	Promotion	03/01/98
	Administrative Depa	McDougle, Cathy	002	Promotion	02/15/98
		McDougle, Cathy	002	Promotion	01/07/98
	General Accounts	Abbot, Dominique	099	**New Hire - Incomp	01/01/98
	Administrative Depa	McDougle, Cathy	001	New Hire	01/01/98
		Meade, Jane	001	New Hire	01/01/98
		McDougle, Cathy	006	Merit	01/01/98
	Corporate Administr	Walters, Annette	099	**New Hire - Incomp	01/01/98
		Easter, Melvyn	099	**New Hire - Incomp	01/01/98
		Allen, Ray	099	**New Hire - Incomp	01/01/98

Opt: 9=Delete Record F4=More Detail F24=More Keys MW

1. Complete the following required field to locate the record with the incorrect effective date:
   - Data Item

2. Complete the following optional fields to locate the record with the incorrect effective date:
   - Turnover Data
   - Change Reason
3. Enter the correct effective date.
4. If the record is a duplicate, or if the change reason is incorrect, delete the record.

What You Should Know About

Correcting the change reason code	The change reason field on Employee Turnover cannot be revised. To correct this information, use Employee Turnover to delete the turnover record with the incorrect change reason code. You reenter the turnover record with the correct change reason code using HR Employee Entry. You must delete the following four records: • Home Company • Home Business Unit • Job Identification • Check Route Code See *Working with Employee Information*.

Purging Turnover Records

To free disk space for additional turnover records, you can purge records that you no longer need. Processing options enable you to specify whether you want to archive purged data to tape or an alternate backup system when you run the purge program. You can also delete turnover records for a specified date.

To purge turnover records, complete the following tasks:

- Set up the purge
- Run the purge

▶ To set up the purge

On Purge Turnover Data

1. Enter the menu selection number for Purge Turnover Data in the following field:
   - Selection
2. Access the DREAM Writer version list.
3. Create your own version of the purge DREAM Writer.
4. Change the Data Selection to identify the employee turnover records to purge.
5. Resequence the DREAM Writer version list so that your version is ZJDE0001.

▶ To run the purge

On Purge Turnover Data

1. Select Purge Turnover Data from the menu.
2. Read the run-time message.
3. Specify the date that you want the system to use to select records.
4. If applicable, specify the storage medium where you want the system to store the purged records.
5. Submit the purge.

Run History and Turnover Reports

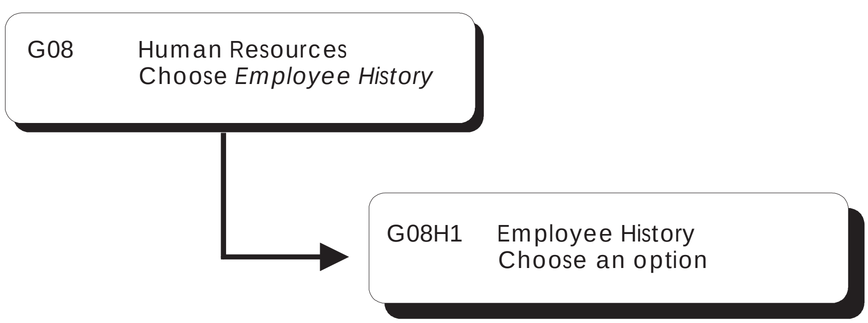
Running History and Turnover Reports

You can run history reports to review the most recent changes made to your employee history records. You can run turnover reports to review the turnover within your organization.

Complete the following tasks:

- ❑ Run history reports
- ❑ Run turnover reports

Running History Reports



You can review the most recent changes made to your employee's history and salary records.

You can run the following reports:

- ❑ Employee History Log report
- ❑ Salary History Analysis report
- ❑ Last History Change report

Employee History Log Report

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

```
 080423                                J.D. Edwards & Company                                     Page - . . .     9
                                All Employees by Home Business Unit                              Date - . . .  6/25/98
                                      01/01/98  Thru  12/31/98

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                  01/15/98                             DEMO01
                                                          18.000                  01/01/98                             DEMO01
                         PSDT Date Pay Starts 08/17/90                            01/01/98                             DEMO01
                         SAL  Annual Salary.            54,080.00                 01/15/98                             DEMO01
                                                        37,440.00                 01/01/98                             DEMO01
                         SALY Pay Class(H/S/P H                                   01/01/98                             DEMO01
                         SSN  Employee Tax ID 058-43-2559                         01/01/98                             DEMO01
                         TARA Tax Area (Work) 06                                  01/01/98                             DEMO01
                         TARR Tax Area (Res.) 06                                  01/01/98                             DEMO01
                         TRS  Change Reason.  07                                  03/01/98                             DEMO01
                                              98                                  01/15/98                             DEMO01
                                              010                Database correc 01/01/98   1.00 010 Database correct DEMO
                                              04                                  01/01/98                             DEMO01
                         UPMJ Date Updated .  10/17/91                            03/01/98                             DEMO01
                                              04/04/95                            01/01/98   1.00                      DEMO
                                              10/14/91                            01/01/98                             DEMO01
                         WCMP Workers Comp .  8810               Administrative  01/01/98   2.00                      DEMO
                                                                 No Worker's Com 01/01/98   1.00 010 Database correct DEMO
                                              8810               Administrative  01/01/98                             DEMO01
Home Business Unit .          451 Accounting Department
-------------------- ------------ ------------------------------
    2022 Kellerman, Jame DT   Date Terminated 07/01/98                            07/01/98   1.00 TE  Termination-Elig BARCLAY
                         HMCU Home Business U          451       Accounting Depa 06/26/98   1.00 010 Database correct DEMO
                         PAST Pay Status . .  9                  Terminated, Las 07/01/98   1.00 TE  Termination-Elig BARCLAY
                         POS  Position ID. .  4510A-1                             06/26/98   1.00 010 Database correct DEMO
                         TRS  Change Reason.  TE                 Termination-Eli 07/01/98   1.00 TE  Termination-Elig BARCLAY
                         UPMJ Date Updated .  03/31/96                            07/01/98   1.00 TE  Termination-Elig BARCLAY
                                              06/26/95                            06/26/98   1.00 010 Database correct DEMO
Home Business Unit .          701 Corporate Administration
-------------------- ------------ ------------------------------
    2006 Walters, Annett ALPH Alpha Name . .  Walters, Annette                    01/01/98                             DEMO01
                         AN8  Address Number               2006 Walters, Annett 01/01/98                             DEMO01
                         DIVC Benefit Group.  MGMT               Management Bene 01/01/98                             DEMO01
                         DSI  Date of Origina 06/03/96                            01/01/98                             DEMO01
                         DST  Date Started .  06/03/96                            01/01/98                             DEMO01
                         ECNT Employee Classi N                                   01/01/98                             DEMO01
                         EEOJ EEO Job Cat. .  001                Officials and M 01/01/98                             DEMO01
                         E001 Eligibility Cod Y                                   01/01/98                             DEMO01
                         E010 Eligibility Cod A                                   01/01/98                             DEMO01
                         FLSA FLSA Exempt Y/N Y                                   01/01/98                             DEMO01
                         HMCO Home Company .                  1                   01/01/98                             DEMO01
                         HMCU Home Business U          701       Corporate Admin 01/01/98                             DEMO01
                         HM04 Disability . .  N                                   01/01/98                             DEMO01
                         IFN  First Initial ( A                                   01/01/98                             DEMO01
                         IH   Hrs/Yr . . . .            2080.00                   01/01/98                             DEMO01
                         JBCD Job Type . . .  1M-2               Project Leader  01/01/98                             DEMO01
```

Processing Options for Employee History Log Report

```
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 Report

Run the Salary History Analysis report to review changes to the primary job salary within the date range you specify.

The system selects a salary record and an hourly record for each employee. It then compares the effective dates of the two records and chooses the earlier date to identify the pay class linked to the employee.

If the pay class is S (Salary), the system prints a report based on salary information. If the pay class is H (Hourly), the system prints a report based on hourly rate information.

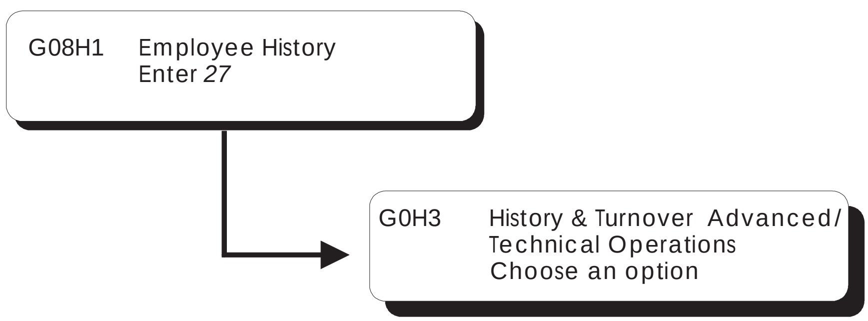
```
080424                                J.D. Edwards & Company                                Page - . . .     2
                                      Employee Salary History                               Date - . . .  3/05/98
                                  All Employees by Home Business Unit

                                       01/01/98  Thru  12/31/98
```

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			01/01/98
		Active		Human Resourc	S6		0.79	S	44,000.00	10.00	Promotion	02/15/98
		Active		Human Resourc	S6			S		100.00-		07/01/98
7504	Meade, Jane	Active			S4		0.92	S	35,000.00			01/01/98
7506	Mayeda, Donald	Active		Clerk				H	7.500			01/01/98
7510	Moralez, Jesus	Active					0.67	H	6.500			01/01/98
6001	Allen, Ray	Active			S7		0.73	S	48,800.00			01/01/98
		Active		President	S7		1.05	S	70,000.00	43.44		03/17/98
5127	Ebby, Chester A.	Active		EEO Specialis				S	25,000,00		Automated Con	01/01/98
6000	Easter, Melvyn	Active	Full-time	Secretary			2.57	H	18.000			01/01/98
		Active	Full-time	Foreman			3.71	H	26.000	44.44		01/15/98
2006	Walters, Annette	Active		Project Leade			0.70	S	40,000.00			01/01/98
2111	Ingraham, Paul	Active		Laborer	H5			S	35,000.00			03/15/98
2129	Jackson, John	Active		Financial Ana			1.26	S	50,000.00			01/15/98
6002	Abbot, Dominique	Active	Full-time	Financial Ana	S4		0.74	S	28,000.00			01/01/98
6010	Eason, Walter	Active		Laborer				H	18.000			01/01/98
7701	Anthony Holiday	Active		Fire Fighter			1.34	H	11.250		Automated Con	01/01/98
7702	Derrick, Leslie	Active		Financial Ana			2.54	H	37.500		Automated Con	01/01/98
7703	Bellas, Debbie	Active		Financial Ana			1.34	S	53,000.00		Automated Con	01/01/98
7704	Rivard, Jacques	Active		Payroll Manag			1.04	S	43,620.00		Automated Con	01/01/98
7508	Mai, Tien	Active					0.54	H	5.250			01/01/98

Processing Options for Employee Salary History Analysis Report

```
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.
```

Last History Change Report



The Last History Change report lists the last change made prior to the most recent change for any data item in the Employee Master table (F060116) for which you are tracking history. You can use this report to verify that the information the the Last History Change Workfile is correct.

For example, if an employee changed from job ID 2H–3 to 2H–2 and then to 2H–1, this report lists the employee's last change job ID as 2H–2.

Complete the following tasks:

- Create the Last History Change Workfile
- Run the Last History Change report

▶ To create the last history change workfile

The Last History Change Workfile is a compilation of changes to data items. The system builds a temporary workfile (T08042W) to be used by the Last Change in History (World Writer) report. Last History Change Workfile does not print a report.

You must run this batch program individually for each data item you want in the workfile and displayed on the Last History Change report.

For example, to show the most recent changes made prior to the current record for all salary changes (data item SAL) as well as for job changes (data item JBCD), verify the processing options are set to add records to the workfile, run this program once for SAL and then again for JBCD.

You should then check your message queue to verify that this program (P0804500) completed successfully.

If you are running the workfile for a new data item, you must clear the workfile before you create a new workfile. If you do not clear the workfile, you will have duplicate entries.

Processing Options for Last History Change Workfile Build

```
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' ) .
```

▶ To run the last history change report

After you have created the Last History Change Workfile, you run the Last Change in History (World Writer) report to review the data.

You must run Last History Change Workfile before you run this World Writer.

		Last Change In History Using Work File T08042W				Page – 1 Date – 03/05/98
Address Number	**Data Item**	**History Data**	**Effective On**	**Date Updated**	**User ID**	**Program ID**
2	SALY	S	11/20/95	02/22/95	RP1411506	P0801
3	SALY	S		01/24/96	WC909193	P0801
4	SALY			05/03/96	SS788627	P0804500
5	SALY	S		12/21/95	JE652201	P0801
6	SALY	S		12/21/95	JE652201	P0801
8	SALY			05/03/96	SS788627	P0804500
9	SALY			05/03/96	SS788627	P0804500
11	SALY			05/03/96	SS788627	P0804500
12	SALY	S	02/21/96	02/21/96	JE652201	P0801
100	SALY	S		02/28/96	JE652201	P0801
133	SALY	S		01/03/96	JE652201	P0801
134	SALY	S		04/03/96	JE652201	P060101
135	SALY	S	04/03/96	04/03/96	JE652201	P060101
136	SALY	S	04/03/96	04/03/96	JE652201	P060101
137	SALY			05/03/96	SS788627	P0804500
138	SALY	S	01/07/96	04/03/96	JE652201	P0801
311	SALY			05/03/96	SS788627	P0804500
312	SALY			05/03/96	SS788627	P0804500
315	SALY			05/03/96	SS788627	P0804500
316	SALY			05/03/96	SS788627	P0804500
317	SALY			05/03/96	SS788627	P0804500
319	SALY			05/03/96	SS788627	P0804500
320	SALY			05/03/96	SS788627	P0804500
321	SALY			05/03/96	SS788627	P0804500
329	SALY			05/03/96	SS788627	P0804500
330	SALY			05/03/96	SS788627	P0804500

Running Turnover/Change Reports

G08 Human Resources
Choose *Turnover/Change Analysis*

G08T2 Turnover Change Analysis
Choose an option

You run the following turnover/change analysis reports to track employee movement:

- The Turnover/Change By Home Business Unit report
- The Turnover/Change By Home Company report
- The Turnover/Change By Job ID report
- The Turnover/Change By Check Route Code report

This report prints information from the Business Unit Master table (F0006) and the Employee Turnover Analysis table (F08045).

Before You Begin

❑ Verify that turnover columns are defined. See *Defining Turnover Columns.*

What You Should Know About

The Initial Employee column	The total in this column is the number of employees linked to the specified home business unit as of the From Date specified in the processing options, and with a numeric change reason code.

What You Should Know About Processing Options

From Date	The From Date must be at least one day after the day that history and turnover were initialized. Otherwise, the Initial Employee column displays all zeros.

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

```
080431                                           J.D. Edwards & Company                                 Page - . . .    2
                                         Employee Turnover by Home Business Unit                   Date - . . .  12/31/98
                                                  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
```

Exercises

See the exercises for this chapter.

Jobs

Objectives

- To define job master information
- To define job profile information
- To attach a job to an employee
- To evaluate jobs
- To review job information
- To update jobs globally
- To work with obsolete job IDs
- To run reports

About Jobs

Before you can link job information to your employees, you must create a job master table. This job master table consists of:

- Identifiers and job titles
- Reporting information
- Pay information
- An hourly or salary job classification
- Benefit and union codes
- Canadian National Occupation Codes

A job ID consists of a job type and, if applicable, a job step.

After you define your jobs, you can associate pay grades and steps for each job. Although it is not required by the system, job profile data allows you to record auxiliary job information, such as the major responsibilities, the authority level, or the background requirements for each job ID.

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

You can review job information by:

- Profile data
- Employee
- Evaluation method
- Pay range
- Pay grade

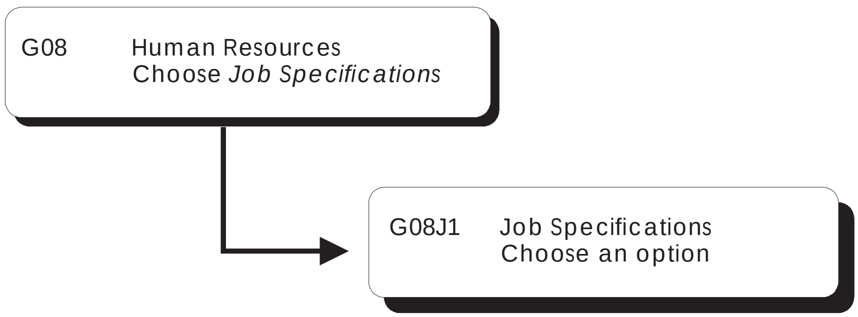
Several types of reports are available to review job information, including:

- Job reports
- Job evaluation reports
- Pay grade/step progression reports

Processing job information includes the following tasks:

- ❑ Defining jobs
- ❑ Reviewing jobs
- ❑ Updating jobs globally
- ❑ Working with obsolete job IDs
- ❑ Changing pay grade/step tables
- ❑ Running job reports

Define Jobs



Defining Jobs

Before you can link job information to your employees, you must create a job master table. The job master table consists of:

- Identifiers and job titles
- Reporting information
- Job evaluation information
- Pay information
- Benefit and union codes
- Canadian NOC information for Canadian companies only

When you create a job master table, you can also enter job profile data. Job profile data includes such job information as the major responsibilities, the authority level and the background requirements for each job ID (job type and job step, if applicable).

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

Defining jobs consists of the following tasks:

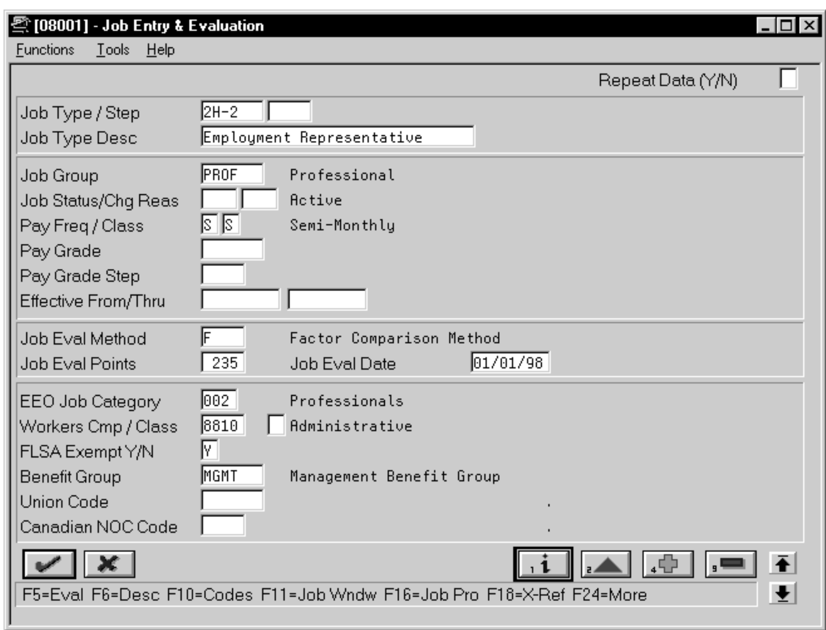
- ❑ Entering initial job information
- ❑ Entering job profile data
- ❑ Entering evaluation information

Entering Initial Job Information

Initial job information is the minimum information required by the system to create a master job record.

Entering initial job information consists of the following tasks:

- Entering identifiers and job title
- Entering reporting information
- Entering pay information
- Entering benefit and union codes
- Attaching Canadian NOC code to a job



▶ To enter identifiers and job title

On Job Entry and Evaluation

1. Complete the following required fields:
   - Job Type
   - Job Type Description
   - FLSA Exempt Y/N
   - EEO Job Category
2. Complete the following optional fields:
   - Pay Frequency
   - Pay Class
   - Job Step
   - Repeat Data (Y/N)
   - Effective From
   - Effective Through
   - Job Evaluation Method
   - Job Evaluation Date
   - Workers Compensation Insurance Code
   - Sub Class – Workers Compensation

Field	Explanation
Job Type (Craft) Code	A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications. A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications.
Job Step	A user defined code (system 06, type GS) that designates a specific step, grade, or salary level within a particular job type. The system uses this field in conjunction with job type to determine pay rates by job.

Field	Explanation
Pay Frequency	A user defined code (system 06, type 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 to calculate the amount per pay period.
Description 01	A user defined name or remark that describes a field. . . . . *Form-specific information* . . . . The system displays an error message if the description does not match the job type/step.
Repeat Data (Y/N)	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 Evaluation Method	A user defined method or grouping (system 08, type EM) 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

What You Should Know About

Attaching a job type and step to an employee

After you define the job type and, if applicable, job step information in the Job Master table (F08001), you can attach an employee to the job type by entering the job ID in the Job Type/Job Step fields on HR Employee Entry. The system then, depending on how you have set the processing options, automatically retrieves complete job information for the job type from the Job Master table and applies it to that employee.

▶ To enter reporting information

On Job Entry and Evaluation

Complete the following fields:

- Job Group
- Job Status
- Job Status Change Reason
- EEO Job Category

Field	Explanation
Job Group	A grouping of similar jobs linked together to form 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. A job category defines a specific job, and all related job categories are classified under a job group. You can define job group codes using user defined code table system 08, type JG.
Job Status Code	A code that indicates whether a job is currently active or inactive. You can define codes using user defined code table system 08, type JS.
Status Change Reason	A user defined code (system 08, type JC) that explains why a change in status was made.
Workers Comp Insurance Code	A user defined code (system 00, type W) that is the workers compensation insurance (WCI) code. It should correspond to the classifications on your periodic workers compensation insurance reports.

Field	Explanation
Sub Class – Workers Comp	The subclass code is used to define 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 standard subclass codes shipped with the system are blank and F. The subclass should remain blank if multiple rates do not exist. Blank There are no special circumstances associated with this code. F There are special circumstances associated with this code.

► To enter pay information

On Job Entry and Evaluation

Complete the following fields:

- Pay Grade
- Pay Grade Step

Field	Explanation
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated. Pay grades are set up using Pay Grades by Class (P082001).

► To enter benefit and union codes

On Job Entry and Evaluation

Complete the following required fields:

- Benefit Group
- Union Code

Field	Explanation
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 company providing you have your benefit plans linked to benefit categories which, in turn, are linked to benefit groups.
Union Code	A user defined code (system 06, type UN) that represents the union or plan in which the employee or group of employees work or participate.

What You Should Know About

Pay Frequency and Pay Class These fields can be left blank and entered at the employee level. If you enter a blank value, these fields will not override a value at the employee level.

Processing Options for Job Data & Evaluation Points

```
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 . . . . . . . . . . . .            ____________
```

Jobs

▶ To attach a Canadian NOC code to a job

If your company is defined as a Canadian company, you can attach a Canadian NOC code to the job to help compile Canadian Employment Equity information.

On Job Entry and Evaluation

Complete the following field:

- NOC Code

What You Should Know About

Pay Frequency and Pay Class	These fields can be left blank and entered at the employee level. If you enter a blank value, these fields will not override a value at the employee level.

Entering Job Profile Data

Profile data is any auxiliary information you want to maintain in any of the following databases:

- Job
- Employee
- Applicant
- Dependent/Beneficiary
- Requisition
- Safety and health case

For example, for each job in the job database, you can record the major responsibilities, the authority level and the background requirements. This information is not required by the system.

Although the specific profile data available for each database is different, the process for entering the data is identical for each database. To enter specific job profile data in Job Profile Entry, follow the steps for entering employee profile data.

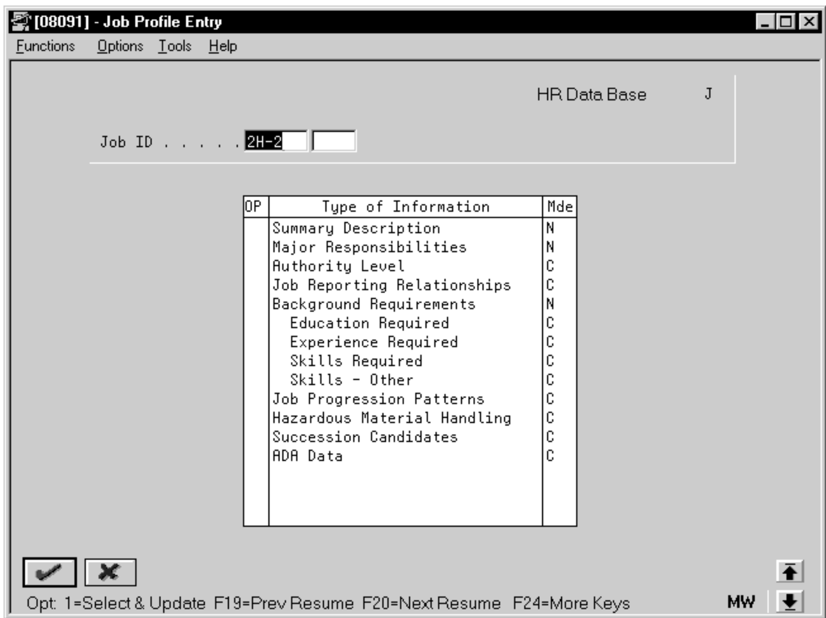
If your company is Canadian, you can compile Canadian Employment Equity information. You can attach the Canadian NOC code to the job.

Before You Begin

❑ If your company is Canadian, very that it is defined as Canadian in Company Constants.

▶ To enter job profile data

On Job Profile Entry



Follow the steps for entering employee profile data.

See Also

- *Entering Employee Profile Data*

Exercises
See the exercises for this chapter.

Entering Evaluation Information

After you have defined your jobs, you can evaluate each job to compare your jobs with each other, and compare your jobs within the overall job market. The system automatically calculates the total evaluation degrees or points and then updates the job master with this information. You can then base your salary ranges on the evaluations.

You can enter either degrees or points for each job factor, depending on the evaluation method you linked to the job using Job Entry and Evaluation.

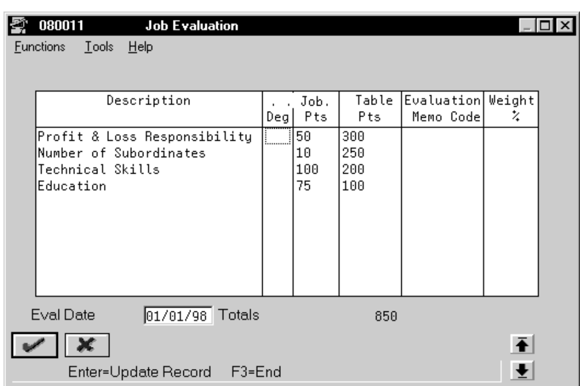
Before You Begin

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

▶ To enter evaluation information

On Job Entry and Evaluation

1. Locate the job.
2. Complete the following fields:
   - Job Evaluation Method
   - Job Evaluation Date
3. Reinquire on the job.
4. Access Job Evaluation.



5. Complete one of the following required fields, depending on how you define the evaluation method:
   - Job Degree
   - Job Points

6. Complete the following optional fields:
   - Evaluation Memo Code
   - Weight %

Field	Explanation
Grade or Degree – 001	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.
Job Evaluation Points	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.
Evaluation Memo Code 1	A memo field used to indicate why a certain point value was assigned to job evaluation factor 01. For example, this field might contain the row and column numbers from a Hay evaluation chart where the particular point value resides.
Factor Weight % 1	A memo field used to indicate the relative importance of the points assigned to job evaluation factor 01 versus the other factors. This allows you to recognize that certain job evaluation factors are more important (carry more weight) than other factors.

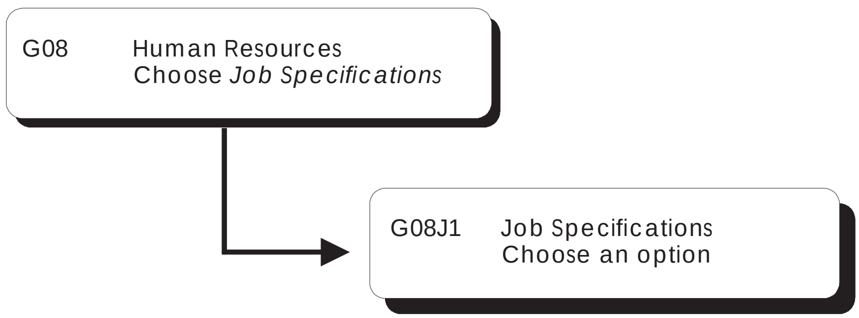
What You Should Know About

Evaluation Memo Code and Weight % Fields	These fields are only for record-keeping purposes. They are not used in weighting of the evaluation to affect the total points.
Job Evaluation	If you add information in the following fields the system displays the Job Evaluation Window: • Job Evaluation Method • Job Evaluation Date If you change information in the fields you must use the appropiate function key to access the Job Evaluation Window.

Exercises

See the exercises for this chapter.

Review Jobs



Reviewing Jobs

You review jobs for a comprehensive view of your employees and the job information to which they are attached, including pay ranges and pay grades.

If your company posts job positions internally, your employees can review job profile information (job description) online to determine if they qualify for job openings. You can also print job profile information to post on company bulletin boards for employees with no online access.

After you evaluate your jobs, you can review your jobs by job evaluation factor to verify that the points for each factor of each evaluation method were assigned equitably.

You can review jobs by pay range to verify that your pay ranges are appropriate for the job type and job step, and for the location where the job is performed.

You also review pay grades for job classifications to verify that the pay ranges for each pay grade and for the location where the job is performed are appropriate.

Complete the following tasks to review jobs:

- ❑ Review jobs by profile data
- ❑ Review jobs by employees
- ❑ Review jobs by evaluation
- ❑ Review pay ranges for jobs
- ❑ Review pay grades for job classifications

Reviewing Jobs by Profile Data

After you enter profile data for jobs, you can use the information to search for jobs linked to one or more data types. You can perform this search by job or by data type.

You can review the profile data available for each job in your company. 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 also review job profile data by a specific type of data. For example, you can review the major responsibilities required for each job in your company.

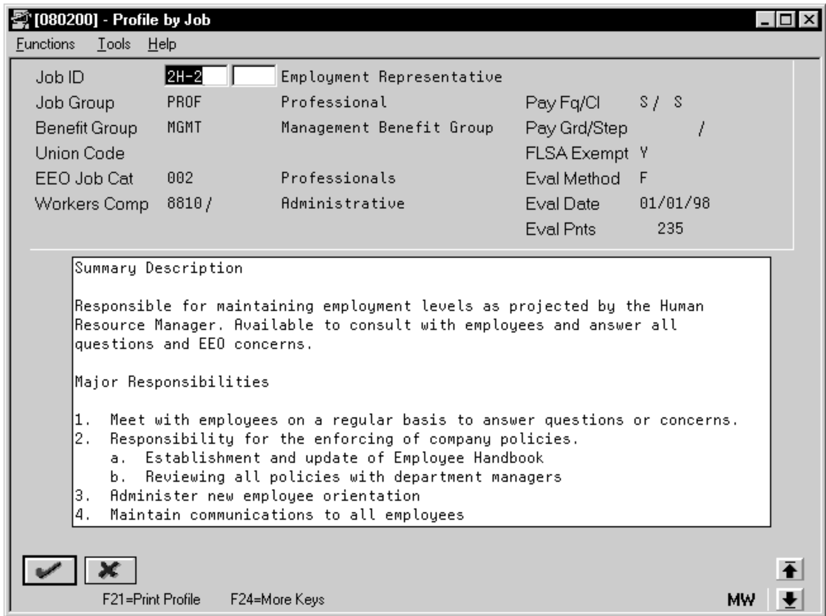
Because you define the types of data you want to track for jobs, the specific data available depends on the profile data you defined.

Reviewing jobs by profile data consists of the following tasks:

- Reviewing a job profile
- Reviewing a job by job profile data type

To review a job profile

On Profile by Job

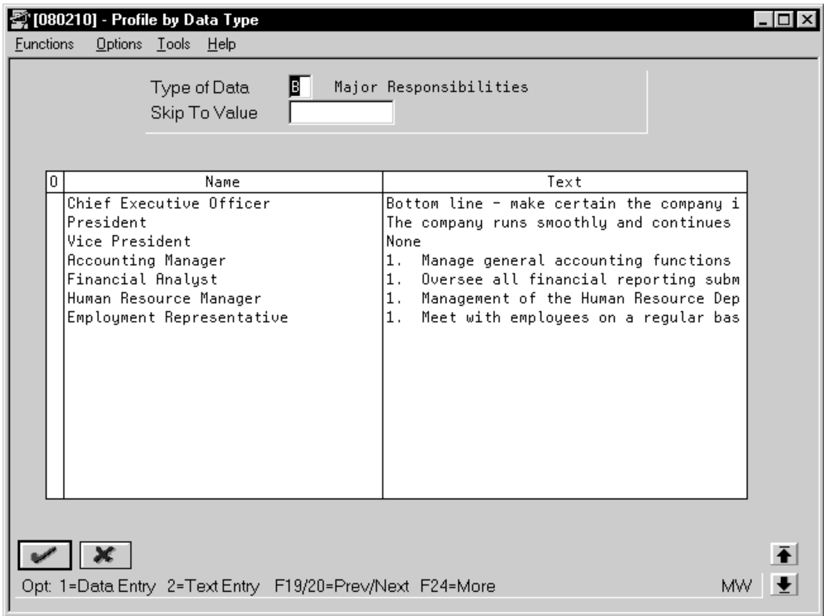


Complete the following field:

- Job ID

▶ To review a job by job profile data type

On Profile by Data Type



1. Complete the following required field:
   - Type of Data
2. Complete the following optional field:
   - Skip to Value

What You Should Know About

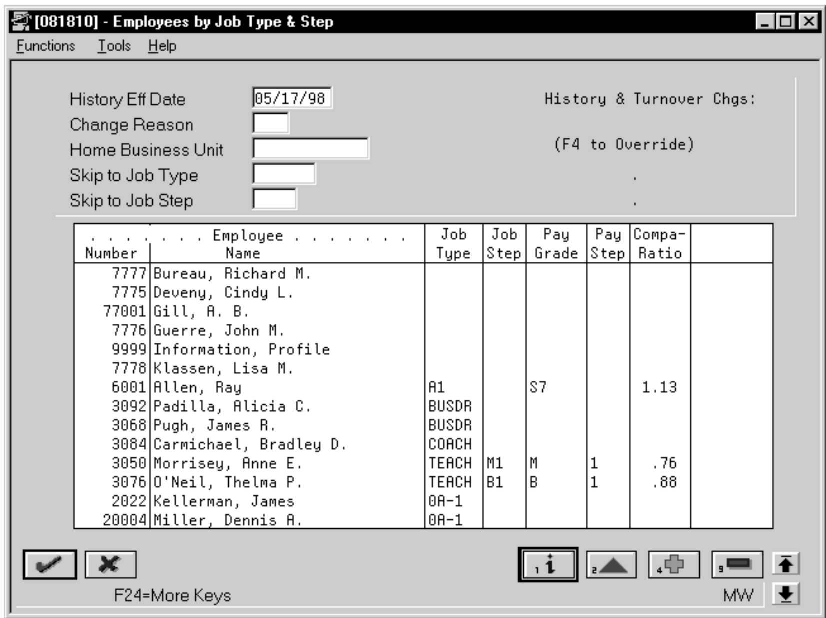
Data entry formats	Select the appropriate option based on the form of the data type.

Reviewing Jobs by Employees

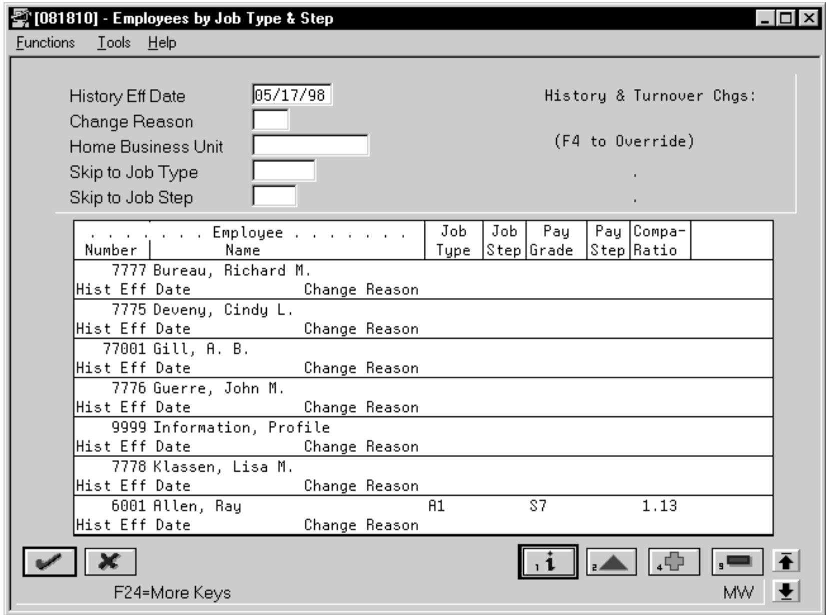
You review jobs by employees for a view of your employees and the job identifier to which they are attached.

▶ To review jobs by employees

On Employees by Job Type & Step



1. Complete the following optional fields to narrow the search:
   - Home Business Unit
   - Skip to Job Type
   - Skip to Job Step
2. Choose More Detail to review additional information.



! The Employee Master table is automatically updated if you make any changes using Employees by Job Type and Step. The system will not edit this data by the Constants.

What You Should Know About

Change reason	You enter a value in the Change Reason field only if an update is to be made to the information and globally applied. The history and turnover data can be applied globally to all changes or entered as information for an individual employee.

Processing Options for Employees by Job Type & Step

```
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
```

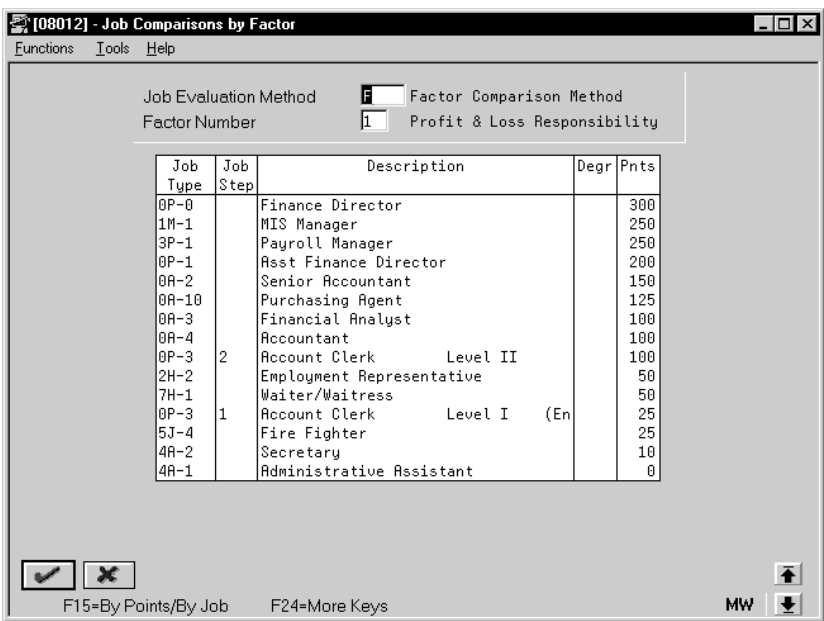
```
     '1' = Default only if blank
     '2' = Always default Job Info

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)
```

Reviewing Jobs by Evaluation

You review jobs by evaluation to verify that the points or degrees for each factor of each evaluation method were assigned equitably.

▶ To review jobs by evaluation

On Job Comparisons by Factor


[08012] - Job Comparisons by Factor

Functions Tools Help

Job Evaluation Method F Factor Comparison Method

Factor Number 1 Profit & Loss Responsibility

Job Type	Job Step	Description	Degr	Pnts
0P-0		Finance Director		300
1M-1		MIS Manager		250
3P-1		Payroll Manager		250
0P-1		Asst Finance Director		200
0A-2		Senior Accountant		150
0A-10		Purchasing Agent		125
0A-3		Financial Analyst		100
0A-4		Accountant		100
0P-3	2	Account Clerk Level II		100
2H-2		Employment Representative		50
7H-1		Waiter/Waitress		50
0P-3	1	Account Clerk Level I (En		25
5J-4		Fire Fighter		25
4A-2		Secretary		10
4A-1		Administrative Assistant		0

F15=By Points/By Job F24=More Keys MW

Complete the following fields:

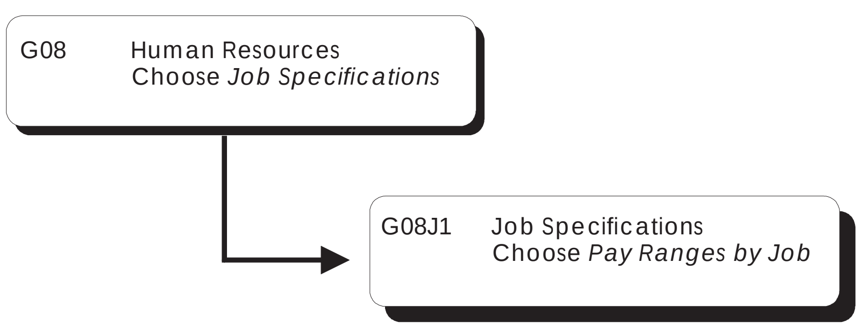
- Job Evaluation Method
- Factor Number

Field	Explanation
Job Evaluation Factor Number	A sequential number that identifies each job evaluation factor. Job evaluation factors should meet the following criteria: • Each factor must distinguish differences between jobs. • Each factor must be common to most of the jobs being rated. A factor should exist in greater to lesser amounts so it is easier to measure factors within a job. • Each factor should be assigned the maximum number of points in each of the 10 levels of degree. • No factor should overlap any other factor. • The factors chosen must be accepted by employees and managers. • The number of factors used should be the minimum needed to insure a balance between completeness and simplicity in rating. • The factor definitions should clearly and objectively define what is being rated so that all raters interpret the factor in the same way.

Processing Options for Job Comparisons by Factor

```
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.
```

Reviewing Pay Ranges for Jobs



You review the pay ranges for your jobs to verify that the pay ranges linked to the jobs are appropriate for the job type and job step, and for the location where the job is performed.

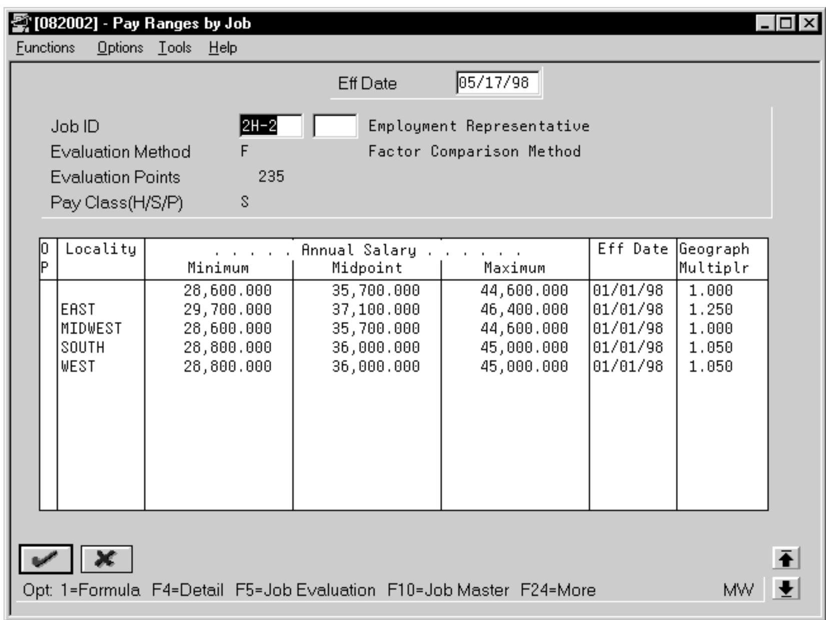
Before You Begin

- ❑ You must evaluate the job and verify that it is not linked to a pay grade before you can display pay ranges for jobs.
- ❑ The job must have a pay class assigned to it.
- ❑ Pay range formulas must be set up.

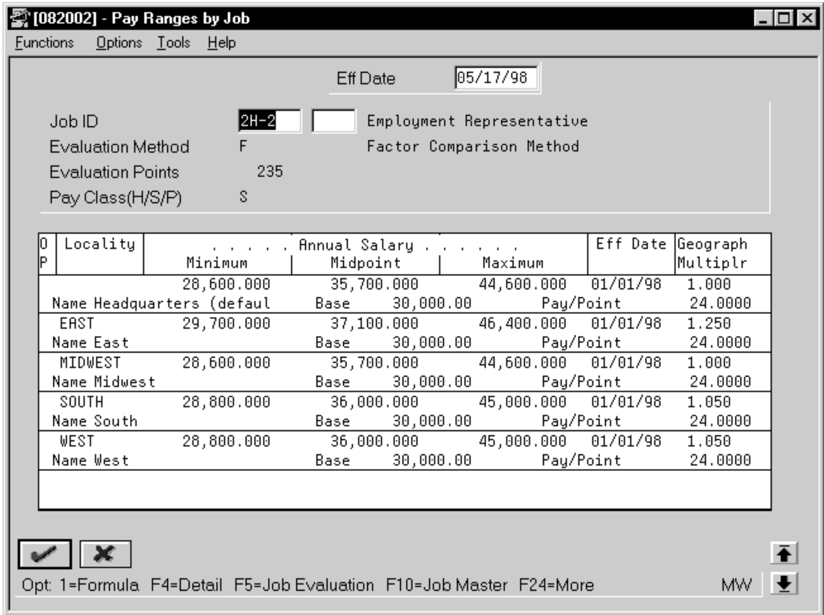
▶ To review pay ranges for jobs

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

On Pay Ranges by Job



1. Complete the following required field:
   - Job ID
2. Complete the following optional field, or let the system use the current date:
   - Effective Date
3. Choose More Detail to review additional information.


[082002] - Pay Ranges by Job

Functions Options Tools Help

Eff Date 05/17/98

Job ID 2H-2 Employment Representative

Evaluation Method F Factor Comparison Method

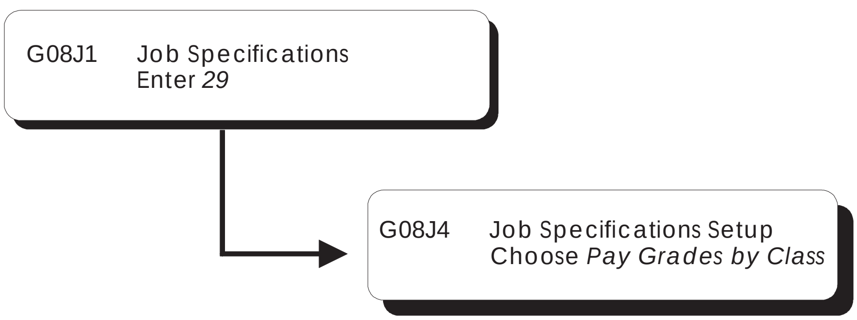
Evaluation Points 235

Pay Class(H/S/P) S

O P	Locality	. . . . . Annual Salary . . . . . . Minimum	Midpoint	Maximum	Eff Date	Geograph Multiplr
		28,600.000	35,700.000	44,600.000	01/01/98	1.000
	Name Headquarters (defaul		Base 30,000.00	Pay/Point		24.0000
	EAST	29,700.000	37,100.000	46,400.000	01/01/98	1.250
	Name East		Base 30,000.00	Pay/Point		24.0000
	MIDWEST	28,600.000	35,700.000	44,600.000	01/01/98	1.000
	Name Midwest		Base 30,000.00	Pay/Point		24.0000
	SOUTH	28,800.000	36,000.000	45,000.000	01/01/98	1.050
	Name South		Base 30,000.00	Pay/Point		24.0000
	WEST	28,800.000	36,000.000	45,000.000	01/01/98	1.050
	Name West		Base 30,000.00	Pay/Point		24.0000

Opt: 1=Formula F4=Detail F5=Job Evaluation F10=Job Master F24=More MW

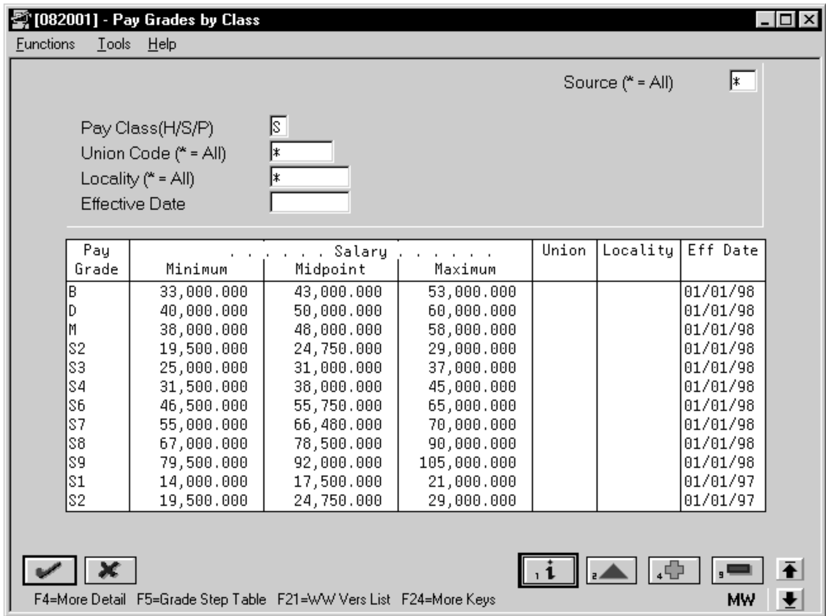
Reviewing Pay Grades for Job Classifications



Use Pay Grades by Class to review job information for jobs linked to pay grades. You review the pay grades for your job classifications to verify that the pay ranges for each pay grade and the pay ranges for the location where the job is performed are appropriate.

To review pay grades for job classifications

On Pay Grades by Class


[082001] - Pay Grades by Class

Functions Tools Help

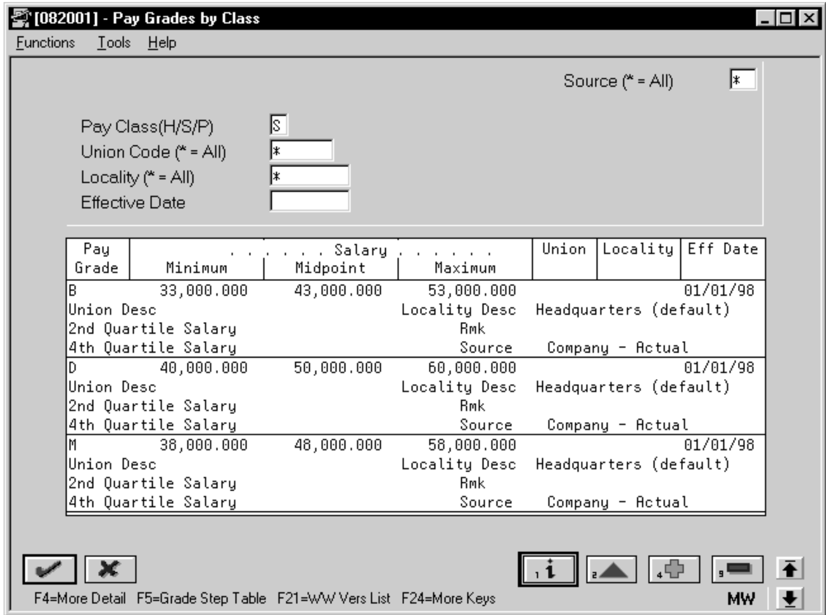
Source (* = All) *

Pay Class(H/S/P) S
Union Code (* = All) *
Locality (* = All) *
Effective Date

Pay Grade	Salary Minimum	Salary Midpoint	Salary Maximum	Union	Locality	Eff Date
B	33,000.000	43,000.000	53,000.000			01/01/98
D	40,000.000	50,000.000	60,000.000			01/01/98
M	38,000.000	48,000.000	58,000.000			01/01/98
S2	19,500.000	24,750.000	29,000.000			01/01/98
S3	25,000.000	31,000.000	37,000.000			01/01/98
S4	31,500.000	38,000.000	45,000.000			01/01/98
S6	46,500.000	55,750.000	65,000.000			01/01/98
S7	55,000.000	66,480.000	70,000.000			01/01/98
S8	67,000.000	78,500.000	90,000.000			01/01/98
S9	79,500.000	92,000.000	105,000.000			01/01/98
S1	14,000.000	17,500.000	21,000.000			01/01/97
S2	19,500.000	24,750.000	29,000.000			01/01/97

F4=More Detail F5=Grade Step Table F21=WW Vers List F24=More Keys MW

1. Complete the following required field:
   - Pay Class (H/S/P)
2. Complete the following optional fields:
   - Source
   - Union Code
   - Locality
   - Effective Date
3. Choose More Detail to review additional information.

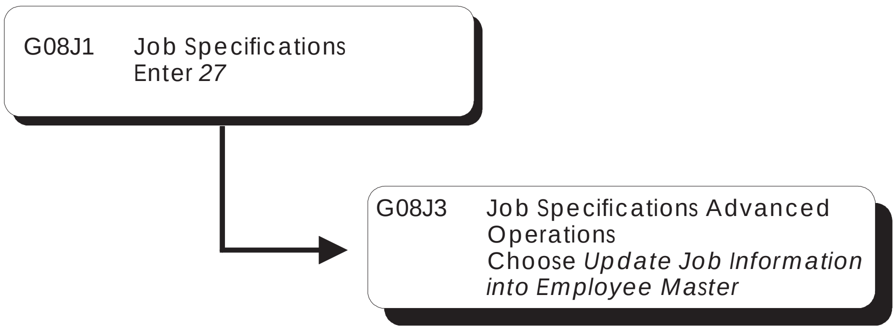


Field	Explanation
Source – Salary Data	A code that identifies the source of the salary information. You can define the codes using user defined code table 08/SS. If you want to display all pay grades regardless of the source, place an asterisk (*) in this field.
Amount – Minimum Salary	The minimum salary or hourly rate allowed within a pay grade. This field is used to trigger warnings in the Salary and Wage module when an employee's salary or rate is lower than the minimum permitted within the pay grade.
Amount – Midpoint Salary	The midpoint salary or hourly rate within a pay grade or pay range. For job IDs with a defined pay grade, this amount is defined in the Pay Grade table (F082001). For job IDs that are evaluated by points, this amount is calculated using a Pay Range Formula table (F08290). The compa-ratio figure (data item #CRA) is calculated by dividing an employee's salary or rate by the appropriate midpoint.
Amount – Maximum Salary	The maximum salary or hourly rate within a pay grade. This field is used to trigger warnings in the Salary and Wage module when an employee's salary or rate is higher than the maximum permitted in the pay grade.

Exercises

See the exercises for this chapter.

Update Jobs Globally



Updating Jobs Globally

Run Update Job Information into the Employee Master to globally update current job information in the Employee Master table. This allows you to keep the job information in the Employee Master table identical to the information in the Job Master table.

This program generates a list of all employee master records affected by this update, if any.

Before You Begin

❑ Make any changes to job information that you want reflected in the Employee Master table by using Job Entry and Evaluatio

```
08801                                              J.D. Edwards & Company                                 Page - . . .    4
                                                 Employees Affected By Update                             Date - . . .  6/18/98
                                                                                                          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 . . .
```

When you run the global update, the salary and hourly rates in the Employee Master table and the Employee Multiple Job table will change if the following are true:

- You have set the Pay Rates Source field in History Constants to Grade Step Table.
- The global update process changes the pay grade step.

All values in the job master fields, except Pay Class and Frequency, will replace those in the Employee Master table. This is especially critical if some fields, such as the pay grade, are entered directly into a specific employee's records.

Processing Options for Update Job Information Into Employee Master

```
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)
```

Work with Obsolete Job IDs

Working with Obsolete Job IDs

Job IDs can become obsolete for many reasons, for example:

- When you make organizational changes within your company and you delete or change job IDs
- If you restructure the naming conventions for your job IDs

To make an obsolete job ID in the system, you must first delete the obsolete job ID from the job master table.

You can also archive the obsolete job ID so that it is not deleted from the system, but is available as a job history records.

Complete the following tasks:

❑ Delete an obsolete job ID

❑ Archive an obsolete job ID

❑ Change pay grade/steps

Deleting An Obsolete Job ID

After you have identified the employees that have an obsolete job that is not in the Job Master table, you must replace the obsolete job ID in the applicable employee master records with a valid job ID.

Deleting an obsolete job ID at the employee level consists of the following tasks:

- Deleting the obsolete job from the Job Master table
- Identifying the employees linked to an obsolete job ID
- Replacing the obsolete job ID with a valid job ID

▶ To delete the obsolete job from the Job Master table

On Job Entry and Evaluation

What You Should Know About

Deleting job identifications from the job master	After you delete a job identification, you will not be able to access any remaining profile data.

1. Locate the job.
2. Delete the job.

▶ To identify employees linked to an obsolete job ID

G08J1 Job Specifications
Enter *27*

G08J3 Job Specifications Advanced Operations
Choose *Invalid Job IDs in Employee Master*

Run Invalid Job IDs in Employee Master to generate a report listing employees linked to a job ID that does not exist in your Job Master table.

```
08801                                      J.D. Edwards & Company                                Page - . . .    4
                                          Employees Affected By Update                           Date - . . .  6/18/98
                                                                                                 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
```

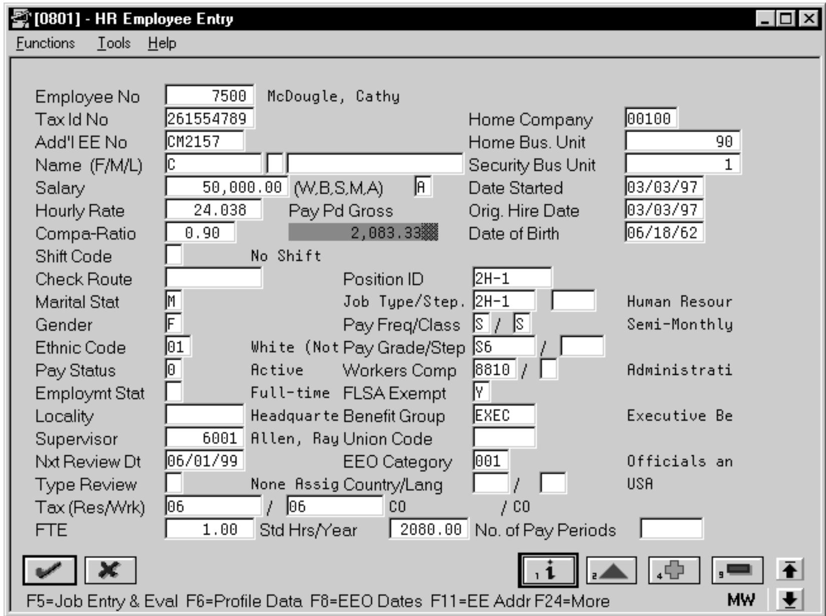
▶ To replace an obsolete job ID with a valid job ID

G08 Human Resources
Choose *Employee Information*

G08E1 Employee Information
Choose *HR Employee Entry*

Jobs

On HR Employee Entry



Replace the information in the following fields with valid job ID information:

- Job Type
- Job Step

Depending on how you have set up your processing options for comparing job information with the job table, you might have to replace the information in the other fields defaulting into the Employee Entry form from the Employee Master table.

Archiving an Obsolete Job ID

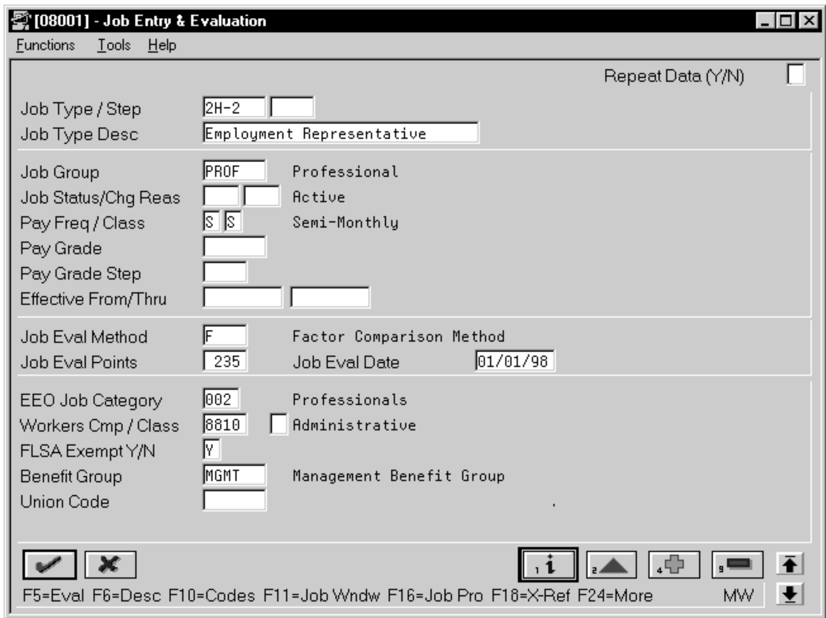
G08 Human Resources
Choose *Job Specifications*

G08J1 Job Specifications
Choose *Job Entry and Evaluation*

You can archive an obsolete job ID for historical purposes.

▶ To archive an obsolete job ID

On Job Entry and Evaluation



1. Locate the obsolete job ID.
2. Change the value in the following field from Active to Historical (HIS):
   - Job Status
3. Complete the following optional fields:
   - Change Reason
   - Effective From Date

What You Should Know About

Job Status	You can use the Job Status field to narrow the search for specific job types. This lets you control the types of jobs you can maintain in the system and view online. For example, you can maintain obsolete job types to track history, but view only current job types.

Exercises

See the exercises for this chapter.

Changing Pay Grade/Steps

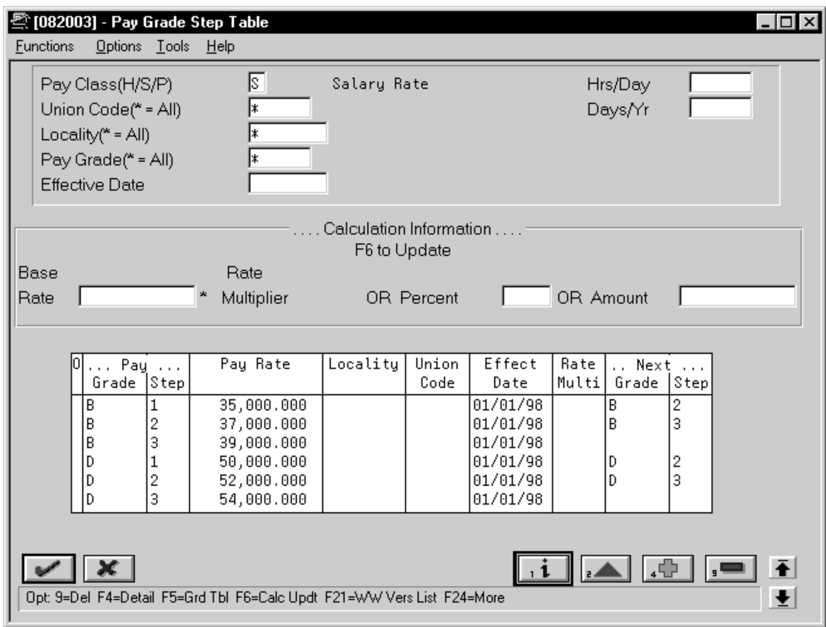
You might need to change pay grade/step amounts with new requirements.

Before You Begin

❑ Define pay grade/steps.

▶ To change pay grade/steps

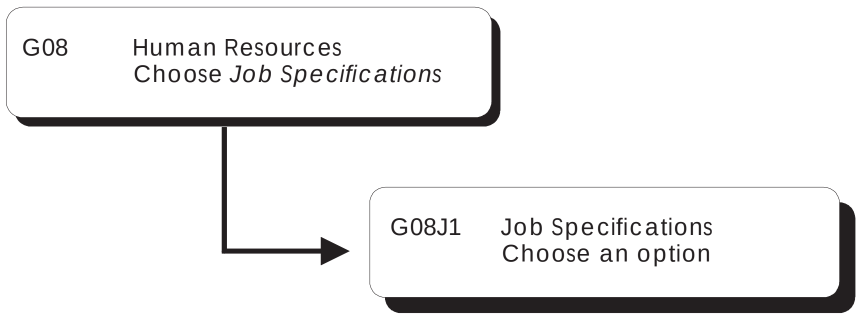
On Pay Grade/Steps



1. Complete the following fields to identify the pay grade structure:
   - Pay Class
   - Union Code
   - Locality
   - Effective Date
   - Pay Grade
2. Locate the last record that meets your search criteria.
3. Complete one or the other of the following fields to enter either a negative or positive percent or amount of change:
   - Percent
   - Amount

4. Choose Calculation Update to apply the result of the calculation to all pay grade/steps on the form.

Run Job Reports



Running Job Reports

You can run a variety of reports to review information about your jobs, including:

- Profile data reports
- Job evaluation reports
- Pay range reports
- Pay grade/step progression reports

Use profile data reports to review the auxiliary information linked to your jobs. You can review this information by individual job or by job data types.

Job evaluation reports enable you to review evaluation information defined for each evaluation method and for each job evaluated.

Several reports are also available for you to use to review pay grade and step progression information. Information available for your review includes salary ranges and employee salary reviews.

Complete the following tasks:

- ❑ Run job profile reports
- ❑ Run job evaluation reports
- ❑ Run the Pay Ranges by Job report
- ❑ Run pay grade/step progression reports

Running Job Profile Reports

You can run reports to review job profile information by:

- Individual job summary
- Profile data type

You can run the following reports:

- ❑ Job Profile Information report
- ❑ Jobs by Data Type report

Job Profile Information Report

Run the Job Profile report to review a summary of data stored in the following tables:

- Define Types of Profile Data (F08090)
- User Defined Code Entry (F08092)
- Narrative Text Entry (F08093)
- Job Master (F08001)

The information that prints on this report is the same information you can review online using Profile by Job.

```
080412                                  J.D. Edwards & Company                    Page Number        8
                                           Job Descriptions                       Date         6/25/98



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. . . . 03/01/98
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
                   institituions.
               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      01/01/98
  SECRETARY  01/01/98
Background Requirements
==============================
  BS         01/01/98          Emphasis in Finance
  MS         01/01/98          Emphasis in Financial Mgmt
  Experience Required
==============================
   Position  Updated   PrevUpd   Description of Experience         Additional Comments        Years Req
  ---------- -------- -------- ------------------------------ ------------------------------ -------------
  ACCOUNT    01/01/98                                                                                 5.00
  FIN ANALST 01/01/98                                                                                 5.00
                                                                                             ------------- -------------
                                                                              Total           10.00
```

Processing Options for Job Profile Information Report

```
Enter an 'N' to bypass printing text              ____________
  information on the report.  Default
  of blank will print the text.
```

Jobs by Data Type Report

Run the Jobs by Data Type report to review a list of all jobs with information in a particular profile data type category, such as job reporting relationships. The information that prints on this report is the same information you can review online using Profile Data Entry. The data types linked to the job appear in alphabetical order below each job ID.

Reviewing Job Information by Data Type

You run the Job Information by Data Type report to review current job profile information by data type. The information that prints on this report is from Job Profile Entry.

```
080402                                       J.D. Edwards & Company                                      Page Number       4
                                          Job Information by Data Type                                   Date         6/25/98


Authority Level
==============================
Employee       Name                    Updated   PrevUpd         Parallel Jobs             Next level job   #Subordina
----------- ------------------------ -------- -------- ------------------------- ----------------------- ------------
  Level    . . . . . CLERK
0A-1        Accounting Manager       01/01/98
0A-3        Financial Analyst        01/01/98
                                                                                                          ------------
                                                                        Total for: CLERK
  Level    . . . . . HIGH
A2          Vice President           01/01/92
                                                                                                          ------------
                                                                        Total for: HIGH
  Level    . . . . . JR. ACCT
0A-1        Accounting Manager       01/01/98
                                                                                                          ------------
                                                                        Total for: JR. ACCT
  Level    . . . . . SECRETARY
0A-1        Accounting Manager       01/01/98
0A-3        Financial Analyst        01/01/98
                                                                                                          ------------
                                                                        Total for: SECRETARY
  Level    . . . . . SENIOR
A0          Chief Executive Officer  01/01/98          A1     President                                         400.00
2H-1        Human Resource Manager   01/01/98          Upper level management
                                                                                                          ------------
                                                                        Total for: SENIOR                       400.00
  Level    . . . . . SR. ACCT
0A-1        Accounting Manager       01/01/98
                                                                                                          ------------
                                                                        Total for: SR. ACCT
                                                                                                          ------------
                                                                        Total for: Authority Level              400.00
```

Processing Options for Jobs by Data Type Report

```
Enter an 'N' to bypass printing text                  ____________
  information on the report.  Default
  of blank will print the text.
```

Running Job Evaluation Reports

You can run reports to review job evaluation information by:

- Job evaluation factor
- Job data and evaluation points
- Compensable factors

You can run the following reports:

- ❑ Job Evaluation Factor Data report
- ❑ Job Data and Evaluation Points report
- ❑ Compensable Factors Table report

Job Evaluation Factor Data Report

You can run the Job Evaluation Factor Data report to review by job the evaluation methods, factors, and points assigned to the job.

081450 J.D. Edwards & Company Page – . . . 2
Job Evaluation Factor Data Date – . . . 6/25/98

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		

Job Data and Evaluation Points Report

You can run the Job Data and Evaluation Points report to review the results of performance reviews.

Job Data & Evaluation Points

Page – 1
Date – 06/25/98

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	03/01/98	1300	S	S9	Y	Officials and	Administrat	
A1		President	EXEC	Executives	D	Degree Method	03/01/98	1200	S	S7	Y	Officials and	Administrat	
A2		Vice President	EXEC	Executives	D	Degree Method	03/01/98	1225	S	S9	Y	Officials and	Administrat	
BUSDR		Bus Driver				No Evaluation Co			H		Y	Officials and	No Worker's	
COACH		Coach				No Evaluation Co			S		Y	Officials and	No Worker's	
TEACH	M2	Teacher				No Evaluation Co			S	M	Y	Officials and	No Worker's	
	M1	Teacher				No Evaluation Co			S	M	Y	Officials and	No Worker's	
	D2	Teacher				No Evaluation Co			S	D	Y	Officials and	No Worker's	
	D1	Teacher				No Evaluation Co			S	D	Y	Officials and	No Worker's	
	B2	Teacher				No Evaluation Co			S	B	Y	Officials and	No Worker's	
	B1	Teacher				No Evaluation Co			S	B	Y	Officials and	No Worker's	
TRNER		Trainer	SERVIC	Service Person		No Evaluation Co			S		Y	Professionals	Administrat	
0A–1		Accounting Mana	EXEC	Executives	D	Degree Method	03/01/98	1175	S	S7	Y	Officials and	Administrat	
0A–10		Purchasing Agen	ADMIN	Administrative	F	Factor Compariso	01/01/98	250	H		N	Office and Cle	Administrat	
0A–2		Senior Accounta	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	550	S	S4	Y	Officials and	Administrat	
0A–3		Financial Analy	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	400	S	S4	N	Professionals	Administrat	
0A–4		Accountant	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	350	S		N	Professionals	General Lia	
0P–0		Finance Directo	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	650	S		Y	Officials and	Administrat	
0P–1		Asst Finance Di	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	450	S		Y	Officials and	Administrat	
0P–2		Accountant	FINAN	Finance & Admi		No Evaluation Co			S		Y	Officials and	Administrat	
0P–3	2	Account Clerk	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	200	S		Y	Officials and	Administrat	
	1	Account Clerk	FINAN	Finance & Admi	F	Factor Compariso	03/01/98	100	S		Y	Officials and	Administrat	
1M–1		MIS Manager	MGR	Managers	F	Factor Compariso	03/01/98	800	S	S5	Y	Officials and	Administrat	
1M–2		Project Leader	CMPSYS	Computer & Sys	E	Evalucomp Method	03/01/98	575	S		Y	Professionals	Computer Pr	
2H–1		Human Resource	MGR	Managers	D	Degree Method	03/01/98	1125	S	S4	Y	Officials and	Administrat	
2H–2		Employment Repr	PROF	Professional	F	Factor Compariso	01/01/98	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	01/01/98	500	S		Y	Officials and	** NOT FOUN	
4A–1		Administrative	ADMIN	Administrative	F	Factor Compariso	03/01/98	200	H		N	Office and Cle	Administrat	
4A–2		Secretary	OFFICE	Office/Clerica	F	Factor Compariso	01/01/98	90	H		N	Office and Cle	Administrat	
5J–4		Fire Fighter	TECH	Technical Grou	F	Factor Compariso	01/01/98	145	H		Y	Technicians	Ontario	7700
5J–5		Electrician	CRAFT	Craft Workers	F	Factor Compariso	01/01/98	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 and	Administrat	
6S–1		Security Superv				No Evaluation Co			S		N	Officials and	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 and	Administrat	
	JR	Engineer	TECH	Technical Grou		No Evaluation Co			H		Y	Technicians	** NOT FOUN	

Compensable Factors Table Report

You can run the Compensable Factors Table (Job Report World Writer) to review the points or degrees assigned to each evaluation method.

Compensable Factors Tables

Page – 1
Date – 06/25/98

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

Running the Pay Ranges by Job Report

You can run the Pay Ranges by Job report to review the pay ranges defined for each job. The information that prints on this report is the same information that you can review online using Pay Ranges by Job.

```
 082450                                       J.D. Edwards & Company                                       Page - . . .   13
                                                Pay Ranges by Job                                          Date - . . .  6/25/96


Job ID . . . . . . 2H-2          Employment Representative
Evaluation Method. F             Factor Comparison Method
Evaluation Points.   235
Pay Class(H/S/P) . S
As of Date . . . . 01/01/98
Locality          Name                 Minimum        Midpoint       Maximum     Eff Date Multiplr    Based On      Pay/Points
-------- ------------------------- -------------- -------------- -------------- -------- -------- -------------- --------------
         Headquarters (default)         28,600.000     35,700.000     44,600.000 01/01/98   1.000      30,000.00         24.0000
EAST     East                           29,700.000     37,100.000     46,400.000 01/01/98   1.250      30,000.00         24.0000
MIDWEST  Midwest                        28,600.000     35,700.000     44,600.000 01/01/98   1.000      30,000.00         24.0000
SOUTH    South                          28,800.000     36,000.000     45,000.000 01/01/98   1.050      30,000.00         24.0000
WEST     West                           28,800.000     36,000.000     45,000.000 01/01/98   1.050      30,000.00         24.0000
```

Processing Options for Pay Ranges by Job Report

Data Options:

```
-------------
1. Enter Pay Range - As of Date.                      ______________
```

Running the Pay Grade/Step Progression Reports

G08J1 Job Specifications
Choose *Pay Grade/Step Administration*

G08J2 Pay Grade/Step Administration
Choose *World Writers*

Depending on the specific World Writer you run, you can review:

- The defined pay grade/salary range
- Which of your employees are being paid above the maximum or below the minimum for their pay grade
- Salary information
- Pay grade/step values

You can run the following reports:

- ❑ Pay Grade/Salary Ranges report
- ❑ Employees Above Pay Grade Maximum report
- ❑ Employees Below Pay Grade Minimum report
- ❑ Grade/Step and Next Grade/Step Values report
- ❑ Pay Grade/Step and Quartile Values report

Pay Grade/Salary Ranges Report

You run the Pay Grade/Salary Ranges report to review the salary ranges by pay class and locality for each pay grade.

Pay Grade/Salary Ranges

Page – 1
Date – 06/25/98

P C	Pay Grade	Minimum Salary	Midpoint Salary	Maximum Salary	Effective Date	Loc	Description	Src	Description
H	H1	4.100	5.700	7.300	01/01/98		Headquarters (d		Company – Actua
H	H2	6.500	8.100	9.700	01/01/98		Headquarters (d		Company – Actua
H	H4	11.300	12.900	14.500	01/01/98		Headquarters (d		Company – Actua
H	H5	13.700	15.000	16.900	01/01/98		Headquarters (d		Company – Actua
H	H6	16.100	17.700	19.300	01/01/98		Headquarters (d		Company – Actua
H	H7	18.500	20.300	22.100	01/01/98		Headquarters (d		Company – Actua
H	H8	21.200	24.500	25.700	01/01/98		Headquarters (d		Company – Actua
H	H9	24.800	26.600	28.400	01/01/98		Headquarters (d		Company – Actua
H	H1	4.100	5.700	7.300	01/01/97		Headquarters (d		Company – Actua
H	H2	6.500	8.100	9.700	01/01/97		Headquarters (d		Company – Actua
H	H4	11.300	12.900	14.500	01/01/97		Headquarters (d		Company – Actua
H	H5	13.700	15.000	16.900	01/01/97		Headquarters (d		Company – Actua
H	H6	16.100	17.700	19.300	01/01/97		Headquarters (d		Company – Actua
H	H7	18.500	20.300	22.100	01/01/97		Headquarters (d		Company – Actua
H	H8	21.200	24.500	25.700	01/01/97		Headquarters (d		Company – Actua
H	H9	24.800	26.600	28.400	01/01/97		Headquarters (d		Company – Actua
H	H1	4.100	5.700	7.300	01/01/96		Headquarters (d		Company – Actua
H	H2	6.500	8.100	9.700	01/01/96		Headquarters (d		Company – Actua
H	H3	8.900	10.500	12.100	01/01/96		Headquarters (d		Company – Actua
H	H4	11.300	12.900	14.500	01/01/96		Headquarters (d		Company – Actua
H	H5	13.700	15.000	16.900	01/01/96		Headquarters (d		Company – Actua
H	H6	16.100	17.700	19.300	01/01/96		Headquarters (d		Company – Actua
H	H7	18.500	20.300	22.100	01/01/96		Headquarters (d		Company – Actua
H	H8	21.200	24.500	25.700	01/01/96		Headquarters (d		Company – Actua
H	H9	24.800	26.600	28.400	01/01/96		Headquarters (d		Company – Actua
H	H1	4.600	6.200	7.800	01/01/98	WEST	West		Company – Actua
H	H2	7.000	8.200	10.200	01/01/98	WEST	West		Company – Actua
H	H3	9.400	11.000	12.600	01/01/98	WEST	West		Company – Actua
H	H4	11.800	13.400	15.000	01/01/98	WEST	West		Company – Actua
H	H5	14.200	15.800	17.400	01/01/98	WEST	West		Company – Actua
H	H6	16.600	18.200	19.800	01/01/98	WEST	West		Company – Actua
H	H7	19.000	20.800	22.600	01/01/98	WEST	West		Company – Actua
H	H8	21.700	24.400	26.200	01/01/98	WEST	West		Company – Actua
H	H1	4.600	6.200	7.800	01/01/97	WEST	West		Company – Actua
H	H2	7.000	8.200	10.200	01/01/97	WEST	West		Company – Actua
H	H3	9.400	11.000	12.600	01/01/97	WEST	West		Company – Actua
H	H4	11.800	13.400	15.000	01/01/97	WEST	West		Company – Actua
H	H5	14.200	15.800	17.400	01/01/97	WEST	West		Company – Actua
H	H6	16.600	18.200	19.800	01/01/97	WEST	West		Company – Actua
H	H7	19.000	20.800	22.600	01/01/97	WEST	West		Company – Actua
H	H8	21.700	24.400	26.200	01/01/97	WEST	West		Company – Actua
H	H1	4.600	6.200	7.800	01/01/96	WEST	West		Company – Actua
H	H2	7.000	8.200	10.200	01/01/96	WEST	West		Company – Actua
H	H3	9.400	11.000	12.600	01/01/96	WEST	West		Company – Actua
H	H4	11.800	13.400	15.000	01/01/96	WEST	West		Company – Actua
H	H5	14.200	15.800	17.400	01/01/96	WEST	West		Company – Actua
H	H6	16.600	18.200	19.800	01/01/96	WEST	West		Company – Actua
H	H7	19.000	20.800	22.600	01/01/96	WEST	West		Company – Actua
H	H8	21.700	24.400	26.200	01/01/96	WEST	West		Company – Actua

Employees Above Pay Grade Maximum Report

You run the Employees Above Pay Grade Maximum report to review a list of any employees who are being paid above the maximum for the pay grade to which they are assigned.

Address Number	Alpha Name	Effective Date	Home Cost Center	Location	Job Title	Pay Grade	Annual Salary	Maximum Salary	Difference
6001	Allen, Ray	01/01/98	General Accounts	Headquarters (default)	President	S7	75,000.00	70,000.000	5.000,000
6005	Ellis, Fred	01/01/98	General Accounts	Headquarters (default)	Operator	H7	39,041.60	22.100	39.019,500
2129	Jackson, John	01/01/98	General Accounts	Headquarters (default)	Financial Analyst	S4	50,000.00	45,000.000	5.000,000
3050	Morrisey, Anne E.	01/01/98	General Accounts	Headquarters (default)	Teacher	M	34,000.00		34.000,000
3050	Morrisey, Anne E.	01/01/98	General Accounts	Headquarters (default)	Teacher	M	34,000.00		34.000,000
3050	Morrisey, Anne E.	01/01/98	General Accounts	Headquarters (default)	Teacher	M	34,000.00		34.000,000
3076	O’Neil, Thelma P.	01/01/98	General Accounts	Headquarters (default)	Teacher	B	35,000.00		35.000,000
3076	O’Neil, Thelma P.	01/01/98	General Accounts	Headquarters (default)	Teacher	B	35,000.00		35.000,000
3076	O’Neil, Thelma P.	01/01/98	General Accounts	Headquarters (default)	Teacher	B	35,000.00		35.000,000

Employees Below Pay Grade Minimum Report

You run the Employees Below Pay Grade Minimum report to review a list of any employees who are being paid below the minimum for the pay grade to which they are assigned.

Address Number	Alpha Name	Effective Date	Home Cost Center	Location	Job Title	Pay Grade	Annual Salary	Minimum Salary	Difference
3050	Morrisey, Anne E.	01/01/98	General Accounts	Headquarters (default)	Teacher	M	34,000.00	38,000.000	4.000,000

Grade/Step and Next Grade/Step Values Report

You run the Grade/Step and Next Grade/Step Values report to review a list of pay grade/step progressions.

Pay Grade/Step & Next Pay Grade/Step Values   Page – 2
Date – 06/25/98

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			01/01/98				
			Headquarters (defa		H6			01/01/98				
			Headquarters (defa		H7			01/01/98				
			Headquarters (defa		H8			01/01/98				
			Headquarters (defa		H9			01/01/98				
			Headquarters (defa		M			01/01/98				
			Headquarters (defa		M	1	38,000.000	01/01/98	M	2	8.00	185
			Headquarters (defa		M	2	40,000.000	01/01/98	M	3	8.00	185
			Headquarters (defa		M	3	42,000.000	01/01/98			8.00	185
			Headquarters (defa		S2			01/01/98				
			Headquarters (defa		S3			01/01/98				
			Headquarters (defa		S4			01/01/98				
			Headquarters (defa		S6			01/01/98				
			Headquarters (defa		S7			01/01/98				
			Headquarters (defa		S8			01/01/98				
			Headquarters (defa		S9			01/01/98				

Pay Grade/Step and Quartile Values Report

You run the Pay Grade/Step and Quartile Values report to review salary information for each pay grade.

Print Pay Grade/Step & Quartile Values   Page – 3
Date – 06/25/98

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	01/01/98
	WEST		H7			19.000		20.800		22.600	01/01/98
	WEST		H8			21.700		24.400		26.200	01/01/98
	WEST		S1			14,600.000		18,100.000		21,600.000	01/01/98
	WEST		S2			20,100.000		25,350.000		29,000.000	01/01/98
	WEST		S3			25,600.000		31,600.000		37,600.000	01/01/98
	WEST		S4			39,100.000		47,600.000		56,100.000	01/01/98
	WEST		S5			39,100.000		47,600.000		56,100.000	01/01/98
	WEST		S6			47,100.000		56,350.000		65,600.000	01/01/98
	WEST		S7			55,600.000		67,080.000		77,850.000	01/01/98
	WEST		S8			67,600.000		79,100.000		90,600.000	01/01/98
	WEST		S9			80,100.000		92,600.000		105,600.000	01/01/98

Requisitions

Objectives

- To create and approve requisitions
- To control the hiring process through requisitions

About Requisitions

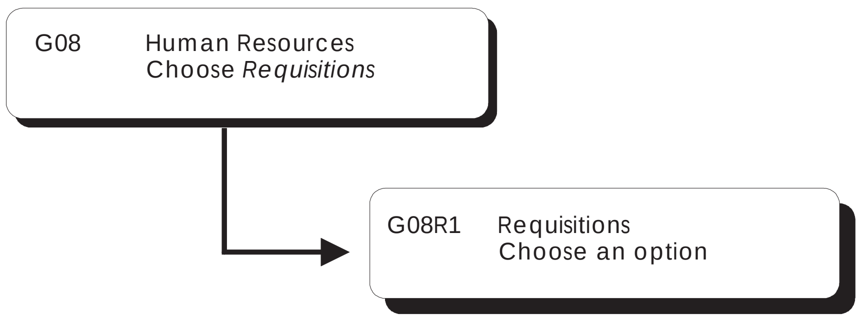
Requisitions provide an easily accessible source of information for vacancies in your company. The requisition defines vacancies to a pay grade and step, pay class, and FLSA exempt status. You can also enter category codes to define the specific requirements to fill the vacancy. For example, if you need a senior consultant who speaks fluent Spanish, you can include a category code for Spanish fluency on your requisition. You can track the status of a requisition through initial creation to approval or rejection.

If you use position control with requisitions, the system can compare the head-count on the requisition to budgeted positions so that the requested vacancy does not exceed the headcount budgeted for the position.

Complete the following tasks:

- ❑ Enter requisitions
- ❑ Approve a requisition
- ❑ Work with requisitions
- ❑ Review requisitions
- ❑ Run requisition reports

Enter Requisitions



Entering Requisitions

You enter requisitions in order to begin the process of filling a vacancy. A requisition contains the data you use to match a candidate to a vacancy, such as:

- Expected salary
- Job type/step
- Pay class

You might also require specific skills, such as fluency in a foreign language, for the vacancy. You can define category codes for the specific skills and include them in the required qualifications.

Complete the following tasks:

- ❑ Enter requisition master information
- ❑ Enter requisition profile data

What You Should Know About

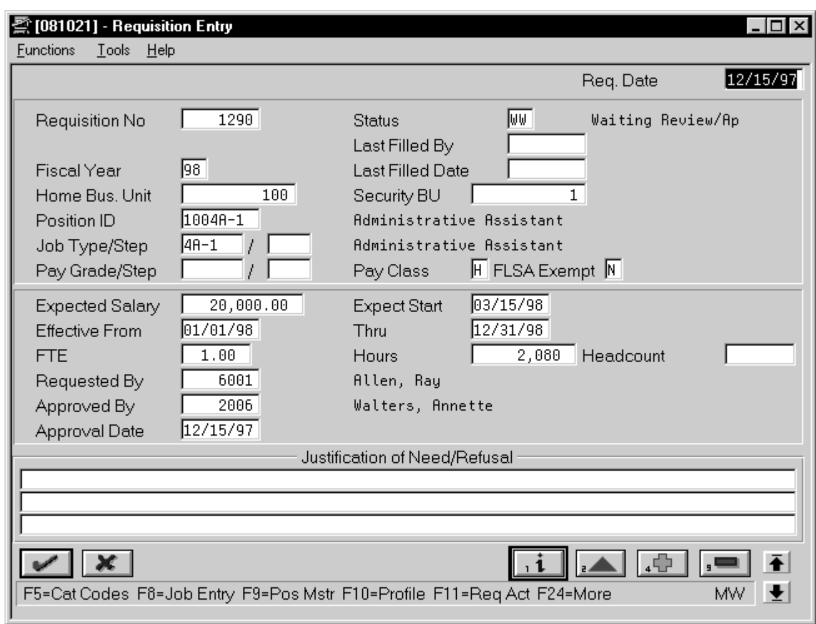
Updating the position budget	When you create a requisition, it does not update the position budget.
Position effective budget edits	The system checks the hours and headcount for the requisition along with all other requisitions that reference the position. The system verifies that the total hours and headcount do not exceed the position's effective budget.

Entering Requisition Master Information

You enter requisition master information to identify a new vacancy. The requisition contains all key information about the vacancy, including its current status, the expected pay, and the pay grade/step for the vacancy.

▶ To enter requisition master information

On Requisition Entry



Complete the following fields:

- Requisition Number
- Status
- Fiscal Year
- Home Business Unit
- Security Business Unit
- Position ID
- Job Type/Step
- Pay Grade/Step
- Pay Class
- FLSA Exempt
- Expected Salary
- Effective From
- Effective Through
- Full Time Equivalent (FTE)
- Requisition Date
- Hours
- Headcount
- Requested Date
- Requested by

Field	**Explanation**
Number – Requisition	The number that identifies the requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.
Status – Requisition	A code which describes the status of a requested position. JDE has provided several codes typically used for requisition status purposes. Two of the them are hardcoded and should not be changed: Approved (AA) and Filled and Closed (99). You can define this code using user defined codes table 08/RS.

Field	Explanation
Fiscal Year	A number that identifies the fiscal year. Generally, you can either type a number in this field or leave it blank to indicate the current fiscal year (as defined on the Company Numbers and Names screen). 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, 1994 and ends September 30, 1995. The end of the first period is October 31, 1994. Specify the year 94 rather than 95.
Business Unit – Home	The number of the business unit in which the employee generally resides.
Business Unit	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. The Business Unit field is alphanumeric. 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 A/P and A/R by business units, to track equipment by responsible department. Business unit security can prevent you from locating business units for which you have no authority. NOTE: The system uses this value for Journal Entries if a value is not entered in the AAI table.
Position ID	Used for budgetary (position) control purposes. The system will not create a position based on a value placed in this field. The position must already exist in the Position Master Information table (F08101).
Job Type (Craft) Code	A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications.
Job Step	A user defined code (system 06, type GS) that designates a specific step, grade, or salary level within a particular job type. The system uses this field in conjunction with job type to determine pay rates by job.
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated. Pay grades are set up using Pay Grades by Class (P082001).
Pay Grade Step	This field identifies the pay grade step associated with a specific pay grade.

Field	Explanation
Pay Class (H/S/P)	The code that indicates how an employee is paid. Valid codes are: 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.
Amount – Expected Salary	The salary you expect to pay the individual filling the requisition.
Expected Start	The date on which an address, item, transaction, or table becomes active or the date from which you want transactions to display. The system uses this field depending on the program. For example, the date you enter in this field might indicate when a change of address becomes effective, or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on. . . . . *Form-specific information* . . . . This is the expected start for the employee filling the requisition.
Date – Effective From	The date on which a requisition, a position, or activity within a position goes into effect.
Date – Effective Thru	The date on which a requistion, a position, or activity within a position is no longer in effect. In position actions, the default is the end of the current fiscal year for the calculation of projected figures.
Full-Time Equivalents – Budgeted	The number of full-time equivalents (FTEs).
Hours – Budgeted Position	The number of hours 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 figure in this field when you budget the position, the system enters a default figure by multiplying the number of FTEs by the company's standard hours per year.
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Field	Explanation
Address Number – Requested By	The Address Book number of the person entering a position requisition. This field is required.

Processing Options for Requisition Entry

```
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 auto-
    matically on an add.
```

Exercises

See the exercises for this chapter.

Entering Requisition Profile Data

Profile data is any auxiliary information that you want to maintain in any of the following databases:

- Requisition
- Job
- Employee

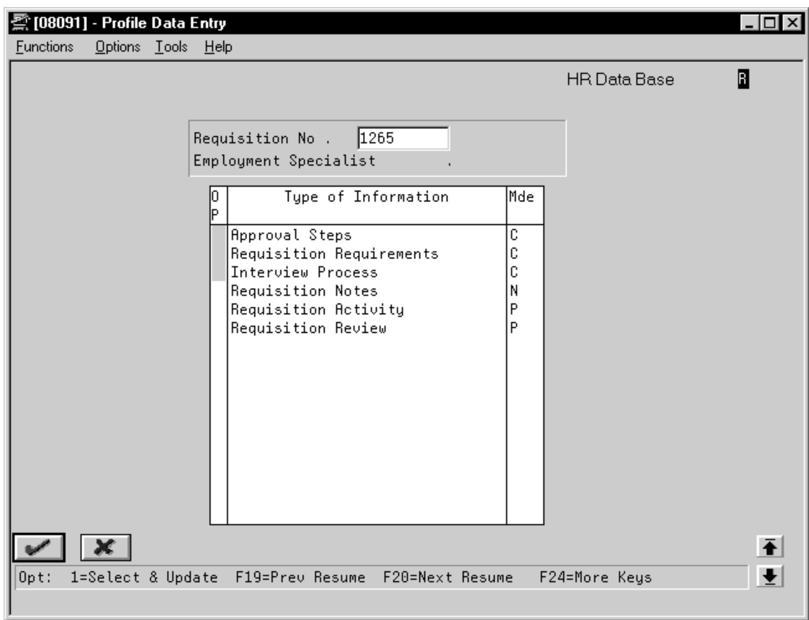
- Applicant
- Dependent/Beneficiary
- Safety and health case

For example, for each requisition in the database, you can record the major requirements, such as relevant qualifications for the vacancy. This information is not required by the system.

Although the specific profile data available for each database is different, the process for entering the data is identical for each database.

▶ To enter requisition profile data

On Profile Data Entry for Requisitions



Follow the steps for entering employee profile data.

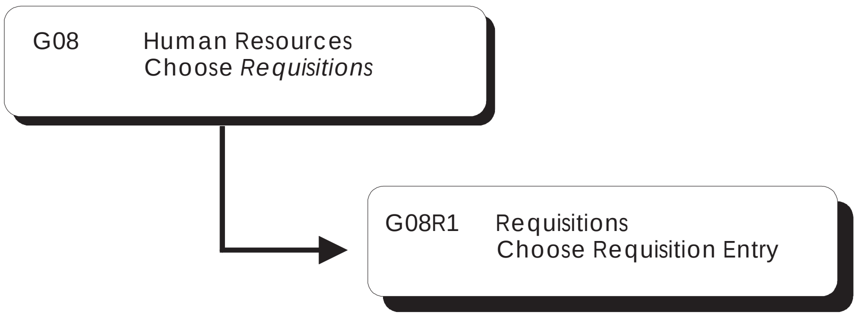
See Also

- *Entering Employee Profile Data*

Exercises

See the exercises for this chapter.

Approve a Requisition

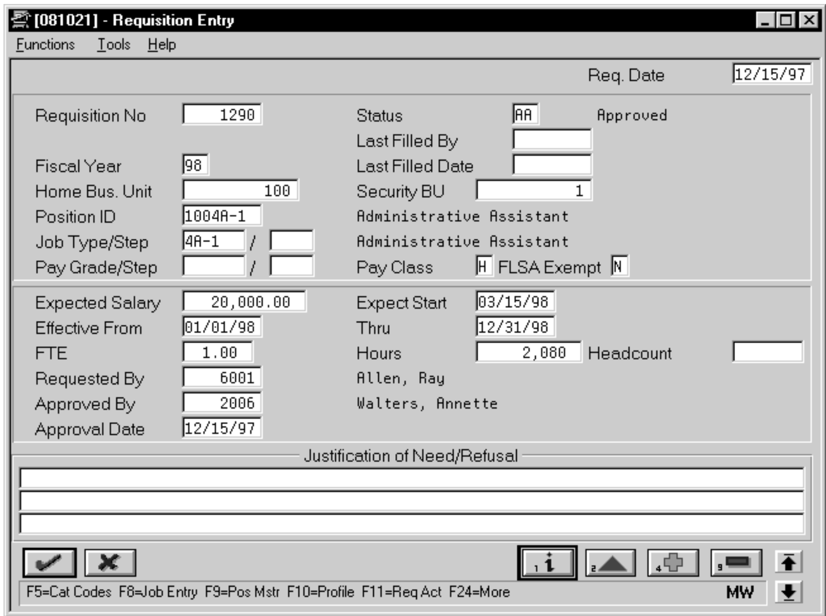


Approving a Requisition

You approve a requisition to make the job or position available to be filled. An applicant cannot be hired until the requisition has been approved.

▶ To approve a requisition

On Requisition Entry



Complete the following fields:

- Status
- Approved By
- Approval Date

Field	Explanation
Status – Requisition	A code which describes the status of a requested position. JDE has provided several codes typically used for requisition status purposes. Two of the them are hardcoded and should not be changed: Approved (AA) and Filled and Closed (99). You can define this code using user defined codes table 08/RS.
Address Number – Requested By	The Address Book number of the person entering a position requisition. This field is required.
Date – Approved (Julian)	The date on which a requisition status is effectively changed to Approved.

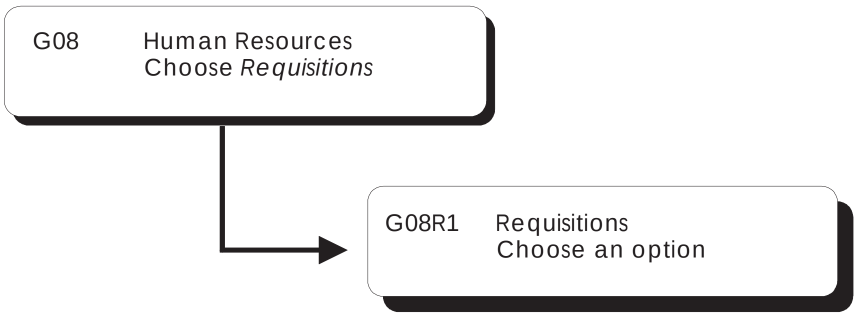
What You Should Know About

Position control	If you use position control, you can set the appropriate processing option in this program to require a position identification for all approved requisitions.

Exercises

See the exercises for this chapter.

Work with Requisitions



Working with Requisitions

You use requisitions to manage the process of searching for and hiring or rejecting candidates for a vacancy. After you enter a requisition, you match candidates to the requirements described on the requisition. You can attach the candidate's record to the requisition to begin the process. If you decide to hire the attached candidate, you can fill the requisition.

Work with requisitions by:

- ❑ Attaching a candidate record to a requisition
- ❑ Rejecting a candidate
- ❑ Closing a requisition
- ❑ Reopening a requisition

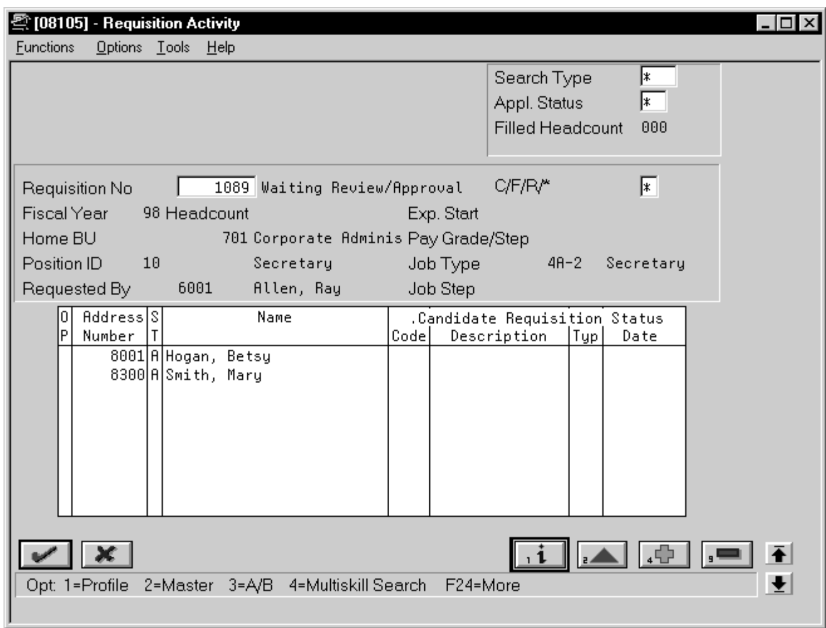
Attaching a Candidate Record to a Requisition

After you have determined that a candidate might be suitable to fill a vacancy, you attach the candidate record to the requisition. This enables you to monitor their progress as they are interviewed or their qualifications evaluated for the vacancy. The procedures are as follows:

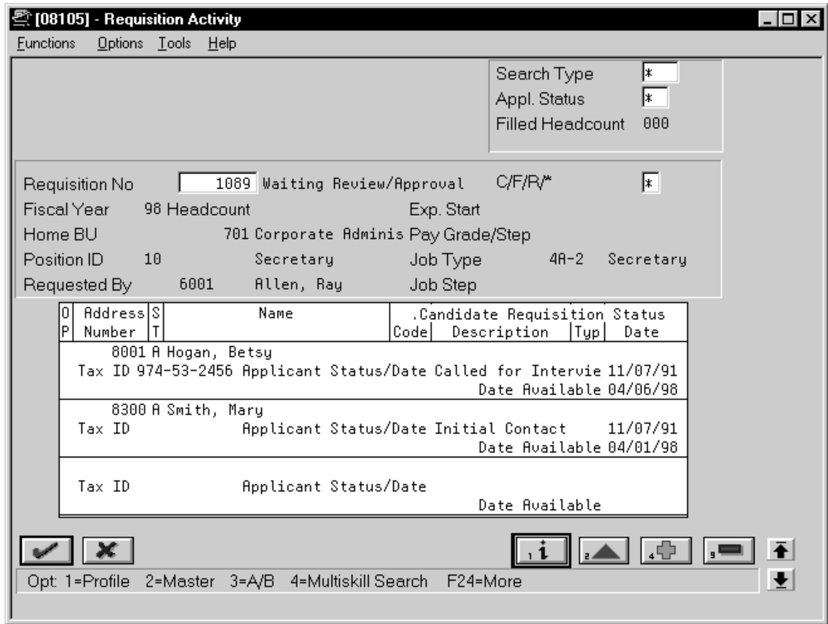
- Attach a candidate record to a requisition
- Attach a candidate to a record with multiskill search

▶ To attach a candidate record to a requisition

On Requisition Activity



1. Complete the following field:
   - Requisition Number
2. Complete the following fields to attach a candidate record to the requisition:
   - Address Number
   - Candidate Requisition Status Code
   - Date
3. Choose More Detail.



4. Complete the following field:
   - Date Available

Field	Explanation
Number – Requisition	The number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.
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
Status – Applicant	This code defines the current status of an applicant. You can define these codes using user defined codes system 08, type AS. Whenever you change the status of an applicant, a record is added to supplemental data within the applicant resume information (if the status code has been defined in user defined codes). This provides a history of the applicant within the system.

Field	Explanation
Candidate Filled or Rejected	This field is used to enter a value that designates what kind of requisition to display. It will display candidate only requisitions, filled requisitions, rejected requisitions or all kinds of requisitions. Valid codes are: C Candidate-only requisitions F Filled requisitions R Rejected requisitions * All requisitions The codes are further grouped based on the hard-coded Special Handling Code values in user defined code table 08/CN. These hard-coded values are: C CAN Candidates code F FIL Any code indicating that the position has been filled R REJ Rejected

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 Review form or by accessing Requisition Review from the Applicant Entry form.

See *Attaching an Applicant to a Requisition (P08102).*

Processing Options for Requisition Activity

```
PROFILE DATA SELECTION EXITS:

---------------------------------
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.)
```

▶ To attach a candidate to a record with multiskill search

You can use the Multiskill search form to search for candidates that match the profile data you have defined for the requisition. For example, you can search for all employees who:

- Have an MBA degree
- Speak French
- Are Certified Public Accountants
- Know the RPG computer programming language

After you have matched the profile data types to the requisition, you can attach each candidate's record to the requisition.

See Also

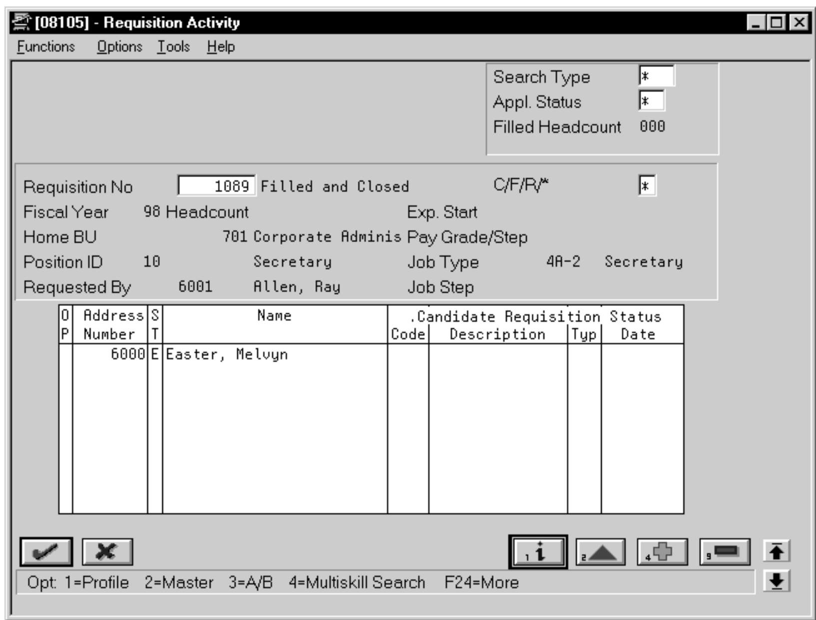
- *Work with Profile Data*

Rejecting a Candidate

If you decide that a candidate is not suitable for the vacancy, you can reject the candidate. This detaches them from the current requisition but retains their name and Address Book number so you can attach them to another requisition.

▶ To reject a candidate

On Requisition Activity



1. Complete the following field:
   - Requisition Number
2. Change the value in the following field:
   - Candidate Requisition Status
   - Date

Field	Explanation
Number – Requisition	The number that identifies the position requisition. This number must be unique. The next number program assigns this number if no other number is provided when the requisition is initially entered.

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, special mailing addresses, and so on.

What You Should Know About

Removing all candidates from the requisition	Use the Delete action to remove all candidates from the requisition.

Exercises

See the exercises for this chapter.

Closing a Requisition

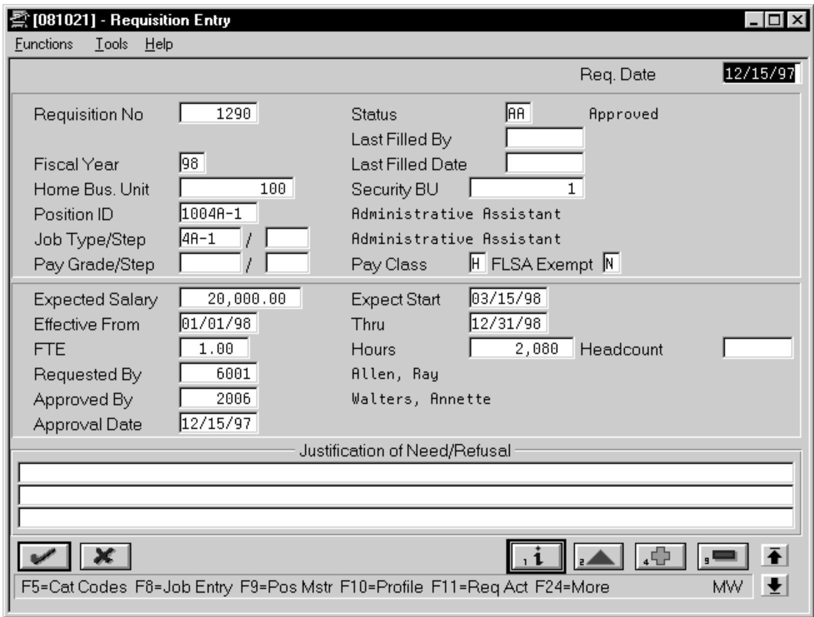
When the filled headcount in Requisition Activity matches the headcount in the requisition, the system changes the requisition status to closed (status code 99).

Reopening a Requisition

You can reopen a requisition after it has been filled and closed in order to meet changing circumstances. For example, if you decide to increase headcount for a vacancy, you can reopen the requisition for the added openings.

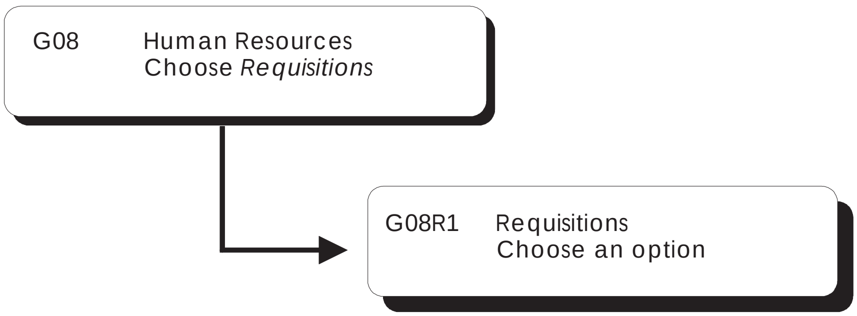
▶ To reopen a requisition

On Requisition Entry



1. Change the following field:
   - Status
2. Change the value in the following field:
   - Headcount

Review Requisitions



Reviewing Requisitions

After entering the requisitions, you review them against your actual needs. You can determine whether candidates are attached to the requisition and if the profile data associated with each requisition is consistent with your current requirements for the vacancy.

Complete the following tasks:

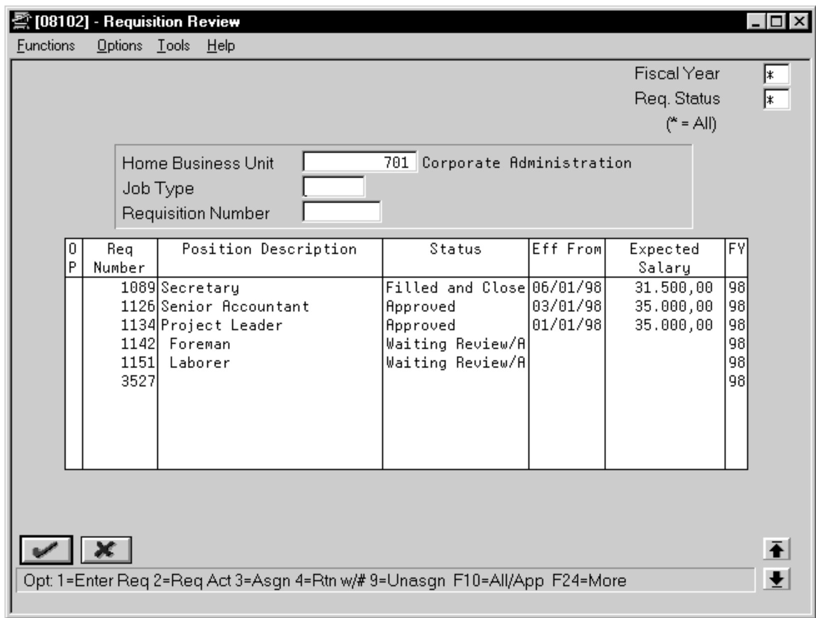
- ❑ Review requisition details
- ❑ Review requisition activity
- ❑ Review profile data by requisition

Reviewing Requisition Details

Requisition details include all background information about the requisition, such as whether it is approved, and if so, when it was approved and who approved it. You use the requisition details to ensure clear communication between the Human Resources department and the rest of the company.

▶ To review requisition details

On Requisition Review



Complete the following optional fields to narrow your search:

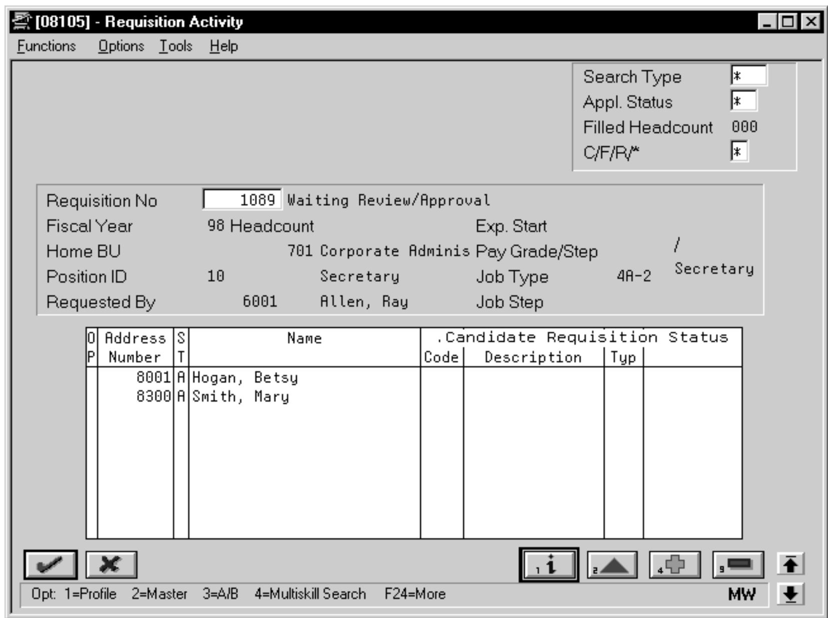
- Fiscal Year
- Requisition Status
- Home Business Unit
- Job Type

Reviewing Requisition Activity

You review requisition activity to review their status relative to a specific requisition.

▶ To review requisition activity

On Requisition Activity



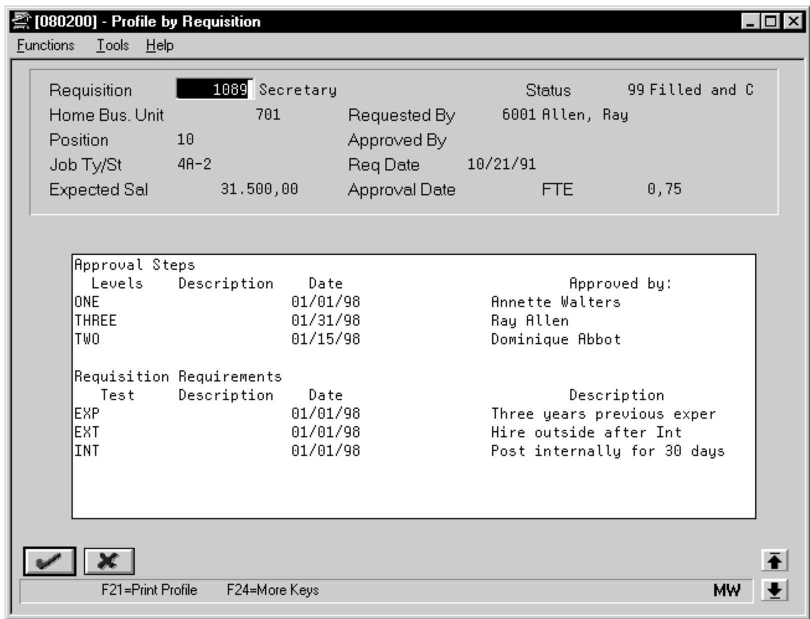
1. Complete the following field:
   - Requisition Number
2. Complete the following optional fields:
   - Search Type
   - Applicant Status
   - Candidate, Filled, or Rejected

Reviewing Profile Data by Requisition

You review the types of profile data associated with each requisition to verify that you are searching for the appropriate qualifications for the vacancy.

▶ To review profile data by requisition

On Profile by Requisition



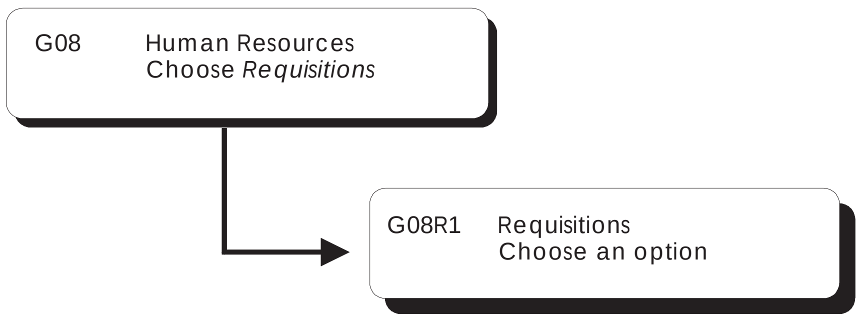
Complete the following field:

- Requisition

See Also

- *Working with Profile Data*

Run Requisition Reports



You can generate several reports to review requisition information.

Complete the following tasks:

- ❑ Run the Requisition Profile report
- ❑ Run the Requisitions by Data Type report
- ❑ Run the Requisition Review report
- ❑ Run the Unfilled Requisitions report

Running the Requisition Profile Report

The Requisition Profile report prints a summary of profile data types in the Requisition database. You choose whether the requisitions are listed by requisition number or alphabetically. You also choose whether the report includes text information.

Data Selection

To print the report in either alphabetical or numeric order, organize your data selection as follows:

Numerical Order

Description	Sequence	Total Level	Page Skip
Address Number	001	01	Yes
Type Data	002	01	No
User Defined Code	003	01	No
Effective Date	004	01	No
Line Number	005		No

This sequence will print the report by requisition number. For example, if you enter a requisition for a teacher, it will appear in the report before a requisition for a secretary. If you use next numbering to assign requisition numbers, this sequence will also print your requisitions in chronological order.

Alphabetical Order

Description	Sequence	Total Level	Page Skip
Description	001	01	Y
Address Number	002		No
Type Data	003	01	No
User Defined Code	004	01	No
Effective Date	005	01	No
Line Number	006		No

This sequence will print your requisitions by description in alphabetical order. For example, a requisition for a secretary will appear in the report before a requisition for a teacher.

```
080416                                   J.D. Edwards & Company                        Page Number        4
                                          Requisition Profile                           Date         5/07/98
                                         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 . 10/21/91
 Position ID. . 10           Secretary             Headcount. . . .                   Approval Date.

 Approval Steps
 ==============================
     Levels     Date                 Approved by:                Follow up required
   ---------- --------          ------------------------------ ------------------------------
   ONE        01/01/98          Annette Walters
   THREE      01/31/98          Ray Allen
   TWO        01/15/98          Dominique Abbot



 Requisition Requirements
 ==============================
      Test      Date                 Description
   ---------- --------          ------------------------------
   EXP        01/01/98          Three years previous exper
   EXT        01/01/98          Hire outside after Int
   INT        01/01/98          Post internally for 30 days
```

Running the Requisitions by Data Type Report

Run the Requisitions by Data Type report to print a list of all data types for requisition profiles.

```
080406                                            J.D. Edwards & Company                                   Page Number        2
                                                 Requistion Info by Type                                   Date         5/08/98
                                                  in Alphabetical Order


Approval Steps
==============================
Requisition    Name                      Date                      Approved by:           Follow up require
----------- ------------------------ -------- -------- ------------------------ -----------------------



  Levels   . . . . . ONE
       1089 Secretary                 01/01/98          Annette Walters


  Levels   . . . . . STEPA
       3404 Swim Coach                01/01/98          HR


  Levels   . . . . . STEPB
       3404 Swim Coach                01/01/98          HR


  Levels   . . . . . STEPC
       3404 Swim Coach                01/01/98          HR


  Levels   . . . . . STEPD
       3404 Swim Coach                01/01/98          HR
```

Running the Requisition Review Report

Run the Reports World Writer (Requisition Review) to generate a summary of all approved or unapproved requisitions. The system retrieves the data from the Requisition Master table (F08102).

```
                                                  Requisition Review                                   Page       –        1
                                                    w/ Approvals                                       Date       – 05/08/98

FY   Business    Description      Position Description        Expected       Req    St Description      Request  Description        Req.
       Unit                          ID                         Salary       No.                           By                        Date
-- ------------ --------------- -------- --------------- ------------ -------- -- --------------- -------- --------------- -------

              1 General Account BD01     Bus Driver                           3391 99 Filled and Clos     7500 Cathy McDougle  12/31/97
                                                                                      Approved by :      6002 Ms. Dominique A 03/01/98
              1                 CH01     Swim Coach                           3404 AA Approved            7500 Cathy McDougle  12/31/97
                                                                                      Approved by :      6002 Ms. Dominique A 01/15/98
              1                 CH02     Tennis Coach                         3439 99 Filled and Clos     7500 Cathy McDougle  03/15/98
                                                                                      Approved by :      6002 Ms. Dominique A 03/15/98
              1                 TR01     Art Teacher                          3421 99 Filled and Clos     7500 Cathy McDougle  12/31/97
                                                                                      Approved by :      6002 Ms. Dominique A 01/15/98
              1                 TR03     English Teacher                      3412 99 Filled and Clos     7500 Cathy McDougle  12/31/97
                                                                                      Approved by :      6002 Ms. Dominique A 01/15/98
              1                 10B–1    Trainer            25,000.00         1206 WW Waiting Review/     7500 Cathy McDougle  03/15/98
                                                                                      Approved by :      7505 Robert Mastro   03/15/98
              1                 10B–1    Trainer            25,000.00         1214 WW Waiting Review/     7500 Cathy McDougle  12/31/97
                                                                                      Approved by :      7505 Robert Mastro   12/31/97
              1                 10B–1    Trainer            25,000.00         1222 WW Waiting Review/     7500 Cathy McDougle  10/14/97
                                                                                      Approved by :      7505 Robert Mastro   10/14/97
```

Requisitions

Running the Unfilled Requisitions Report

Run the Unfilled Requisitions World Writer to generate a summary of all requisitions that are still open. The system retrieves the data from the Requisition Master table (F08102).

Unfilled Requisition by Effective Date

Page – 1
Date – 07/01/98

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			10/14/97	AA	Approved
1249	General Accounts	5067	Laborer Level I	98			10/14/97	WW	Waiting Review/Approval
2330	General Accounts	63	Operator	98				WW	Waiting Review/Approval
1134	Corporate Administration	4	Project Leader	98	01/01/98	01/01/99	10/18/91	AA	Approved
1177	Accounting Department	4510P–2	Accountant	98	01/01/98	12/13/98	12/15/97	AA	Approved
1185	Balance Sheet	1000A–4	Accountant	98	01/01/98	12/13/98	12/15/97	AA	Approved
1193	Balance Sheet	1004A–1	Administrative Assistant	98	01/01/98	12/31/98	12/15/97	AA	Approved
1257	** NOT FOUND **	488P	Lathe Operator	98	01/01/98	12/31/98	12/15/97	AA	Approved
1290	Balance Sheet	1004A–1	Administrative Assistant	98	01/01/98	12/31/98	12/15/97	AA	Approved
1302	Administrative Department	5J–8	Teacher	98	01/01/98	12/31/98	12/14/97	AA	Approved
1337	Administrative Department	5J–8	Teacher	98	01/01/98	12/31/98	12/14/97	AA	Approved
3404	School	CH01	Swim Coach	7	01/01/98		01/15/98	AA	Approved
1126	Corporate Administration	2	Senior Accountant	98	03/01/98	12/31/98	10/18/91	AA	Approved
3535	General Accounts			98	03/01/98		03/01/98	AA	Approved
1311	Administrative Department	5J–8	Teacher	98	05/01/98	12/31/98	12/14/97	AA	Approved
1089	Corporate Administration	10	Secretary	98	06/01/98	12/31/98		WW	Waiting Review/Approval
1206	Administrative Department	10B–1	Trainer	98	06/01/98	06/01/99	03/15/98	WW	Waiting Review/Approval
1214	Administrative Department	10B–1	Trainer	98	06/01/98	06/01/99	12/31/97	WW	Waiting Review/Approval
1222	Administrative Department	10B–1	Trainer	98	06/01/98	06/01/99	10/14/97	WW	Waiting Review/Approval
1265	Administrative Department	2H–2	Employment Specialist	98	06/01/98	06/01/99	10/14/97	AA	Approved
1329	Administrative Department		Trainer	98	06/30/98		12/14/97	AA	Approved

Applicant Information

Objectives

- To enter and maintain all applicant information

About Applicant Information

Whenever anyone applies for a vacancy with your company, you can enter basic and profile information on the applicant. Entering applicant information enables you to track applicants and locate an applicant who has a specific skill. If applicants submit resumes when applying for a position, you can also enter information from an applicant's resume.

After you enter basic and profile information, you can attach the applicant to a requisition. You can view all applicants who have applied for the job on the requisition.

You can review all applicant information you enter, as well as all the information anyone else has entered for an applicant. Additionally, you can determine the current status of the applicant and identify which applicants have the required skills for a specific job.

You can send the applicant a letter of acknowledgement. This letter informs applicants of their status in the review process and that their applications have been received.

When you make a job offer and the applicant accepts it, you need to hire the applicant and transfer their data to the employee database. After you hire the applicant, the system can automatically transfer an applicant's profile data and basic information to the employee database.

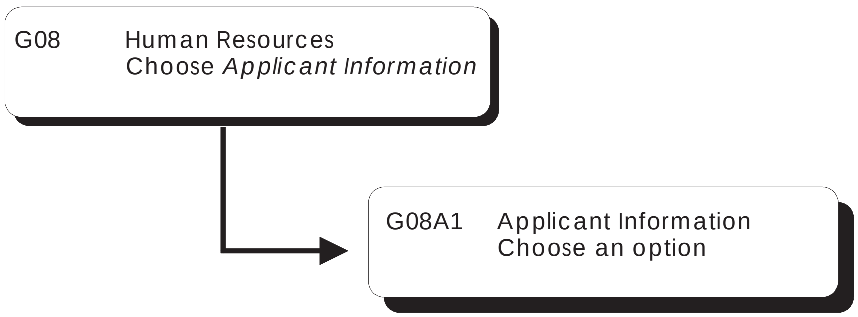
After applicants are no longer considered active, you can purge applicant information from the system.

You can run reports to review applicant, Equal Employment Opportunity (EEO), and Affirmative Action information. Applicant reports summarize applicant information as well as detail profile information for each applicant. You use the EEO and Affirmative Action reports to assist in meeting the reporting requirements of the Equal Employment Opportunity Commission (EEOC).

Complete the following tasks:

- ❑ Enter applicant information
- ❑ Run a multiskill search
- ❑ Attach an applicant to a requisition
- ❑ Review applicant information
- ❑ Print letters of acknowledgement
- ❑ Hire an applicant
- ❑ Purge applicant information
- ❑ Run applicant and EEO reports

Enter Applicant Information



Entering Applicant Information

Whenever anyone applies for a vacancy with your company, you can enter initial and profile information for the applicant. Entering applicant information enables you to track applicants and locate an applicant who has a specific skill.

Before you can track an applicant or search for specific applicants, you must enter basic applicant information. You can also use application information when preparing EEO reports.

After you enter the applicant, you can enter profile data, which is any additional information you want to use to help search for a specific applicant who has a specific skill, training, and experience.

When you know which job or position the applicant is applying for, you can attach the applicant to the requisition assigned to the open job. If the applicant is hired, the position budget information will be updated.

Complete the following tasks:

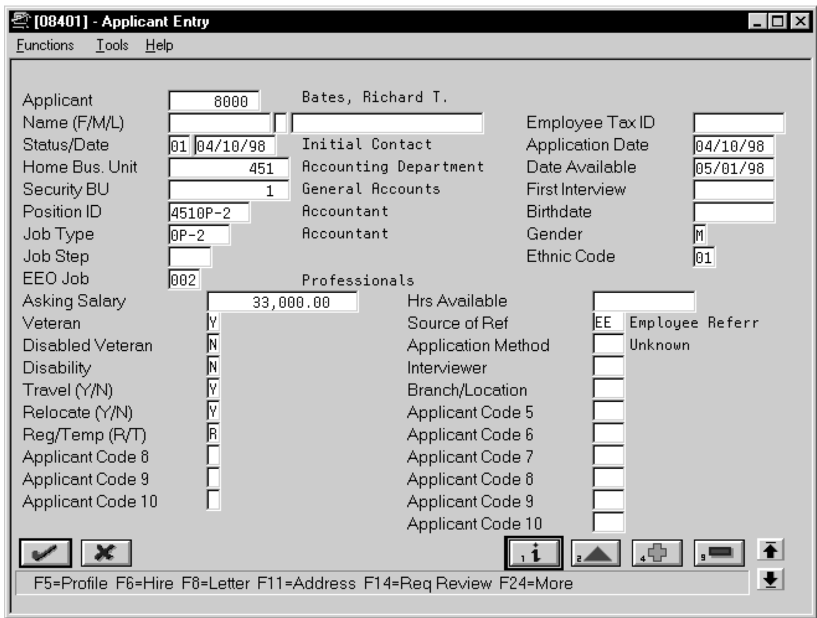
- ❑ Enter general information
- ❑ Enter profile information
- ❑ Attach an applicant to a position

Entering General Information

Before you can track an applicant or search for an applicant who has a specific skill, you enter general applicant information.

▶ To enter general information

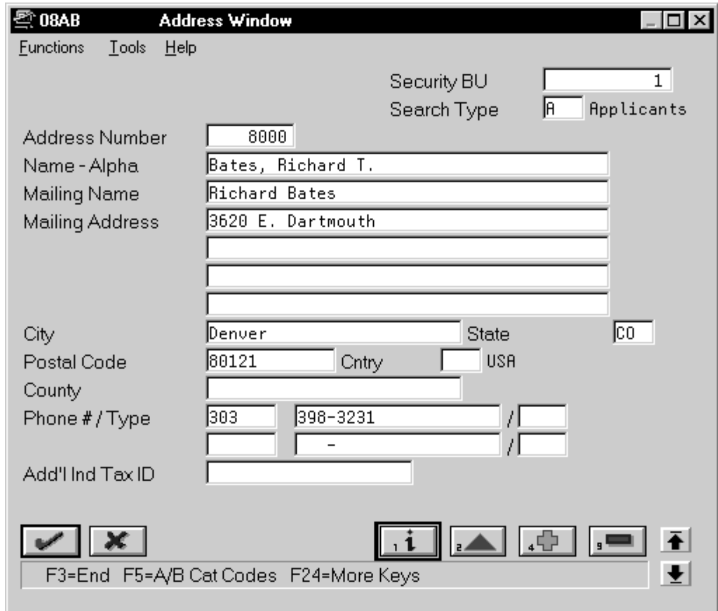
On Applicant Entry



1. Complete the following fields:
   - Applicant
   - Name (First/Middle/Last)
   - Status/Date
   - Application Date
   - Ethnic Code
   - Gender
   - EEO Job

The processing options for Applicant Entry determine whether the Ethnic Code, Gender, and EEO fields are displayed.

2. Access Address Window.



3. On Address Window, complete the following fields:
   - 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, special mailing addresses, and so on. . . . . *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. The system does not allow you to enter duplicate applicant numbers.

Field	Explanation
Status	This code defines the current status of an applicant. You can define these codes using user defined codes system 08, type AS. Whenever you change the status of an applicant, a record is added to supplemental data within the applicant resume information (if the status code has been defined in user defined codes). This provides a history of the applicant within the system.
Date	The date you want all the changes you make on this form to take effect, or the date the changes went into effect. If you are entering data and you do not put a date in this field, the current system date is used as the effective date. . . . . *Form-specific information* . . . . The date you entered the applicant into the system.
Mailing Address	The first line of the mailing address in the Address Book system. . . . . *Form-specific information* . . . . The applicant's street address and apartment number, if applicable.

Processing Options for Applicant Entry

```
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 Addition-  ____________
    al Individual Tax ID Number in the
    Address Book window.  Default of
    blank will NOT display the Addition-
    al 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.

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.

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.
```

Entering Profile Information

After you enter initial applicant information, you can enter profile information, which is any additional information you want to include about the applicant. You can also use the information to help search for a specific applicant who has a specific skill, training, or experience.

You can work with all types of profile information that can be tracked for a particular applicant. You can create this data in either code or narrative format.

See Also

- *Working with Profile Data*

Exercises

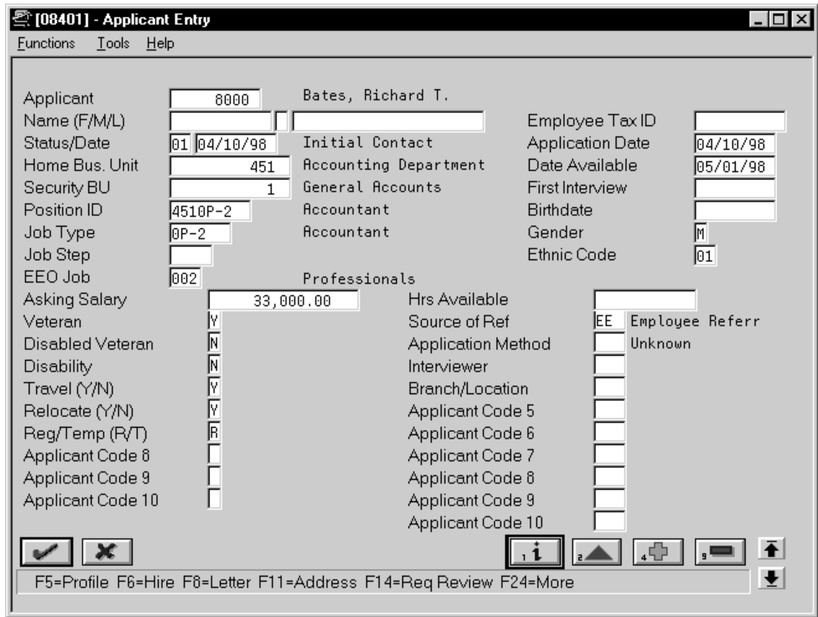
See the exercises for this chapter.

Attaching an Applicant to a Position

When you know for which position the applicant is applying, you can attach the applicant to that position. When an applicant is hired to the position, the system automatically updates position budget information.

▶ To attach an applicant to a position

On Applicant Entry

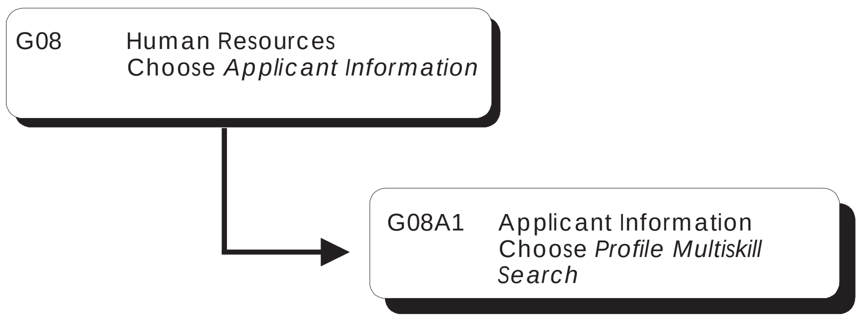


Complete the following fields:

- Home Business Unit
- Position ID

Field	Explanation
Home Business 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	Used for budgetary (position) control purposes. Some organizations use the job type as the position ID, but this is not required. The position ID controls the sequence of the positions within a home business unit or a department. If you maintain a stable set of job type codes, you may choose to use the job type for the position ID. Otherwise, assign a sequential number as appropriate.

Run a Multiskill Search

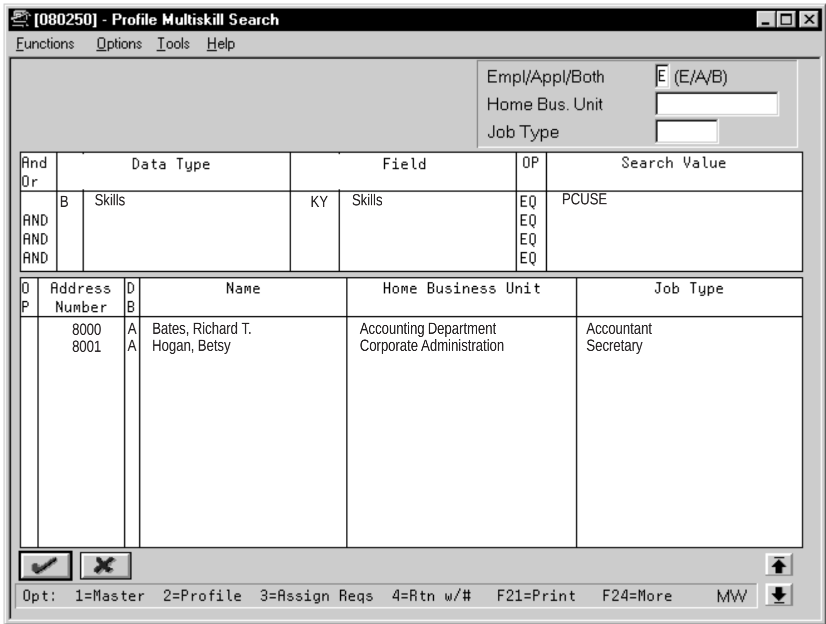


Running a Multiskill Search

After you enter applicant profile information, you can choose Profile Multiskill Search to locate all the applicants who are qualified for a job.

▶ To run a multiskill search

On Profile Multiskill Search



Complete the following fields:

- Employee/Applicant/Both
- Data Type
- Field
- Options
- Search Value
- And/Or

Field	**Explanation**
Employee/Applicant/Both	A field that controls the database from which the screen displays information. Valid codes are: E Employee database A Applicant database B Both the employee and the applicant databases

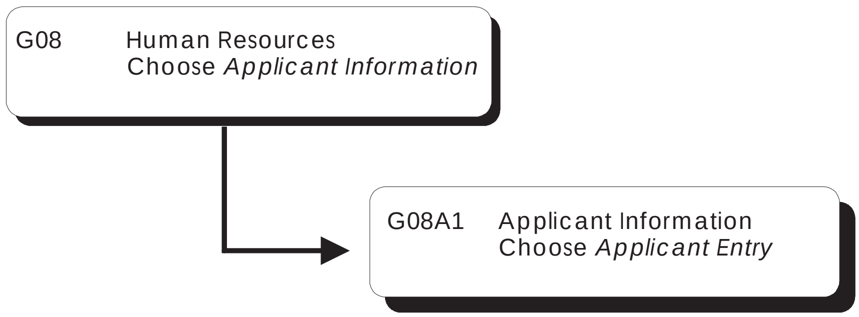
Field	Explanation
Data Type	This rate, in cost per hour, is the rate used to calculate the future machine cost as of the last simulation and update. . . . . *Form-specific information* . . . . The type of inforamtion from the Profile Data Entry form that you want the search to find.
Field	Indicates which data item is to be included in the search.
Options	You can specify any of the following relationships: 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	This field does not have an associated user defined code. You must enter a search value based on the data you entered in the profile for the selected field. NOTE: This field is case sensitive. For example, 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% will display both bamboo and bachelor. • %ing will display all words ending with ing. • %BA% will display any words containing the letters B and A, such as abate, cabbage, or bachelor.

Field	Explanation
And/Or Selection 1	A code to designate 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, on the first line, type the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, type 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. As another example, to identify employees who are both CPAs and who have MBAs, on the first line, type the code for professional licenses and certificates in the Data Type field and CPA in the Search Value field. On the second line, type the code for education in the Data Type field and MBA in the Search Value field. Link the two lines by typing Or in the And/Or field of the second line. To search for applicants who speak Spanish and German, type Spanish as the first search value, German as the second search value, then type And in this field. To search for applicants who speak Spanish or German, type Spanish as the first search value, German as the second search value, then type Or in this field.

What You Should Know About

Search parameters in field level help	When the Employee/Applicant/Both field is set for (E) Employee or (A) Applicant, the search parameters in field level help will display values. However, if the value is set for Both, you must enter either E or A in the search parameters to display values.

Attach an Applicant to a Requisition

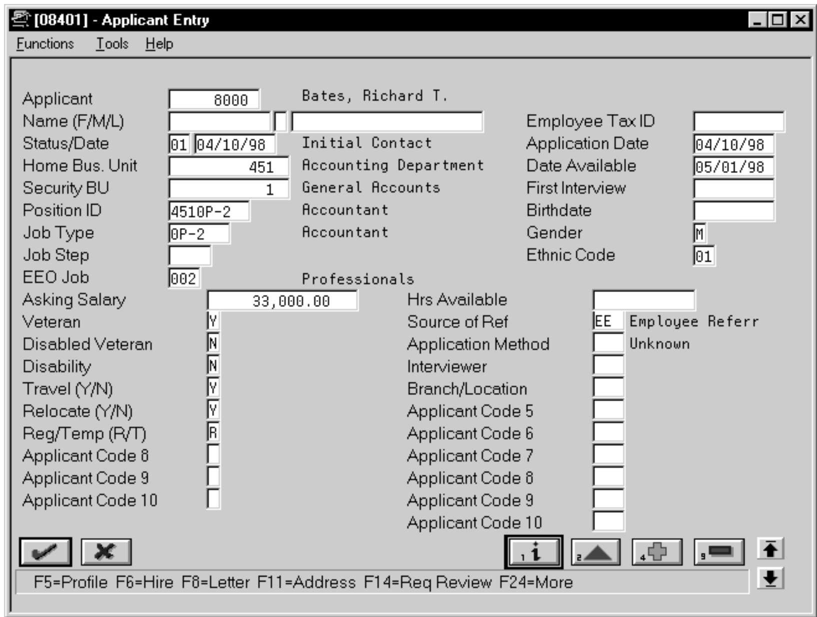


Attaching an Applicant to a Requisition

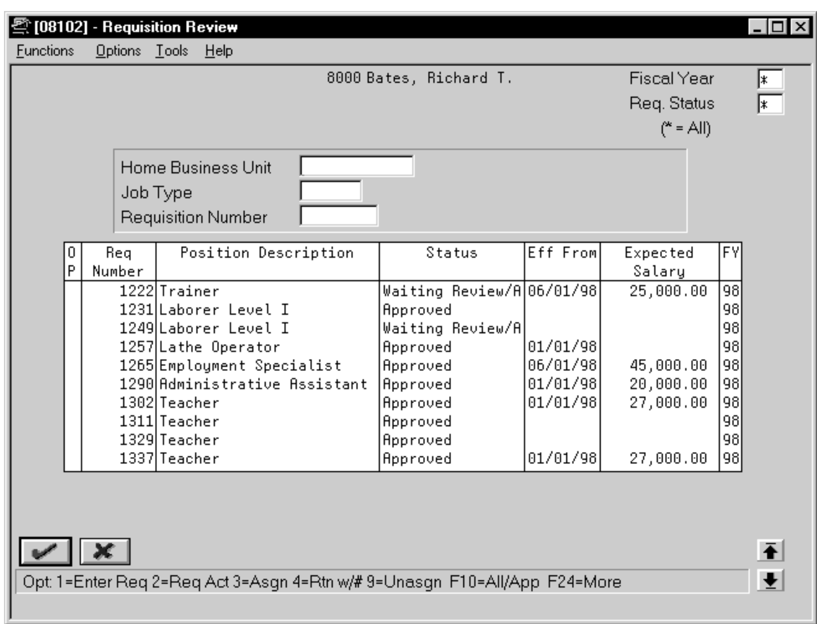
You can attach applicants to requisitions. Attaching an applicant to a requisition enables managers to determine if an applicant's requirements and skills meet their needs. As the applicants go through the process of interviewing for the position, you can track their progress.

▶ To attach an applicant to a requisition

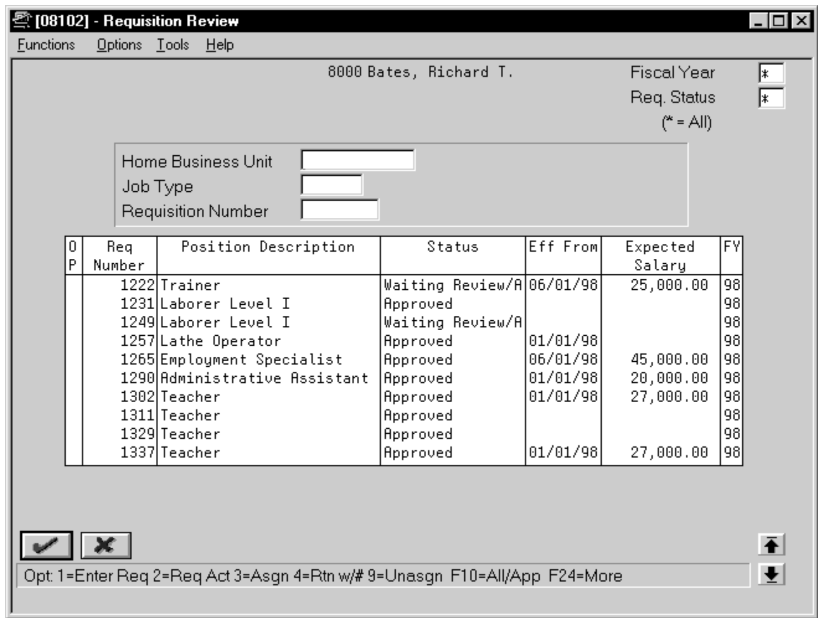
On Applicant Entry



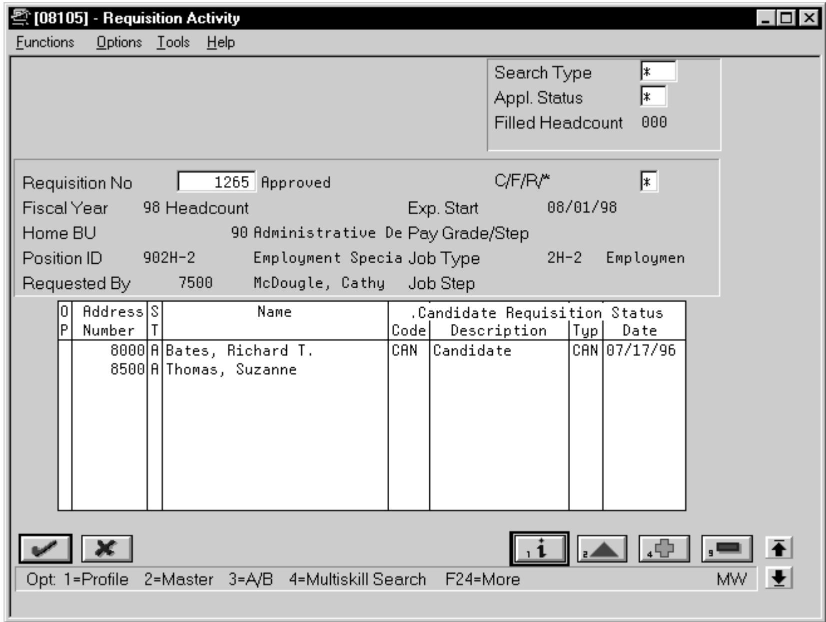
1. Complete the following field to locate the applicant:
   - Applicant
2. Access Requisition Review.



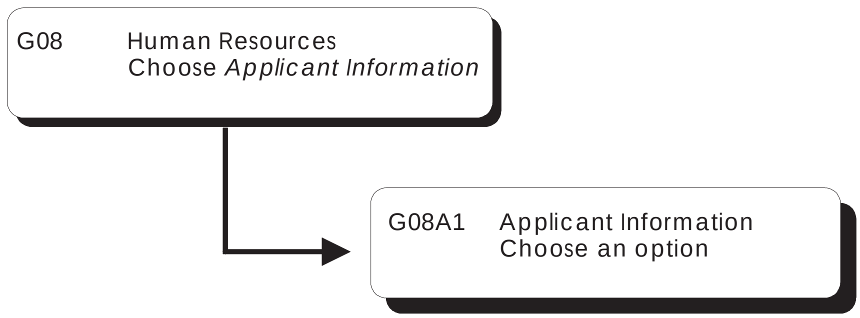
3. On Requisition Review, complete the following fields to narrow your search:
   - Requisition Status
   - Home Business Unit
   - Job Type
   - Requisition Number
4. Choose *Assign* for a specific requisition.



5. Access Requisition Activity to review your work.


[08105] - Requisition Activity
Functions Options Tools Help
Search Type *
Appl. Status *
Filled Headcount 000
Requisition No 1265 Approved
C/F/R/* *
Fiscal Year 98 Headcount
Exp. Start 08/01/98
Home BU 90 Administrative De
Pay Grade/Step
Position ID 902H-2 Employment Specia
Job Type 2H-2 Employmen
Requested By 7500 McDougle, Cathy
Job Step
O P
Address Number
S T
Name
.Candidate Requisition Status
Code
Description
Typ
Date
8000 A Bates, Richard T. CAN Candidate CAN 07/17/96
8500 A Thomas, Suzanne
Opt 1=Profile 2=Master 3=A/B 4=Multiskill Search F24=More
MW

Review Applicant Information



Reviewing Applicant Information

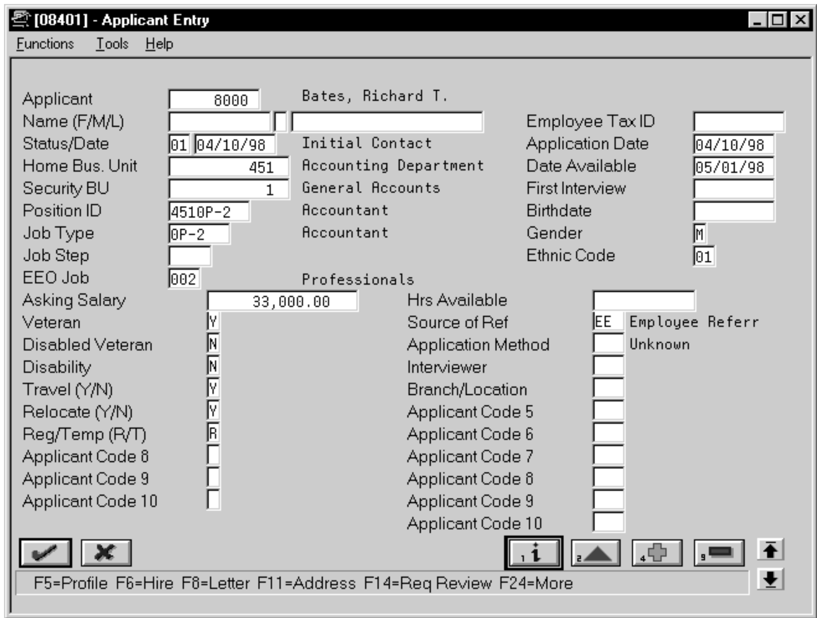
After you enter applicant information you can review it. You can review general information and profile information.

Complete the following tasks:

- Review general information
- Review profile information

▶ To review general information

On Applicant Entry



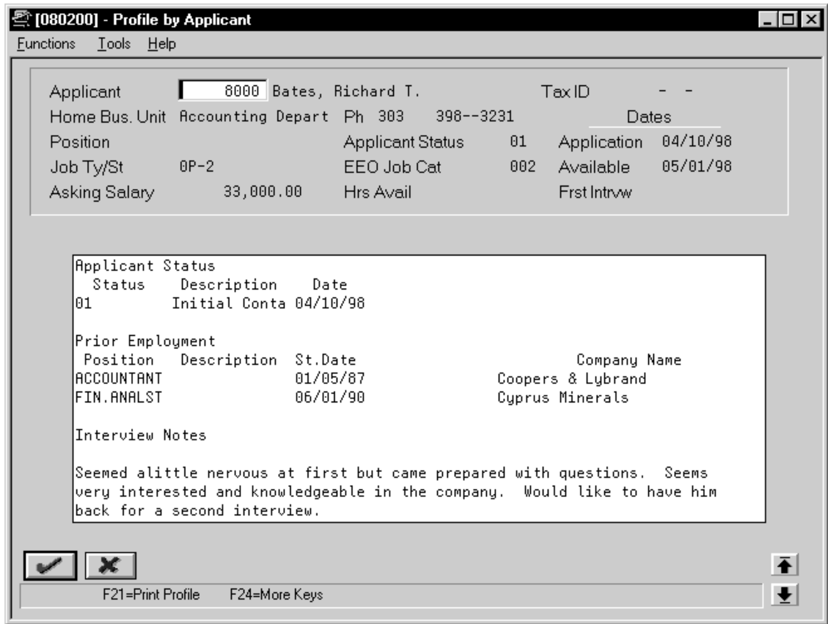
1. Complete the following field to locate the applicant:
   - Applicant
2. Review the information.

See Also

- *Running a Multiskill Search (P080250)*

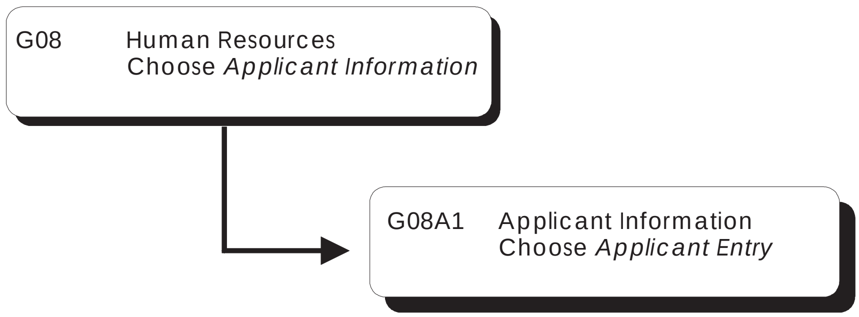
To review profile information

On Profile by Applicant



1. Complete the following field:
   - Applicant
2. Review the information.

Print Letters of Acknowledgement



Printing Letters of Acknowledgement

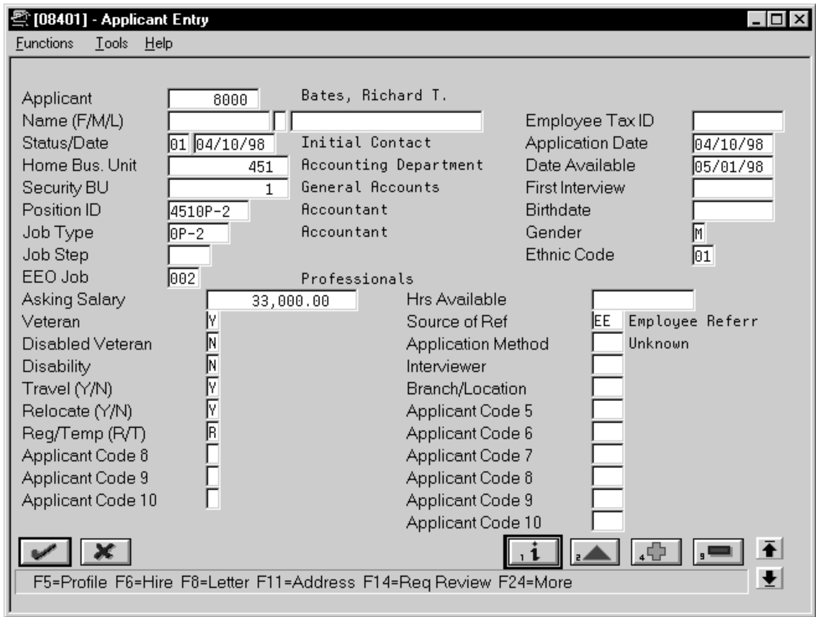
After you enter applicant information, you can print a letter of acknowledgement and send it to the applicant. This letter informs applicants that their applications have been received. This enables you to respond to applicants effectively with standard form letters.

Before You Begin

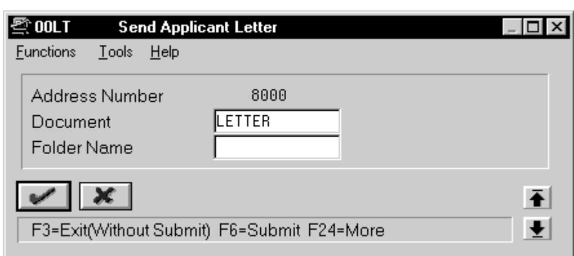
- ❑ You must have AS/400 Office Vision installed in your system.
- ❑ You must set up documents and appropriate folders to use with AS/400 Office Vision.

▶ To print letters of acknowledgement

On Applicant Entry



1. Complete the following field to locate the applicant:
   - Applicant
2. Access Send Applicant Letter.



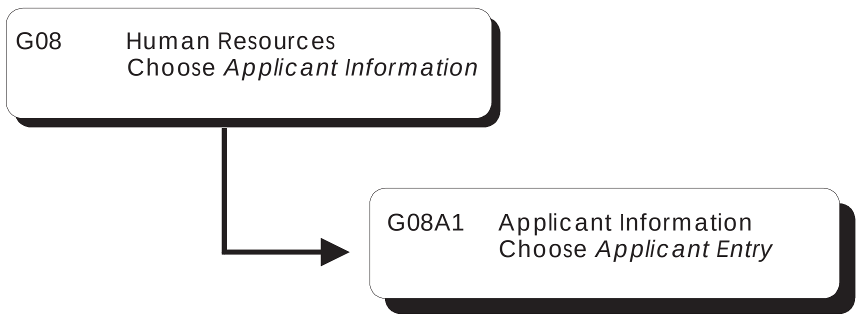
3. On Send Applicant Letter, complete the following fields:
   - Document
   - Folder Name

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 Office Vision Manual* to set up the letters in Office Vision.

Hire an Applicant



Hiring an Applicant

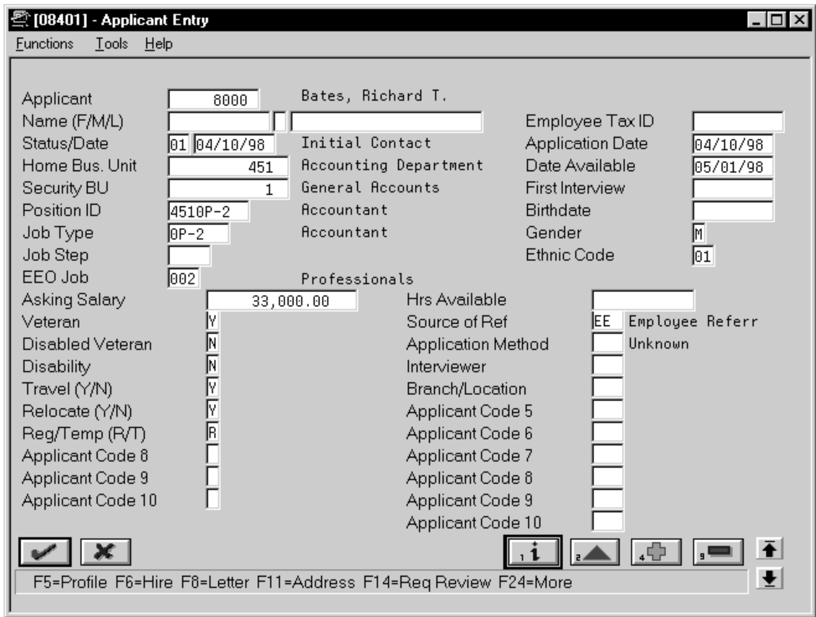
When you make a job offer and the applicant accepts it, you can then hire the applicant. When you hire an applicant, you can transfer the applicant basic information and the applicant profile information to employee information and employee profile data. If your processing options require it, you must also enter any additional employee information when you hire the applicant.

Before You Begin

- ❑ Verify that the processing option that allows applicant profile data to transfer to the employee profile file is correctly set. See *Entering Initial Applicant Information*.
- ❑ Verify that the applicant status is set up on Define Types of Data. See *Setup*
- ❑ Verify the setup of transfer of data on Hire/Termination. See *Building Profile Transfer Table*.

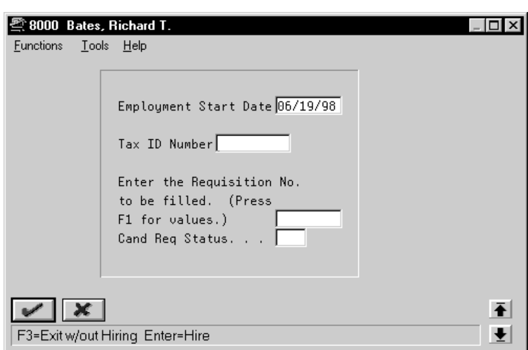
To hire an applicant

On Applicant Entry



1. Complete the following field to locate the applicant:
   - Applicant
2. Choose Hire.

   The system displays Hire Applicant.



3. On Hire Applicant, complete the following fields:
   - Employment Start Date
   - Employee Tax Identification
   - Requisition Number to be filled
   - Candidate Requisition Status

   After you enter the information, the system displays Human Resources Employee Entry.

4. On Human Resources Employee Entry, update the employee record as required.

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 current system date is used. This field can be used multiple times if, for example, an employee is a seasonal worker. The calculation tables in payroll and the eligibility tables and date codes in Human Resources also use this date as a start date to compute deductions, benefits, or accruals. . . . . *Form-specific information* . . . . The date the applicant's employment begins with the company.
Candidate Requisition Status	The current activity level of a Candidate Requisition. These codes are retrieved from user defined code table system 08, type CN. The codes are further grouped 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.

What You Should Know About

Applicant Information program (P08401) processing options

You can set a processing option to use the following fields in the Applican Information program:

- Security Business Unit
- Position Identification
- Home Business Unit
- Job Type/Setup

If you use these fields, you must replace the information in thm when you hire the applicant.

Search type changes after hiring an applicant

If you hire an applicant, the system changes the search type in Address Book from A (applicant) to E (Employee)

Address Book changes after hiring an applicant

When you hire an applicant, the system automatically updates the Employee Yes/No flag.

Entering an employee tax identification

You can enter this field in the Employee Master.

See Also

- *Entering Employee Infomation*

Exercises

See the exercises for this chapter.

Purge Applicant Information

Purging Applicant Information

After applicants are no longer considered active, you can purge applicant information and applicant profiles from the system. Purging applicant information frees storage space on your computer. Purging applicants does not affect current employees because their information is automatically transferred to the employee database after they are hired.

Complete the following tasks:

- ❑ Purge general information
- ❑ Purge profile information

Before You Begin

- ❑ Create the necessary DREAM Writer versions.

Purging General Information

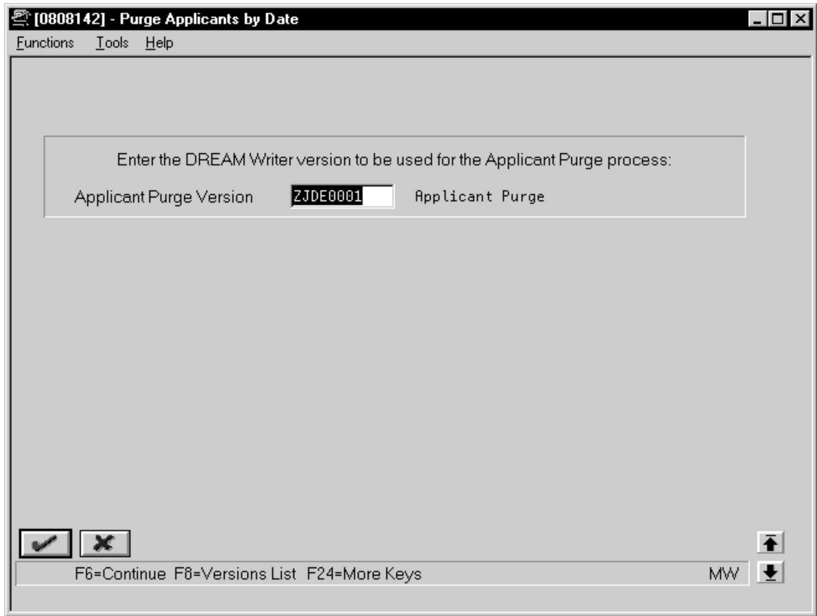
G08A1 Applicant Information
Enter *27*

G08A3 Applicant Technical Operations
Choose *Purge Applicants by Date*

Run Purge Applicant by Date to purge applicant information from the system according to the dates of application. This enables you to delete old or outdated applicant records from the system. You can enter other criteria to retain applicants who are still being considered for employment, 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 exempt their record from the purge operation.

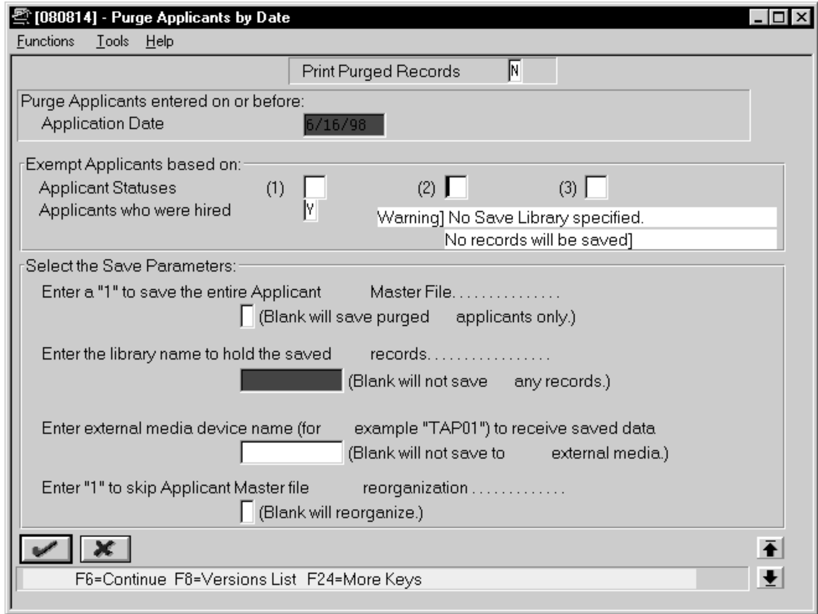
To purge general information

On Purge Applicant by Date



1. Complete the following field:
   - Applicant Purge Version
2. Select a DREAM Writer version.

   When you enter the information, the system displays a second Purge Applicants by Date form.



3. 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
4. Complete the fields in the Select the Save Parameters section of the form.

Field	Explanation
Purge Date	Dependent upon the values found within the Applicant Master (F08401), this date will be used in two ways. 1 If the Applicant Master Application Date is present, the purge date will be tested against the Application Date. If the Application date is equal to or older than the purge date, the applicant record will be purged. 2 If the Applicant Master Application Date is NOT present, the purge date will be tested against the date the applicant record was last updated. If the Date Last Update is equal to or older than the purge date, the applicant record will be purged. NOTE: If you use today's date as the purge date, all applicants presented to this process by the DREAM Writer will be purged. For selective purging see DREAM Writer considerations in the program helps.

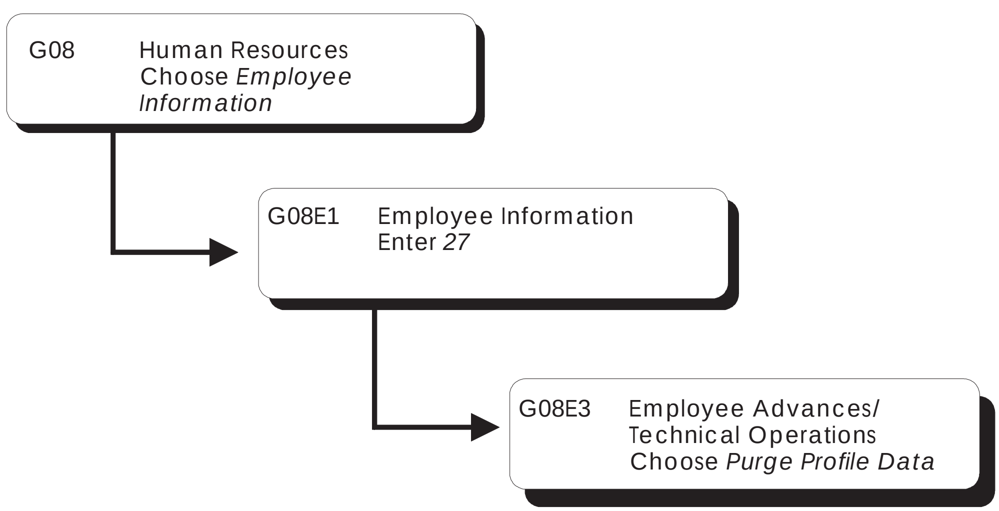
Field	Explanation
Applicant Status	This code defines the current status of an applicant. You can define these codes using user defined codes system 08, type AS. Whenever you change the status of an applicant, a record is added to supplemental data within the applicant resume information (if the status code has been defined in user defined codes). This provides a history of the applicant within the system.
Yes or No Entry	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 applicant information will be purged if all other criteria for purge is met.
Save Instruction	A code that carries the instructions to the save function of the purge process. A default value of blank will add to the save file only those records that are purged from the file. A value of 1, will copy the entire file to the save file before any records are purged. In either case the saved file needs to be copied to an external media such as magnetic tape and archived for possible future needs. The difference: Blank Only the records purged are written to the save file. To reload the purged records, the save file is copied into the original file with the “add” function. (They can be re-purged when need is satisfied.) 1 All records are saved to the save file. To reload, the saved file must be returned to the system intact. For example, the file could be reloaded to a new library, used, and then removed from disk storage.
Save Library	The Data File Library Name field designates the library location of the data base files.
Save Device	The name of the tape device to which magnetic media is to be sent.

Field	Explanation
Reorganize option	This code carries the instructions related to file reorganization after a purge process has been completed. A default of blank will cause the process to include the file reorganization before completion. A 1 will cause the process to skip the file reorganization. The value of the reorganization is to reorder the file after the purge process to improve speed and efficiency for processes using the file. The drawback is the cost of reorganizing the file. In the case of a large file, reorganization may impact other jobs.

Processing Options for Purge Applicants by Date

```
 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          ____________
```

Purging Profile Information



Run Purge Profile Data to delete unnecessary applicant profile information. This frees space in your database.

Processing Options for Purge Profile Data

```
Enter a 'Y' to delete narrative only
 from the profile data.  Default of
 blank will delete all profile
 data.
```
____

Run Applicant and EEO Reports

Running Applicant and EEO Reports

You can run reports to review applicant, Equal Employment Opportunity (EEO), and Affirmative Action information.

Complete the following tasks:

- ❑ Run applicant profile data reports
- ❑ Run World Writer reports for applicants
- ❑ Run EEO/Affirmative Action reports

Run applicant profile data reports and World Writer reports to review a summary of applicant information as well as the detailed profile information for each applicant. You use the EEO and Affirmative Action reports to assist you in meeting the reporting requirements of the Equal Employment Opportunity Commission (EEOC). Employees can be considered applicants when they apply for a job within the company. However, they do not appear on these reports unless they are entered into the system as applicants.

Running Applicant Profile Data Reports

G08 Human Resources
Choose *Applicant Information*

G08A1 Applicant Information
Choose an option

You can run the following reports:

- ❑ Applicant Profile report
- ❑ Applicants by Data Type report

Applicant Profile Report

Run the Applicant Profile report to review applicant information from the basic applicant and profile data tables. You can create a DREAM Writer version to review applicants either alphabetically by last name, numerically by applicant number, or in any other sequence you choose.

```
080411                                       J.D. Edwards & Company                                           Page Number        2
                                               Applicant Profile                                              Date         6/28/98
                                             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. . . 04/10/98
Position ID. . .                                              Hours Available.                   Available. . . . 05/01/98
EEO Job Cat. . .           001 Officials and Managers         Asking Salary. .    33,000.00      First Interview.
Applicant Status
==============================
    Status     Date
  ---------- --------
  01         04/10/98
Prior Employment
==============================
   Position  St.Date  End Date          Company Name                Years in Position
  ---------- -------- -------- ------------------------------ ------------------------------
  ACCOUNTANT 01/05/87          Coopers & Lybrand
  FIN.ANALST 06/01/90          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      03/15/98
  PCUSE      03/15/98
Professional Licenses/Certif
==============================
   License   Dte Rec. Exp Date          State/Agency                                           Fees
  ---------- -------- -------- ------------------------------                              -------------
  CFP        01/05/90          Colorado
  CPA        08/01/88          Colorado
```

Applicants by Data Type Report

Run the Applicants by Data Type report to review all applicants who have information in data types, such as language skills, licenses, and prior work history. J.D. Edwards supplies two formats of this report from which you can choose:

- Applicant Information by Data Type
- Applicant Information by Applicant

Choose Applicant Information by Data Type to review a list of data types and all the applicants who have that data type with a specific user defined code in their profile data. The report sequences by data type and then UDC within the data type. You choose to review applicants either alphabetically by last name or numerically by applicant number.

Choose Applicant Information by Applicant to review applicant records for each data type entered in their profile data. The report sequences by data type. You can choose to review applicants either alphabetically by last name or numerically by applicant number.

```
080401                                        J.D. Edwards & Company                               Page Number        3
                                        Applicant Information by Data Type                         Date         6/28/98
                                              Alphabetical Sequence


Prior Employment
==============================
Applicant      Name                    St.Date  End Date         Company Name           Years in Position
----------- ------------------------ -------- -------- ------------------------- -----------------------
 Position  . . . . . ACCOUNTANT
       8000 Bates, Richard T.        01/05/87          Coopers & Lybrand
       8007 Tucker, Steve            06/21/93          Alexander Grant
 Position  . . . . . ADM ASS
       8001 Hogan, Betsy             02/01/94          Kelly Services            2
 Position  . . . . . BEN. CRD
       8500 Thomas, Suzanne          01/14/90 10/15/93 Davidson Electronics      3
 Position  . . . . . FIN.ANALST
       8000 Bates, Richard T.        06/01/90          Cyprus Minerals
 Position  . . . . . RECRUITER
       8500 Thomas, Suzanne          10/25/93          Career Track
 Position  . . . . . SECRETARY
       8001 Hogan, Betsy             03/15/94 01/04/95 Lear Siegler              1
 Position  . . . . . SR. ACCT
       8007 Tucker, Steve            10/21/95          Cypress Minerals
 Position  . . . . . TEACHER
       8004 Torres, Elizabeth M.     08/15/93 06/01/95 Ben Lomond High
       8004 Torres, Elizabeth M.     08/01/96          George Washington High    current
```

Running World Writer Reports for Applicants

You can run World Writer reports to review applicant information that is in the Applicant Master table. You can use World Writer Reports for Applicants to:

- Manage and update your applicant information.
- Satisfy governmental regulatory reporting requirements.

You can run 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

Running EEO/Affirmative Action Reports

G08A1 Applicant Tracking
Choose *EEO/Affirmative Action*

G08E12 EEO/Affirmative Action Reports
Choose an option

You can run the following reports:

- EEO-1 Employment Data report
- EEO-4 Analysis report
- EEO Staff Utilization report
- Hired Applicants by EEO Job report
- Application Flow Analysis report
- Adverse Impacy Analysis report
- Workforce Analysis report
- Veterans Employment (VETS-100) report

EEO-1 Employment Data Report

This DREAM Writer report separates employees into the standard EEO job categories and then sorts employees by ethnic code. The total for each job category is calculated and printed, as is the total for each company.

Applicant List
EEO Information

Page – 1
Date – 06/28/98

Address Number	Applicant	Ap St	Description	EEO Job	Description	EEO Min	Description	I9	Vet	Dis Vet	Hand	Sex
8000	Bates, Richard T.	01	Initial Contact	001	Officials and Managers	01	White (Not of Hispanic		Y	N	N	M
5127	Ebby, Chester A.	95	Terminated Employee	002	Professionals	01	White (Not of Hispanic		N	N	N	M
8001	Hogan, Betsy	02	Called for Interview	005	Office and Clerical	01	White (Not of Hispanic		N	N	N	F
2049	McLind, Rod	95	Terminated Employee	002	Professionals	04	Asian or Pacific Islan		N	N	N	M
8300	Smith, Mary	01	Initial Contact	001	Officials and Managers	01	White (Not of Hispanic		N	N	N	F
8015	Temple, Martin	01	Initial Contact	006	Craft Workers (Skilled	01	White (Not of Hispanic		N	N	N	M
8500	Thomas, Suzanne	01	Initial Contact	002	Professionals	01	White (Not of Hispanic		N	N	N	M
8004	Torres, Elizabeth M.	01	Initial Contact	001	Officials and Managers	01	White (Not of Hispanic		Y	N	N	F
8007	Tucker, Steve	01	Initial Contact	002	Professionals	01	White (Not of Hispanic		N	N	N	M
20005	Wheaton, Monica B.	95	Terminated Employee	002	Professionals	02	Black		N	N	N	F

Processing Options for Report – EEO–1 Employee Data

1. Enter the Beginning and Ending Date for the Reporting period.
   Beginning Date . . . . ______
   Ending Date. . . . . ______

2. Enter the appropriate number associated with the type of reporting unit. ______

   Single Establishment – ’1’
   Consolidated Report – ’2’
   Headquarters Report – ’3’
   Individual Est. – ’4’
   Special Report – ’5’

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 Business Unit Address Book Number for this report. Leave blank if same as option number 4. ______

6. Enter a ’1’ if report was filed last year. ______

7. Enter a ’1’ if the company employs 100 people or more. ______

8. Enter ’1’ if affiliated with another company in a venture that employs 100 or more people. ______

9. Enter ’1’ if Gov’t Contracts are involved as in Section C question number 3. ______

10. If ’1’ is entered for option number 9, then enter the 9 digit Dunn and Bradstreet ID. number. ______

11. Enter the Certifying Official's Employee Number. ______________

12. Enter the Certifying Official's Title. ______________

13. Enter the Contact Person's Employee Number. ______________

14. Enter the Contact Person's Title. ______________

15. Enter the Contact Person's Phone Extension number. ______________

EEO-4 Analysis Report

This DREAM Writer report separates employees into the standard EEO job categories and then sorts employees by EEO ethnic code and salary ranges. The total for each job category is calculated and printed along with the total for each home company.

```
068514                                                 J.D. Edwards & Company                                      Page -        5
                                                            EEO-4 Report                                           Date -  7/19/98
        Bus. Unit             50                        Full Time Employees
       General Accounts                                    By Business Unit
                                                 Reporting Period:  07/01/97 thru 06/30/98
                        Annual Salary
                                       Total | . . . . . . . . .  Male  . . . . . . . . . | . . . . . . . . . Female . . . . . . . .
     Job Categories      (thousands)   Empls |  White   Black   Hisp.   Asian  Indian |  White   Black   Hisp.   Asian  Indian
------------------------ ------------ ------ | ------  ------  ------  ------  ------ | ------  ------  ------  ------  ------
Technicians                15.0 - 15.9       |                                        |
                           16.0 - 19.9       |                                        |
                           20.0 - 24.9       |                                        |
                           25.0 - 32.9       |                                        |
                           33.0 - 42.9       |                                        |
                           43.0 - 54.9     1 |             1                          |
                           55.0 - 69.9       |                                        |
                           70.0 - PLUS     1 |      1                                 |
                                      ------ | ------  ------  ------  ------  ------ | ------  ------  ------  ------  ------
                 Job Category Total        2 |      1       1                         |
                                               Total Male. . .      2                   Total Female. .
Sales                      15.0 - 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       |                                        |
                           70.0 - PLUS       |                                        |
                                      ------ | ------  ------  ------  ------  ------ | ------  ------  ------  ------  ------
                 Job Category Total        1 |                                        |      1
                                               Total Male. . .                          Total Female. .      1
```

Processing Options for Report – EEO–4 Analysis

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        (more)          ____________
3) Answer Yes (1) to one of the
   following formats :
   Report for Full Time Employees (1/0)     ____________
   Report for New Hires           (1/0)     ____________
   Report for Other than Full Time(1/0)     ____________
   Default of blank in all 3 fields will
   print Full Time Employees.
```

EEO Staff Utilization Report

Run this DREAM Writer report to review the number of actual hours worked within job categories by ethnic groups. If an employee works in different job categories, the actual hours spent in each job category are counted separately and appear on the report once for each job. For example, if an employee works ten hours in job category A and thirty hours in job category B, the report separates them into the two different categories. The employee would appear on the report twice.

The system uses the Time and Pay Detail History table to compile the information. The types of information the report creates for each job category are as follows:

- Total hours worked in all job categories
- Total hours worked by females
- Total hours worked by males
- Total employees
- Total of male employees
- Total of female employees

```
068900                                J.D. Edwards & Co.                              Page      -        2
                                  EEO Staff Utilization Report                        Date      -  7/22/98
                                                                                      Beginning -  03/01/98
                                                                                      Ending    -  03/30/98
           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 for EEO Staff Utilization

```
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.                      ____________
```

Hired Applicants by EEO Job Report

This DREAM Writer report categorizes all applicants by job categories and ethnic codes for Affirmative Action reporting on applicants. This report shows how many of those applicants were hired, as well as the percent hired for each of the ethnic groups within the EEO job categories by gender.

084400 J.D. Edwards & Company Page No. . . 2
Hired Applicants by EEO Job Category Date – . . . 6/28/98
Reporting Period:
01/01/98 – 12/31/98

Job Category		. . . Total . . . Appld	Hired	%	. . White . . Appld	Hire	%	. . Black . . Appld	Hire	%	. . Hispanic . . Appld	Hire	%	. . Asian . . Appld	Hire	%	. . Indian . . 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 for Hired Applicants by EEO Job Category

```
Enter the Beginnging and Ending Date
 for the Reporting period.
              Beginning Date . . . . . .          ____________
              Ending Date. . . . . . . .          ____________
```

Application Flow Analysis Report

This DREAM Writer report summarizes the number of applicants in each EEO job category who have received offers, the number hired, and the number rejected. Categories are also divided into male and female within the EEO ethnic group.

```
084411                                  J.D. Edwards & Company                             Page -          3
                                      Application Flow Analysis                            Date -    6/28/98
                                           by Business Unit
                          Applicant Dates Selected  FROM:  01/01/98   THRU:   12/31/98


                                 . . 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 for Applicant Flow Analysis

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 -          ____________

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. . . .        ____________
```

Adverse Impact Analysis Report

Run this DREAM Writer report to review the number of male, female, and ethnic applicants who applied for a position in the company against the number who were hired. Because this report is divided into male, female, and ethnic group, one applicant can be counted in more than one group. For example, a Hispanic woman would be counted as both female and ethnic.

084412 J.D. Edwards & Company Page Number 2
Adverse Impact Analysis Date 7/01/98
All Employees by Business Unit
01/01/98 through 12/31/98

EEO Job Category	. . . . . .Male. . . . . . Hired	Applied	% Hired	% Ratio	. . . . . Female . . . . . Hired	Applied	% Hired	% Ratio	. . . . . .Ethnic. . . . . . 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 for Adverse Impact Analysis

```
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:      ____________
```

Workforce Analysis Report

Run this DREAM Writer report to print a summary of employees by gender and ethnic data based on job type and step. You can select any data items in the Employee Master table (F060116), as well as set up the levels at which you want to print totals and specify where page breaks should occur. The types of data that appear in the report columns are as follows:

- Job Type
- Job Description
- Job Step
- EEO Job Category
- Pay Grade
- Total female employees by ethnic code
- Total male employees by ethnic code

```
  080435                                          J.D. Edwards & Company                                Page Number        2
                                                Workforce Analysis Report                               Date         2/27/99
                                                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
```

What You Should Know About

Data Selection

In order for the Workforce Analysis report to print correctly, do not select the following data items to total:

- Job Code (JBCD)
- Job Step (JBST)

Data Sequencing

In order for the Workforce Analysis report to print correctly, the following data items must be the highest sequence numbers:

- Job Type (JBCD)
- Job Step (JBST)

What You Should Know About

Data Selection

In order for the Veterans Employment report to total correctly, do not select the following data item to total:

- EEO Job Category (EEOJ)

Data Sequencing

In order for the Veterans Employment report to print correctly, the following data item should be selected to print first:

- EEO Job Category (EEOJ)

Totals in the Employee column

This column on the report includes only employees with a start date before or during report period and who remained active during the entire reporting period. The report column will not include employees terminated during the reporting period.

Totals in the New Hire column

This column on the report includes only employees with a start during the report period, regardless of the termination date. The report column will include any employees who were hired and terminated within the reporting period. Employees hired during the reporting period and are still active employees will appear in both the New Hire and Employee Column

Totals in Special Disabled Veterans columns

This column on the report includes only employees with a Yes (Y) status in Disabled Vet field in the Employee Master table (F060116). Disabled veterans who are either employees or new hires have separate columns on the report.

Total in Vietnam Era Veterans column	This column on the report includes only employees with a Veteran (V) status in the Veteran field in the Employee Master table.
Total in the Total Both Veterans and Non-Veterams column	This column on the report includes all employees regardless of their veteran status.

Processing Options for Workforce Analysis

```
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 JDE human
   resources system.
```

Veterans Employment (VETS-100) Report

Run this DREAM Writer report to review a summary of the number of employees in each EEO job category who are disabled veterans or Vietnam era veterans.

```
080434                                             J.D. Edwards & Company                                Page Number        2
                                                 Veterans' Employment Report                             Date         2/27/99
                                                          (VETS-100)
                                                  by Cost Center and Company

                                                 01/01/98  through  12/31/98

                                                       . . . 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 Cost Center . .          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
```

Processing Options for Veterans Employment (VETS-100)

```
Enter the Beginning and Ending dates
 for the reporting period.
                        Beginning Date –            ____________
                        Ending Date    –            ____________
```

Exercises

See the exercises for this chapter.

Position Control

Objectives

- To define position budgets
- To work with, review, and purge position budgets
- To upload a position budget to the general ledger
- To assign an employee to a position budget
- To run reports

About Position Control

Position control refers to the creation, maintenance, and monitoring of positions and their budgets. Because you cannot have a position without a budget, positions and their budgets are referred to as position budgets.

You define a position budget to establish, monitor, and control budgets for employee activity. 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. 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 your position budgets, you can upload 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 upload position budgets in summary detail or in full detail.

You can assign an employee to a position budget and then review position budget detail to ensure that your salary figures projected through year end compare favorably to the budgeted salaries.

After you define your position budgets for a fiscal year, you can make budget revisions based on budget changes or correct input errors.

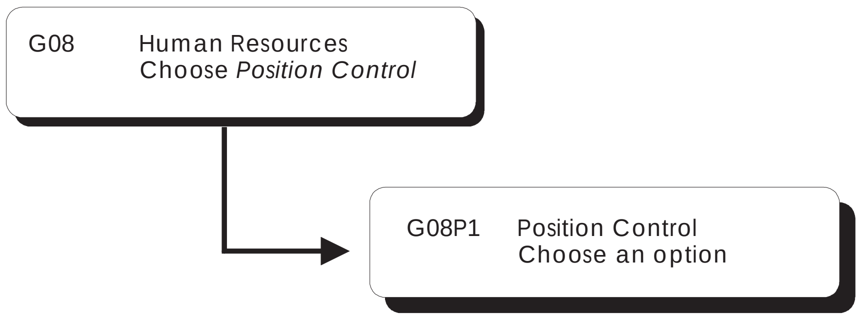
Further, you can move past years' position information to tape or an alternate backup system so you can clear space on your system for creating next year's positions. You can also delete position records for which you have no further use.

You can run a position report to review the most recent changes made to activity records in position budgets. Several reports are also available to help you review budgeted and projected position budget figures. These figures include salaries, full-time equivalents (FTEs), hours worked, headcount, and open amounts. You can review this information for current, previous, or future fiscal years.

Processing position information includes the following tasks:

- ❑ Defining a position budget
- ❑ Uploading a position budget to the general ledger
- ❑ Assigning an employee to a position budget
- ❑ Reviewing position budget detail
- ❑ Working with a position budget
- ❑ Creating next year's position budget
- ❑ Purging a position budget
- ❑ Running position reports

Define a Position Budget



Defining a Position Budget

You define a position budget to establish, monitor, and control budgets for employee activity. 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 employee, your organization can plan for and control salary expenditures, hours worked, FTEs, and the number (headcount) of employees.

Positions are defined by fiscal year, home business unit, and a position ID. In addition, a position must have a position budget for salary, hours, and FTE.

You can choose to define your position budgets manually, or you can let the system automatically define them for you. However, if the initial or first fiscal year's position budget you enter into the system does not equal an employee's salary, standard hours per year, or FTE, you might want to enter the positions manually. Otherwise, you will need to manually change the budget values after you initially create the position budgets using the the Start Position Control program.

When defining a position budget, you:

- Identify the need for an employee
- Approve the need for the employee
- Set up a budget for the employee's salary and hours worked, and assign the appropriate FTE and headcount
- Monitor to ensure that you do not exceed your budget

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

Example: Budget Processing

You need an order puller position in your warehouse and you need 10 employees to fill this position. The plant manager approves the need for this position and the number of employees. You set up the position budget for these employees, after which it is approved by the appropriate authority.

After you set up the position budget, you can then hire 10 employees for the position. The system can immediately alert you if you exceed any of your position budgets for salary, hours, FTE, or headcount based on your constants setup. You can take steps to make corrections.

Before You Begin

- ❑ Set up your business units and fiscal periods.
- ❑ Define your job type codes.

What You Should Know About

Future position activity

After you create your position budgets, your constants, and the system setup, 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
- Assigned position
- Date the employee was assigned to the position
- Employee's salary
- Standard hours per year
- Full-time equivalent

Position ID

The position ID consists of:

- Position
- Fiscal year
- Home business unit

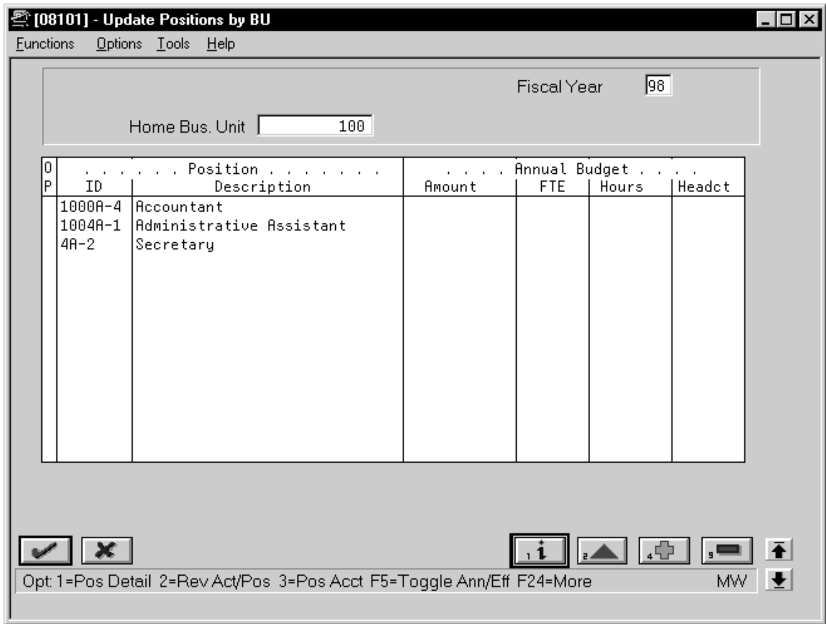
For example, you can identify the position of Accounting Manager as A0-1 for fiscal year 1997–1998, for home business unit 41.

Defining Multiple Position Budgets Manually

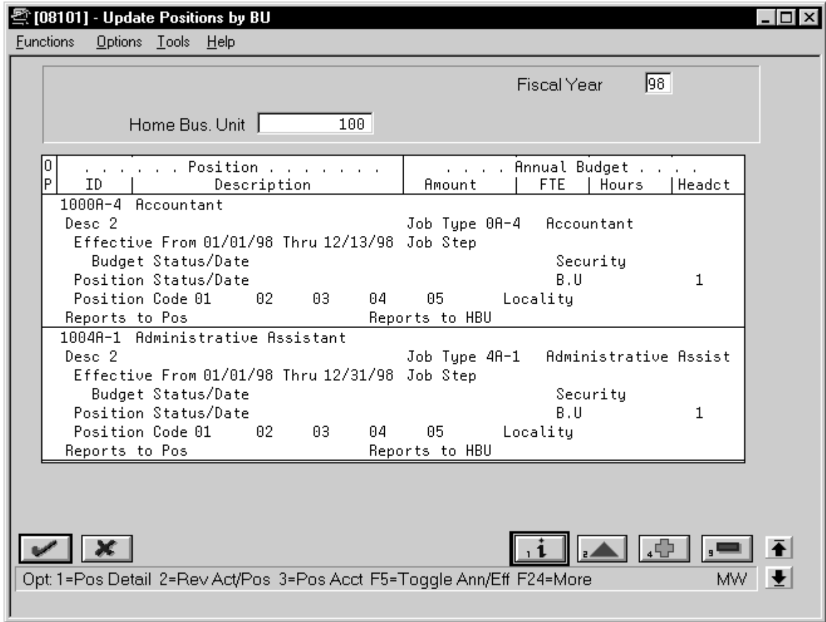
You can define all position budgets for one business unit so that you can update and review position budget details for an entire business unit at the same time.

▶ To define multiple position budgets manually

On Update Positions by Business Unit



1. Complete the following field to locate the home business unit:
   - Home Business Unit
2. Complete the following fields:
   - Position ID
   - Position Description
   - Amount
   - FTE
   - Hours
   - Headcount
3. Select More Detail.



4. Complete the following optional fields:
   - Description 2
   - Job Type
   - Job Step
   - Effective From
   - Effective Through
   - Budget Status
   - Budget Status Date
   - Position Status
   - Position Status Date
   - Security Business Unit
   - Position Codes 01–05
   - Locality

What You Should Know About

Entering effective dates

When you enter an effective from date that is greater than the beginning of your fiscal year, the system uses the dates to calculate the effective budget or a through date that is before the end of the fiscal year.

The system also calculates these values when no dates are entered and as such are equal to the annual budget amounts. The effective budget values are then used by the system to:

- Determine budget edits set in the Constants table.
- Update the general ledger constants.

See *Purging a Position Budget.*

Defining a Single Position Budget Manually

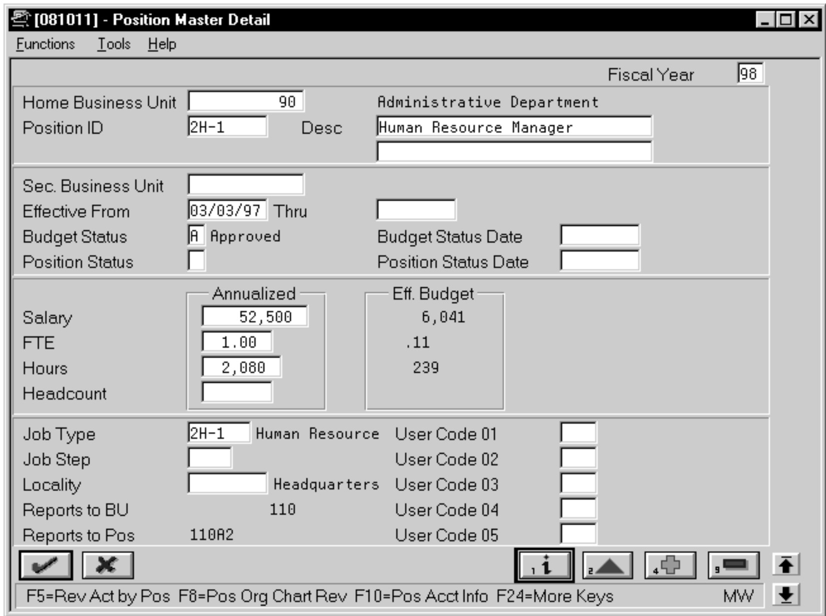
You define a single position budget manually for the following reasons:

- You want to create a position budget for a new position that does not currently exist in the employee database.
- The budget amounts you have allocated for this year's positions are different at the position level from the budget amounts for next year's positions.
- Because automatically defining position budgets also causes the position ID and the job type to be identical, you define position budgets manually if you want the position ID to be unique.

To save data entry time, you can also use Position Master Detail to copy information from existing position budgets to create new position budgets.

▶ To define a single position budget manually

On Position Master Detail



Complete the following fields:

- Fiscal Year
- Home Business Unit
- Position ID
- Description
- Effective From
- Effective Through
- Budget Status
- Budget Status Date
- Position Status
- Position Status Date
- Annualized Salary
- Annualized Full-Time Equivalent (FTE)
- Annualized Hours
- Annualized Headcount

- Job Type
- Job Step
- Locality
- Position Codes 1–5

Field	Explanation
Fiscal Year	A number that identifies the fiscal year. Generally, you can either type a number in this field or leave it blank to indicate the current fiscal year (as defined on the Company Numbers and Names screen). 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, 1994 and ends September 30, 1995. The end of the first period is October 31, 1994. Specify the year 94 rather than 95.
Business Unit – Home	The number of the business unit in which the employee generally resides.
Position ID	Used for budgetary (position) control purposes. The system will not create a position based on a value placed in this field. The position must already exist in the Position Master Information table (F08101).
Date – Effective From	The date on which a requisition, a position, or activity within a position goes into effect.
Date – Effective Thru	The date on which a requistion, a position, or activity within a position is no longer in effect. In position actions, the default is the end of the current fiscal year for the calculation of projected figures.
Amount – Position Budget	The salary amount budgeted for a particular position within a business unit. This figure is drawn from the Position Master table, and it represents the total salary amount budgeted for all the full-time equivalents (FTEs) within this position.
Full-Time Equivalents – Budgeted	The number of full-time equivalents (FTEs).
Hours – Budgeted Position	The number of hours 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 figure in this field when you budget the position, the system enters a default figure by multiplying the number of FTEs by the company's standard hours per year.
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Field	Explanation
Job Type (Craft) Code	A user defined code (system 06, type G) that specifies job classifications established for an organization. This field is used to determine pay rates and benefit plans for employees linked to these classifications.
Budget Status	This code 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 be in 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 the current budget status became active.
Position Status	The current activity level of the position.
Position Status Date	The date the current status of the position became active.
Full Time Equivalents	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.
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.
User Codes 01–05	A user defined code (system 08, type P1) used to classify Position Master records (unique by fiscal year, business unit, and position ID) for reporting purposes. For example, you may wish to 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

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. I your system has only a small number of activity records, you can delete them with Enter Employee Activity or Revise Employee Activity.

See *Purging a Position Budget.*

Processing Options for Position Master Detail

```
1. Enter a '1' to use the Job Informa-             ____________
   tion 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
   iqnore this processing option.
```

Exercises

See the exercises for this chapter.

Defining a Position Budget Automatically

When your initial position budgets equal the salary, hours, FTE, and headcount in your current employee records, you can use Start Position Control to automatically create the following tables:

- Position Master Information (F08101)
- Position Budget Detail (F08111)

You can also use Start Position Control if you plan to use your employees' job type codes as the same position. When you run Start Position Control, the employee's job type, job type description, home business unit, and salary automatically convert to the position ID, the position description, the home business unit, and the salary for the position budget.

When you define position budgets automatically, the system does not automatically update the budget status with an approved status code. Only positions with approved budget status codes can be assigned to employee. Therefore, you must update the budget status code in each position budget. Further, you must update the budget status because an approved requisition can only reference an approved position budget.

To update budget status codes, use either Update Positions by Business Unit, Position Master Detail, or the World Writer Global Update.

After you have automatically defined a position budget, you must also complete other fields, such as Effective From and Effective Through Dates as described for manually creating a position budget.

An employee's job record is not included in the creation of the Position Master table if:

- The employee is terminated prior to the beginning of the current fiscal year.
- The employee does not have a job type entered in his Employee Master record.
- The employee has a hire date greater than the system date that you start Position Control.
- 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.

  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.

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

- *Understanding History and Turnover Tracking*
- *Defining Multiple Position Budgets Manually*
- *Defining a Single Position Budget Manually*

Processing Options for Start Position Control

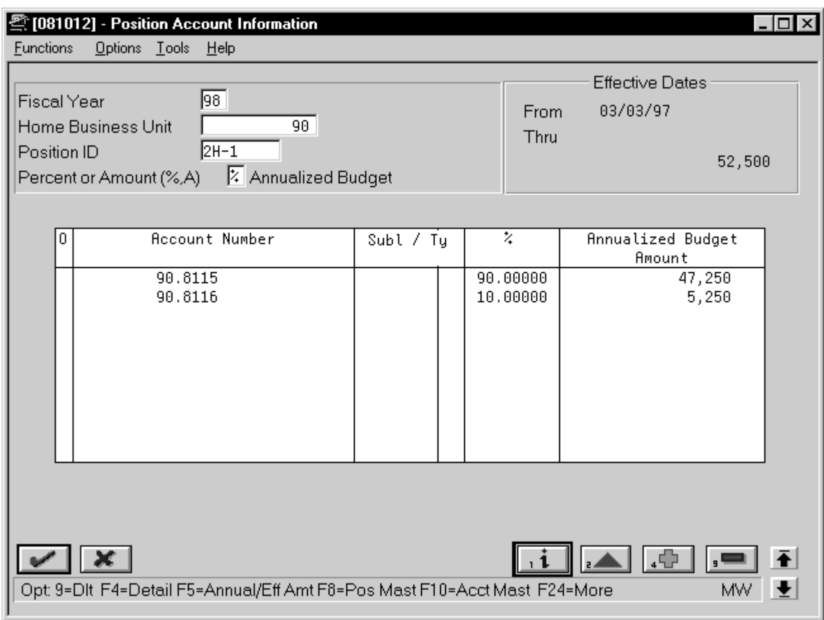
```
1.  Enter a '1' to Clear the Position             ____________
    Master File (F08101) and the
    Position Detail File (F08111). This
    should be done when this program
    is run for a second time or more.
    Default = ' '.
```

Defining Position Accounts

After you define your position budgets, you can use Position Account Information to automatically summarize all position budgets and upload the position budget information to the general ledger. Position Account Information automatically links the position budget to the general ledger account that you specify.

▶ To define position accounts

On Position Account Information



1. Complete the following fields:
   - Fiscal Year
   - Home Business Unit

- Position ID
- Percent or Amount (%, A)
- Account Number

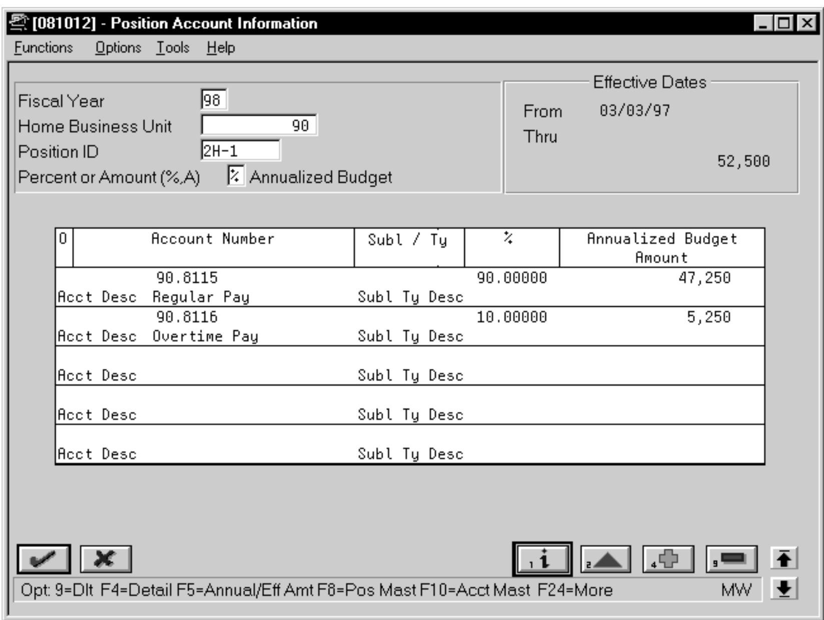
If the method of calculation (Percent or Amount field) is %, you must complete the following field:

- % (Percentage)

If the method of calculation (Percent or Amount field) is A, you must complete the following field:

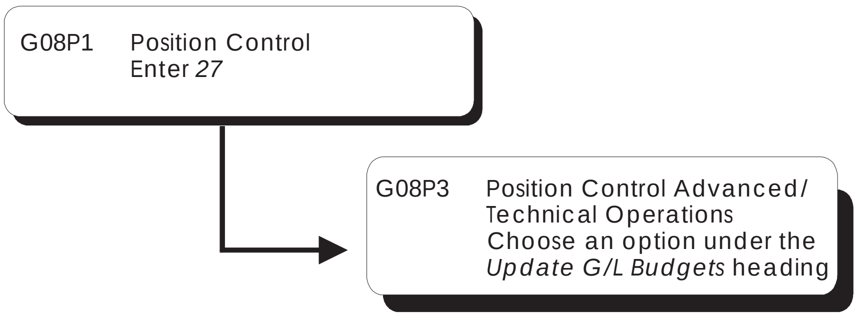
- Annualized Budget Amount

2. Complete the following optional fields:
   - Subledger
   - Subledger Type
3. Select More Detail to review additional information.



Field	Explanation
Method of Calculation	This is an input field only and is not stored in the file. It is used in the position account information to determine how the percentage of a position account will be calculated. It can be done by "%" which is a percent amount you enter or it can be "A" which is an amount you enter. When used in pay grade/step progression, the percent amount will increase the hourly or salary amount for the selections on the screen.
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.
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 (as shown in the second line of description) or can be 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.
Amount – Position Budget	The salary amount budgeted for a particular position within a business unit. This figure is drawn from the Position Master table, and it represents the total salary amount budgeted for all the full-time equivalents (FTEs) within this position.

Upload a Position Budget to the General Ledger



Uploading a Position Budget to the General Ledger

After you define your position budgets and position accounts, you can upload position budgets 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 upload position budgets in summary or in full detail.

To upload a position budget in summary, you must upload your position budgets to an Account Balances table (F0902). To upload a position budget in full detail, you must post your position budget to the Account Ledger.

Complete the following tasks:

❑ Update position budgets to an account balances table

❑ Post position budgets to an account ledger

Before You Begin

❑ Define the position budget and the position account.

See Also

- *Defining a Position Budget*
- *Entering Annual Budget Amounts (P14102)* and *Entering Detailed Budget Amounts (P14101)* in the *General Accounting I Guide*

Updating Position Budgets to the Account Balances Table

You update position budgets to the general ledger Account Balances table to create or refresh your budget accounts. You typically run the Update Position Budgets to Account Balances program to establish an initial budget for a new year.

This program provides three modes:

- Requested
- Approved
- Final (also know as original)

Each of the three modes represents a different version of the same DREAM Writer.

Each mode presents the budget amounts for review and updates the appropriate field in the Account Balances table (F0902).

When you run the update for the requested position budgets, the system also updates the approved and final budget fields for the same account in the Account Balances table with the same values.

When you run the update 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 update for the final budget, only that value is update, and the values for requested and approved remain the same.

You perform these updates so that you have an audit trail from the beginning budget amounts through the final budget amounts as you proceed through the budget process.

Only positions with an approved budget status code are included in the update. Also, only position effective budget amounts and hour values are updated to the general ledger.

What You Should Know About

Update Position Budgets to Account Balances processing options	To process a requested budget — Verify that all three fields are set to 1. To process an approved budget — Verify that the Requested Budget field is blank, and the Approved Budget and Final Budget fields are set to 1. To process a final budget — Verify that the Requested Budget and Approved Budget fields are blank, and the Final Budget field is set to 1.

Position Control

Processing Options for Update Position Budgets to Account Balances

```
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:
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 last two digits of the
   fiscal year.                                  ____________

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:         ____________
```

Posting Position Budgets to an Account Ledger

You can run the Create Batch program and update the position budget to the Account Ledger (F0911) or the Account Balances (F0902) tables. The account ledger contains the detail budget information.

Only positions with an approved budget status code are included in the posting.

See Also

- *Post General Journal* for posting balances

Processing Options for Update Position Budgets to Account Ledger

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:
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:

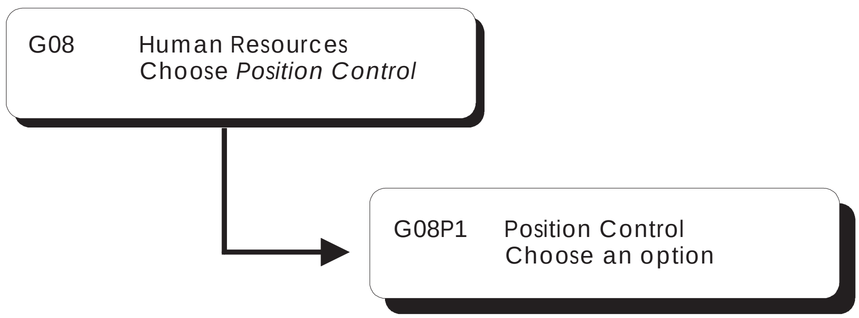
The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also, the following ledger types cannot be updated by this program: AA, CA, XA, Ya, Za, Ac.

Fiscal Year:
4. Enter the last two digits of the fiscal year. ____________

Exercises

See the exercises for this chapter.

Review Position Budget Detail



Reviewing Position Budget Detail

You review position budget detail to ensure that your salary figures projected through year end compare favorably to the budgeted salaries. You can review this information within a business unit, the position, or by the activity involving the position.

Reviewing position budget details consists of the following tasks:

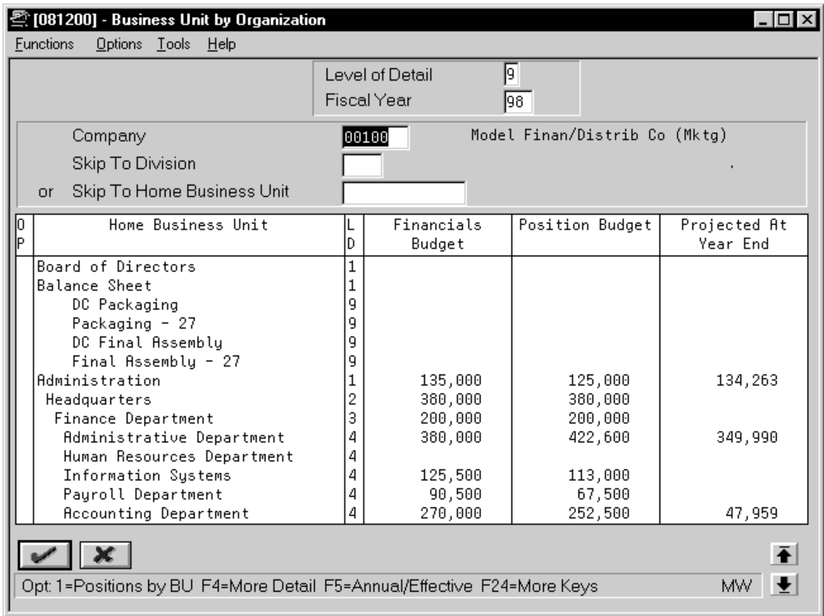
- ❑ Reviewing position budget detail by business unit
- ❑ Reviewing position budget detail by position
- ❑ Reviewing position budget detail by activity

Reviewing Position Budget Detail by Business Unit

Use Business Unit by Organization to compare salary figures on budgeted positions as compared to year-end levels to determine whether salary budgets will be met within a business unit.

▶ To review position budget detail by business unit

On Business Unit by Organization


[081200] - Business Unit by Organization

Functions Options Tools Help

Level of Detail 9
Fiscal Year 98

Company 00100 Model Finan/Distrib Co (Mktg)
Skip To Division
or Skip To Home Business Unit

O P	Home Business Unit	L D	Financials Budget	Position Budget	Projected At Year End
	Board of Directors	1			
	Balance Sheet	1			
	DC Packaging	9			
	Packaging - 27	9			
	DC Final Assembly	9			
	Final Assembly - 27	9			
	Administration	1	135,000	125,000	134,263
	Headquarters	2	380,000	380,000	
	Finance Department	3	200,000	200,000	
	Administrative Department	4	380,000	422,600	349,990
	Human Resources Department	4			
	Information Systems	4	125,500	113,000	
	Payroll Department	4	90,500	67,500	
	Accounting Department	4	270,000	252,500	47,959

Opt: 1=Positions by BU F4=More Detail F5=Annual/Effective F24=More Keys MW

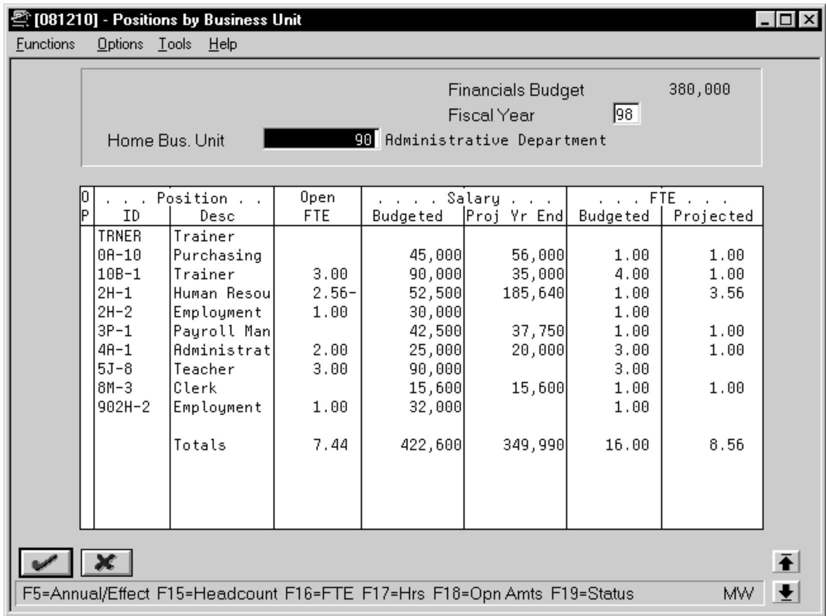
1. Complete the following fields:
   - Company
   - Fiscal Year
2. Complete the following optional fields:
   - Level of Detail
   - Skip to Division
   - Skip to Home Business Unit

Reviewing Position Budget Detail by Position

Use Positions by Business Unit to compare salaries, FTEs, hours, and headcount, both budgeted and projected to year end, for each position within a business unit. You determine whether a budget will be met by projecting a fiscal year's employee position activity through the end of the fiscal year.

▶ To review position budget detail by position

On Positions by Business Unit


[081210] - Positions by Business Unit

Functions Options Tools Help

Financials Budget 380,000

Fiscal Year 98

Home Bus. Unit 90 Administrative Department

O P	. . . Position . . ID	Desc	Open FTE	. . . . Salary . . . Budgeted	Proj Yr End	. . . FTE . . . Budgeted	Projected
	TRNER	Trainer					
	0A-10	Purchasing		45,000	56,000	1.00	1.00
	10B-1	Trainer	3.00	90,000	35,000	4.00	1.00
	2H-1	Human Resou	2.56-	52,500	185,640	1.00	3.56
	2H-2	Employment	1.00	30,000		1.00	
	3P-1	Payroll Man		42,500	37,750	1.00	1.00
	4A-1	Administrat	2.00	25,000	20,000	3.00	1.00
	5J-8	Teacher	3.00	90,000		3.00	
	8M-3	Clerk		15,600	15,600	1.00	1.00
	902H-2	Employment	1.00	32,000		1.00	
		Totals	7.44	422,600	349,990	16.00	8.56

F5=Annual/Effect F15=Headcount F16=FTE F17=Hrs F18=Opn Amts F19=Status MW

Complete the following fields:

- Fiscal Year
- Home Business Unit

What You Should Know About

Open Amounts A positive open amount indicates you are under budget for the fiscal year. A negative open amount indicates you are over budget for the fiscal year.

Processing Options for Positions by Business Unit

```
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'
```

Reviewing Position Budget Detail by Activity

Use Activity by Position to review activity involving a position budget at the position level or to skip to a specific employee to review all the employees linked to the position.

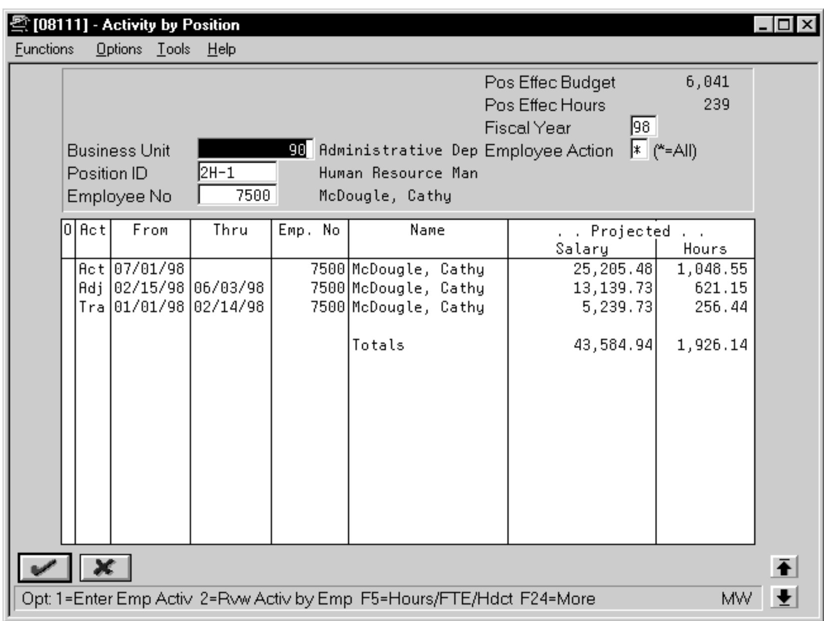
Use Activity by Employee to review all the positions to which an employee has been assigned.

To review position budget detail by position activity, complete the following tasks:

- Review position budget detail by position activity
- Review position budget detail by employee activity

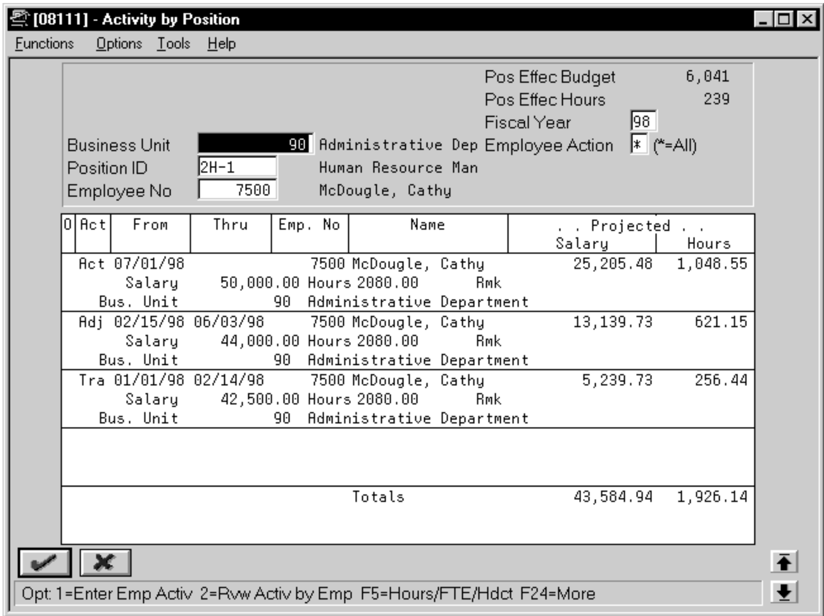
▶ To review position budget detail by position activity

On Activity by Position



1. Complete the following fields:
   - Business Unit
   - Fiscal Year
   - Position ID

2. Complete the following optional fields:
   - Employee Action
   - Employee Number
3. Choose More Detail.



4. Review the information.

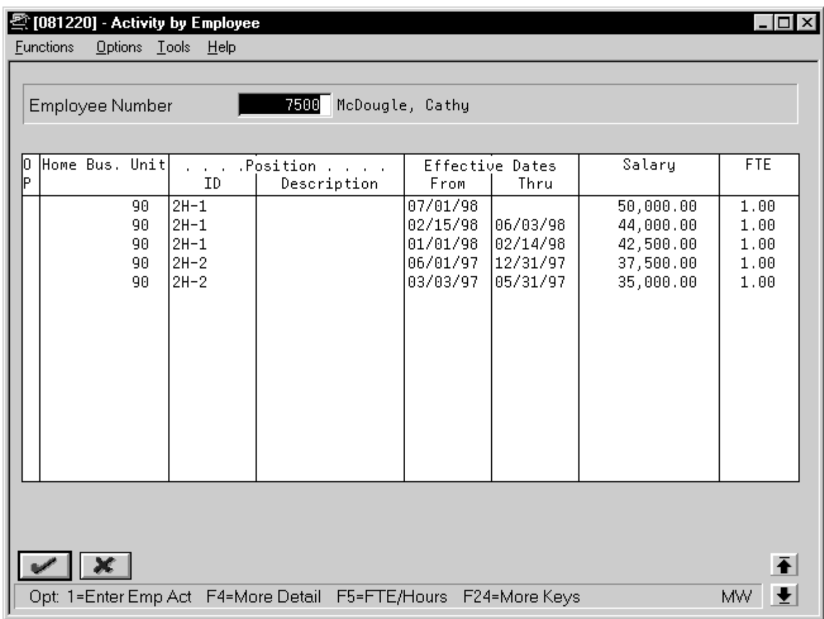
Field	**Explanation**
Employee Action	The type of employee activity for which you want to see position history information. For example, if you want to review the employees linked to a position who are on a leave of absence, type an L in this field. Only activity history with an employee action code of L displays. The following codes are provided by J.D. Edwards and should not be changed: 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 You can add to these codes using user defined code table system 08, type AT.

Processing Options for Activity by Position

```
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.
```

▶ To review position budget detail by employee activity

On Activity by Employee



Complete the following field to locate the employee:

- Employee Number

What You Should Know About

Projected through year-end salary	The projected through–year-end salary is based on the employee's annual salary and the effective from and through dates.

Calculating the projected through year-end salary

You calculate the projected through year-end salary when:

- The employee has a salary forecast change date within the fiscal year
- The constants are set to use the salary forecast change date and the pay grade step or pay rate table to calculate the projected through year-end salary

The projected through year-end salary is the sum of:

- The employee's current annual salary prorated to the salary forecast change date
- The new annual salary prorated from the salary forecast change date through the end of the fiscal year

Processing Options for Activity by Employee

```
1.  Enter a '1' to initially display          ____________
    the screen with Hours Worked
    information.  Default of blank will
    initially display FTE information.
```

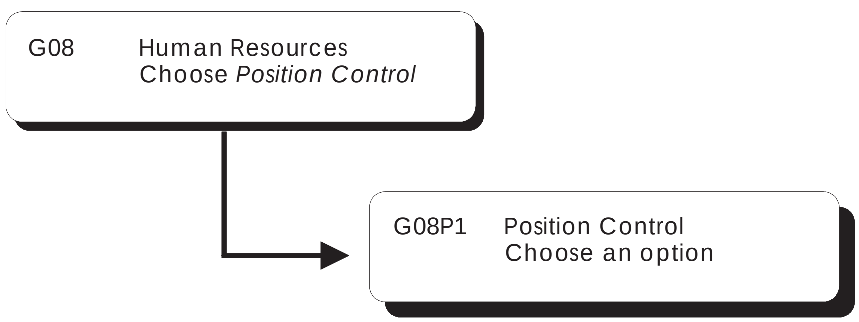
Work with a Position Budget

Working with a Position Budget

After you have your position budgets defined for a fiscal year, you can work with them to make budget revisions based on budget changes or correct input errors.

Working with position budgets information consists of the following tasks:

- ❑ Changing position budgets
- ❑ Correcting employee activity

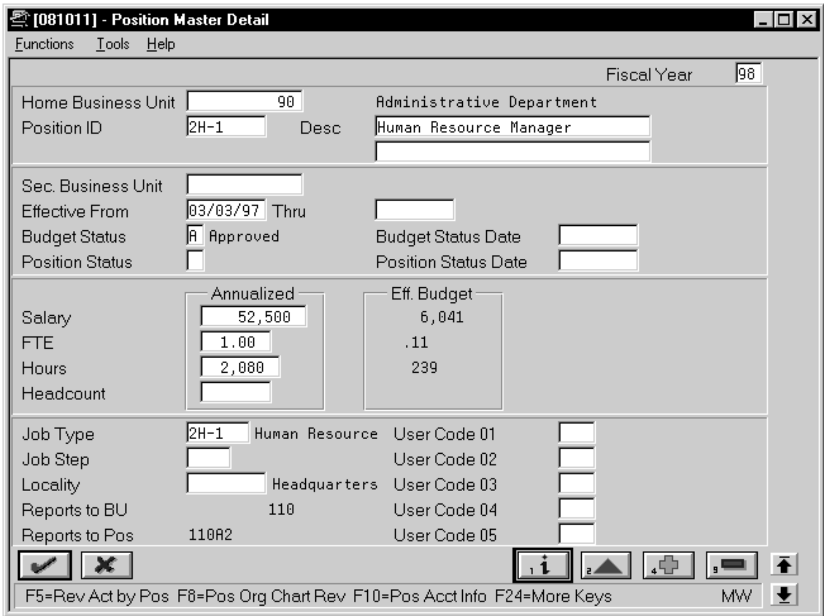


Changing Position Budgets

Use Position Master Detail to change position budget information if an error was made during input, or when any of the position parameters change, such as effective date, budget, job type, job step, or user defined codes.

▶ To change position budgets

On Position Master Detail



1. Complete the following fields to locate a position:
   - Fiscal Year
   - Home Business Unit
   - Position ID
2. Change the following optional fields:
   - Effective From
   - Effective Through
   - Salary
   - Full-Time Equivalent (FTE)
   - Hours
   - Headcount
   - Job Type
   - Job Step
   - Locality
   - User Codes 01–05

Correcting Employee Activity

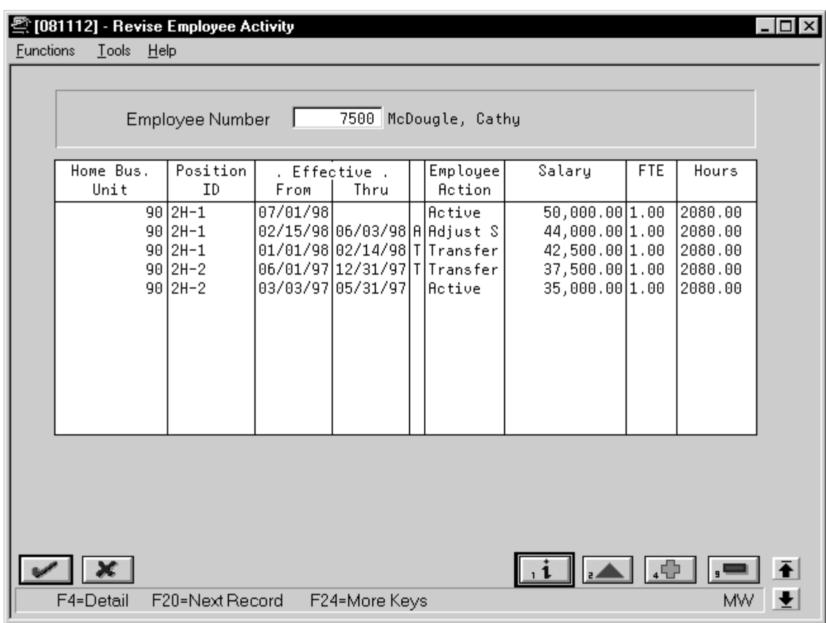
G08P1 Position Control
Enter *27*

G08P3 Position Control Advanced/
Technical Operations
Choose *Revise Employee Activity*

The system can automatically make changes to an employee's position detail record in the Position Budget Detail table (F08111) if you set up the appropriate history and position constants. Because correcting the employee record also updates the Position Activity table, you must manually delete the incorrect record from the table using Revise Employee Activity.

▶ To correct employee activity

On Revise Employee Activity


[081112] - Revise Employee Activity

Functions Tools Help

Employee Number 7500 McDougle, Cathy

Home Bus. Unit	Position ID	. Effective . From	Thru		Employee Action	Salary	FTE	Hours
90	2H-1	07/01/98			Active	50,000.00	1.00	2080.00
90	2H-1	02/15/98	06/03/98	A	Adjust S	44,000.00	1.00	2080.00
90	2H-1	01/01/98	02/14/98	T	Transfer	42,500.00	1.00	2080.00
90	2H-2	06/01/97	12/31/97	T	Transfer	37,500.00	1.00	2080.00
90	2H-2	03/03/97	05/31/97		Active	35,000.00	1.00	2080.00

F4=Detail F20=Next Record F24=More Keys MW

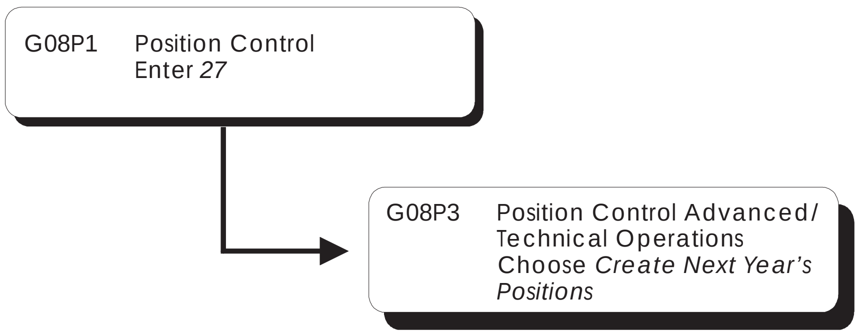
1. Complete the following field to locate the employee:
   - Employee Number
2. Enter the necessary information.

J.D. Edwards recommends assigning a high security level to this form.

Exercises

See the exercises for this chapter.

Create Next Year's Position Budget



Creating Next Year's Position Budget

Use Create Next Year's Positions to calculate position budget information for the next fiscal year. The system:

- Creates the position, fiscal year, home business unit, and position ID and description
- Creates a DREAM Writer exception report for any positions with effective through dates prior to the new fiscal year
- Can create a position accounts table for the next fiscal year.

The following is an example of an esception report:

What You Should Know About

Closed positions	The system does not create a budget for a closed position. The system indicates a closed budget status by placing an *x* in the first position of the second description.
Data Selection	you must enter the fiscal year from which you want the system to calculate position budget information.

Create Next Fiscal Year's Position Budgets program processing options

Creating vacant positions— When the system creates vacancies, it uses the salary default source constants to determine the budgeted amount.

See *Constants Information.*

Creating position budgets — You can use a process option if you want to create position budgets that have a through date before the beginning of the next fiscal year.

```
 081820                                          J.D. Edwards & Company                             Page Number        1
FY               98                       Create Next Year's Position Budgets                       Date         7/22/98
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                  08/03/98          EE Not in Position
    7500 McDougle, Cathy                     0 1 2H-1     Human Resource Manag A   03/03/97          EE Not in Position
Total Positions by HBU           2
 081820                                          J.D. Edwards & Company                             Page Number        2
FY               98                       Create Next Year's Position Budgets                       Date         7/22/96
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 for Create Next Fiscal Years Position Budgets

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. ____________

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) and hours. (Same rules 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 with 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. ____________

Exercises

See the exercises for this chapter.

Purge a Position Budget

G08P1 Position Control
Enter *27*

G08P3 Position Control Advanced/ Technical Operations
Choose *Purge Positions and Activity*

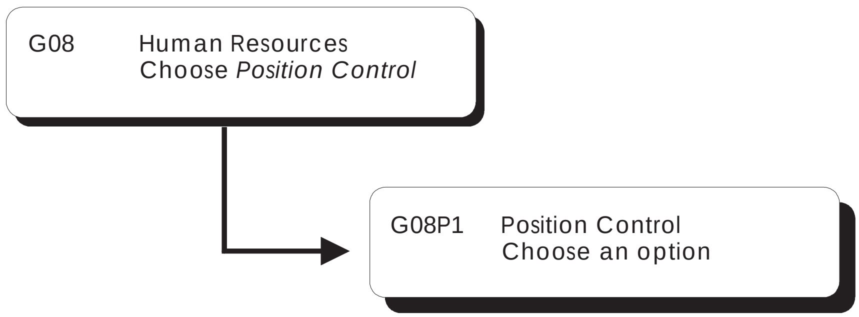
Purging a Position Budget

Use Purge Positions and Activity to move past years' position information to tape or an alternate backup system to clear space on your system for creating next year's positions.

You can also use Purge Positions and Activity to delete position records for which you have no further use.

Run the Purge Position and Activity program to purge a position budget.

Run Position Reports



Running Position Reports

You can run a position report to review the most recent changes made to position budgets.

Several reports are also available to help you review budgeted and projected position budget figures. These figures include salaries, FTEs, hours worked, headcount, and open amounts. You can review this information for current, previous, or future fiscal years.

You can run reports to display information in any of the following formats:

- 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

Complete the following tasks:

❑ Run the Open Amounts By Position report

❑ Run the Open Effective Amounts by Position report

- ❑ Run the Cross-Year Budget Comparison report
- ❑ Run the Cross-Year Effective Budget Comparison report
- ❑ Run the Position Full-Time Equivalents (FTEs) report
- ❑ Run the Position Headcount report
- ❑ Run the Position Reports World Writers

Running the Open Amounts by Position Report

Run the Open Amounts by Position report to review position data for salaries, FTEs, and hours worked. The report displays budgeted and projected figures through the fiscal year end. The report also displays open amounts, which are the difference between budgeted and projected figures.

```
081420                                      J.D. Edwards & Company                             Page  -          2
                                           Open Amounts by Position                            Date  -      7/01/98
                                    All Business Units - Fiscal Year 1998

Home BU :            50 General Accounts
          . . . . . . . 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 .          50 General Accounts
 . . . . . . . . . .
5J-9          75,000       62,702       12,298      2.00      2.00                          2      2-    4,160     4,160
  Draftsperson
5067          53,111                    53,111      1.00                1.00                               2,080               2,080
  Laborer Level I
62            47,840       47,840                   1.00      1.00                          1      1-    2,080     2,080
  Foreman
63            76,440       75,296        1,144      2.00      1.97       .03                2      2-    4,160     4,097        63
  Operator
66            52,832       52,832                   1.00      1.00                          1      1-    2,080     2,080
  Electrician
67            75,712      174,712      99,000-      2.00      4.00      2.00-               4      4-    4,160     8,320    4,160-
  Laborer98
9S-2          25,480       25,480                   1.00      1.00                          1      1-    2,080     2,080
  Sales Representative
         ------------ ------------ ------------ --------- --------- --------- ------- ------- ------- --------- --------- ---------
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 system calculates the projected amounts depending on the fiscal year for which the position is defined. After the fiscal pattern is retrieved from the company to which the position is linked, the system:

- Uses the beginning of the fiscal year date and end of 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.

Running the Open Effective Amounts by Position Report

Run the Open Effective Amounts by Position report to review the difference between projected and budgeted effective amounts. The system calculates effective amounts based on the effective from and effective through dates for the position.

```
081421                                          J.D. Edwards & Company                             Page  -          2
                                              Open Effective Amounts by Position                   Date  -      7/01/98
                                                All Business Units - All Years
Home BU :          2435 School
          . . . . . . . Salaries . . . . . . .   . Full Time Equivalents .     . . . Headcount . . .   . . . . Hours Worked . . . .
ID/Desc   Eff. Budget   Projected      Open     Eff. Bud  Projected    Open    Ef. Bud Project  Open   Eff. Budg Projected   Open
-------- ------------ ------------ ------------ --------- --------- --------- ------- ------- ------- --------- --------- ---------
Fiscal Year. . . . .           07
Home Business Unit .         2435 School
 . . . . . . . . . .
BD01          30,000       16,105       13,895      2.00      1.59       .41       2       2             2,080     1,630       450
  Bus Driver
CH01          25,000                    25,000      2.00                2.00       2               2     4,160               4,160
  Swim Coach
TR01          35,000       35,000                   1.00      1.00                 1       1             2,080     2,080
  Art Teacher
TR03          60,000       44,000       16,000      2.00      1.00      1.00       2       1       1     4,160     2,080     2,080
  English Teacher
         ------------ ------------ ------------ --------- --------- --------- ------- ------- ------- --------- --------- ---------
HBU Tot:     150,000       95,105       54,895      7.00      3.59      3.41       7       4       3    12,480     5,790     6,690
         ------------ ------------ ------------ --------- --------- --------- ------- ------- ------- --------- --------- ---------
FY Tot:      150,000       95,105       54,895      7.00      3.59      3.41       7       4       3    12,480     5,790     6,690
```

Running the Cross-Year Budget Comparison Report

Run the Cross-Year Budget Comparison report to simultaneously review the position budgets for two fiscal years. The figures display in a side-by-side format for comparison. The report also displays the percentage change in each budget from one fiscal year to the next.

```
081430                                                J.D. Edwards & Company                                Page  –            2
                                                   Cross–Year Budget Comparison                             Date  –      7/01/98
                                                          1998 and 1999
                                                        All Business Units
               . . . . . . . . . 98 . . . . . . . .        . . . . . . . . . 99 . . . . . . . . .             . . . . % Change . . . .
ID /Desc   Salary         FTE      Hdcnt    Hours       Salary         FTE      Hdcnt    Hours      Salary  FTE     Hdcnt   Hours
-------- -------------- --------- ------- ----------- -------------- --------- ------- ----------- ------- ------- ------- -------
5J–9             75,000      2.00               4,160                                              100.00– 100.00–         100.00–
  Draftsperson
5067             53,111      1.00               2,080                                              100.00– 100.00–         100.00–
  Laborer Level I
62               47,840      1.00               2,080                                              100.00– 100.00–         100.00–
  Foreman
63               76,440      2.00               4,160                                              100.00– 100.00–         100.00–
  Operator
66               52,832      1.00               2,080                                              100.00– 100.00–         100.00–
  Electrician
67               75,712      2.00               4,160                                              100.00– 100.00–         100.00–
  Laborer98
9S–2             25,480      1.00               2,080                                              100.00– 100.00–         100.00–
  Sales Representative
         -------------- --------- ------- ----------- -------------- --------- ------- ----------- ------- ------- ------- -------
HBU:           50
                406,415     10.00              20,800                                              100.00– 100.00–         100.00–
```

What You Should Know About

Calculating percentage change figures

The system calculates the percentage change figures by dividing the difference between the budget for each year displayed by the first year's budget as it appears in the leftmost column of the report.

Processing Options for Cross–Year Budget Comparison

```
1. Enter the first fiscal year (two                    ____________
    digits) to be displayed.
2. Enter the second fiscal year (two                   ____________
    digits) to be displayed.
```

Running the Cross-Year Effective Budget Comparison Report

Run the Cross-Year Effective Budget Comparison report to simultaneously review the effective position budgets for two fiscal years. The figures display in a side-by-side format for comparison. The report also displays the percentage change in each budget from one fiscal year to the next.

```
081431                                          J.D. Edwards & Company                              Page  –          2
                                          Cross–Year Effective Budget Comparison                    Date  –      7/01/98
                                          2 year Comparison by Processing Option
                                                    All Business Units
               . . . . . . . . 98 . . . . . . .         . . . . . . . . 99 . . . . . . . .          . . . . % Change . . . .
ID /Desc   Salary         FTE     Hdcount   Hours       Salary         FTE     Hdcount   Hours      Salary  FTE     Hdcnt   Hours
-------- -------------- --------- ------- ----------- -------------- --------- ------- ----------- ------- ------- ------- -------
5J–9            75,000      2.00                4,160                                               100.00– 100.00–         100.00–
  Draftsperson
5067            53,111      1.00                2,080                                               100.00– 100.00–         100.00–
  Laborer Level I
62              47,840      1.00                2,080                                               100.00– 100.00–         100.00–
  Foreman
63              76,440      2.00                4,160                                               100.00– 100.00–         100.00–
  Operator
66              52,832      1.00                2,080                                               100.00– 100.00–         100.00–
  Electrician
67              75,712      2.00                4,160                                               100.00– 100.00–         100.00–
  Laborer98
9S–2            25,480      1.00                2,080                                               100.00– 100.00–         100.00–
  Sales Representative
         -------------- --------- ------- ----------- -------------- --------- ------- ----------- ------- ------- ------- -------
HBU:           50
              406,415     10.00               20,800                                               100.00– 100.00–         100.00–
```

Processing Options for Cross–Year Effective Budget Comparison

1. Enter the first fiscal year (two digits) to be displayed. ______________
2. Enter the second fiscal year (two digits) to be displayed. ______________

Running the Position Full-Time Equivalents (FTEs) Report

Run the Position Full-Time Equivalents (FTEs) report to review current position activity to the level budgeted for the upcoming fiscal year. Current headcount is a total of all FTEs in a position.

```
081440                                          J.D. Edwards & Company                                   Page No. . .    2
                                                 Position FTE Report                                     Date - . . .  7/01/98
                                          Current Activity vs. Fiscal Year 98
                                                   . . . . 98 . . . .
    . . . . . Position . . . . .           Current     New        Total         Percent
   ID            Description                FTE     Positions    Planned       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
1000A-4  Accountant
1004A-1  Administrative Assistant
4A-2     Secretary
                                        ----------  ----------  ----------    ----------
         100       Balance Sheet
110A1    President                                        1.00       1.00
110A2    Vice President                                   1.00       1.00
1100A-1  Senior Accountant                                2.00       2.00
1100A-2  Accountant                                       2.50       2.50
                                        ----------  ----------  ----------    ----------
         110       Headquarters                           6.50       6.50
1400A-3  Financial Analyst                                2.00       2.00
1400P-0  Finance Director                                 1.00       1.00
1400P-1  Assistant Finance Director                       1.00       1.00
                                        ----------  ----------  ----------    ----------
         140       Finance Department                     4.00       4.00
1421M-1  MIS Manager                                      1.00       1.00
1421M-2  Project Leader                                   1.00       1.00
1424A-2  Secretary                                        1.00       1.00
                                        ----------  ----------  ----------    ----------
         142       Information Systems                    3.00       3.00
1433P-1  Payroll Manager                                  1.00       1.00
1434A-1  Payroll Administrator                            1.00       1.00
                                        ----------  ----------  ----------    ----------
         143       Payroll Department                     2.00       2.00
```

What You Should Know About

New positions

A new position is the difference between current headcount and the next year's budgeted FTE. This report displays the new position figure as the number of FTEs that would have to be activated in order for current headcount to match the budgeted level. This report also displays this figure as a percentage of the ratio of new positions to current headcount.

Processing Options for Position FTE Report

Enter the fiscal year (two digits) whose budgeted headcount will be compared to the current headcount. ______________

Running the Position Headcount Report

The Position Headcount report displays the headcounts allocated to each position within the fiscal year.

081441 J.D. Edwards & Company Page No. . . 3
Position Headcount Report Date – . . . 7/01/86
Current Activity vs. Fiscal Year 98

. . . . . Position . . . . . ID	Description	Current Headcount	. . . . 98 . . . . New Positions	Total Planned	Percent 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–
	451 Accounting Departmen	1	1–		100.00–
0A–3	Financial Analyst	2	2–		100.00–
3	Financial Analyst	1	1–		100.00–
4	Project Leader	1	1–		100.00–
5	Human Resource Manager	1	1–		100.00–
5J–4	Fire Fighter				
5J–5	Electrician	1	1–		100.00–
5J–9	Journeyman	1	1–		100.00–
62	Foreman	1	1–		100.00–
63	Operator	1	1–		100.00–
7	Laborer	1	1–		100.00–
7H–1	Waiter/Waitress				
	701 Corporate Administra	10	10–		100.00–
0A–3	Financial Analyst	2	2–		100.00–
3P–1	Payroll Manager	1	1–		100.00–
5J–4	Firefighter	5	5–		100.00–
	707 Corporate Administra	8	8–		100.00–
10C–2	Waiter/Waitress	1	1–		100.00–
	800 Rockies Bar & Grill	1	1–		100.00–
BD01	Bus Driver	2		2	
CH01	Swim Coach		2	2	
CH02	Tennis Coach	1		1	
CH03	Football Coach	1		1	
TR01	Art Teacher	1		1	
TR02	Music Teacher		1	1	
TR03	English Teacher	3	1–	2	33.33–
	2435 School	8	2	10	25.00

Processing Options for Position Headcount Report

Enter the fiscal year (two digits) whose budgeted headcount will be compared to the current headcount. ______________

Running the Position Reports World Writers

The Position Reports World Writers provide you with the capability to review in detail established or budgeted positions for a current, previous, or future fiscal year. You can review this information by position budget or by the employee activity linked to the position budget.

You can run the following World Writer reports to display established or budgeted position information:

- Position Budgets World Writer
- Position Budgets by Job Type and Step World Writer
- Position Budgets by Business Unit World Writer
- Position Effective Budgets World Writer
- Position Effective Budget by Job Type and Step World Writer
- Position Effective Budget by Home Business Unit World Writer
- Employee Activity by Number World Writer
- Employee Activity by Name World Writer

Position Budgets World Writer

Run the Position Budgets World Writer to review by fiscal year the position budgets established for all business units and positions.

Position Budgets

Page – 1
Date – 07/01/98

FY	Home Business Unit	Description	Position ID	Description	Position Budget	Budgeted FTE	Budgeted Hours	Headcount
98	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	
	140	Finance Department	1400A–3	Financial Analyst	100,000	2.00	4,160	
	140		1400P–0	Finance Director	60,000	1.00	2,080	
	140		1400P–1	Assistant Finance Dire	40,000	1.00	2,080	
	142	Information Systems	1421M–1	MIS Manager	55,000	1.00	2,080	
	142		1421M–2	Project Leader	40,000	1.00	2,080	
	142		1424A–2	Secretary	18,000	1.00	2,080	
	143	Payroll Department	1433P–1	Payroll Manager	50,000	1.00	2,080	
	143		1434A–1	Payroll Administrator	17,500	1.00	2,080	
	200	Distrib/Manuf Balance She	488P	Setup Person				
	200		8P–5	Production Worker				
	419	Administration	4192H–5	EEO Specialist	25,000	1.00	2,080	
	419		4194A–1	Administrative Assista	20,000	1.00	2,080	
	419		4194A–2	Secretary	30,000	2.00	4,160	
	419		4195J–7	Nurse	50,000	2.00	4,160	
	451	Accounting Department	4500P–32	Accounting Clerk	40,000	3.00	6,240	
	451		4510A–1	Accounting Manager	45,000	1.00	2,080	
	451		4510A–2	Senior Accountant	42,500	1.00	2,080	
	451		4510P–2	Accountant	125,000	4.00	8,320	
	701	Corporate Administration	0A–3	Financial Analyst	38,000	1.00	2,080	
	701		3	Financial Analyst	50,000	1.00	2,080	
	701		4	Project Leader	50,000	1.00	2,080	
	701		5	Human Resource Manager	45,000	1.00	2,080	
	701		5J–4	Fire Fighter				
	701		5J–5	Electrician	29,848	1.00	2,080	
	701		5J–9	Journeyman				
	701		62	Foreman				
	701		63	Operator	39,041	1.00	2,080	
	701		7	Laborer	83,200	2.00	4,160	
	701		7H–1	Waiter/Waitress				
	707	Corporate Administration	0A–3	Financial Analyst	110,000	2.00	1,950	
	707		3P–1	Payroll Manager	65,000	1.00	1,950	

Position Budgets by Job Type and Step World Writer

Run the Position Budgets by Job Type and Step World Writer to by review by fiscal year the position budgets established for all business units and positions for each job type and job step within your organization.

```
                                              Position Budget by Job Type & Step                                       Page       -        1
                                                                                                                       Date       - 07/01/98

 FY Job    Job     Description           Home          Description        Position    Description         Position     Budgeted   Headcount
    Typ    Step                       Business Unit                          ID                             Budget       FTE
 -- ------ ---- -------------------- ------------- -------------------- -------- -------------------- -------------- --------- -----------
  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           2
                                                                                                     -------------- ---------  ---------
Fiscal Year. . . . 7
Sum                                                                                                         150,000      7.00           7
  9 BUSDR       Bus Driver                   2435  School               BD01     Bus Driver                  30,000      2.00           1
    COACH       Coach                        2435  School               CH01     Swim Coach                  25,000      2.00           2
                                             2435  School               CH02     Tennis Coach                12,500      1.00           1
                                             2435  School               CH03     Football Coach              40,500      1.00           1
    TEACH  B1   Teacher                      2435  School               TR01     Art Teacher                 35,000      1.00           1
           B2                                2435  School               TR02     Music Teacher               28,000      1.00           1
           M1                                2435  School               TR03     English Teacher             60,000      2.00           2
                                                                                                     -------------- ---------  ---------
Fiscal Year. . . . 9
Sum                                                                                                         231,000     10.00           9
 95                                           701  Corporate Administra HELEN    helen                       10,000      1.00
                                                                                                     -------------- ---------  ---------
Fiscal Year. . . . 95
Sum                                                                                                          10,000      1.00
 96 5J-9   A.2  Journeyman                     50  General Accounts     5J-9     Draftsperson                75,000      2.00
    62          Foreman                        50  General Accounts     62       Foreman                     47,840      1.00
    63     J    Operator                       50  General Accounts     63       Operator                    76,440      2.00
    66     FORE Electrician                    50  General Accounts     66       Electrician                 52,832      1.00
    67     A.2  Laborer                        50  General Accounts     67       Laborer96                   75,712      2.00
           1                                   50  General Accounts     5067     Laborer Level I             53,111      1.00
                                                                                                     -------------- ---------  ---------
Fiscal Year. . . . 96
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. . . . 97
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
```

Position Budgets by Business Unit World Writer

Run the Position Budgets by Business Unit World Writer to review the position budgets established for all positions and business units within your organization.

Position Budgets by Business Unit

Page – 1
Date – 07/01/98

FY	Description	Home Business Unit	Position ID	Description	Budgeted Amount	Budgeted FTE	Budgeted Hours	Headcount	Job Type	Job Step
98	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	
Home Business Unit . . . . . . Sum					422,600	16.00	33,280			
	Balance Sheet	100	1000A–4	Accountant					0A–4	
		100	1004A–1	Administrative Assis					4A–1	
		100	4A–2	Secretary					4A–2	
Home Business Unit . . . . . . Sum										
	Headquarters	110	110A1	President	100,000	1.00	2,080		A1	
		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			
Home Business Unit . . . . . . Sum					380,000	6.50	13,520			
	Finance Department	140	1400A–3	Financial Analyst	100,000	2.00	4,160		0A–3	
		140	1400P–0	Finance Director	60,000	1.00	2,080		0P–0	
		140	1400P–1	Assistant Finance Di	40,000	1.00	2,080		0P–1	
Home Business Unit . . . . . . Sum					200,000	4.00	8,320			
	Information Systems	142	1421M–1	MIS Manager	55,000	1.00	2,080		1M–1	
		142	1421M–2	Project Leader	40,000	1.00	2,080			
		142	1424A–2	Secretary	18,000	1.00	2,080		4A–2	
Home Business Unit . . . . . . Sum					113,000	3.00	6,240			
	Payroll Department	143	1433P–1	Payroll Manager	50,000	1.00	2,080		3P–1	

Position Effective Budgets World Writer

Run the Position Effective Budgets World Writer to review the effective position budgets for all positions and business units for the fiscal year.

Position Effective Budgets

Page – 1
Date – 07/01/98

FY	Home Business Unit	Description	Position ID	Description	Effective Budget	Effective Hours	Effective FTE
98	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
	140	Finance Department	1400A–3	Financial Analyst	19,999	831	.40
	140		1400P–0	Finance Director	11,999	415	.19
	140		1400P–1	Assistant Finance Di	7,999	415	.19
	142	Information Systems	1421M–1	MIS Manager	55,000	2,080	1.00
	142		1421M–2	Project Leader	40,000	2,080	1.00
	142		1424A–2	Secretary	18,000	2,080	1.00
	143	Payroll Department	1433P–1	Payroll Manager	50,000	2,080	1.00
	143		1434A–1	Payroll Administrato	17,500	2,080	1.00
	200	Distrib/Manuf Balanc	488P	Setup Person			
	200		8P–5	Production Worker			
	419	Administration	4192H–5	EEO Specialist	25,000	2,080	1.00
	419		4194A–1	Administrative Assis	3,999	415	.19
	419		4194A–2	Secretary	5,999	831	.40
	419		4195J–7	Nurse	9,999	831	.40
	451	Accounting Departmen	4500P–32	Accounting Clerk	40,000	6,240	3.00
	451		4510A–1	Accounting Manager	45,000	2,080	1.00
	451		4510A–2	Senior Accountant	42,500	2,080	1.00
	451		4510P–2	Accountant	125,000	8,320	4.00
	701	Corporate Administra	0A–3	Financial Analyst	38,000	2,080	1.00
	701		3	Financial Analyst	50,000	2,080	1.00
	701		4	Project Leader	50,000	2,080	1.00
	701		5	Human Resource Manag	26,065	1,204	.57
	701		5J–4	Fire Fighter			
	701		5J–5	Electrician	29,848	2,080	1.00
	701		5J–9	Journeyman			
	701		62	Foreman			
	701		63	Operator	39,041	2,080	1.00
	701		7	Laborer	83,200	4,160	2.00
	701		7H–1	Waiter/Waitress			
	707	Corporate Administra	0A–3	Financial Analyst	110,000	1,950	2.00
	707		3P–1	Payroll Manager	65,000	1,950	1.00

Position Effective Budget by Job Type and Step World Writer

Run the Position Effective Budget by Job Type and Step World Writer to review by fiscal year the effective position budgets established for all business units and positions for each job type and job step within your organization.

Position Eff. Budget by Job Type & Step

Page – 1
Date – 07/01/98

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. . . . 7										
Sum								150,000	7.00	7
9	BUSDR		Bus Driver	2435	School	BD01	Bus Driver	30,000	2.00	1
	COACH		Coach	2435	School	CH01	Swim Coach	25,000	2.00	2
			Coach	2435	School	CH02	Tennis Coach	12,500	1.00	1
			Coach	2435	School	CH03	Football Coach	40,500	1.00	1
	TEACH	B1	Teacher	2435	School	TR01	Art Teacher	35,000	1.00	1
		B2	Teacher	2435	School	TR02	Music Teacher	28,000	1.00	1
		M1	Teacher	2435	School	TR03	English Teacher	60,000	2.00	2
								---------------	---------	---------
Fiscal Year. . . . 9										
Sum								231,000	10.00	9
95				701	Corporate Admin	HELEN	helen	10,000	1.00	
								---------------	---------	---------
Fiscal Year. . . . 95										
Sum								10,000	1.00	
96	5J–9	A.2	Journeyman	50	General Account	5J–9	Draftsperson	75,000	2.00	
	62		Foreman	50	General Account	62	Foreman	47,840	1.00	
	63	J	Operator	50	General Account	63	Operator	34,043	.89	
	66	FORE	Electrician	50	General Account	66	Electrician			
	67	A.2	Laborer	50	General Account	67	Laborer96	75,712	2.00	
		1	Laborer	50	General Account	5067	Laborer Level I	53,111	1.00	
								---------------	---------	---------
Fiscal Year. . . . 96										
Sum								285,706	6.89	
97	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. . . . 97										
Sum								519,499	14.60	
98				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

Position Effective Budget by Home Business Unit World Writer

Run the Position Effective Budget by Home Business Unit World Writer to review the effective position budgets established for all business units and positions within your organization.

Position Effect Budget by Home Business Unit

Page – 1
Date – 07/01/98

FY	Home Business Unit	Description	Position ID	Description	Effective Budget	Effective Hours	Effective FTE	Headcount	Job Type
98	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
	142	Information Sys	1421M–1	MIS Manager	55,000	2,080	1.00		1M–1
	142		1421M–2	Project Leader	40,000	2,080	1.00		
	142		1424A–2	Secretary	18,000	2,080	1.00		4A–2
	143	Payroll Departm	1433P–1	Payroll Manager	50,000	2,080	1.00		3P–1
	143		1434A–1	Payroll Adminis	17,500	2,080	1.00		4A–1
	200	Distrib/Manuf B	488P	Setup Person					8P–4
	200		8P–5	Production Work					8P–5
	419	Administration	4192H–5	EEO Specialist	25,000	2,080	1.00		2H–5
	419		4194A–1	Administrative	3,999	415	.19		4A–1
	419		4194A–2	Secretary	5,999	831	.40		4A–2
	419		4195J–7	Nurse	9,999	831	.40		5J–7
	451	Accounting Depa	4500P–32	Accounting Cler	40,000	6,240	3.00		0P–3
	451		4510A–1	Accounting Mana	45,000	2,080	1.00		0A–1
	451		4510A–2	Senior Accounta	42,500	2,080	1.00		0A–2
	451		4510P–2	Accountant	125,000	8,320	4.00		0P–2
	701	Corporate Admin	0A–3	Financial Analy	38,000	2,080	1.00		0A–3
	701		3	Financial Analy	50,000	2,080	1.00		0A–3
	701		4	Project Leader	50,000	2,080	1.00		1M–2
	701		5	Human Resource	26,065	1,204	.57		2H–1
	701		5J–4	Fire Fighter					5J–4
	701		5J–5	Electrician	29,848	2,080	1.00		5J–5
	701		5J–9	Journeyman					5J–9
	701		62	Foreman					62
	701		63	Operator	39,041	2,080	1.00		63
	701		7	Laborer	83,200	4,160	2.00		67
	701		7H–1	Waiter/Waitress					7H–1
	707	Corporate Admin	0A–3	Financial Analy	110,000	1,950	2.00		0A–3
	707		3P–1	Payroll Manager	65,000	1,950	1.00		3P–1

Employee Activity by Number World Writer

Run the Employee Activity by Number World Writer to review by employee number all the position activity for each employee within your organization.

Employee Activity by Number

Page – 1
Date – 07/01/98

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	06/03/96
2022	Kellerman, James	451	** NOT FOUND **	4510A–1	Accounting Mana	30,000.00	X	Terminate	02/05/95
2111	Ingraham, Paul	50		67	Laborer98	52,000.00		Active	05/21/96
		50		67	Laborer97	52,000.00		Active	05/21/96
		50		67	Laborer96	52,000.00		Active	05/21/96
		701	General Account	7	Laborer	52,000.00	X	Terminate	03/15/95
2129	Jackson, John	701	General Account	3	Financial Analy	50,000.00		Active	03/15/88
3050	Morrisey, Anne E.	2435		CH02	Tennis Coach	3,000.00		Active	04/01/98
		2435		TR03	English Teacher	44,000.00		Active	03/01/98
		2435		TR03	English Teacher	34,000.00		Active	06/01/97
		2435		TR03	English Teacher	30,000.00		Active	06/01/96
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	03/23/96
		2435		TR01	Art Teacher		A	Adjust Status	03/23/96
		2435		TR01	Art Teacher	30,000.00	A	Adjust Status	03/23/96
3084	Carmichael, Bradle	2435		CH03	Football Coach	38,000.00		Active	06/01/70
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
4520	wow, wow	50		67	Laborer98	47,000.00		Active	12/31/97
		50		67	Laborer97	47,000.00		Active	12/31/97
		50		67	Laborer96	47,000.00		Active	12/31/97
		50		67	Laborer98	35,000.00	A	Adjust Status	05/24/96
		50		67	Laborer97	35,000.00	A	Adjust Status	05/24/96
		50		67	Laborer96	35,000.00	A	Adjust Status	05/24/96
5127	Ebby, Chester A.	419		4192H–5	EEO Specialist	25,000.00		Active	03/15/98
5651	Rothchild, Abigal	701	General Account	4	Project Leader	50,000.00		Active	11/15/90
6000	Easter, Melvyn	419		4194A–2	Secretary	57,131.36		Active	01/01/98
		419		4194A–2	Secretary	57,131.36	T	Transfer	04/04/95
6002	Abbot, Dominique	701	General Account	0A–3	Financial Analy	38,000.00		Active	04/10/89
6003	Akin, Dwight	701	General Account	5J–5	Electrician	29,848.00		Active	02/01/90
6005	Ellis, Fred	701	General Account	63	Operator	39,041.60		Active	03/22/94
6010	Eason, Walter	701	General Account	7	Laborer	31,200.00		Active	10/10/91
7500	McDougle, Cathy	90		2H–1	Human Resource	50,000.00		Active	07/01/98
		90		2H–1	Human Resource	50,000.00		Active	07/01/98
		90		2H–1	Human Resource	44,000.00	A	Adjust Status	02/15/98
		90		2H–1	Human Resource	44,000.00	A	Adjust Status	02/15/98
		90		2H–1	Human Resource	42,500.00	T	Transfer	01/01/98
		90		2H–1	Human Resource	42,500.00	T	Transfer	01/01/98
		90		2H–2	Employment Spec	37,500.00	T	Transfer	06/01/97
		90		2H–2	Employment Spec	37,500.00	T	Transfer	06/01/97
		90		2H–2	Employment Spec	35,000.00		Active	03/03/97
		90		2H–2	Employment Spec	35,000.00		Active	03/03/97
7503	Kraton, Ralph	90		0A–10	Purchasing Agen	56,000.00		Active	05/12/95
7504	Meade, Jane	90	General Account	10B–1	Trainer	35,000.00		Active	08/03/86
		90	General Account	10B–1	Trainer	35,000.00		Active	08/03/86
7505	Mastro, Robert	90		3P–1	Payroll Manager	37,750.00		Active	01/03/96
		90		3P–1	Payroll Manager	37,750.00		Active	01/03/96
7506	Mayeda, Donald	90	General Account	8M–3	Clerk	15,600.00		Active	03/03/97
		90	General Account	8M–3	Clerk	15,600.00		Active	03/03/97
7508	Mai, Tien	800	General Account	10C–2	Waiter/Waitress	4,888.00		Active	06/03/96
7510	Moralez, Jesus	90		4A–1	Administrative	20,000.00		Active	01/01/97
		90		4A–1	Administrative	20,000.00		Active	01/01/97
7540	Milenski, Douglas	200	General Account	488P	Setup Person	18,928.00		Active	07/14/33

Employee Activity by Name World Writer

Run the Employee Activity by Name World Writer to review by name all the position activity for each employee within your organization.

Employee Activity by Name

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Date – 07/02/98

Employee Number	Home Business Unit	Position ID	Description	Annual Salary	Em Ac	Eff From	Hours
8889	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00
	90	TRNER	Trainer	9.00		11/25/21	2080.00

Wage and Salary Administration

Objectives

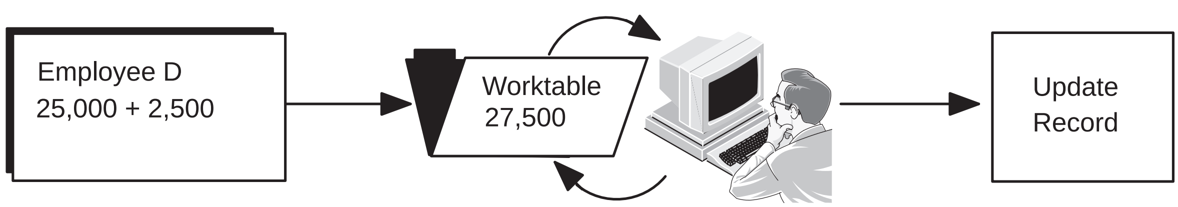
- To understand the concepts of making pay changes
- To make current or planned pay changes to an employee
- To make current or planned pay changes to more than one employee
- To learn how to select a group of employees who receive the same amount of pay change
- To delete obsolete review groups
- To run an analysis of pay changes

About Wage and Salary Administration

Managing wages and salaries includes planning and entering pay changes, as well as assessing their financial impact on the budget. Pay changes can include merit increases, cost of living adjustments, or regular planned increases based on seniority changes.

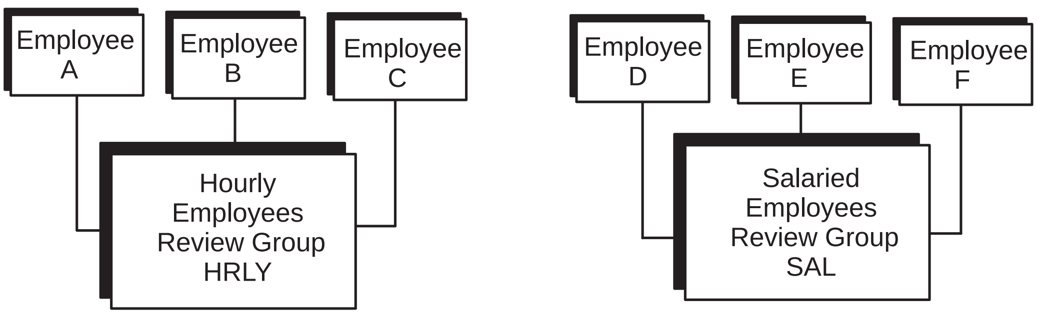
You might make some pay changes, such as a merit increase, to an individual employee directly in the employee's record. However, to enable you to plan effectively for the financial impact of a pay change, you can enter the planned changes into a worktable prior to actually updating their record.

The following graphic illustrates this process:



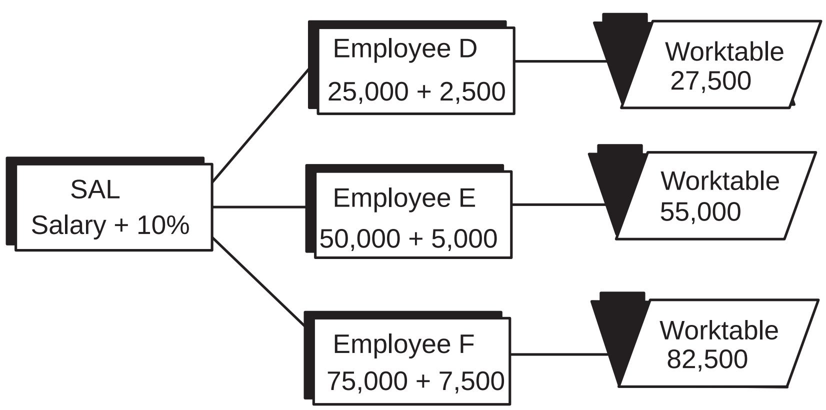
If you make pay changes to groups of similar employees, such as workers paid on an hourly basis, you might apply a flat amount or percent increase to the entire group. You can organize the similar employees into a review group and apply the changes to the group.

The following graphic illustrates typical methods of organizing review groups:



You can use the Wage and Salary Administration system to plan pay changes. The system provides a temporary worktable you can use to enter pay changes for one employee or the entire review group without updating the employee master table. This lets you assess the financial impact of pay changes before actually making them.

The following graphic illustrates this process:



Compa-ratios change with pay changes. When you run the Compa-Ratio Calculation batch program, the system automatically recalculates the compa-ratio for all employees affected by the pay change. You can recalculate compa-ratio for one employee or multiple employees, depending on how you define the data selection.

After you are done working with review groups, you can delete any review groups if any employees remain in them. This enables you to conserve disk space. For ongoing review of your wage and salary structure, you can run the Employee Salary Analysis program to print a report of employee salary history.

Complete the following tasks:

- ❑ Enter individual employee pay changes
- ❑ Enter multiple employee pay changes
- ❑ Delete obsolete review groups
- ❑ Run Employee Salary Analysis

Enter Individual Employee Pay Changes

G08 Human Resources
Choose *Employee Information*

G08E1 Employee Information
Choose an option

Entering Individual Employee Pay Changes

Pay changes can include an increase or decrease in salary or hourly rate, and can occur at any time, such as during an annual cost of living allowance. A change in pay can be a current change, applicable in the current or next pay period, or it can be a future change.

You can enter a current pay change directly into the employee's record. You can enter the amount in weekly, biweekly, semi-monthly, monthly, or annual amounts. When the system does not use the pay rate table as its pay rate source, the system calculates the hourly amount, if it is not entered directly, by dividing the annual salary by the standard number of hours per year. For employees with one assigned job, the annual salary is calculated for one job for the entire year. The system calculates the compa-ratio automatically.

Some employees might have more than one assigned job. For example, a teacher might also be a coach for three months out of the year. You might enter pay changes for the second job as an *effective salary*. The effective salary is the amount of pay that the employee receives for the three months. For example, if the teacher/coach is paid 1000 per monthly pay period for the additional job for the three months, the effective salary for that job is 3000. Since the teacher is paid monthly, the pay periods entered would represent the number of months, in this case, three months.

Planned pay changes might require evaluation and approval. To evaluate planned pay changes, you can enter them into a worktable before updating the Employee Master table (F060116). You can view planned pay changes and adjust them, if necessary. The Update Actuals batch program moves the planned changes to the Employee Master table.

Complete the following tasks:

- ❑ Define a current pay change for a primary job
- ❑ Define a current pay change for multiple jobs
- ❑ Define a pay change for an individual employee

Defining a Current Pay Change for a Primary Job

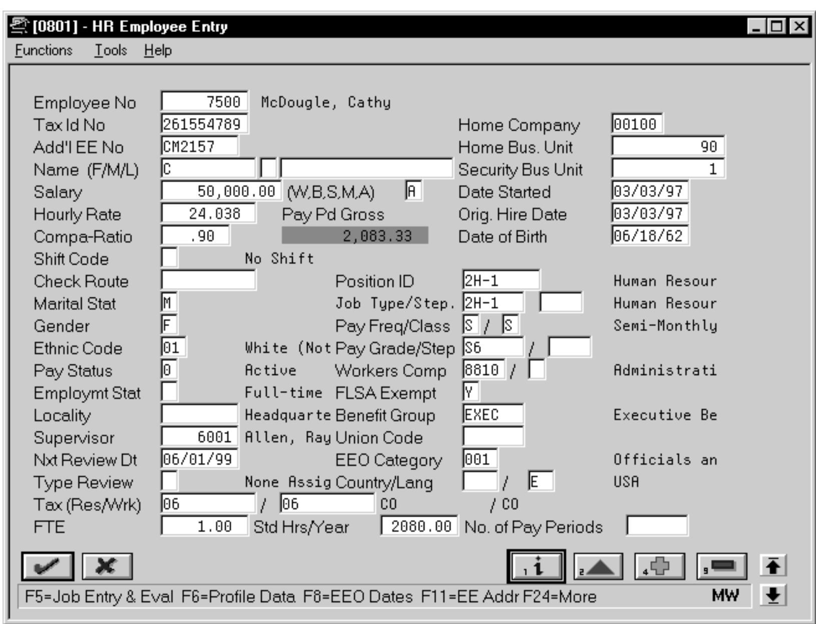
You can enter a pay change for an employee's primary job that directly updates the employee's master record. Depending on how you have set up your constants, your pay changes can be edited against the following tables:

- The Pay Rate table
- The Pay Grade/Step table

You use the Pay Rate table to check your pay changes against union codes, job types, and job steps. You use the Pay Grade/Step table to check your pay changes against defined pay grades and steps in your organization.

▶ To define a current pay change for a primary job

On HR Employee Entry



1. Complete the following field to locate the employee:
   - Employee Number
2. Complete the following fields as required:
   - Salary
   - Hourly Rate
   - Standard Hours per Year
   - Pay Grade/Step

The system reads the appropriate hourly rate for the job type/step and change it for the employee.

What You Should Know About

Deriving the salary or hourly amount from the Pay Grade Step table

The following applies when your pay rate source constant is the pay grade step:

To bring in the pay amount for the employee directly from the Pay Grade Step table, enter the new pay grade and step. Leave the following fields blank or unchanged:

- Salary
- Standard Hours per Year

The entries in the Salary, Hours per Day, and Hours per Year fields will update the employee record from the Pay Grade Step table.

Overriding a hourly amount from the Pay Grade Step table

To calculate a value for the employee's salary instead of deriving it from the Pay Grade Step table, blank out the value in the Salary field and because of a change in standard hours, enter a value in the following field:

- Standard Hours per Year

The system will calculate the salary amount from the standard hours per year. If you use the Hours per Day and Days per Year, you must re-enter the information.

Overriding a salary amount from the Pay Grade Step table

To manually enter a salary amount instead of using the Pay Grade Step table, leave the Standard Hours per Year field blank and enter a value in the following field:

- Salary

The system will use the value entered in the Salary field.

Calculating a pay amount based on a changed FTE

To calculate a salary amount, blank out the Salary and Standard Hours per Year field and enter a value in the following field:

- FTE (Full time equivalent)

The system will calculate the pay using either the Pay Grade Step value for salary and the calculated value for Standard Hours per Year.

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 (/).
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated.
Pay Grade Step	This field identifies the pay grade step associated with a specific pay grade.
Rate – Salary, Annual	The employee's annual salary for all payroll entries manually entered or automatically generated for the payroll period from the employee's master record.
Rate – Hourly	The employee's hourly rate as retrieved, entered, or calculated during time entry. (See also GRT, PWRT, BRT.) If you enter a rate in this field, the rate overrides 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.

What You Should Know About

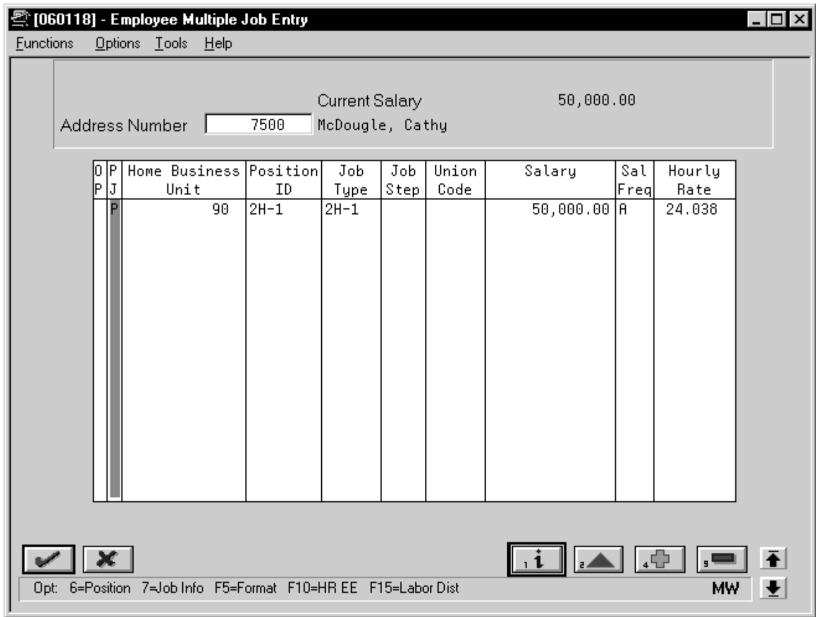
Tracking employee history	If you are tracking employee history by effective date, each change to an employee's record requires you to enter an effective date in the Effective Date Window. To track why the change was made, enter the change reason.
Tracking turnover	If you are tracking turnover, each change to an employee's record requires you to enter a reason for the change.
Specifying pay grade/step and position budget	The system checks the entered information against the data entered in Constants Information.
Tracking current pay effective date	This field in Constants Information determines whether the system records employee history and turnover according to the effective date of change or saves it according to the date you actually enter the change.

Defining a Current Pay Change for Multiple Jobs

An employee might have more than one job for which you make a pay change. For example, a teacher might coach basketball for five months of the year. You can make pay changes to the different jobs.

▶ To define a current pay change for multiple jobs

On Employee Multiple Job Entry



1. Complete the following field to locate the employee:
   - Address Number
2. Complete the following fields:
   - Salary
   - Hourly Rate
3. Change one or both of the following fields to derive the pay rate source from the Pay Rate Table:
   - Home Business Unit
   - Job Type/Step
4. Choose More Detail to derive the pay rate source from the Pay Grade Step Table:
5. Change the following fields:
   - Pay Grade
   - Pay Step

Processing Options for Employee Multiple Job Entry

```
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

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, ' ' for No.              ____________

Edit/Default Options:
---------------------
4. The Job Information table (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' if you wish to use the
   Business Unit/Job ID X-Reference table
   (F08005).  This will default in the
   Union Code, Workers Comp Code and
   Subclass when adding and/or changing
   the Business Unit or Job.  Enter ' '
   and the Job Information table (F08001)
   will be used.                                ____________

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.                   ____________
```

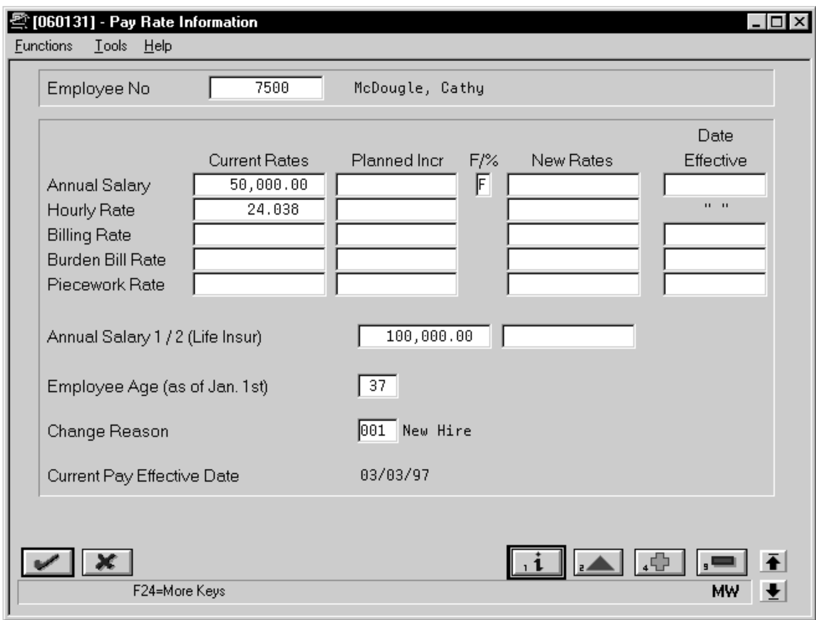
Defining a Pay Change for an Individual Employee

You can define pay changes that are effective immediately. Or you can define the pay change to take effect in the future. You must enter an effective date on which you want the new pay changes to take effect. Depending on the type of pay change you want to define, perform one of the following tasks:

- Define a current pay change for an individual
- Define a future pay change for an individual

▶ To define a current pay change for an individual

On Pay Rate Information



1. Complete the following field to locate the employee:
   - Employee Number
2. Complete the following field:
   - Current Rate

▶ To define a future pay change for an individual

On Pay Rate Information

1. Complete the following field to locate the employee:
   - Employee Number
2. Complete the following fields to define a future pay change as a percent increase or flat amount:
   - Planned Increase
   - $/% (Method of pay increase)
   - Date Effective
3. Complete the following fields to define a future pay change generated by the system:
   - New Rates (annual salary or hourly rate)
   - Date Effective

Field	**Explanation**
Method for Pay Increase	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 flat dollar increase.
Rate – Salary at Next Raise	The employee's new annual salary for all payroll entries manually entered or automatically generated for the payroll period after the date of next raise from the employee's master record. See the definition for data item NRDT (Date – Next Raise).

What You Should Know About

Entering new rates or planned increases

If you enter the pay change as a planned increase, either as a percent of flat amount, the system generates the pay change and applies it to the employee's record on the effective date. If you enter the new rate, the system calculates the planned amount of the increase.

Entering effective dates

In order for a pay change to take place within a specific pay period, you must enter an effective date that falls within the pay cycle in which you want the pay to change take effect. The new amount will be used for the entire pay period.

Exercises

See the exercises for this chapter.

Enter Multiple Employee Pay Changes

Entering Multiple Employee Pay Changes

You might have a number of employees for whom you must enter the same pay change. For example, you might apply a flat amount, such as a 1000 raise for each salaried employee or a 1.5 an hour cost of living allowance. You can also make additional increases to separate employees in the review group. For example, you can add an additional 500 for a promotion to an outstanding employee in the review group. This is particularly helpful if you perform annual reviews and salary increases.

You can create a review group for the employees and apply the pay change to all of them. Depending on the data selection, the system stores the following in a worktable separate from the Employee Master record:

- The calculated pay change for each employee in the group
- The effective date of the pay change
- The approval code for the pay change
- The date of the next review

After you create and enter pay changes for a group, you can view the results through Review and Rank Employees. You can then run the Update Actuals program to update the Employee Master record with the actual pay changes and display the changes immediately.

Complete the following tasks:

- ❑ Define multiple pay changes for primary jobs
- ❑ Define multiple pay changes for pay grade/steps

Defining Multiple Pay Changes for Primary Jobs

If you are working with employees with only primary jobs, you can make the recommended pay changes for them by creating review groups. The review groups that you create and the pay changes remain in the Salary Review worktable until you run the Update Actuals program to move the data to the Employee Master table (F060116). This enables you to assess the impact of a planned pay change without changing the actual data.

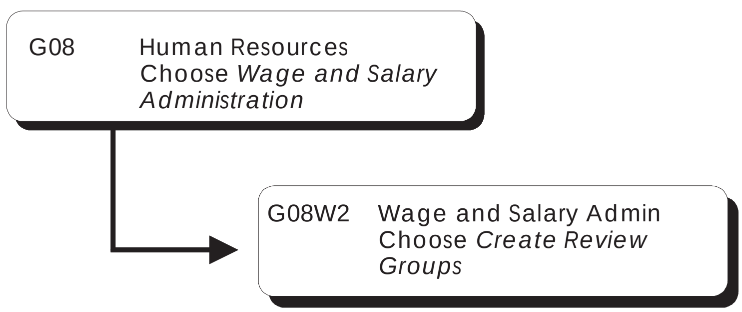
You make the pay changes to the multiple employees by:

- ❑ Creating a review group
- ❑ Working with a review group

Creating a Review Group

You define pay changes for a review group to change the pay for a group of employees. You can create a logical group of employees to which you want to apply pay changes. For example, you could create a review group by salaried and hourly workers or by a particular job title, such as production workers who receive a flat pay change. Creating review groups enables you to efficiently apply pay changes to a large group of employees.

▶ To create a review group



This DREAM Writer program also enables you to assess the effect of the pay change without applying the change to the Employee Master table.

Create Review Group enables you to:

- Assign employees to a review group
- Assign a pay change to the group
- Assign an effective date
- Assign 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 work table at a time. If the employee is in another review group, the system produces an error report.
Hourly or salaried employees in review groups	A review group can only consist of all hourly employees or all salaried employees.
Assigning pay classes to review groups	You must assign hourly and salaried employees to separate review groups.
Decimal setup errors	You must set up the following data items with the same number of display decimals. The system generates a report if there is a discrepancy between the display decimals in either set of items. The data items, for both salaried and hourly employees, are as follows:

Salaried employees:

- SAL (Annual Salary)
- SALC (Salary Change Amount)
- SALN (New Annual Salary
- AMT1 (Cost of Living Increase)
- AMT2 (Cost of Living Increase)
- AMT3 (Merit Increase)
- AMT4 (Promotion Increase)

Hourly Employees:

- PHRT (Hourly Rate)
- HRTC (Hourly Rate Change Amount)
- HRTN (New Hourly Rate)
- AMT6 (Cost of Living Increase)
- AMT7 (Local Cost of Living Increase)
- AMT8 (Merit Increase)
- AMT9 (Promotion Increase)

Processing Options for Create Review Group

```
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 follow-
   ing 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.

5. If procesing option 4 is not blank,             ____________
   enter a '1' to NOT replace recom-
   mended 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.
```

Working with a Review Group

Review groups enable you to manage pay changes for a group of employees. You can make global pay changes to the entire review group and separate or additional pay changes to individuals in the review group. For example, you might make a global pay change of 1000 annually, or a five percent increase to the hourly rates of the individuals in a group.

To work with review groups, perform the following tasks:

- ❑ Enter global pay changes for a review group
- ❑ Enter pay changes for one group member
- ❑ Enter pay changes by component for one employee
- ❑ Enter a bonus for an employee in a review group
- ❑ Enter appraisal information
- ❑ Update salary actuals

Entering Global Pay Changes for a Review Group

You enter global pay changes for a review group who receive the same percent or amount of pay changes according to review and rank.

- Enter global pay changes for a review group
- Review recommended global pay changes

▶ To enter global pay changes for a review group

G08 Human Resources
Choose *Wage and Salary Administration*

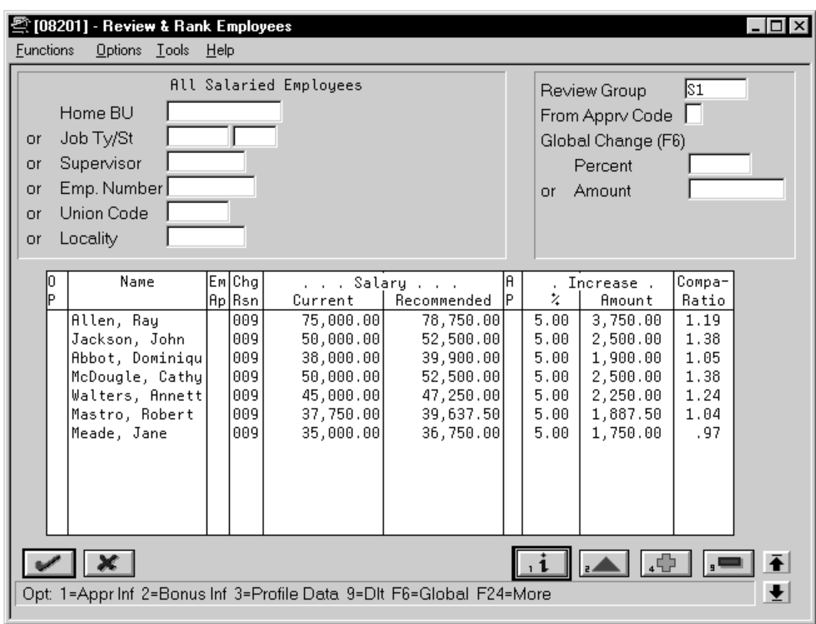
G08W2 Wage and Salary Admin
Choose *Review and Rank Employees*

Before you update the Employee Master table with actual pay changes, you can apply pay changes to a review group in either percentage or flat amounts. You can evaluate the effect of the pay change with Review and Rank Employees with different pay change as a "what if" analysis of a recommended pay change. The system will not log these changes into the employee master record until you run Update Actuals (Clear Work Table).

Before You Begin

- ❑ Check that business unit security is set up in the Business Unit Security table (F0001). If so, you can only work with employees with Security Business Units for which you are authorized.

On Review and Rank Employees



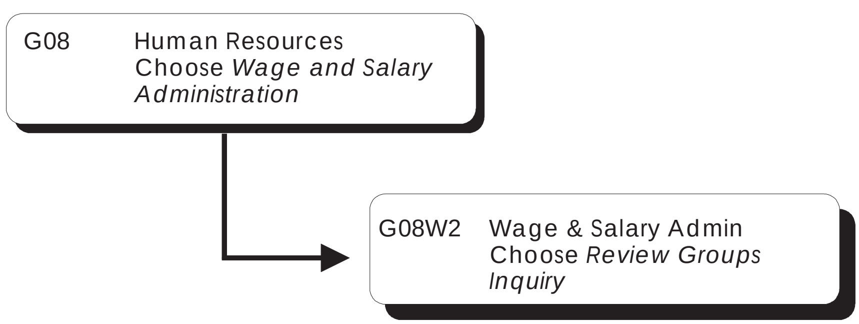
1. Complete the following field:
   - Review Group
2. Complete the following fields as required to limit the display to a specific group of employees:
   - From Approval Code
   - Home Business Unit
   - Job Type/Step
   - Supervisor
   - Employee Number
   - Union Code
   - Locality
3. Complete one of the following fields:
   - Percent
   - Amount
4. Choose Global Increase by Percent or Amount.

Field	Explanation
Review Group	The name assigned to a group of employees going through a similar salary/wage review process. For example, you might group all salaried employees together for annual review and call the review group SAR. Or you might group all hourly employees due a merit increase together and name the review group HMI. You can define this code using user defined codes table 08/RG.
From Approval 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 form 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.
Business Unit - Home	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.

Processing Options for Review and Rank Employees

```
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 table (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.
```

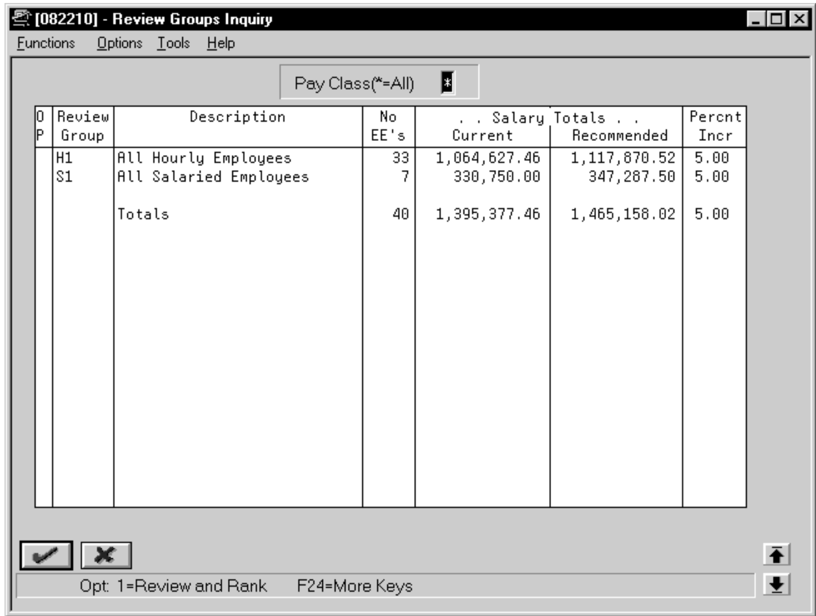
▶ To review recommended global pay changes



You might need to review all review groups to compare the recommended pay changes made to all of them. Review Groups Inquiry shows you:

- A summary of all the review groups in the worktable
- Totals of the current and recommended total pay for each group
- Percent change from the current total pay

On Review Groups Inquiry



Complete the following field:

- Pay Class

Field	Explanation
Pay Class (H/S/P)	The code that indicates the method by which an employee is paid. Valid codes are: * All pay methods H Hourly S Salaried P Piecework

Entering Pay Changes for One Group Member

In addition to making a global pay change to all the employees in a review group, you can choose to make a separate pay change to one of more individuals in the group. For example, you might award an additional flat amount of 1000, or an additional 10% to an employee's salary or hourly rate.

▶ To enter a pay change for one group member

On Review and Rank Employees

1. Complete the following field:
   - Review Group
2. Blank out the value in the following field:
   - Salary Recommended
3. Complete one of the following fields, depending on the type of pay change you want to make:
   - Percent
   - Amount

   Or, blank out the value in following field next to the employee:

   - Increase $/%
4. Complete the following field:
   - Amount

Entering Pay Changes by Component for One Employee

You can enter an additional pay change for an employee in a review group. This change replaces the global pay change, if any, you applied to the review group. To keep the global change amount, re–enter it in the fold area for employee.

▶ To enter a pay change by component for one employee

On Review and Rank Employees

1. Complete the following field:
   - Review Group
2. Depending on how you give pay changes, do one of the following:

   Blank out the following fields for the employee:

   - Recommended Salary
   - Percent Increase
   - Amount Increase
3. Choose More Detail.

4. Complete any of the following fields depending on the types of components you are using for the pay change:
    - Base Salary
    - Salary-Cost of Living
    - Merit Increase
    - Promotion
    - Year to Date Adjustment
5. To retain the global change amount, re-enter the dollar amount in one of these fields:
    - Base Salary
    - Salary COL (cost of living)
    - Merit Increase
    - Promotion

What You Should Know About

Components	These are user defined and can be changed to meet your needs

Entering a Bonus For an Employee In a Review Group

You can enter bonuses for an employee within the review group. If you enter a bonus amount, the system prompts you for a reason for the bonus. If you do not enter a date, the system date defaults. This entry is for memo purposes only. It does not generate a payment when updated to the profile data type for bonuses. This provides you with effective tracking of expenditures for bonuses.

▶ To enter a bonus for an employee in review group

On Review and Rank Employees

1. Complete the following field:
    - Review Group
2. Choose More Detail.

3. Complete the following fields:
   - Bonus
   - Date
   - Reason

Entering Appraisal Information

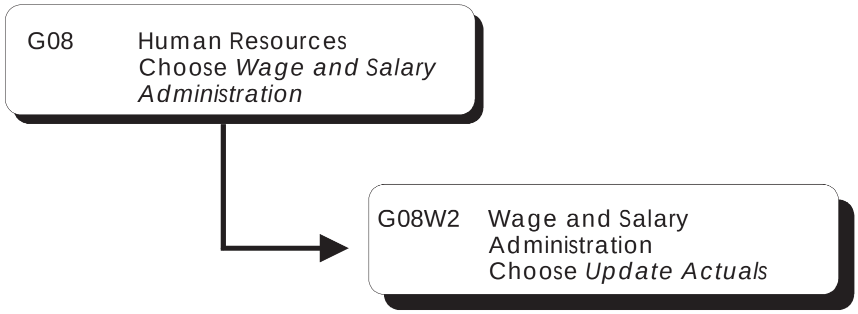
You can enter appraisal information for individual employees in the review group. This provides you with effective information tracking to justify pay changes. You can appraise contract or temporary employees as well as regular employees. Update Actuals moves this data to the Appraisal detail profile data type.

▶ To enter appraisal information

On Review and Rank Employees:

1. Complete the following field:
   - Review Group
2. Locate the employee
3. Choose More Detail.
4. Complete the following field:
   - Employee Appraisal Code
5. Complete the following fields to enter the appraisal information:
   - Appraisal Points
   - Appraisal Type
   - Appraisal Date
6. Complete the following optional field to enter textual information about the appraisal:
   - Appraisal Remark

Updating Salary Actuals



You use the Update Salary Actuals program to transfer the records from the temporary worktable to the records of the employees in the review group.

After you enter and review multiple employee pay changes, you can apply the change to the employee record. Run the Update Actuals program to update all employee master records associated with the employee as well as profile data.

When you run Update Actuals, the program:

- Removes the data in the work table.
- Creates two reports
- Updates the employee master record
- Updates the Employee Master History and Turnover table
- Updates the Employee Multiple Job table
- Updates the Employee Multiple Job History table
- Updates all profile data

What You Should Know About

Raise information	If an employee is being processed through a payroll cycle, the raise information won't be processed causing the employee to remain in the worktable.

```
082810                                       J.D. Edwards & Company                                       Page  -        2
                                        Update Salary Actuals from Work File                              Date  -  7/22/98
                                                 All Review Groups


                           The following employee data have been updated to the Employee Master file:

Review   . . . . Employee . .    Job  Job  E . . . . New Rates . . . .   Raise   Pay    Grad .Next Review.   . .Change Reason. .
Group   Number         Name     Type  Step S   Hourly       Salary      Effect. Grade  Step Ty    Date     CR     Description
------ -------- -------------- ------ ---- - -----------
                                             ----------- -------------
                                                          ------------- -------- ------ ---- -- ---------- --- ------------------
AAG        6010 Eason, Walter  67     1           15.240     31,700.00 07/17/96                 03/15/98  009 Annual Raise
AAG        7578 Griffin, Patri 5J-5               27.690     57,596.00 07/17/96                           009 Annual Raise
AAG        7508 Mai, Tien      7H-1                2.590      5,388.00 07/17/96                 06/03/98  009 Annual Raise
AAG        7570 Manderfield, J 64-1               26.240     54,580.00 07/17/96                 12/15/98  009 Annual Raise
AAG        7574 Mckenna, Marti 5J-9   A.2         24.990     51,980.00 07/17/96                 12/15/98  009 Annual Raise
AAG        7568 McGrew, Nancy  64     JR          22.540     46,884.00 07/17/96                 12/15/98  009 Annual Raise
AAG        7576 McMurray, Mich 5J-9   A.1         21.740     45,220.00 07/17/96                 12/15/98  009 Annual Raise
AAG        7572 Miller, Michae 65                 23.840     49,588.00 07/17/96                 12/15/98  009 Annual Raise

       Totals:      8 processed,
                    0 excluded.
```

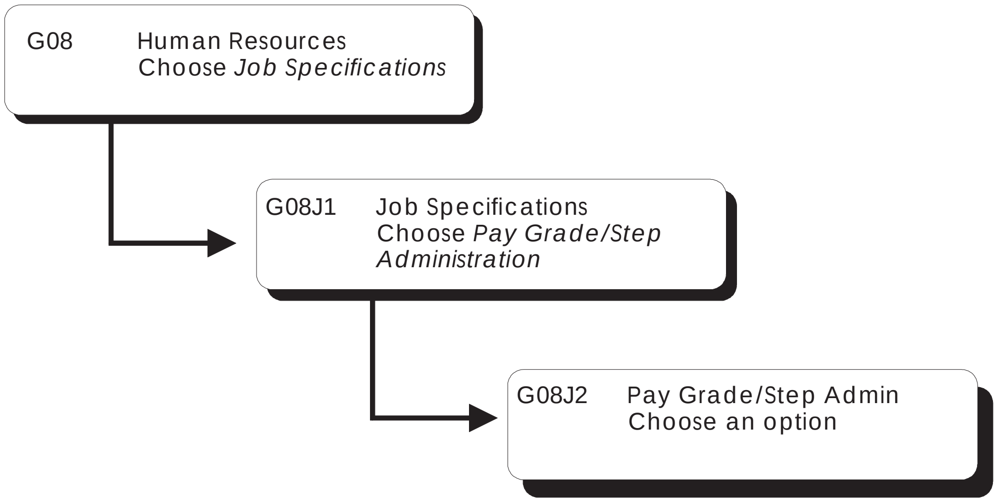
Processing Options for Update Salary Actuals

```
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.

3. Enter a '1' to update NEW salary and               ______________
   rate.  Default of blank updates
   CURRENT salary and rate(see help
   instructions).
```

Exercises

See the exercises for this chapter.

Defining Multiple Pay Changes for Pay Grade/Steps



If you have employees with pay grade/steps, you can use pay grade and step progression to apply pay changes. You can make pay changes, usually based on time of service, to each employee in the group for each job that they perform. The change will apply to both primary and secondary jobs.

Pay grade/step progression enables you to update pay rates for multiple employees based on a set rate of progression. The rates of progression are defined on the Pay Grade/Step table. You can determine an individual employee's rate according to the pay grade/step to which they are currently defined, or you can enter a new pay grade/step from the Pay Grade/Step table.

Pay grade/step progression is based on the rate of progression you must define multiple employee pay changes for multiple jobs, do the following tasks:

- ❑ Creating a work group
- ❑ Work with a work group
- ❑ Update employee records

Creating a Work Group

You can select a logical grouping of employees to which you want to apply pay changes. For example, you could group employees by a particular job title or status, such as elementary school teachers ending a year's service, who receive a flat pay change across the board. You could organize these employees into a work group and apply global pay changes This gives you an efficient method to apply pay changes to a large group of employees.

Run this DREAM Writer program to do the following:

- Assign employees to a work group
- Create a new rate for an employee
- Print an optional report

Below is an example of the report that you can print.

```
 0820051                                       J.D. Edwards & Company                                  Page Number        1
                                        Build Grade Progression Work Group.                            Date         6/13/98
                                                                                                       Exception Report
                                                        -----------  Current  ------------ ------------  New  ---------------
       Alpha            Address      Home          Job     P  Pay    Grad  Hourly      Annual        Pay  Grad  Hourly      Annual
        Name            Number   Business Uni  Type/Step   J Grade  Step   Rate       Salary       Grade  Step   Rate       Salary
---------------------- -------- ------------ ----------- - ------ ---- --------- ------------- ------ ---- -------- -------------
McLind, Rod                2049            9 0A–10 /     P               14,903     31.000,000

D’Angelo, Suzanne          2057            9 0A–2  /     P               15,385     32.000,000

Escalante, Jorge           2428            9 0A–3  /     P               15,865     33.000,000

Ellis, Jody                2479            9 0A–4  /     P               16,346     34.000,000

Connie Ato                 6832            9 0A–4  /     P               16,134     33.560,000

Moore, James H.            7011            9 0A–4  /     P               17,307     36.000,000

Marshall, Rodney O.        7020            9 0A–4  /     P               13,942     29.000,000

Green, Greg               55222            9 8M–1  /     P               24,471     50.900,000
```

Processing Options for Build Grade Progression Work Group

```
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'.

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.
```

Working with Work Groups

After you create a work group, you can review or delete employees in the review group. A work group is a grouping of employees that you want to include in the update of the pay grade/step progression. If an employee has more than one assignment, and those assignments meet your selection criteria, then the system will include multiple jobs and pay rates in the work group.

You can view pay changes created through the Create Work Group process and delete employees from the work group.

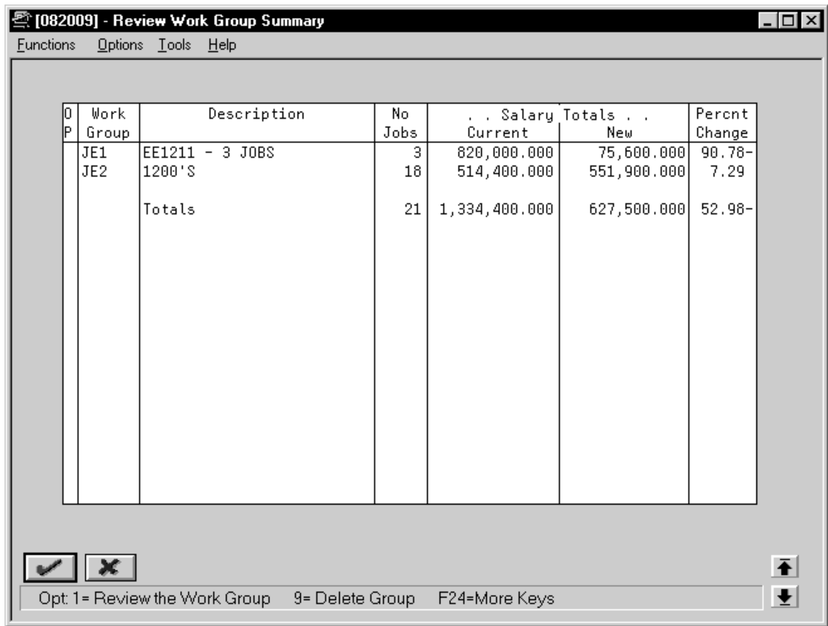
To work with work groups, do any of the following:

- Review a work group summary
- Review work group detail
- Delete an employee from a work group

▶ To review a work group summary

Use this task to view all review groups created through the Create Review Group program.

On Review Work Group Summary

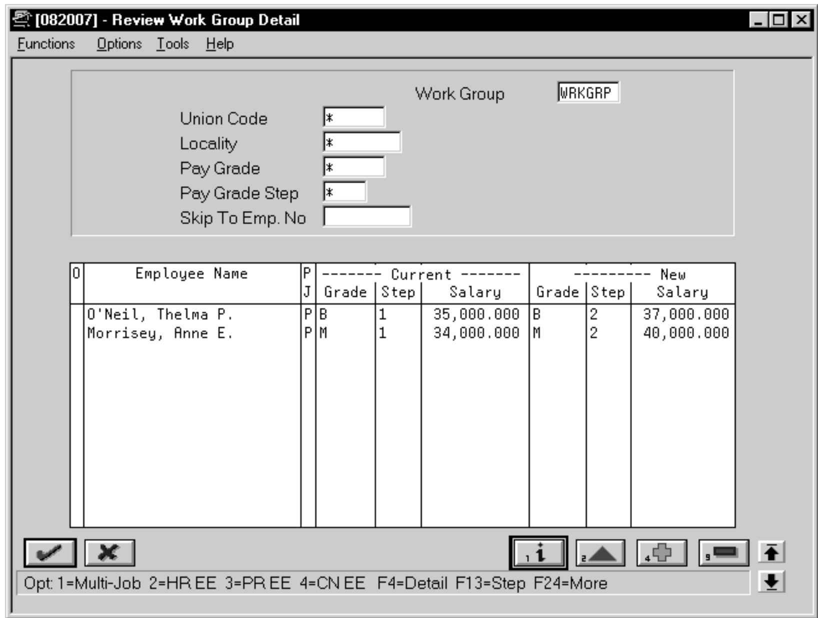


OP	Work Group	Description	No Jobs	. . Salary Totals . . Current	New	Percnt Change
	JE1	EE1211 - 3 JOBS	3	820,000.000	75,600.000	90.78-
	JE2	1200'S	18	514,400.000	551,900.000	7.29
		Totals	21	1,334,400.000	627,500.000	52.98-

Review the information

▶ To review work group detail

On Review Work Group Detail



1. Complete the following field:
   - Work Group
2. Complete any or all of the following optional fields to narrow your search:
   - Union Code
   - Locality
   - Pay Grade
   - Pay Grade Step
3. Delete those not included in the review group

▶ To delete an employee from a work group

On Review Work Group Detail

1. Complete the following field:
   - Work Group
2. Locate the employee.
3. Use the appropriate function key to delete the record.

Updating Employee Records

After you have built the work group, you can update the employee records with the changes by running the Grade Progression Work Group update program. This program updates:

- Pay grades
- Pay grade steps
- Salary
- Hourly rate
- Hours per day
- Hours per year

Processing Options for Grade Progression Work Group Update

```
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).
```

Exercises

See the exercises for this chapter.

Delete Obsolete Review Groups

Deleting Obsolete Review Groups

You might have review groups that are no longer valid. For example, you may have created separate review groups for salaried employees at a senior-level and other salaried employees and now want to consolidate all salaried employees under one review group. In preparing for next year's increases, you would need the most up-to-date information on review groups.

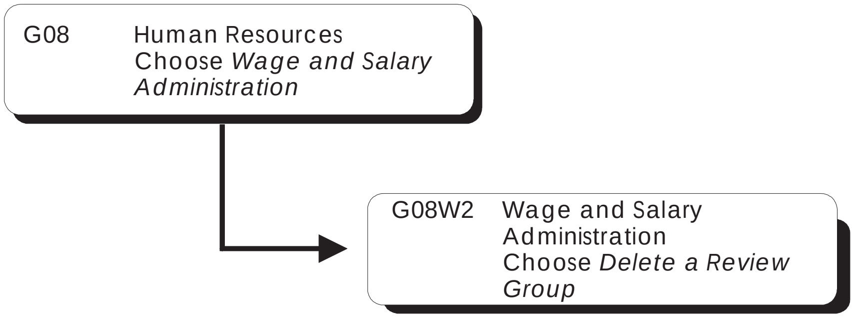
Complete the following tasks:

- ❑ Delete wage and salary review groups
- ❑ Delete pay grade/step progression review groups

Deleting Wage and Salary Review Groups

You can use this DREAM Writer program to delete a review group that you no longer use. You use a processing option to select the group that you want to delete.

▶ To delete wage and salary review groups



What You Should Know About

Deleting individual employees	If you delete a review group from the work file, you delete all the employees in that group.

Processing Options for Delete a Review Group

```
Enter the name of the Review Group to
 be deleted (six characters maximum).
 Default of blank or invalid name will
 not delete any records.
```
____

Deleting Pay Grade/Step Progression Review Groups

You can delete review groups th at you have changed in the pay grade/step table and need to recreate.

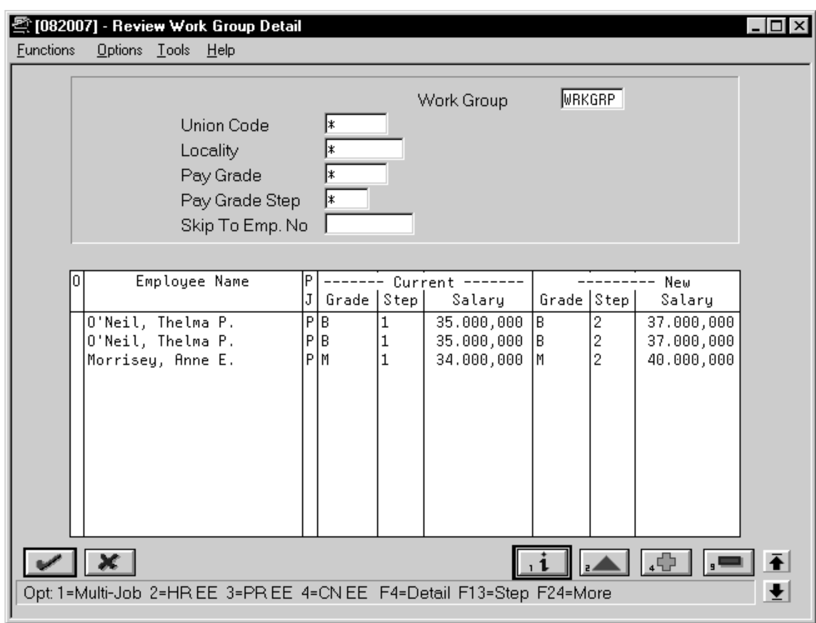
▶ To delete pay grade/step progression groups

G08 Human Resources
Choose *Job Specifications*

G08J1 Job Specifications
Choose *Pay Grade/Step Administration*

G08J2 Pay Grade/Step Admin
Choose *Review Work Group Detail*

On Review Work Group Summary



1. Locate the work group.
2. Use a function key to delete the work group.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Review Group ID</td><td>A group of employees selected in order to review whether they should be in the pay grade step/progression update. This update will do one of the following:
Change the existing pay rate based on the employee's pay grade step.
Move the employee to the next pay grade step as defined in the Pay Grade Step table (F082001) and change the pay rate, hours per day, days per year, and resultant hours per year in the employee's record.</td></tr>
<tr><td>Pay Grade</td><td>This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated.

Pay grades are set up using Pay Grades by Class (P082001).</td></tr>
<tr><td>Pay Grade Step</td><td>This field identifies the pay grade step associated with a specific pay grade.</td></tr>
</table>

Run Employee Salary Analysis

Running Employee Salary Analysis

G08 Human Resources
Choose *Wage and Salary Administration*

G08W2 Wage and Salary Administration
Choose an option

You may need to provide printed reports of all data associated with wages and salaries for supervisory review.You can run the Employee Salary Analysis program to print a report of employee salary history. Depending on the type of salary analysis that you want to use, you can set up World Writer to print reports by:

- Home business unit
- Job type
- Specific employee
- Supervisor

To illustrate the types of salary analysis reports, the Employee Salary Analysis by Business Unit appears as follows:

082400 J.D. Edwards & Company Page – 7

Employee Salary Analysis by Home BU Date – 7/02/98

Employee	Name	Bus. Unit	Description	Hire Date	Pay Grade	Grad Step	Compa– Ratio	User Code	Description	Annual Salary	Expcted Bn/Comm	Expected Income	Yr (Salary History)	Salary (Salary History)	Bonus/ Comm (Salary History)	Total (Salary History)	Remarks
7500	McDougle, Cathy	90	Administrative Depa	03/03/97	S6		0.90			50,000		50,000	95				
													94				
												93					
7503	Kraton, Ralph	90	Administrative Depa	07/27/97						56,000		56,000	95				
													94				
												93					
7504	Meade, Jane	90	Administrative Depa	08/03/86	S4		0.92			35,000		35,000	95				
													94				
												93					
7505	Mastro, Robert	90	Administrative Depa	01/03/96	S4		0.99			37,750		37,750	95				
													94				
												93					
7506	Mayeda, Donald	90	Administrative Depa	03/03/97						15,600		15,600	95				
													94				
												93					
7510	Moralez, Jesus	90	Administrative Depa	12/01/97						13,520		13,520	95				
													94				
												93					
	Home Business Unit .		90 Administrative Depar				0.47			207,870		207,870					

Processing Options for Employee Salary Analysis

```
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:

-----------------------------

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).                               ____________
```

Safety and Health Administration

Objectives

- To work with accident or illness data
- To run reports
- Generate OSHA 200 summary and logs

About Safety and Health Administration

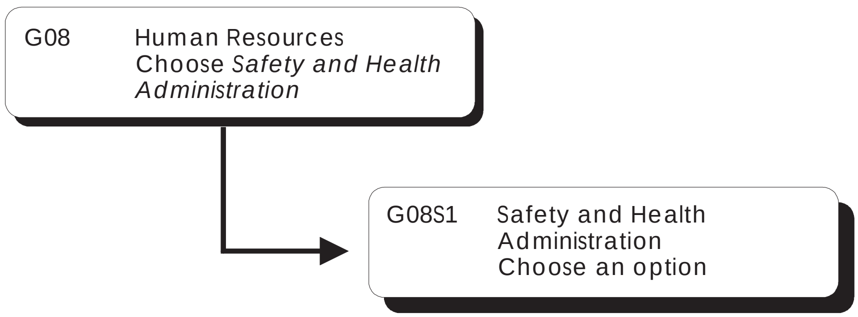
You use the Safety and Health Administration system to track all aspects of an illness or accident. Using this information, you can create accurate and complete reports for the Occupational Safety and Health Administration (OSHA), as well as perform internal review for your company-specific requirements. This system satisfies all OSHA 200 reporting requirements.

Complete the following tasks:

❑ Work with accident or illness data

❑ Run safety and health reports

Work with Accident or Illness Data



Working With Accident or Illness Data

Accident or illness data is information you use to track the elements of an incident. You use this information to create and run the OSHA 200 Log and the OSHA 200 Summary reports and profile reports.OSHA has approved J.D. Edward's OSHA 200 Log and OSHA 200 Summary reports for submission and posting in the United States. The information includes:

- Date and time
- Employee
- Part of body
- Action taken

OSHA has specific requirements for reporting accident or illness data, which includes such specific information as the part of body involved. In addition, you can enter and track any data you choose about a case. You enter the data by individual case, and you can use a variety of criteria, such as:

- Who was involved in the case?
- Where did the accident or illness take place?
- When did the accident or illness occur?
- If it was an accident what item, such as a tool or piece of equipment, was involved?
- At what location did the accident take place?

You can also enter case profile information to track company injury and illness statistics, regardless of whether the case is reportable to OSHA.

Complete the following tasks:

- ❑ Opening a case
- ❑ Closing a case
- ❑ Review a case

Opening a Case

When you open a case, you enter the occupational injury and illness information necessary to create and run the OSHA 200 Log and the OSHA 200 Summary reports.

You can also track all company injury and illness statistics regardless of whether they are reportable to OSHA. You enter which employee was involved or affected, a detailed description of the injury or illness, and the extent or outcome of the case. You can also enter any company-specific information.

Complete the following tasks:

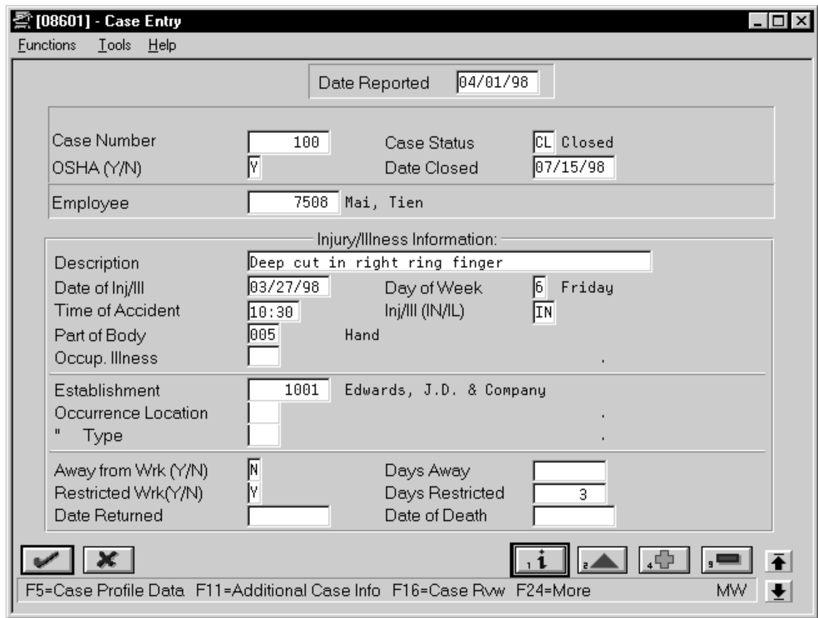
- Enter initial case information
- Enter OSHA information
- Enter case profile data

Before You Begin

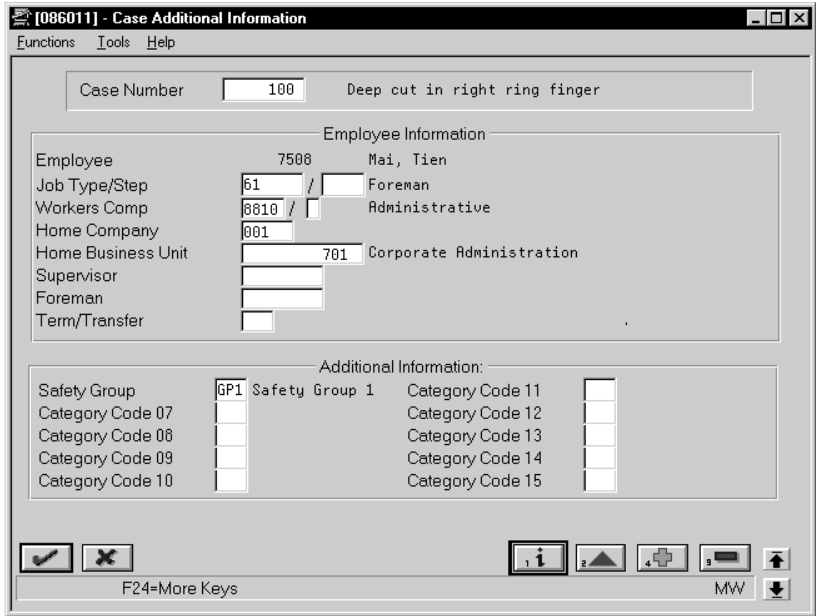
- ❑ You must set up establishments in Address Book

To enter initial case information

On Case Entry



1. Complete the following fields:
   - Date Reported
   - Case Number
   - Case Status
   - OSHA (Y/N)
   - Employee
   - Description
   - Date of Injury or Illness
   - Occupational Illness
   - Injury or Illness
   - Establishment
   - Away from Work
   - Restricted Work
2. Access Case Additional Information.



3. On Case Additional Information, complete the following fields:
    - Termination/Transfer

Field	Explanation
Description – Injury or Illness	A brief description of the injury or illness, including the part or parts of body 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.
Injury/Illness Related (IN/IL)	A code that indicates whether the case is an injury or an illness. Valid codes are: IN Injury: Injuries are caused by instantaneous 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.

Field	Explanation
Number – Establishment of Business Activity	The establishment where the occurrence took place. An Establishment is a single physical location where business is conducted or where services or industrial operations are performed. It is the place where the employees report for work, operate from, or from where they are paid.
Days Away from Work Y/N	A code defining whether the employee lost any days of work as a result of the injury or illness. This field is required when reporting OSHA 200 incidents. Valid codes are: Y Yes, the employee lost days of work N No, the employee did not lose days of work
Restricted Work Activity Y/N	A code indicating 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 full time • Working at a permanently assigned job but not being able to perform all the duties normally connected to it This field is required when reporting OSHA 200 incidents.
Termination/Transfer (Health & Safety Category Codes 06)	A code that defines whether the employee was terminated or permanently transferred as the result of an occupational illness. Do not change the codes J.D. Edwards provides. The OSHA 200 Log report is 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.

What You Should Know About

Employee Master Codes

When you open an occupational illness or injury case for an employee, the system retrieves the following codes from the Employee Master table (F060116):

- Job Type/Step
- Workers Comp Insurance
- Home Company
- Home Business Unit
- Supervisor

If any of these codes have been changed, you can enter a new code for any or all of them.

► To enter OSHA information

The system generates the OSHA 200 log in the approved format to post at the work site and to submit to OSHA. You can develop the log directly from the database.

What You Should Know About

OSHA 200 field codes

The system stores OSHA 200 codes in the Profile Data. They are formatted and prepared to satisfy OSHA requirements without need of modification. OSHA 200 field codes cannot be changed

► To enter case profile data

Profile data is any auxiliary information you record in the employee, applicant, job, dependent/beneficiary, requisition, and case databases. For example, in the case database you can record how the incident occurred, what the employee was doing when the incident occurred, or the medical expenses that result from the incident.

You can work with all types of case profile information that can be tracked for for a particular occupational injury or illness case. You can create this data in either code or narrative format.

On Case Profile Entry

Follow the steps for Entering Profile Data.

See Also

- *Entering Profile Data* in *Defining Employee Information*

Closing a Case

After you have resolved the case and fulfilled all reporting requirements, you must close the case to fulfill OSHA 200 requirements. You must enter a closed status as well as the date that you closed the case.

► **To close a case**

On Case Entry

1. Locate the case you want to close.
2. Complete the following fields:
   - Case Number
   - Case Status
   - Date Closed

What You Should Know About

Case status	When you set up user-defined codes for Case Status (08/CS) that indicate a closed status for a case, you must enter the letter 'X' in the Description-2 field in the User-Defined Code form. This will cause the system to prompt you for a specific date when you close the case.

Reviewing a Case

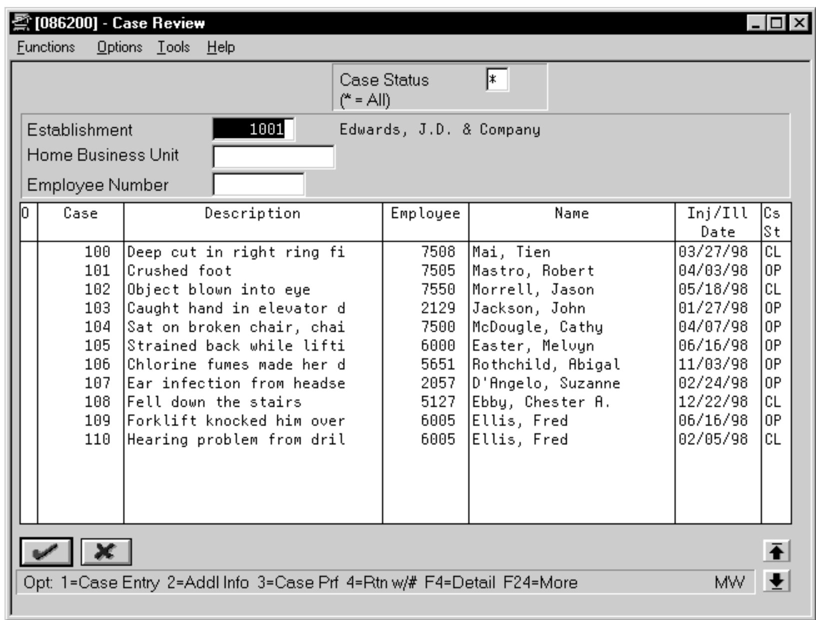
You can review open or closed cases according to a variety of data types to identify possible causes of accidents or illness. You review information using data not reportable to OSHA. There are three ways to review case information. These are:

- Review cases by establishment
- Review cases by profile
- Review cases by type of data

▶ To review case information by establishment

All cases are attached to an establishment, which is any single location where business is conducted or where services are rendered. You can identify the amounts and types of incidents that occur at one establishment, such as a branch office. You can also narrow the search to incidents that occur at a specific home business unit or to one employee. You can also review cases by a specific case status.

On Case Review



1. Complete one or all of the following fields to determine your search pattern, or leave them blank to show all cases:
   - Establishment
   - Home Business Unit
   - Employee Number
2. Complete the following optional field:
   - Case Status

To review case information by profile

You can review profile data about each injury or illness, including those not reportable to OSHA, to identify unsafe conditions and to develop solutions for them. Although the data types differ, the functionality of Cases by Profile is identical to Profile by Employee. You perform this task the same way you peform Profile by Employee.

On Cases by Profile

Complete the following field:

- Case Number

See Also

- *Reviewing Profile Data* in *Work with Profile Data*.

To review cases by type of data

You can review case information, including cases not reportable to OSHA, by any type of data you have defined in your system, such as medical expenses. This can give you more specific data from which to develop solutions. Although the data types differ, the functionality of Cases by Type of Data is identical to Profile by Employee. You perform this task the same way you peform Profile by Employee.

On Cases by Type of Data

Complete the following field:

- Type of Data

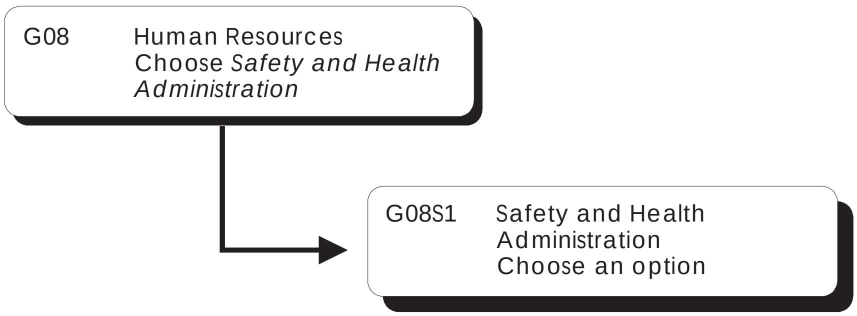
See Also

- *Running Profile by Employee*

Exercises

See the exercises for this chapter.

Run Safety and Health Reports



Running Safety and Health Reports

To meet OSHA reporting requirements, you must run reports containing all types of accident and illness data.

Complete the following tasks:

- ❑ Run the OSHA 200 Log
- ❑ Run the OSHA 200 Summary
- ❑ Run the Cases by Profile
- ❑ Run the Cases by Type of Data
- ❑ Run World Writer for Safety and Health Administration

Running the OSHA 200 Log

Use the OSHA 200 Log to produce the complete OSHA 200 Log report, including the case information and employee information. You can also use this report to track company injury and illness statistics.

OSHA accepts J.D. Edward’s OSHA 200 Log for submission. You can submit the report directly to the government. With this report, you view which employee was involved or affected, a short description of the injury or illness, and the extent or outcome of the incident.

086410

J.D. Edwards & Company
OSHA 200 Injury and Illness Report
Calendar Year – 1998

Page No. . 1 of __
Date – . . 5/17/98

Establishment. 00001001 Edwards, J.D. & Company
8055 E. Tufts Ave.
Suite 1300
Denver
CO 80237

					INJURIES						ILLNESSES												
					Fatalities	. . . Nonfatal Injuries . . .					. .Occupational Illness. .							Fatalities	. . . Nonfatal Illnesses . . .				
Case Number (A)	Date of Inj/Ill (B)	Employee Name (C)	Job ID (D)	Home Business Unit (E)	Date of Death (1)	Away or Restr (2)	Awy Frm Work (3)	Days Away (4)	Days Rstr (5)	W/out loss (6)	(7) (a)	(b)	(c)	(d)	(e)	(f)	(g)	Date of Death (8)	Away or Restr (9)	Awy Frm Work (10)	Days Away (11)	Days Rstr (12)	W/out loss (13)
100	03/27/98	Mai, Tien	Foreman	Corporate Admin		X			3														
Description of Inj/Ill (F). Deep cut in right ring finger																							
101	04/03/98	Mastro, Robert	Financial Analyst	Corporate Admin		X	X	1	5														
Description of Inj/Ill (F). Crushed foot																							
102	05/18/98	Morrell, Jason	Laborer Level I	Corporate Admin		X	X	1	5														
Description of Inj/Ill (F). Object blown into eye																							
103	01/27/98	Jackson, John	Financial Analyst	Corporate Admin						X													
Description of Inj/Ill (F). Caught hand in elevator door																							
104	04/07/98	McDougle, Cathy	Human Resource Manag	Administrative		X	X	14															
Description of Inj/Ill (F). Sat on broken chair, chair collapsed																							
105	06/16/98	Easter, Melvyn	Secretary	Administration		X	X	7															
Description of Inj/Ill (F). Strained back while lifting boxes																							
106	11/03/98	Rothchild, Abigal	Project Leader	Corporate Admin										X						X	1		
Description of Inj/Ill (F). Chlorine fumes made her dizzy																							
107	02/24/98	D'Angelo, Suzanne	Senior Accountant	Corporate Admin											X				X			5	
Description of Inj/Ill (F). Ear infection from headsets																							
108	12/22/98	Ebby, Chester A.	EEO Specialist	Administration		X	X	3	5														
Description of Inj/Ill (F). Fell down the stairs																							
109	06/16/98	Ellis, Fred	Operator	Corporate Admin						X													
Description of Inj/Ill (F). Forklift knocked him over, hurt head																							
110	02/05/98	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

Running the OSHA 200 Summary

Use the OSHA 200 Summary to produce the report that you are required to post no later than February 1 of each calendar year. This report contains a summary of the injury or illness and the extent or outcome of the incident. OSHA accepts J.D. Edward's OSHA 200 Summary for posting.

```
086400                                               J.D. Edwards & Company                                   Page - . .    1 of __
                                               OSHA 200 Injury and Illness Report                             Date - . .    5/26/98




                 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         |
```

Running the Cases by Profile

Use the Cases by Profile report to summarize information held in profile data files and in the Case Master table. The cases are listed numerically by case number.

Although the data types differ, the functionality of the Cases by Type of Data report is identical to the Employee Profile Information report. You run this report the same way you run the Employee Profile Information report.

You can set processing options to control the information that displays on the report.

```
080413                                            J.D. Edwards & Company                                 Page Number        2
                                                     Case Information                                    Date         5/17/98
Case Number. . . . .           100 Deep cut in right ring finger      OSHA Recordable . Y               Dates:
Employee Number. . .          7508 Mai, Tien                          Case Status . . . CL                Reported . . . . 04/01/98
Home Company. . . .          001                                      Establishment . .     1001          Injury/Illness . 03/27/98
Home Business Unit .           701 Corporate Administration           Occur Loc/Type. .     /             Returned . . . .
Job Type/Step . . .  61     /      Foreman                            Days Restr/Away .    3  /           Closed . . . . . 07/15/98
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      03/27/98          Static block
  ROPE       03/27/98          Handline
Medical Expenses
==============================
  Treatment    Date             Explanation of Treatment          Administered Where         Amt Due
  ---------- --------          ------------------------------ ------------------------------ -------------
  TREATMENT  03/27/98          Stopped bleeding and bandaged                                      225.00
  XRAYS      03/27/98                                                                             250.00
                                                                                    ------------- -------------
                                                                     Total              475.00
```

Running the Cases by Type of Data

The Cases by Type of Data report lists all cases with information in a particular data type category, such as how the incident occurred. The report prints the same information you see on the Cases by Type of Data form.

Although the data types differ, the features of the Cases by Type of Data report are identical to those of the Employees by Data Type report.

You can set processing options to control the information that displays on the report.

```
080403                                                J.D. Edwards & Company                                Page Number        2
                                                  Case Information by Data Type                             Date         5/17/98
How Incident Occurred
==============================
        100 Deep cut in right ring f
               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 that
               was being delivered, 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, cha
               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 injurying her lower back.
        105 Strained back while lift
               Moving paper from mail room to printer
```

See Also

- *Running Jobs by Data Type*

Running World Writer for Safety and Health Administration

World Writer, J.D. Edward’s proprietary query language, helps you query your AS/400 database. World Writer enables you to access any file, whether it is a J.D. Edwards file or not, to retrieve information for reports without having to know a programming language. Each time you run your query, you obtain up-to-the-minute results.

```
Group. . . Q086                                 Query Version Cover Page                                     Page              2
Version. . OSHA_001                                                                                         Date         05/17/98
User ID. . RS908297
                         Version Title.     OSHA 200 Injury and Illness Report
                                                OSHA 200 Injury and Illness Report                           Page       –        1
                                                    with Employee Information                               Date       – 05/17/96
  Case   Inj/Ill                             Job   Job                     Home                    In    Description of        Days Days  Date of
 Number    Date      Employee Name          Type  Step  Description   Business Unit   Cost Center  Il    Injury/Illness        Restr Away   Death
-------- -------- -------------------- ------ ---- -------------- ------------- --------------- -- ------------------------- ----- ----- --------
```

What You Should Know About

Profile data	If you run a profile data report, the data you want to view must already be in the supplemental data files. Otherwise, the information will not print on the report.

See Also

- The *World Writer Guide*

Exercises

See the exercises for this chapter.

Organizational Structure

Objectives

- To define an organizational structure
- To review and print organizational structures

About Organizational Structure

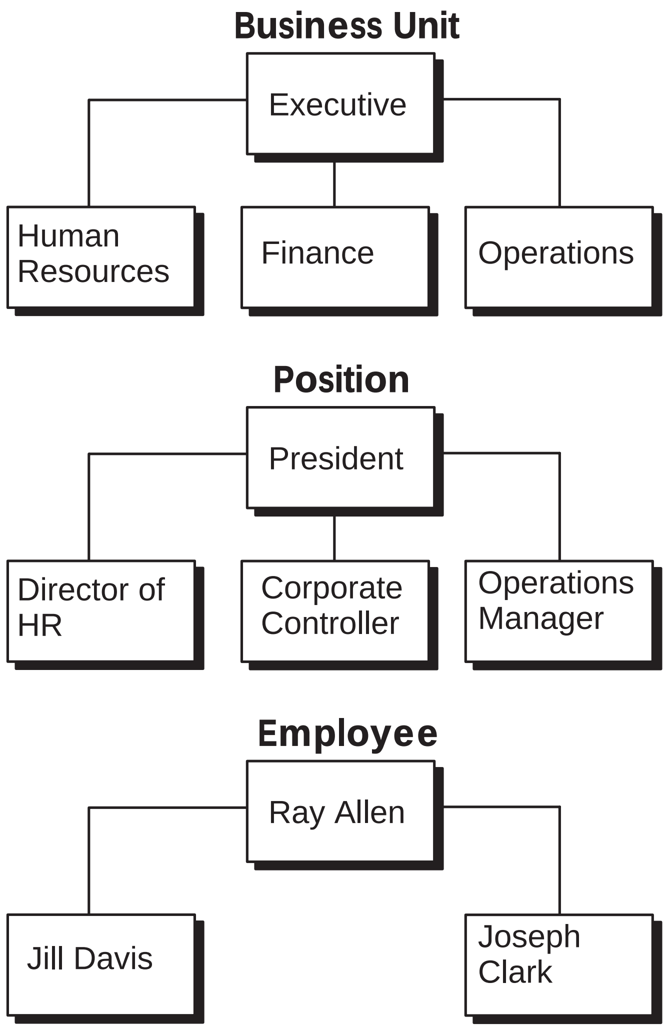
Depending on the size and nature of your business, your needs for an organizational structure will vary. Top management might require a broad organizational structure that shows a big picture of branch offices that report to the main headquarters. Individual departments might need an organizational structure that shows each employee that reports to a single manager.

You use the Organizational Structure software to define your organizational structure according to your own unique requirements. Depending upon whether you organize by business unit or position, you can create a reporting structure for it.

Organizational structure can vary from business to business, or even from department to department within a business. You can define your organizational structure at any level of complexity. Depending on the size and scope of your business, you can define your structure by:

- Business unit
- Positions in the company
- Individual employee

The following graphic illustrates types of organizational structures by business unit, employee, and position:

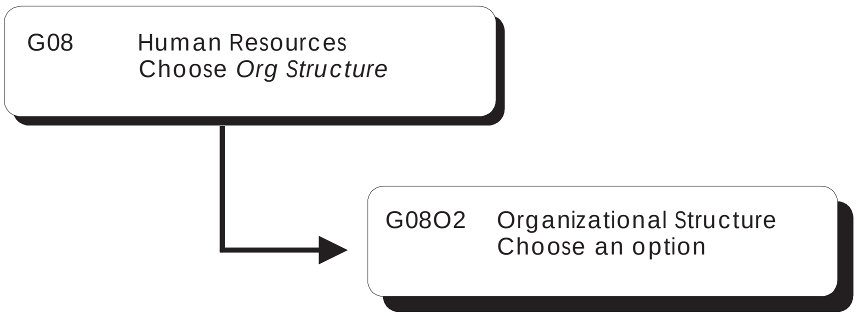


You can periodically review and adjust your structure to reflect staff additions or turnover. You can access your structure online and, if necessary, change it. You can also print your organizational structure.

Complete the following tasks:

- ❑ Work with organizational structure

Work with an Organizational Structure



Working with an Organizational Structure

You might organize a large enterprise with several regional offices, each of which are children, or subsidiary business units of the headquarters. The regional offices can in turn be parents, or higher-level business units, of local offices. And at each of the offices, you might organize by employee, with upper-level managers as parents of mid-level managers, and employees as grandchildren of the middle-level managers.

You can also organize by position. For example, you can organize a reporting structure, in which you define group leaders as parents to programmer/analysts. The group leaders are, in turn, child positions to a department manager.

After you have defined your organizational structure, management personnel can view it online and, if necessary, revise it. It is also possible to print reports for review by management or for internal posting.

Complete the following tasks:

- ❑ Define an organizational structure
- ❑ Revise an organizational structure
- ❑ Review an organizational structure
- ❑ Print an organizational structure

Defining an Organizational Structure

You can define your organizational structure at any time your management needs require it. For example, if you are creating a structure by position, you can distribute the number of positions reporting to the first-level managers equally among all the managers.

Complete the following tasks:

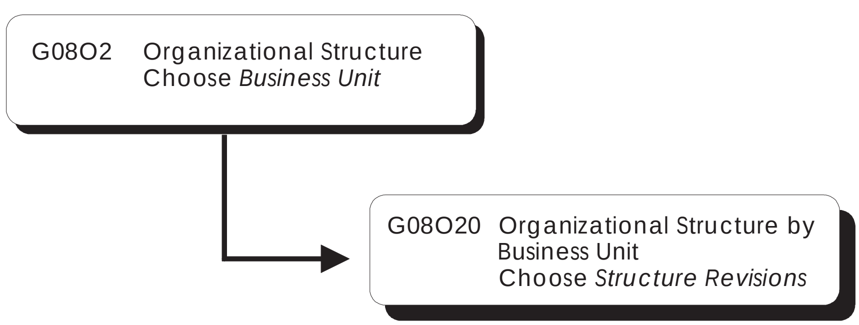
- Define a structure by business unit
- Define a structure by position position
- Define a structure by employee

You can create hierarchies of parents and children. For example, business unit B, which is a regional office, can be the parent of one or more local offices. At the same time, business unit B can also be the child of business unit A, which is the main headquarters. You can create a structure by business unit with up to nine levels of parent and child relationships below the top-level parent.

Before You Begin

❑ In some situations, the organizational structure might have been set up along with the Chart of Accounts. Verify that the organizational structure has not yet been set up in the General Accounting system.

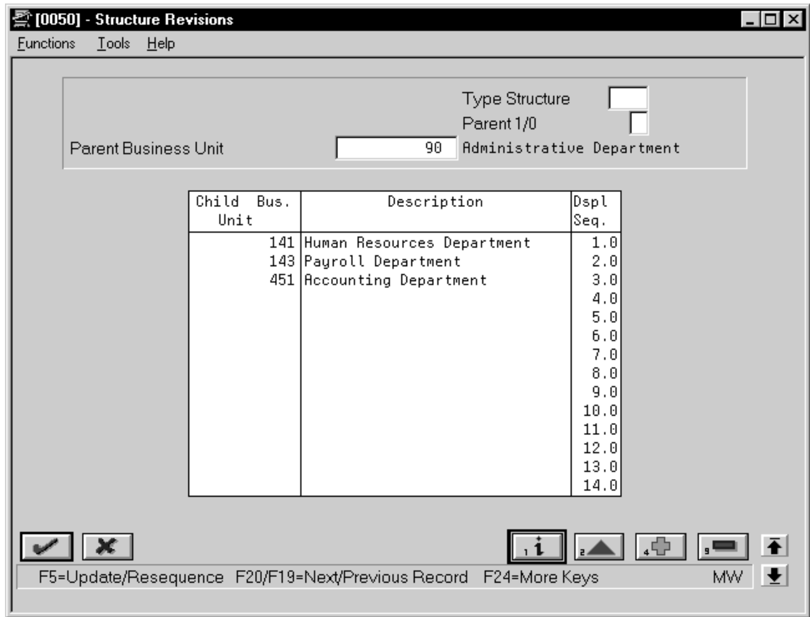
▶ To define a structure by business unit



You can create an organizational structure with a the administrative office at the top level, with major departments, such as the Manufacturing or Accounting department, as child business units of the top-level office. You can use one of the following modes to enter components of the structure, as follows:

- Enter the children business units for a higher-level parent business unit
- Enter the parent business units under which you define the children

On Structure Revisions



1. Complete one of the following required fields, depending on which mode of entry you use:
   - Parent Business Unit
   - Child Business Unit
   - Sequence Number
2. Complete the following optional fields:
   - Type Structure
   - Parent 1/O

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.

Field	Explanation
Parent/Child Business Unit	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. The Business Unit field is alphanumeric. 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 A/P and A/R by business units, to track equipment by responsible department. Business unit security can prevent you from locating business units for which you have no authority. NOTE: The system uses this value for Journal Entries if a value is not entered 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.
Organization Type Structure	A code that identifies the type of organization structure, such as financial or responsibility, each with a different hierarchy. This is a user defined code (system 00, type TS).
Display Parent or Child Business Units	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 The system will interpret a blank as 0.

The Organization Type Structure field lets you have an organizational structure with multiple hierarchies with both functional and financial reporting relationships. You can also use it in planning possible future reporting relationships.

To define a structure by position

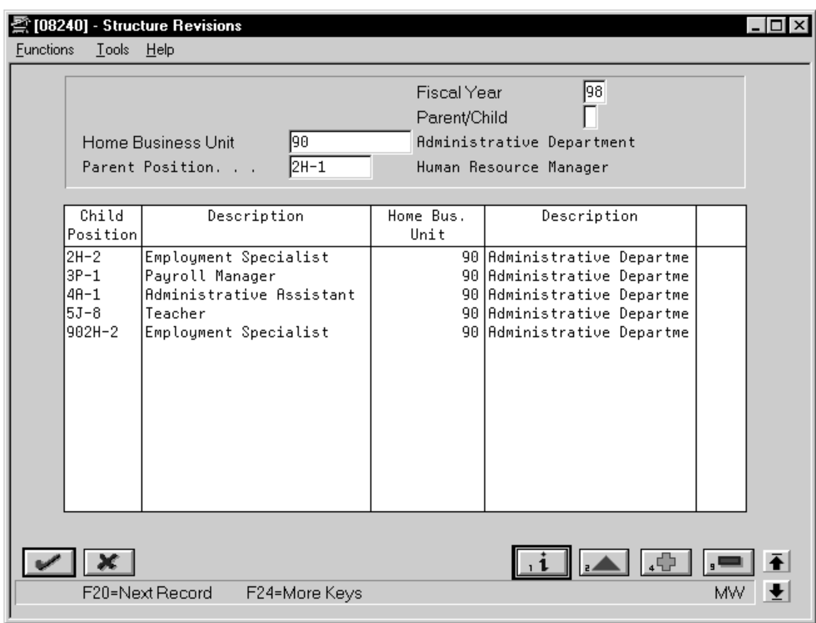
G08O2 Organizational Structure
Choose *Position*

G08O21 Organizational Structure by Position
Choose *Structure Revisions*

To eliminate the need to continually revise an organizational structure to reflect changes in personnel, you can define your organizational structure by position. This eliminates the need to revise the structure when an individual employee changes jobs. You can define an organizational structure by position in one of the following two modes:

- Enter child positions for a higher-level parent
- Enter a parent position for subordinate child positions

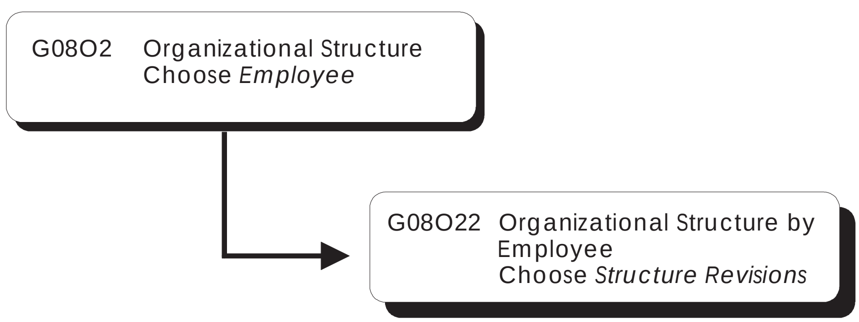
On Structure Revisions



1. Complete the following fields:
   - Fiscal Year
   - Home Business Unit (header)
   - Parent Position
   - Child Position
   - Home Business Unit (detail)
2. Complete the following optional field:
   - Parent/Child

Field	Explanation
Display Parent or Child Business Units	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 The system will interpret a blank as 0.

▶ To define a structure by employee



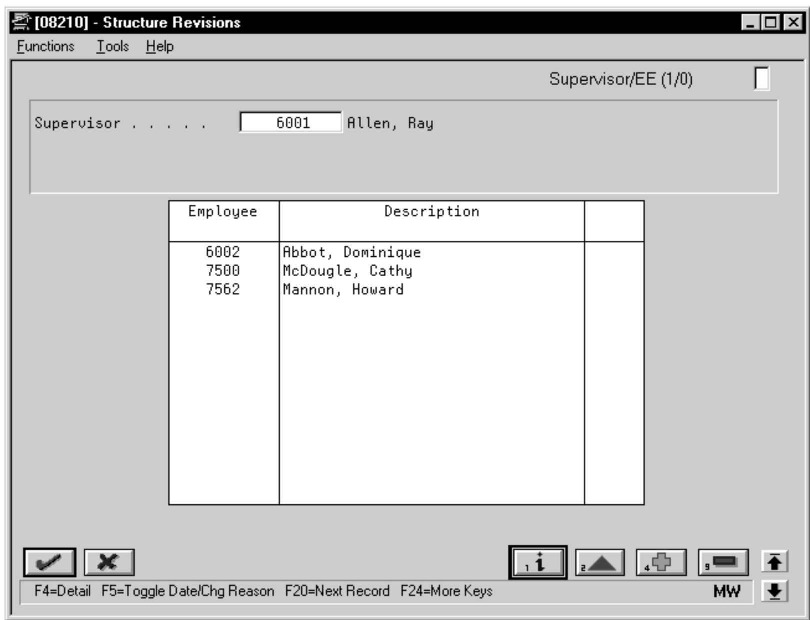
If your business requires a detailed breakdown of the organizational structure, you can create an organizational structure with multiple levels of supervisors and employees. Each employee can have only one immediate supervisor for a primary job. The system prevents you from entering a manager as a subordinate 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

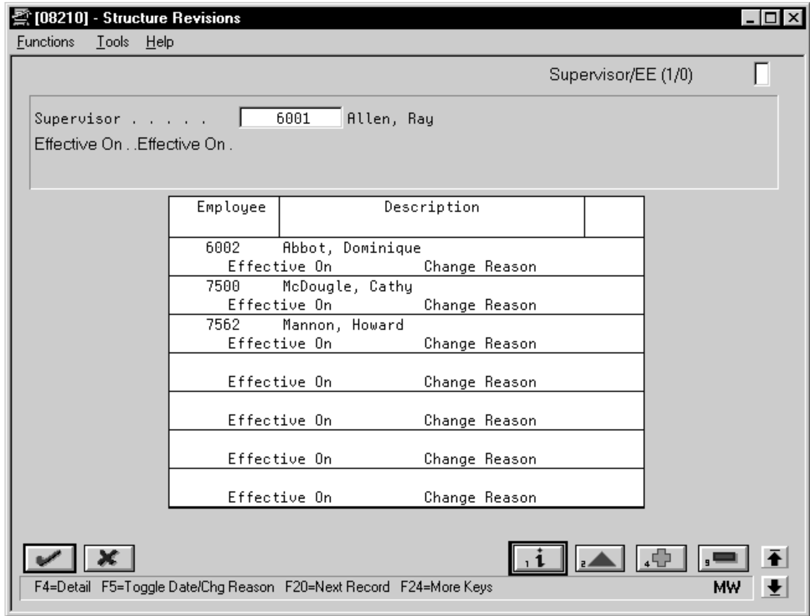
When you create an organizational structure by employee, the system updates the following tables with primary reporting relationships as defined in the employee master record:

- Employee Master (F060116)
- Employee History (F08042)
- Employee Multiple Job (F060118)
- Employee Multiple Job History (F060119)

On Structure Revisions



1. Complete the following required fields:
   - Supervisor
   - Employee
   - Supervisor/EE (1/0)
2. Choose More Detail.



3. Complete the following fields:
   - Effective On
   - Change Reason

Field	Explanation
Display Supervisor/Employees	The code 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.
Supervisor	The address book number of the supervisor. NOTE: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values at 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.
Date – Effective On	The date you want all the changes you make on this form to take effect, or the date the changes went into effect. If you are entering data and you do not put a date in this field, the current system uses the current date.

Field	Explanation
Change Reason – Turnover	Enter a value in this field to have the system write a record to the Turnover table (F08045). This also updates the employee's record with the new change reason. The change reason code indicates the following: 1. Why an active employee's record in the master table record was changed 2. The termination reason for an inactive employee. When the Human Resources Monitor reads the information on this form, it writes a turnover record only if a change reason was entered in this field. If you do not want turnover records written for a change of data, leave this field blank.

What You Should Know About

Employees with multiple jobs	An employee might have multiple jobs that have a different reporting structure. The Organizational Structure system shows only the relationships for an employee's primary job.
Maintaining history and turnover for changes to an organizational structure	You can enter an effective date in the Effective On and Change Reason fields if you are updating the supervisor to whom the employee reports.

See Also

- *Human Resources Subsystem and Monitor*

Processing Options for Organization Structure Revisions

```
INITIAL SELECTION VALUES:
  (Any value(s) entered below will be
  preloaded into their corresponding
  fields on the screen.)

  Organization Structure Type:                ____________
```

Organizational Structure

Revising an Organizational Structure

Changing circumstances might require you to revise your organizational structure. For example, a reorganization might change the supervisor to whom some positions report.

Complete the following tasks:

- Revise an organizational structure by business unit
- Revise an organizational structure by position
- Revise an organizational structure by employee

▶ To revise an organizational structure by business unit

On Structure Revisions

Replace any or all of the following fields to change the organizational structure:

- Child Business Unit
- Display Sequence (Dspl Seq)

▶ To revise an organizational structure by position

On Structure Revisions

Replace any or all of the following fields to change the organizational structure:

- Child Business Unit
- Display Sequence (Dspl Seq)

▶ To revise an organizational structure by employee

On Structure Revisions

Replace the following field to change the organizational structure:

- Employee

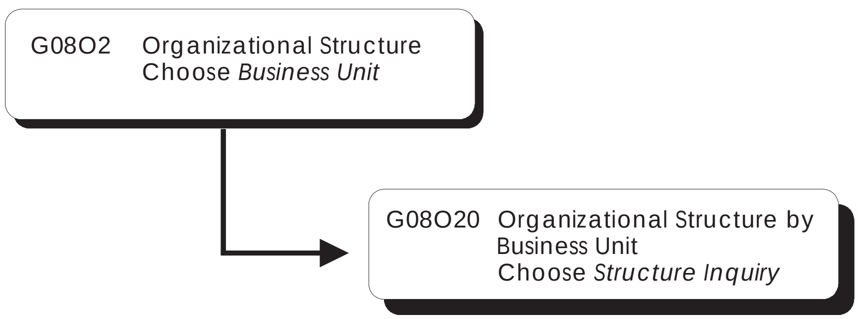
Reviewing an Organizational Structure

You might need to review your structure to evaluate the need for possible changes or adjustments to your structure.

Complete the following tasks:

- Review a structure by business unit
- Review a structure by position
- Review a structure by employee

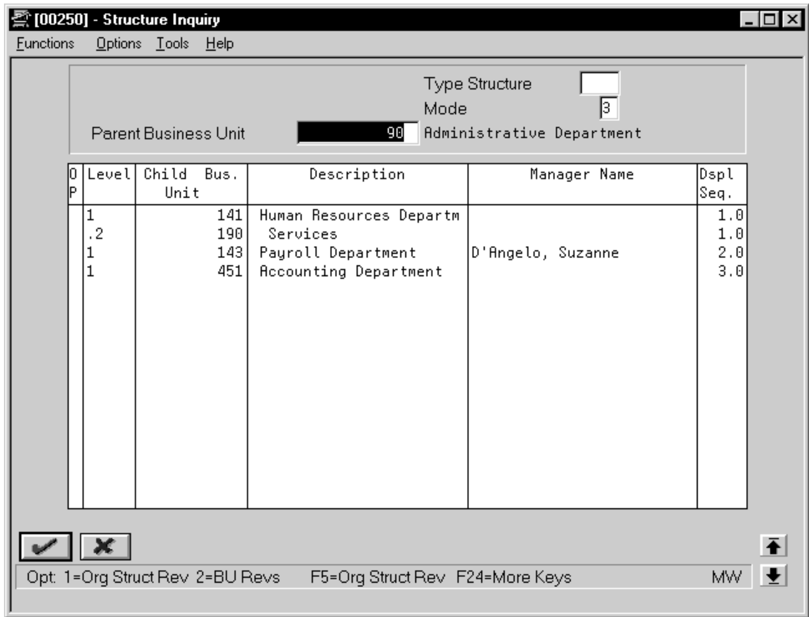
▶ To review a structure by business unit



You can review your organizational structure by business unit in three different modes:

- Single-level structure that shows only the immediate children for a parent business unit
- Multiple-level structure that shows all of the children for a parent business unit and their level in the hierarchy
- Multiple-level structure that shows all of the children for a parent business in an indented format

On Structure Inquiry



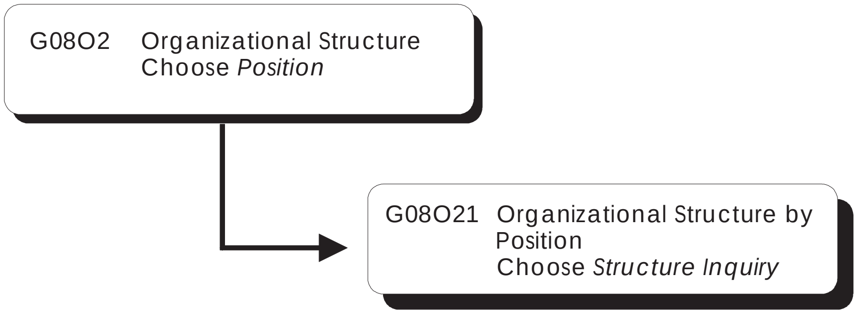
1. Complete the following fields:
   - Mode
   - Parent Business Unit
   - Type Structure

Field	Explanation
Mode – Structure Display	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. 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 with a maximum of 25 levels). 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. The relationships and rollups are readily apparent. For 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 for Organization Structure Inquiry

```
INITIAL SELECTION VALUES:
  (Any value(s) entered below will be
  preloaded into their corresponding
  fields on the screen.)

  Organization Structure Type:                      ____________
```

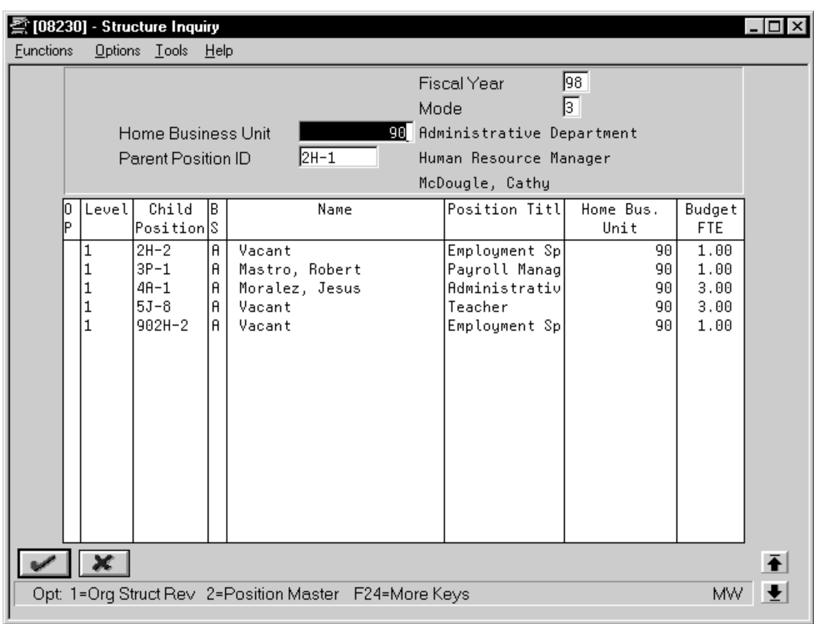
To review a structure by position



You can view your organizational structure by position in the following modes:

- Review a single-level hierarchy that shows only the subordinate positions directly under a parent position
- Review 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
- Review an indented multiple level hierarchy. You can view a maximum of five levels

On Structure Inquiry



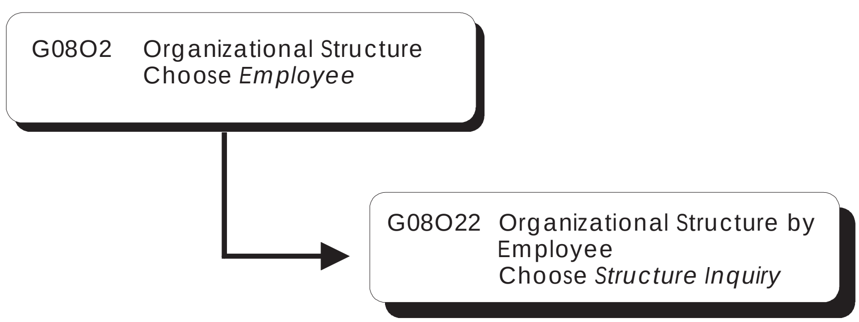
Complete the following fields:

- Fiscal Year
- Mode
- Home Business Unit
- Parent Position ID

Processing Options for Organization Structure Inquiry – Positions

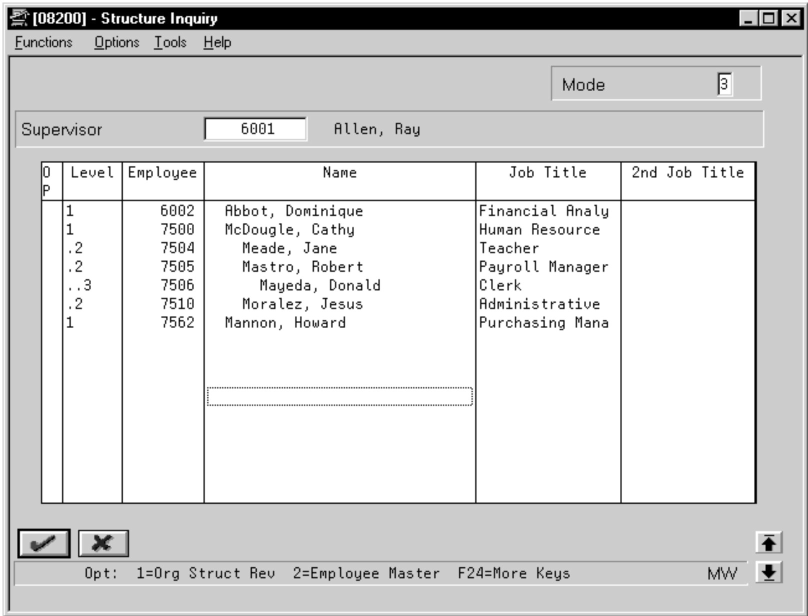
```
1. Enter a '1' to display the Job Title
   of the job associated with the
   position.  Default of blank will
   display the Position Title. . . . . .        ____________

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. . . .        ____________
```

▶ To review a structure by employee



You can view your organizational structure by employee in multiple hierarchies that can be independent of each other.

On Structure Inquiry



Complete the following fields:

- Supervisor
- Mode

Processing Options for Organization Structure Inquiry – Employee/Supervisor

```
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. . . .          ____________
```

Printing an Organizational Structure

You can print an organizational structure either for management review or internal posting.

You can print the following:

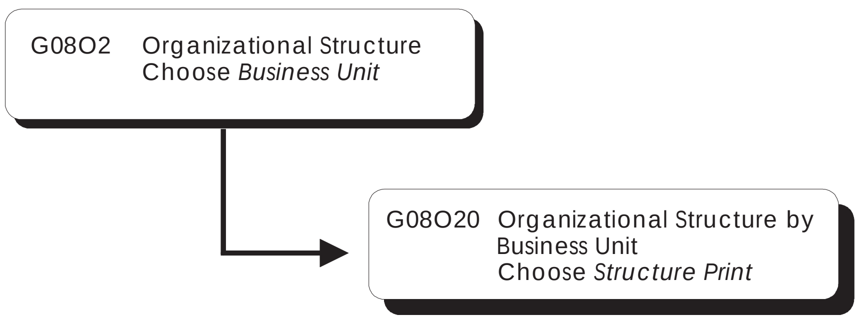
- Structure by business unit
- Structure by position
- Structure by employee

You can use processing options to print the organizational structure showing as many levels your organizational structure as you need. The structure formats are as follows:

- Single level
- Multi-level
- Multi-level indented
- Indented up to level 2
- Indented up to level 3

For example, you can print the report only at 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.

Example: Structure by Business Unit



You can show the entire hierarchy or just the top-level parents. The printed structure is similar to the display you see on Structure Inquiry. You can include as many as nine levels in your structure.

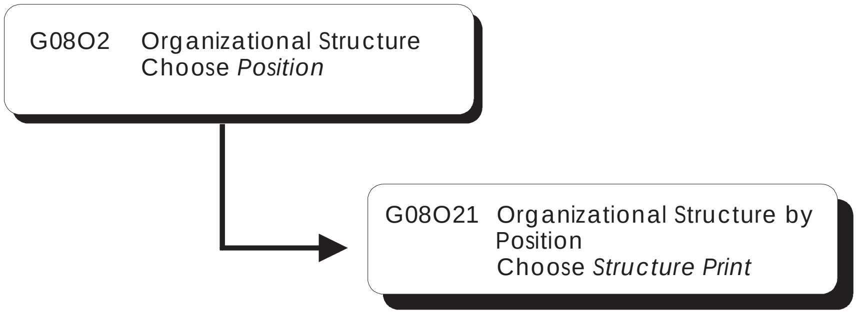
```
00425                                  J.D. Edwards & Company                                  Page. . . .        2
                                     Organization Structure Report                             Date. . . .  6/17/98
                                               3035 Only


 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.

Example: Structure by Position



You can print your organizational structure by position in the following modes:

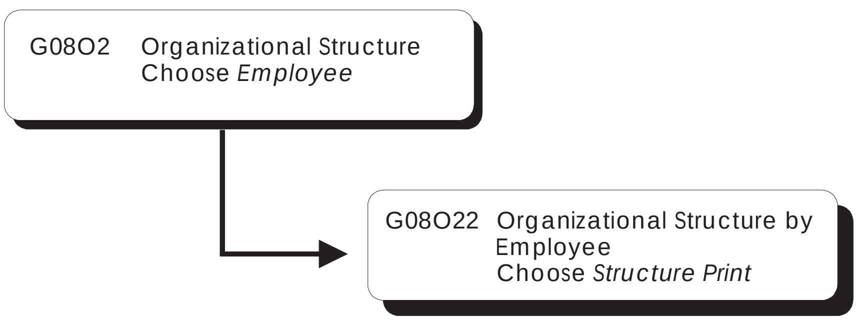
- Print the subordinate positions directly under a parent position.
- Print all of the subordinate positions directly under a parent position, but also all of the positions that report to each subordinate.
- Print an indented multiple level hierarchy that shows the same information as mode two, but also indents each level below the parent position. You can print a maximum of five levels.

```
 08425                                              J.D. Edwards & Company                                     Page. . . .        2
                                                    Organization Structure                                      Date. . . .  6/22/98
                                                   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
```

What You Should Know About

Printing the entire structure	If you the entire organizational structure, rather than selecting only certain supervisors, the whole structure will be printed 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	If you will be printing the structure descending from a certain supervisor or range of supervisors that are not at the very top of the organizational stucture, enter the Address Book number of the supervisor, or a range of supervisors.

Example: Structure by Employee



To circulate copies among your employees, you can print your organizational structure by employee, you can print multiple hierarchies. You can format the report to print in five different modes:

- Print only the employees directly under a supervisor.
- Print a multiple level structure, with all employees under the supervisor.
- Print 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.
- Print an indented structure with a maximum of two levels.
- Print an indented structure with a maximum of three levels.

```
08425                                                J.D. Edwards & Company                                   Page. . . .        7
                                                     Organization Structure                                   Date. . . . 12/13/98
                                                      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
```

Printing the entire structure

If you print a report that shows all the employees in your organizational structure, some of them might appear more than once, depending upon how you have structured the hierarchy.

Selecting parent positions to print

If you print a report with a structure that descends from a certain supervisor or group of supervisors that are not at the top of the hierarchy, you must enter the supervisor or range of supervisors on the DREAM Writer data selection form.

Exercises

See the exercises for this chapter.

Setup

System Setup

Objectives

- To understand how to set up basic data in the Human Resources system so you can process and track Human Resources information
- To understand how the system uses the data

About System Setup

System setup determines the types of data you will use throughout the Human Resources system as well how the system processes, stores, and tracks the data. Some types of data, such as health and safety information, is required for regulatory reporting. You can define other types of data to accommodate your company's own unique requirements.

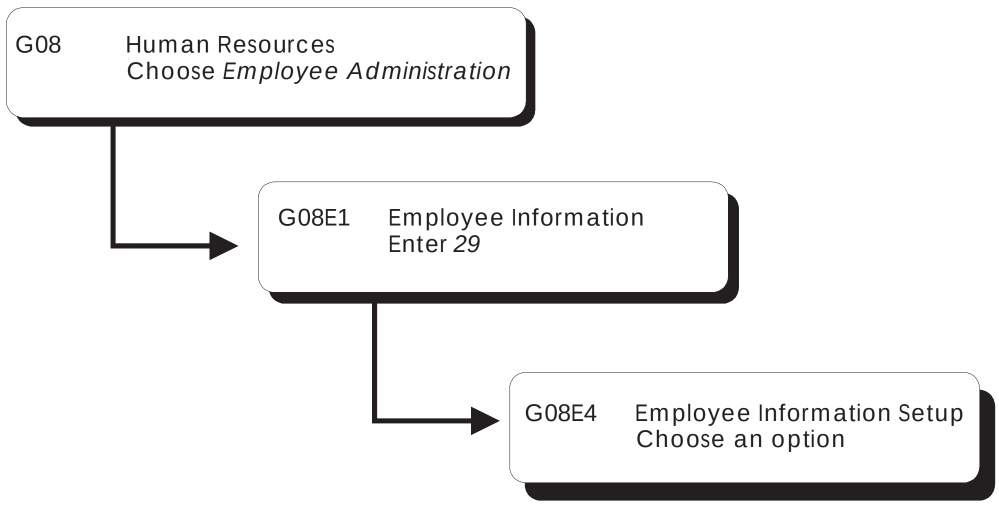
Complete the following tasks:

- ❑ Set up profile data
- ❑ Set up constants and history/turnover
- ❑ Set up jobs
- ❑ Set up employee information
- ❑ Set up safety and health administration
- ❑ Set up requisitions
- ❑ Set up applicant information
- ❑ Set up wage and salary administration

See Also

- *Technical Foundation Guide* for information on defining user defined codes

Set Up Profile Data



Setting Up Profile Data

Profile data provides broad categories of information that you can define to accommodate your own unique business requirements. It can include basic information about employees, such as their education or experience, or data unique to your 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

You might need to make the types of information consistent across specific databases. For example, you can conduct a multiskill search in the applicants database using the same data types as are in the employee database.

Complete the following tasks:

- ❑ Define types of profile data
- ❑ Define user defined codes
- ❑ Add user defined values
- ❑ Link user defined codes to profile data
- ❑ Define security for profile data
- ❑ Set up cross reference table for employee and applicant profile databases
- ❑ Generate the title search table
- ❑ Transfer profile data

Defining Types of Profile Data for Human Resources

Each of the type of data exists in a separate database. You can use each of the databases to track data, such as:

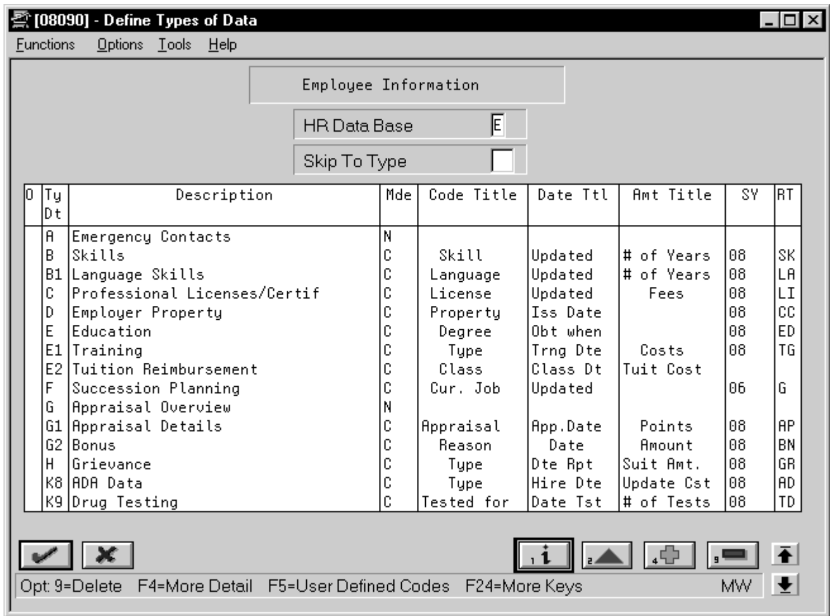
- Employee skills and education levels
- Job responsibilities
- Applicant qualifications
- Health and safety case histories
- Requisition requirements
- Dependent/beneficiary contacts

Depending on your specific requirements, you can choose to enter information in either of two formats, or modes:

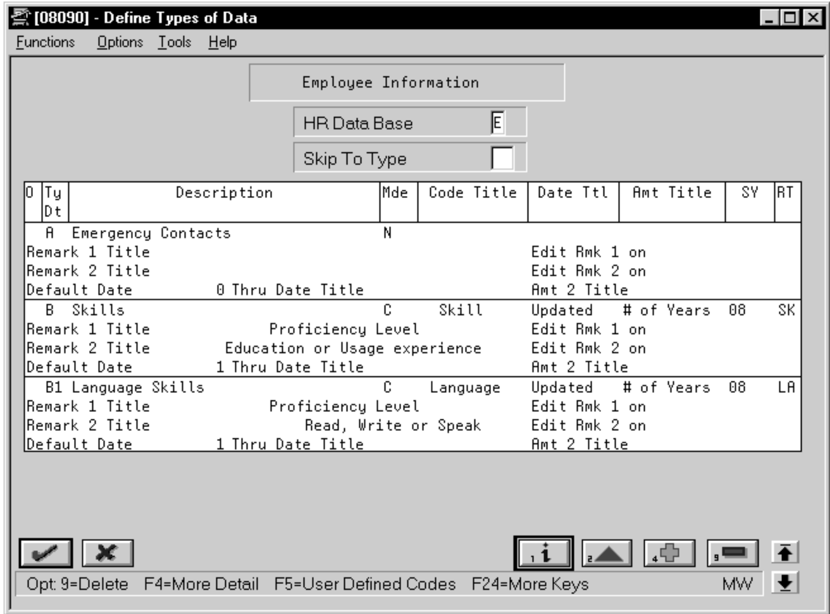
- Narrative, which lets you enter information in your own words, such as the results of an performance appraisal
- Code, which lets you enter data in specific fields

▶ To define types of profile data for Human Resources

On Define Types of Data



1. Complete the following fields:
   - HR Data Base
   - Type Data
   - Description
   - Mode
2. Complete the following optional fields if you are defining types of data in code format:
   - Code Title
   - Date Title
   - Amount Title
   - System Code
   - Record Type
3. Choose More Detail.



4. Complete the following fields as appropriate:
   - Remark 1 Title
   - Edit Remark 1 on
   - Edit Remark 2 on
   - Remark 2 Title
   - Default Date
   - Through Date Title
   - Amount 2 Title
   - Program ID/Version

Field	**Explanation**
HR Data Base	A code used to specify a particular database within the HR system. The letter in this field indicates the database the program is drawing information from. The possible choices are A Applicant Resume E Employee Resume J Job Description H Injury/Illness Case Number P Dependent/Beneficiary Information R Requisition Information You can define this code using user defined code system 08, type RC.
Description	A user defined name or remark that describes a field.

Field	Explanation
Display Mode – Code or Narrative	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. The system edits these codes against the User Defined Codes table (F0005). N Narrative format, which displays the form for entering narrative text. P Program exit, which instructs the system 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 System.
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.
Date #1 Column Title	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.
Amount 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.
System Code	A user defined code (98,/SY) that identifies a J.D. Edwards system.
User Defined Codes	Identifies the table which 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 the first Remark field on a data entry form. It contains additional information and remarks.
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.

Field	Explanation
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 even display the Date field.
Date #2 Column 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. The title of the field that indicates when the COBRA coverage expires.
Amount 2 Title	The title of a row heading which appears next to the Amount No. 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.
Program ID	The identification (such as program number, table number, and report number) that is assigned to an element of software. . . . . *Form-specific information* . . . . The program number assigned to the COBRA program.

Defining User Defined Codes

To tailor a software system to your business needs, you need the capability of assigning your own set of unique codes to a data field.

User Defined Codes are a method of using table values to define the allowed values for an input-capable field without having to recompile a program.

J.D. Edwards uses User Defined Codes to provide:

- A table of values used to validate entered data
- A uniform description for each valid value
- A method used in conversion programs

We provide a number of codes with each system, you might need to modify some of these and set up additional ones.

Many fields only accept User Defined Codes. For example, if you enter a code in the Employment Status field on the Employee Setup form, you can enter only a code that exists in the User Defined Codes list for employment status. When a J.D. Edwards program encounters a User Defined Code field, it checks the data the user enters against the field's table of values. If no match is found, the program issues an error message.

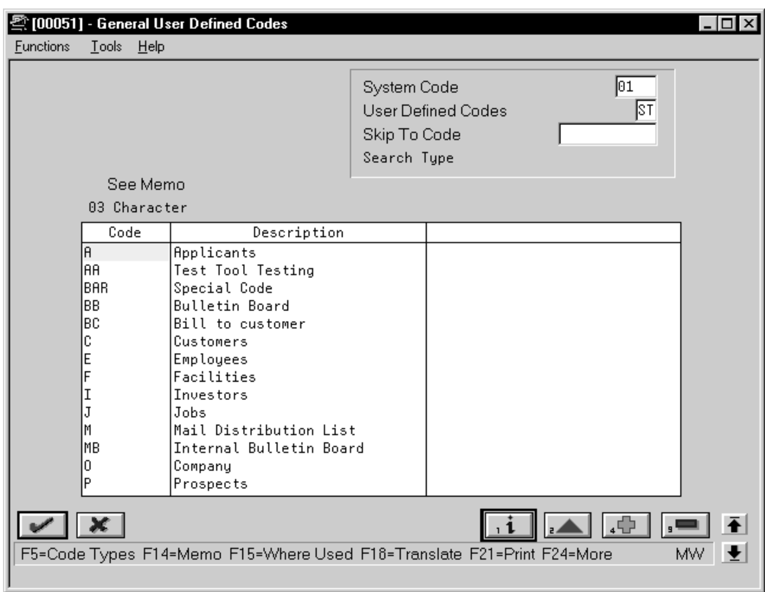
Adding User Defined Code Values

This task explains how to add a User Defined Code value for a field.

▶ To add User Defined Code values

From General Systems (G00), choose General User Defined Codes.

1. Inquire on the table that you want.



2. Do one of the following:
   - Type the new value and description over the top of one of the existing values—the existing value is still there and will re-display the next time you perform an inquiry
   - Type the new value and description on a blank line
3. Perform an add or a change—either action works the same in this case.

What You Should Know About

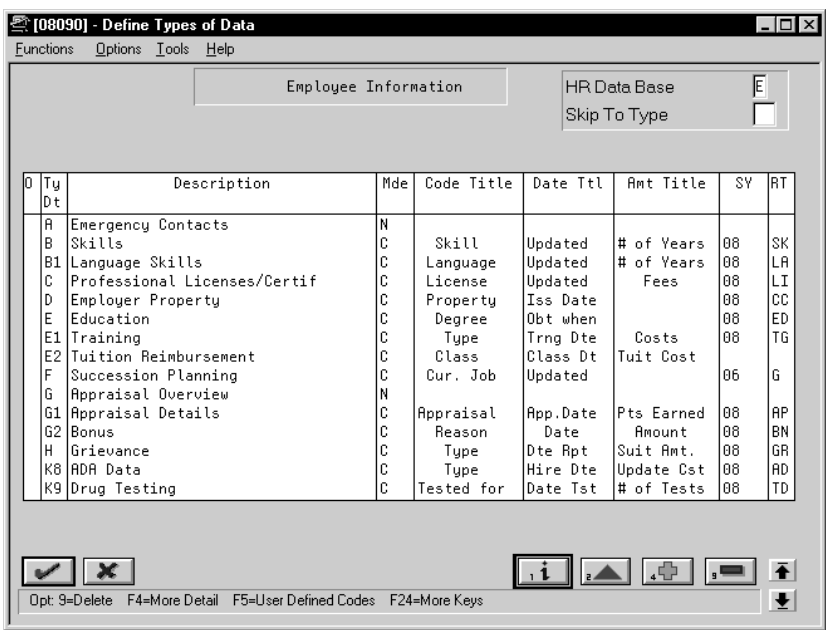
Locating UDC tables You can locate a general UDC selection to define UDCs on many setup menus. For example, General User Defined Codes is a selection on both the Employee Information Setup and Job Specification menus.

Linking User Defined Codes to Profile Data

To begin using your user defined codes to create profiles for applicants, employees, injury and illness cases, jobs, dependent/beneficiary, and requisition information, you must link them with the profile data. The System Code and Record Type entries edit the value entered in the Code Title field. Use the fields located in the detail area of the form to edit the values entered in the remark and title fields.

▶ To link user defined codes to profile data

On Define Types of Data



O	Ty Dt	Description	Mde	Code Title	Date Ttl	Amt Title	SY	RT
	A	Emergency Contacts	N					
	B	Skills	C	Skill	Updated	# of Years	08	SK
	B1	Language Skills	C	Language	Updated	# of Years	08	LA
	C	Professional Licenses/Certif	C	License	Updated	Fees	08	LI
	D	Employer Property	C	Property	Iss Date		08	CC
	E	Education	C	Degree	Obt when		08	ED
	E1	Training	C	Type	Trng Dte	Costs	08	TG
	E2	Tuition Reimbursement	C	Class	Class Dt	Tuit Cost		
	F	Succession Planning	C	Cur. Job	Updated		06	G
	G	Appraisal Overview	N					
	G1	Appraisal Details	C	Appraisal	App.Date	Pts Earned	08	AP
	G2	Bonus	C	Reason	Date	Amount	08	BN
	H	Grievance	C	Type	Dte Rpt	Suit Amt.	08	GR
	K8	ADA Data	C	Type	Hire Dte	Update Cst	08	AD
	K9	Drug Testing	C	Tested for	Date Tst	# of Tests	08	TD

1. Locate the database to which you want to link user defined codes

2. Complete the following fields:
   - Type Data
   - Description
   - Mode
   - Code Title
   - Date Title
   - Amount Title
   - System Code
   - Code Type

Exercises

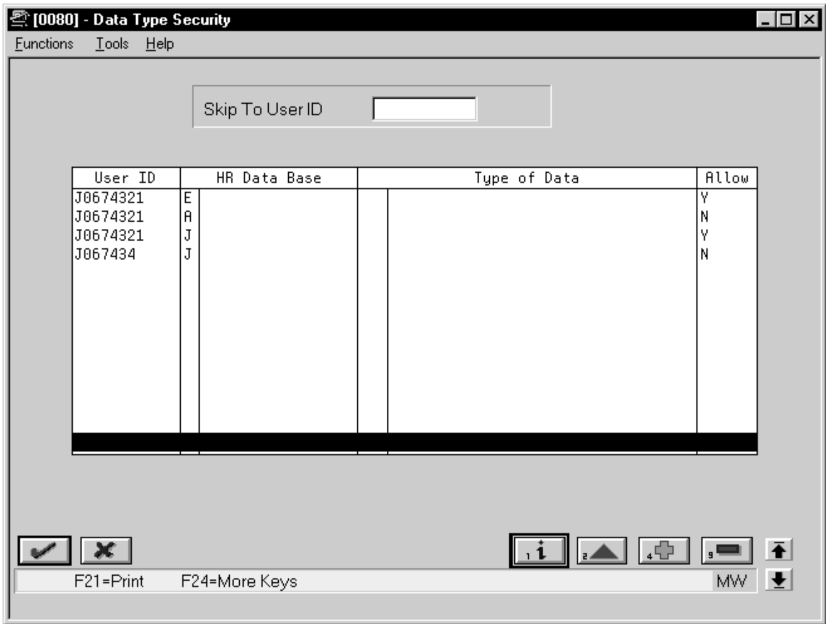
See the exercises for this chapter.

Defining Security for Profile Data

You might need to restrict access to certain types of data to specific personnel. For example, you can allow Human Resources personnel exclusive access to drug testing information.

▶ To define security for profile data

On Data Type Security



For each user that you want to restrict access to profile data, complete the following fields:

- User ID
- HR Data Base
- Type of Data
- Allow

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
Type of Data	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. . . . . *Form-specific information* . . . . The specific type of data that you are restricting the employee from accessing.

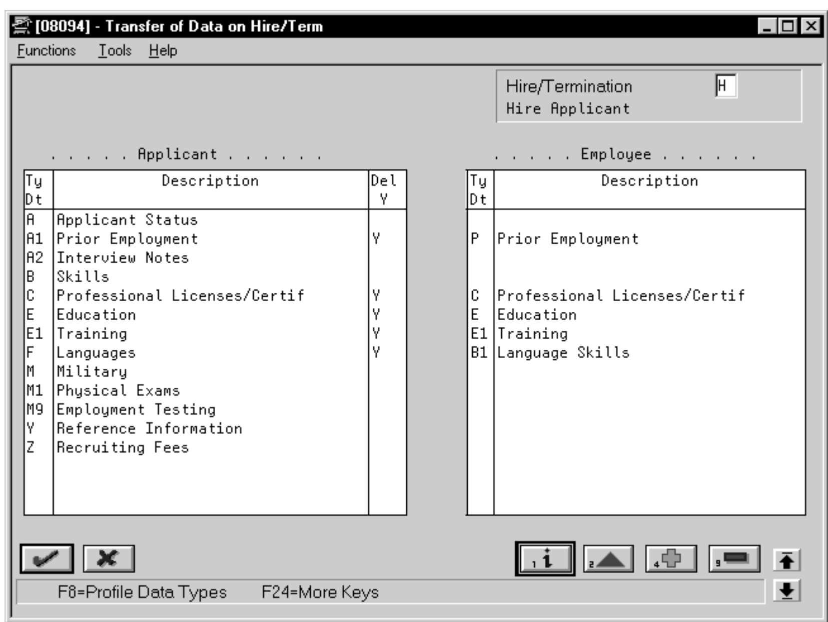
Setting Up the Cross-Reference Table for Profile Data

You can set up the cross reference table to transfer profile data at hire and termination. For example, if you decide to hire an applicant, you can transfer profile data from the applicant database to the employee database.

The cross reference table enables you to maintain consistent data tracking throughout the process of hiring applicants and terminating employees.

▶ 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
Cross Reference Type	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.
Type Data – Employee	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.

Generating the Title Search Table for Human Resources

After you have defined the types of profile data that you will use and the column headings, you must run the Build Word Search File program. You need to run this batch program each time you add or change profile data, descriptions, or column headings. In order to search for a data type by description, you need to generate the Title Search Table.

To generate the Title Search Table, select Build Word Search File from the menu. The system automatically submits your request to batch.

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. 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 you are copying to.

```
080840                                          J.D. Edwards & Company                                      Page No. . .    2
                                            Job Descriptions - Copy/Move                               Date - . . .  4/06/98



                                  HR Data Base . . . . J   Job Descriptions
                                 From Type of Data. . D   Job Reporting Relationships
                                To   Type of Data. . D1  Job Reporting Relationships - Staff
                                                                                                                        Job Type
                                                                                                                     and Step
         Name              Reports to                         Date               Comment                     ----------
----------------------------- ---------- ------------------- -------- --------------------------------
```

From Profile Data Copy/Move, select the type of transfer operation you want to run.

Processing Options for Profile Data Copy/Move

```
1. Enter the Type of Data the                                 ____________
    information will be copied FROM.

2. Enter the Type of Data the                                 ____________
    information will be copied TO.

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).
```

Exercises

See the exercises for this chapter.

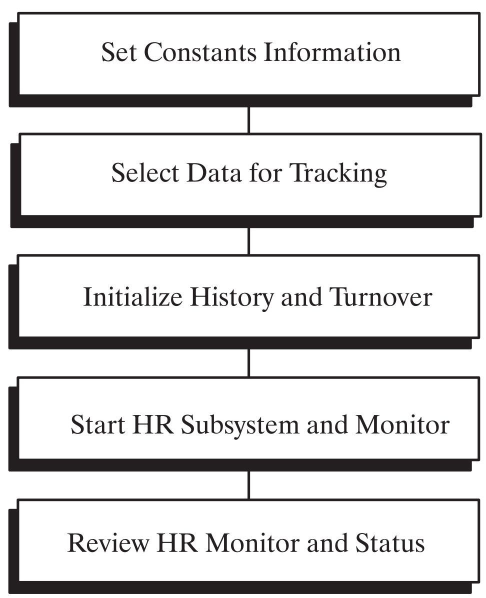
Understand History and Turnover Tracking

Understanding History and Turnover Tracking

History and turnover tracking enables you to maintain history on the employee master record. Before the system can track changes to history and turnover, you must establish parameters within which the system works. The parameters are:

- System-wide constants, which are the means by which you track master information, such as salary information for each employee.
- Employee master fields you want to track changes to need to be identified.

The the following steps outline the process you must follow to track history and turnover:



Constants Information identifies the name and location of the library and subsystem, and whether you want to track employee history, position control, and employee turnover. You can also track history by effective date.

You use Select Data for Tracking to select the fields (data items) for which you want to maintain history.

You use Initialize History & Turnover to establish the starting point for the field values in the Employee Master table that you want to save in the history table.

After you have set up the tracking instructions, you can start the subsystem and monitor.

Any history and turnover changes you make cannot be transferred to the Employee History or Employee Turnover tables if the monitor is not active.

What is the Subsystem and Monitor?

The subsystem and monitor are two elements of the tracking process that allow the system to read field and change reason changes made in the Employee Master table and transfer the information to the Employee History (F08042) and Employee Turnover (F08045) tables.

A subsystem is the portion of the overall processing capacity of the computer reserved for a particular purpose. One example of a subsystem is the batch subsystem where most batch jobs are run. Another example is the Human Resources subsystem used in the history and turnover functions of this system.

In the Human Resources system, the subsystem provides a place for the Human Resources monitor (P080301) to run and to maintain a data queue for changes that need to be processed by the monitor. The subsystem must be active in order for the monitor to run.

The data queue is a data storage facility that holds changes that you make until the subsystem and monitor can process them. After the monitor is able to process the changes, they are taken off the data queue and transferred into either the Employee History or Employee Turnover table as specified in the constants.

The monitor converts changes that you make to the Employee Master table into history and turnover records.

When the monitor is active, it can process any changes made in the Employee Master table. It reads the changes made in the Employee Master table and transfers them to the Employee History and Employee Turnover tables where the changes become part of the history or turnover records.

History and Turnover Advanced/Technical Operations provide a variety of options for turning the subsystem and monitor off and on. The way in which you operate your system determines how often you use the selections on this menu.

What Happens When I Start the Subsystem and Monitor?

The first time you start the Human Resources subsystem, it creates a data queue. The data queue reserves space in the computer to hold history and turnover information for processing by the Human Resources Monitor. The data queue remains active from that point on regardless of the subsystem or monitor's status.

The subsystem holds any changes you make to employee master information in a data queue. If the subsystem and the monitor are not active when you make changes, the changes are processed as soon as the subsystem and monitor are activated.

What You Should Know About

Processing changes held in the data queue	You must process the changes held in the data queue on a regular basis. If the data queue becomes overloaded, you will lose all the unprocessed changes.

Prior to upgrading to the next J.D. Edwards software version, you must process all changes held in the data queue. Once the changes are processed, you must delete the data queue and restart the subsystem and monitor. The IBM command is DLTDTAQ F060116

When Should I Start and Stop the Subsystem and Monitor?

After you have set up your constants information, selected the data that you want to track, and initialized history and turnover, you can start the subsystem and monitor.

The Start Subsystem and Monitor program reserves a location in the computer for the subsystem when you initially set up the subsystem and monitor. When you choose this program, the system creates the subsystem and data queue and automatically starts the monitor. The data queue then exists no matter what the status of the subsystem and monitor.

When to start and stop the subsystem and monitor depends on your requirements and the policy of your company. For example, you could:

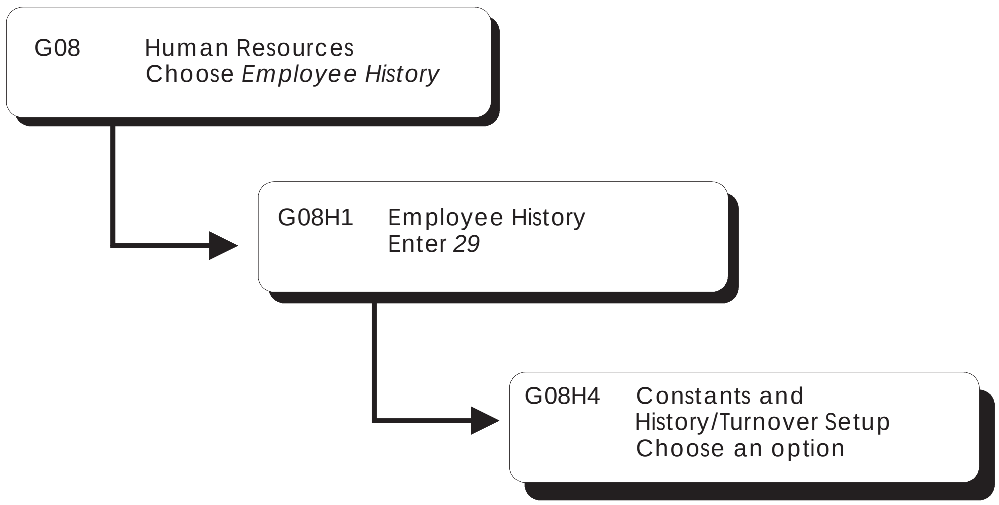
- Start the subsystem and monitor and run them 24 hours a day
- Start the subsystem and monitor during the day and stop them at night
- Start the subsystem and monitor at night to process changes you made during the day and stop them in the morning

You might want to use Unattended Night Operations to start your subsystem and monitor at night and then stop your subsystem and monitor in the morning. You must stop the subsystem and monitor whenever the computer is shut down for any reason, such as backup operations. Then you need to restart both the subsystem and monitor after you restart the system.

See Also

- *Technical Foundations Guide* for more information on unattended night operations
- *Setting Up History and Turnover Tracking*
- *Activating History and Turnover Tracking*

Set Up Constants and History/Turnover



Setting Up Constants

Constants control the types of information that you track in the Human Resources system. For example, you can decide whether to track employee history or to use position control. If you use position control, the system edits fields related to employee positions and position budgets.

Setting up constants consists of the following tasks:

- ❑ Defining system-wide constants
- ❑ Selecting employee master fields for tracking
- ❑ Setting up employee master change tracking
- ❑ Initializing the History and Turnover Monitor
- ❑ Activating history and turnover tracking
- ❑ Reviewing the HR monitor status

Defining System-Wide Constants

Constants control the types of information that you track for each employee. For example, you can decide whether to track employee history or to use position control. You can also choose to display the effective salaries of employees who have more than one job, such as a history teacher who is also the baseball coach. If you choose to impose position control, the system initiates certain edits on fields relating to employee positions and position budgets.

Complete the following tasks:

- Set up tracking information
- Set up position control criteria
- Set up requisition criteria
- Set up pay range edit
- Set up position budget edits

▶ To set up tracking information

Tracking information controls the type of data you want to track for employees as well as the specific database in which you will store the data.

On Constants Information

Complete the following fields:

- HR Subsystem Name
- Employee History (Y/N)
- Position Control (Y/N)
- Employee Turnover (Y/N)
- Track by Effective Date (Y/N)
- Employee Assignment Window
- Display Salary (Annual/Effective)

Field	Explanation
HR Subsystem Name	This is the name of the HR subsystem. This subsystem is created (if it doesn't already exist) when the option to start the HR subsystem is selected. Since the HR monitor executes this subsystem, it is important to know the name of the subsystem so you can determine if the monitor is running.
Employee History (Y/N)	This code determines whether you want to track employee history. Valid codes are: Y Yes, track history and write employee history records. N No, do not track history or write employee history records. For information to be current, you must start the HR subsystem and monitor.
Prompt – Employee History 03	This code defines whether you want Employee Master table (F060116) changes interpreted into changes in the Position Activity table (F08111). Valid codes are: Y Yes, interpret the changes and write position activity records. N No, ignore the changes and do not write records.
Employee Turnover (Y/N)	This code defines whether you want the system to write employee turnover records when you change an Employee Master field. Valid codes are: Y Yes, write employee turnover analysis records. N No, do not write employee turnover analysis records. Turnover information consists of any records in the Turnover file with a change reason that is not blank. For information to be current, the HR subsystem and monitor must be started.
Prompt – Track by Effective Date	A code that defines whether employee history and turnover records are written based on the effective date of the change (data item EFT). Valid codes are: Y Yes, use the effective date of change (data item EFTO) to track employee history and turnover. N No, instead of using the effective date of change, track history and turnover based on the date changes were actually entered into the system. If you enter a Y in this field, you will be prompted to enter an effective date for all changes to Employee Master records that affect history and/or turnover. NOTE: If you enter a Y in this field you must also choose to track employee history, employee turnover, or both.

Field	Explanation
Use Assignment Window	This field is used to control the display of the employee assignment window. The employee assignment window allows you to associate the assignment of an employee to a home business unit, position ID or job type/step with a requisition and to detach that employee from a previous requisition assignment.

What You Should Know About

Edits for salary display	You can set an HR Constant to use the pay grade step table to determine pay rates based on the number of hours worked per year.

▶ To set up the position control criteria

You can define how the system uses position control to create, maintain, and monitor positions and their budgets. Because you cannot have a position without a budget, positions and their budgets are referred to as position budgets.

On Constants Information

Complete the following fields:

- Position ID Required
- Pay Rates Source
- Pay Grade Step Progression Rate Source
- Salary Default Source
- Rate Change in Projections

Field	Explanation
Prompt – Position Control Edit Method	This code determines if position control (ID) is being used throughout the HR system, and if so, how editing will function. Valid codes are: 1 Position ID is required 2 Position ID is NOT required but still display the field 3 Position ID is NOT required and do NOT display the field If you leave this field blank, the system assumes Position ID is optional (code 2).
Pay Rate Source	When the salary and hourly rate are blank for an employee's record on an add or a change, this constant will determine the default rate source. Pay Rate Source 1 Pay Rate Tables 2 Grade Step Table 3 None The system will multiply the employee's standard hours per year times the table's hourly rate to calculate a salary.
Step Progression Rate Source	This field is used to determine the pay grade step rate source for calculating employee position projected year end amounts when the employee has a salary forecast change date and building annual position budget amounts based on employee records. Step Progression Rate : 1 Same Grade Step 2 Next Grade Step
Salary Default Source	This field specifies the salary/rate default source for creating new positions or defining vacancies when the Create Next Year's Position program (P081820) is run. Allowed values are: blank None 1 Pay Grade Minimum 2 Pay Grade Midpoint 3 Pay Grade Maximum 4 Pay Grade Step Amount When the pay grade step is the source, that table's calculated hours/year (hours per day times days per year) will be used as the default standard hours per year. If this data does not exist in the table, the normal defaults will be used to determine the standard hours per year basis: • Home Company Standard Hours Per Year • Default Company Standare Hours Per Year • Data Dictionay • 2080

Field	Explanation
Rate Change in Projections	This constant determines if future rate changes, based on an employee's salary forecast change date, will be taken into account in the calculation of position projected year end values. Valid values are: Y Yes N No

▶ To set up the requisition criteria

Requisition criteria control the method by which you want to create requisitions. You can choose to create them manually on an as-needed basis, or you can let the system create a requisition automatically when you terminate an employee.

On Constants Information

Complete the following field:

- Create Upon Termination

Field	Explanation
Prompt – Automatically Add Requisition	This code determines if a requisition is automatically added for the position when an employee is terminated. Valid codes are: blank No, do not automatically add a requisition 1 Yes, automatically add and display the new requisition

▶ To set up the pay range edits

You use the pay rate edits to control how the system responds to pay changes outside the established pay ranges. This is helpful if budgetary restrictions require you to monitor pay changes closely.

On Constants Information

Complete the following field:

- Pay Range/Step Edits

Field	Explanation
Pay Range/Step Edit	This field specifies pay range minimum and maximum, or pay grade step amount editing. Allowed values are: blank No Edit 1 Warning message if out of range for pay grade or not the pay grade step amount, processing allowed to continue. 2 Hard error if out of range for pay grade or not the pay grade step amount, processing stops, no file updates.

▶ To set up position budget edits

You select the types of verification to perform against changes in positions. For example, you might want the system to check if a specific position has exceeded the budget, and if so, to generate either a hard error or a warning message.

On Constants Information

Complete the following fields:

- Salary
- FTE
- Hours
- Headcount

Field	Explanation
Position Budget Edit – Salary	This field specifies editing of position budget effective salary data. 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 file updates.

Field	Explanation
Position Budget Edit – FTE	This field specifies editing of position budget effective FTE. 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 file updates.
Position Budget Edit – Hours	This field specifies editing of position budget effective hours data. 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 file updates.
Position Budget Edit – Headcount	This field specifies editing of position budget headcount data. 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 file updates.

Selecting Employee Master Fields for Tracking

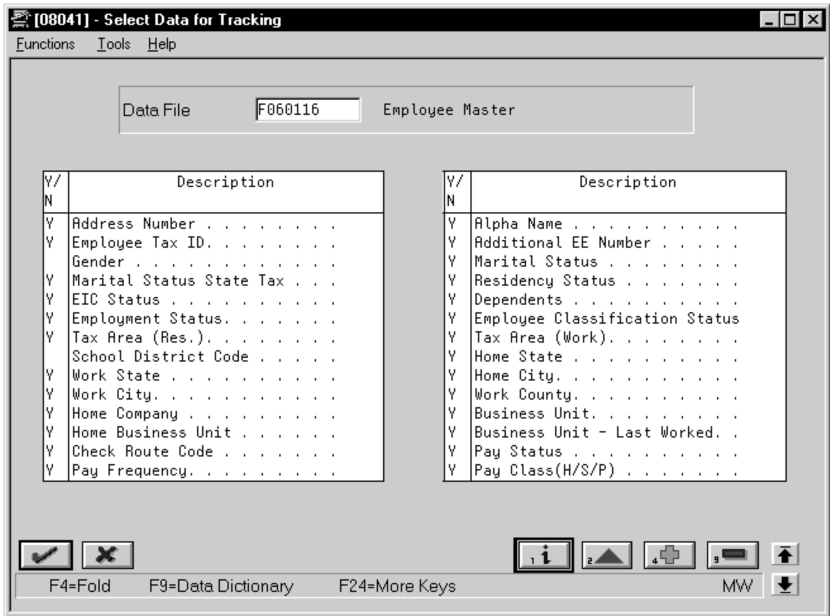
You can set up the types of data you will track for each employee. This includes information such as salary and pay status.

Before You Begin

- ❑ If you need to add to or change the data that you want the system to track, you must stop the monitor, make your changes and then restart the monitor.

▶ To select employee master fields for tracking

On Select Data for Tracking



1. Complete the following required field:
   - Data File
2. Enter Y in the following field to select a data item for which to track history:
   - Y/N

Field	Explanation
Data File	The identification (such as program number, table number, and report number) that is assigned to an element of software. . . . . *Form-specific information* . . . . This is the Employee Master table that contains the data items that can be tracked in history.

Exercises

See the exercises for this chapter.

Setting Up Employee Master Change Tracking

Employee master change tracking controls how you track the following types of employee data:

- Reasons for changes to employee information
- Turnover reporting

Turnover reporting identifies changes in jobs or termination. The data you choose to track controls the types of column headings that you want to use in analyzing turnover. For example, you might want to report on terminations with and without cause. To do this, you would set up a column to compile the two different change reason types for termination.

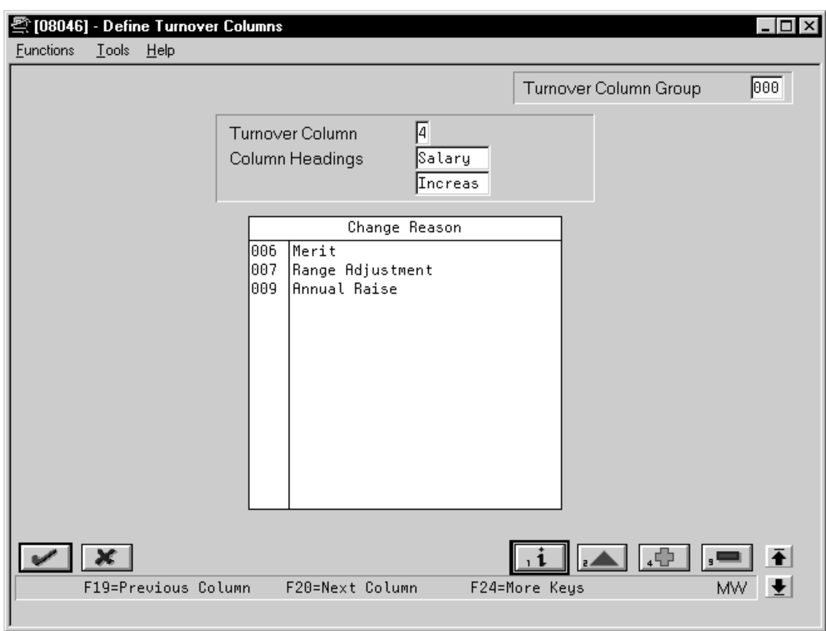
Complete the following task:

- Define turnover reports

Before You Begin

▶ To define turnover reports

On Define Turnover Columns



1. Complete the following required fields:
   - Turnover Column
   - Column Headings
2. Complete the following optional field:
   - Turnover Column Group

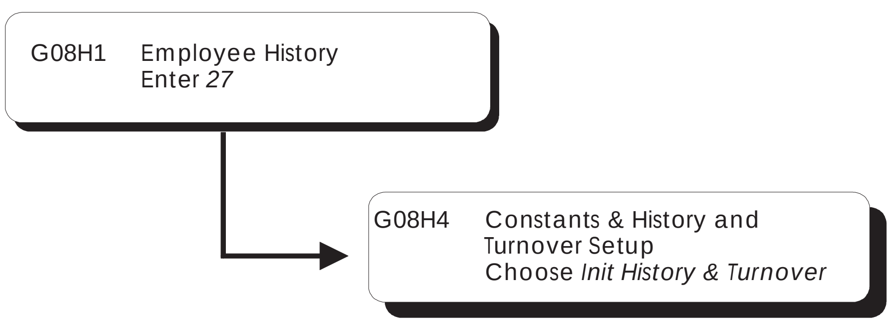
Field	Explanation
Column Number – Turnover	The number of the column that you want to define for your Employee Turnover Analysis reports. There are seven columns, numbered from left to right, available for you to define.
Column Heading 01 – Turnover	This field, in conjunction with the field directly below it (data item TCH2), allows you to define the title of one of the seven columns available on the Employee Turnover Analysis reports to match one of your change reason codes. You use this first field to either enter the first word or an abbreviation of the column heading. You can use a maximum of seven characters. For example, if you want to title a column New Hire, you would use this field for the word New. You would use the field below this one for the word Hire. 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 field directly above it (data item TCH1), allows you to define the title of one of the seven available columns on the Employee Turnover Analysis reports to match one of your change reason codes. You use this second field to enter the second word or an abbreviation. You can use a maximum of seven characters. For example, if you want to title a column New Hire, you would use this field for the word Hire. You would use the field above this one for the word New. On the reports, this column title would look like this: New Hire You do not have to define all seven available column headings.

Field	Explanation
Turnover Column Group	The Define Turnover Columns screen allows you to define up to 999 sets of column headings for your turnover analysis reports. You use the Turnover Column Group field to number each set of column headings. For example, the first group of column headings could be Turnover Column Group 000. To define an additional set of column headings, change the number in this field to 001 and then define as many of the seven available column headings as necessary to meet your needs. If you require additional sets of column headings, increase the number in this field by one and again define the necessary column headings.

Exercises

See the exercises for this chapter.

Initializing the History and Turnover Monitor



Before you begin to track changes with the History Monitor, you must record what is currently in the the employee master record. After you initialize the history and turnover monitor, the system will edit changes to the employee master record. When a change shows a different value, the system records a history record.

Before You Begin

Verify that all employees are entered in the Employee Master Table.

- ❑ Verify that the Employee Turnover Constant is set to Yes
- ❑ You should set up user-defined codes for change reasons

What You Should Know About

Initialize effective date

When you run the initialize program, J.D. Edwards recommends that you enter an effective date in the processing option that controls the effective date. The effective date should be a day prior to the date of your first date for reporting turnover. The system will then consider employees active as of the initialize effective date.

Change reason

You should use a numeric change reason in the processing option controlling initial turnover and history records.

▶ To initialize the history monitor

The menu selection displays the DREAM Writer Versions list. Select the version that you want to run. The system submits the job to batch processing.

Processing Options for Initialize Employee History

```
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.

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 rcds.  A blank
    will default a change reason of '99'
    New Hire for turnover rcds and the
    window value for the history rcds.
    (F1 will display allowed values.)
```

Activating History and Turnover Tracking

After you have selected the types of data that you want to track, you must start tracking history and turnover for each employee. This DREAM Writer program will start the HR Subsystem and Monitor.

What You Should Know About

The number of monitors	If you have more than one monitor running at one time, such as in a test and production environment, you must enter the appropriate number of monitors in the processing option controlling the number of monitors.
Starting and stopping the subsystem	When you have multiple environments, you only need to control the start and stop subsystem in one of them.
Starting and stopping the monitor	When you have multiple environments, you need to control the start and stop the monitor in each environment

From Start Subsystem and Monitor, the system automatically submits the job to batch processing.

Processing Options for Start HR Subsystem/Monitor

```
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.
```

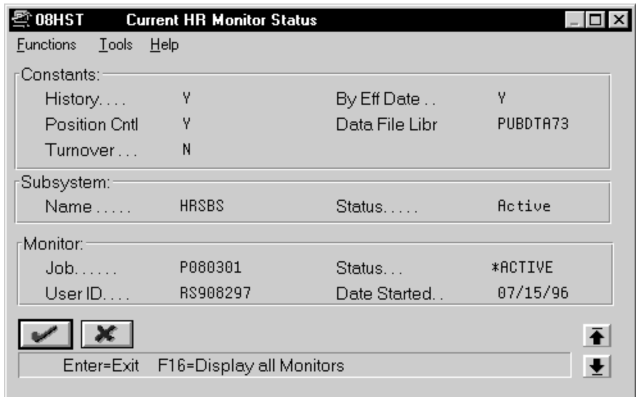
Reviewing the HR Monitor Status

After you start the HR Monitor, you should review its status to verify that it is functioning. Perform the following tasks:

- Review status of the current monitor
- Review the status of all monitors

To review the status of the current monitor

On Review HR Monitor Status



Verify that the monitor is running.

To review the status of all monitors

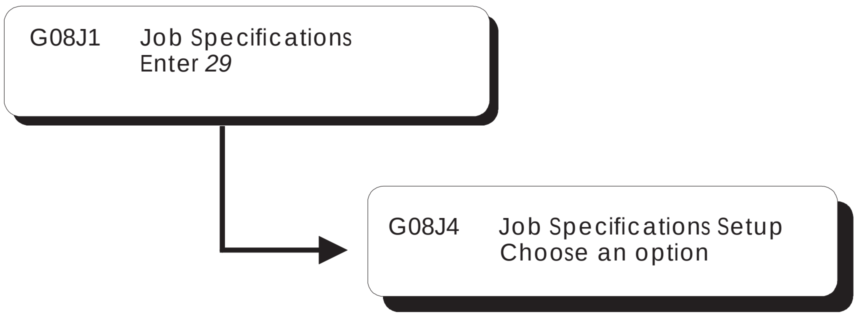
On Review HR Monitor Status

Use the appropriate function key to verify that the monitors are running.

Exercises

See the exercises for this chapter.

Set Up Jobs



Setting Up Jobs

Job setup determines such baselines for job evaluation as whether the job is an executive-level job or a technical job, or the evaluation method that you use to determine pay ranges. You can also prepare a detailed job description that your recruiting personnel can use to match with applicants.

Complete the following tasks:

- ❑ Define pay information
- ❑ Define job evaluation factors
- ❑ Define user-defined codes for jobs
- ❑ Set up a cross-reference table by business unit
- ❑ Work with job profile data

Defining Pay Information

Pay information controls the standards by which individual employee salaries can be evaluated, as well as the amounts and ranges of pay you use for your business. This provides you with an orderly and equitable method of compensating your employees and a stable basis for controlling payroll costs. Pay information includes:

- Pay grades
- Pay grade steps
- Formulas for calculating pay ranges

Pay grades are standards for evaluating employee salaries by minimum, midpoint, and maximum amounts. Pay grade steps enable you to establish progression in pay within a grade.

In situations where you might define pay based on calculations, you can enter data that calculates the different pay ranges based on the job evaluation points. For example, if a job pays more in one region of the country than in another, you can apply a geographic modifier to the pay range formula to calculate different minimums, midpoints, and maximums for the different areas.

Complete the following tasks:

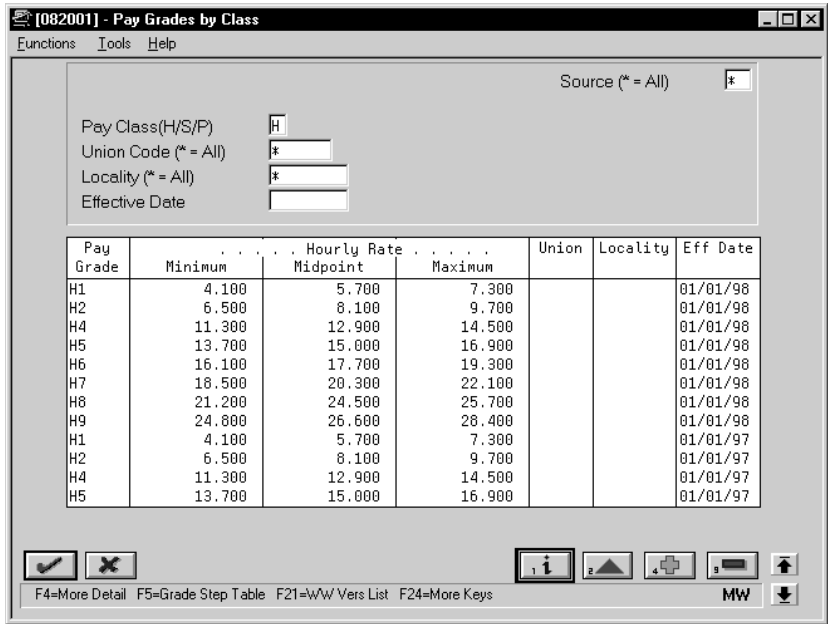
- Define pay grades
- Define pay grade steps from the header information
- Define pay grade steps from a rate multiplier

What You Should Know About

Defining pay grades in the Pay Grade/Step table	You do not need to define a pay grade in the Pay Grade table (F082001) in order to set up a pay grade step.

▶ To define pay grades

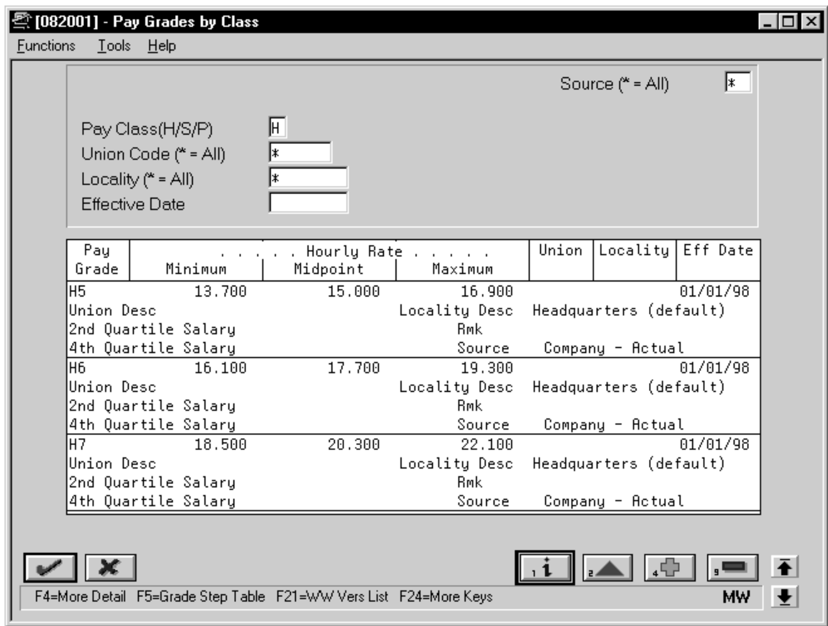
On Pay Grades by Class



Pay Grade	. . . . . Hourly Rate . . . . . Minimum	Midpoint	Maximum	Union	Locality	Eff Date
H1	4.100	5.700	7.300			01/01/98
H2	6.500	8.100	9.700			01/01/98
H4	11.300	12.900	14.500			01/01/98
H5	13.700	15.000	16.900			01/01/98
H6	16.100	17.700	19.300			01/01/98
H7	18.500	20.300	22.100			01/01/98
H8	21.200	24.500	25.700			01/01/98
H9	24.800	26.600	28.400			01/01/98
H1	4.100	5.700	7.300			01/01/97
H2	6.500	8.100	9.700			01/01/97
H4	11.300	12.900	14.500			01/01/97
H5	13.700	15.000	16.900			01/01/97

1. Complete the following field:
   - Pay Class (H/S/P)
2. Complete any of the following fields in the header to add to each new pay grade:
   - Source
   - Union Code
   - Locality
   - Effective Date
3. Complete the following required fields:
   - Pay Grade
   - Minimum
   - Midpoint
   - Maximum

4. Complete the following optional fields if you did not already enter them in the header:
   - Union
   - Locality
   - Effective Date
5. Access the fold area.



6. Complete the following optional fields:
   - Second Quartile
   - Fourth Quartile
   - Remark
7. Complete the following field if you have not already entered it in the header:
   - Source

Field	Explanation
Source – Salary Data	A code that identifies the source of the salary information. You can define the codes using user defined code table 08/SS. If you want to display all pay grades regardless of the source, place an asterisk (*) in this field.
Union Code	A user defined code (system 06, type UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
Locality	A code used for comparison purposes to define the different salary localities within an organization. For example, employees on the East Coast might be paid more than employees in the Midwest. You can define the codes using user defined code system 06, type SL. . . . . *Form-specific information* . . . . This field appears in following two sections of this form: • In the header section, you can use this field to limit the information that displays on the field to pay grades in a specific locality. If you leave this field blank, all pay grades display 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 Class (H/S/P)	The code that indicates the method by which an employee is paid. Valid codes are: H Hourly S Salaried P Piecework
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated.
Amount – Minimum Salary	The minimum salary or hourly rate allowed within a pay grade. This field is used to trigger warnings in the Salary and Wage module when an employee's salary or rate is lower than the minimum permitted within the pay grade.
Amount – Midpoint Salary	The midpoint salary or hourly rate within a pay grade or pay range. For job IDs with a defined pay grade, this amount is defined in the Pay Grade file (F082001). For job IDs that are evaluated by points, this amount is calculated using a Pay Range Formula (F08290). The compa-ratio figure (data item #CRA) is calculated by dividing an employee's salary or rate by the appropriate midpoint.

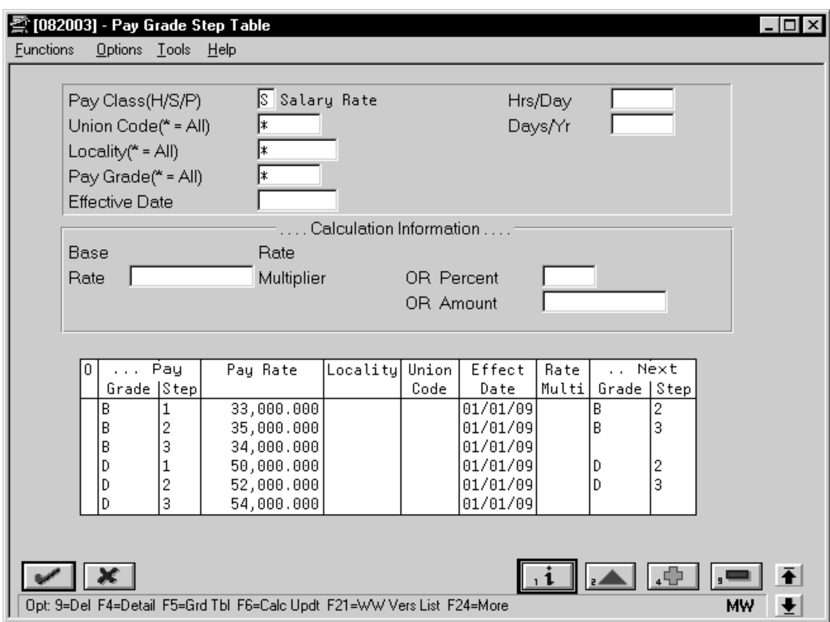
Field	Explanation
Amount – Maximum Salary	The maximum salary or hourly rate within a pay grade. This field is used to trigger warnings in the Salary and Wage module when an employee's salary or rate is higher than the maximum permitted in the pay grade.
Name – Remark	A generic field that you use for a remark, description, name, or address.

Processing Options for Pay Grade/Salary Range Information

```
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).
```
____

▶ To define pay grade steps from the header information

On Pay Grade Step Table



1. Complete the following field:
   - Pay Class

2. Complete any of the following fields in the form header to add to each new pay grade step:
   - Union Code
   - Locality
   - Hours/Days
   - Days/Year
   - Effective Date
3. Complete the following fields:
   - Pay Grade
   - Pay Grade Step
   - Pay Rate
4. If you did not enter this information in the form header fields, complete the following optional fields:
   - Locality
   - Union Code
   - Effective Date
   - Next Grade
   - Next Step
5. Access the fold area.
6. Complete the following optional fields:
   - Remark
   - Hours/Day
   - Days/Year

Field	**Explanation**
Pay Class (H/S/P)	The code that indicates the method by which an employee is paid. Valid codes are: H Hourly S Salaried P Piecework
Union Code	A user defined code (system 06, type UN) that represents the union or plan in which the employee or group of employees work or participate.

Field	Explanation
Salary Data Locality	A code used for comparison purposes to define the different salary localities within an organization. For example, employees on the East Coast might be paid more than employees in the Midwest. You can define the codes using user defined code table 06/SL.
Pay Grade	This code designates a specific salary or wage level within an organization. Grade descriptions are written to identify and define successively greater increments of job skills, requirements, decision making, and responsibility inherent in the type and range of job being evaluated.
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.
Standard Hours per Day	The number of hours in a day if 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.
Standard Days per Year	Days per year multiplied by hours per day equals the standard hours per year. When the pay grade step table is used to define employee rates, this value is multiplied by the hourly rate in the calculation of salary amounts.

▶ To define the pay grade steps from a rate multiplier

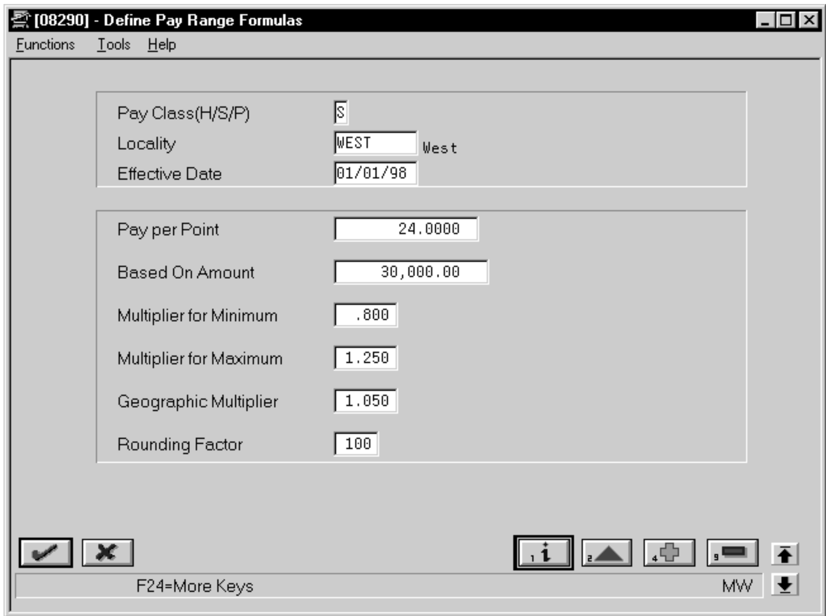
On Pay Grade Step Table

1. Locate the pay class.
2. Complete any of the following fields in the header to add to each pay grade step:
   - Union Code
   - Locality
   - Effective Date
   - Hours per Day
   - Day per Year

3. Complete the following fields:
   - Base Rate
   - Pay Grade
   - Pay Step
   - Rate Multiplier
   - Next Grade/Step
4. If you did not enter this information in the form header fields, complete the following optional fields:
   - Union Code
   - Locality
   - Hours/Day
   - Days/Year
5. Complete any of the following optional fields:
   - Next Pay Grade
   - Next
6. Access the fold area.
7. Complete the following optional fields:
   - Remark

▶ To define pay range formulas

On Define Pay Range Formulas



1. Complete the following required 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 fields:
   - Rounding Factor

Field	Explanation
Pay Class (H/S/P)	The code that indicates how an employee is paid. Valid codes are: H Hourly S Salaried P Piecework

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.
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.

Exercises

See the exercises for this chapter.

Defining Job Evaluation Factors

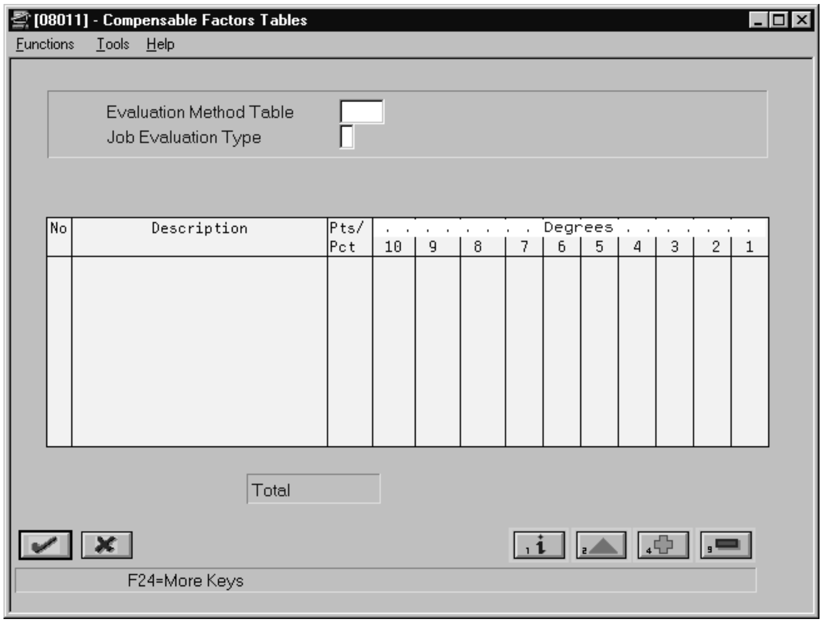
Job evaluation factors enable you to gauge the scope of a job. You can set up a user-defined factors table to define the types of factors you might use. These might include one or more of the following:

- Degree (Simple Subjective Point System)
- Evalucomp
- Factor comparison
- Hay method
- Point factor

The job evaluation type determines the way in which you establish points for each job evaluation factor. For example, if you use evaluation type D for degree, this indicates that each factor has a maximum number of points. Within the factor the ten degrees establish the number of points associated with each degree.

To define job evaluation factors

On Compensable Factors Tables



1. Complete the following required fields:
   - Evaluation Method Table
   - Job Evaluation Type
   - Number
   - Description
   - Points/Percentage
2. Complete the following field if you use job evaluation method 2:
   - Degrees

Field	Explanation
Job Evaluation Method	A user defined method or grouping (system 08, type EM) 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. Job evaluation factors should meet the following criteria: • Each factor must distinguish differences between jobs. • Each factor must be common to most of the jobs being rated. A factor should exist in greater to lesser amounts so it is easier to measure factors within a job. • Each factor should be assigned the maximum number of points in each of the 10 levels of degree. • No factor should overlap any other factor. • The factors chosen must be accepted by employees and managers. • The number of factors used should be the minimum needed to insure a balance between completeness and simplicity in rating. • The factor definitions should clearly and objectively define what is being rated so that all raters interpret the factor in the same way.
Description	A user defined name or remark that describes a field. For example, the data type is Education, and you enter MA in the column you defined as Degree. The system automatically brings in the Master of Arts description linked to MA.
Job Evaluation Points	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
Job Evaluation Factor–Points in Degr 010	For the Compensable Factors Table screen, enter the maximum evaluation points allowable within this degree for this factor. For the Factor Comparison Method window, if permitted, enter the degree corresponding to this particular job. The points calculation program automatically determines the points associated with the degree you enter.

Defining User-Defined Codes for Jobs

You can set up user-defined codes for jobs to fit your own organizational structure. The values define how you organize jobs in your business. For example, you can define the job titles you use in your business.

You can set up the following user-defined codes as part of identifying job information:

Job types (06/G)	Use these codes to specify job classifications. The job type is then used to determine pay rates and benefit plans.
Job steps (06/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 categories (06/J)	Use these codes to specify classifications established by the Equal Employment Opportunity Commission (EEOC) for use in reporting levels of employment classifications. Do not change any of the EEOC codes provided by J.D. Edwards. 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.
Unions (06/UN)	Use these codes to identify the union or plan in which the employees or group of employee participates.

Job evaluation methods (08/EM)	Use these codes to define the method used for evaluating the job type.

What You Should Know About

Updating user-defined codes	A processing option for the Job Master Table (F08001) allows you to add job types/steps to the user–defined codes directly from the job master. This enables you to create new job types/steps without accessing user–defined codes from the menu.

Exercises

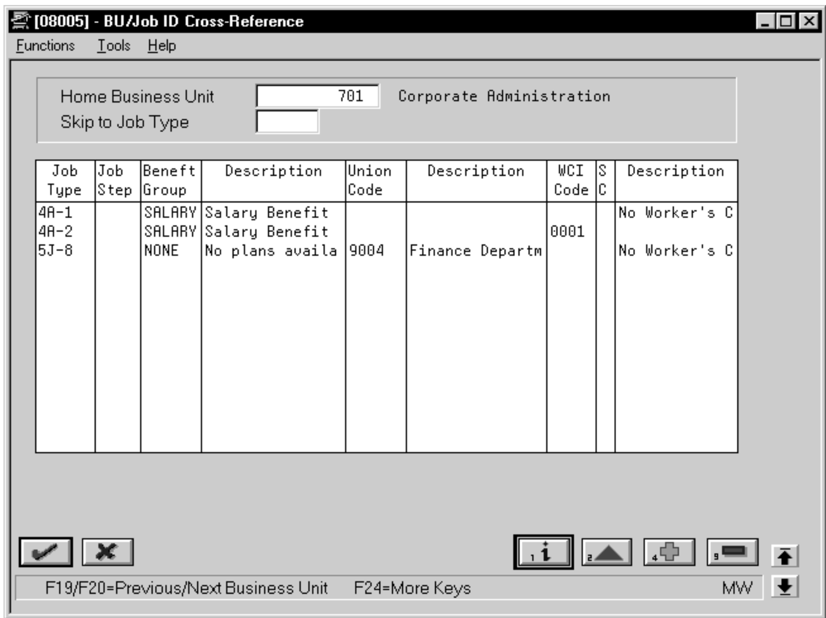
See the exercises for this chapter.

Setting Up a Cross-Reference Table by Business Unit

You can set up different job types within a business unit to belong in different unions. For example, when an employee is assigned to a particular work location and job, they might be assigned to a specific union.

▶ 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
   - Benefit Group
   - Union Code
   - Worker’s Compensation Insurance Code
   - Subclass (Worker’s Compensation Insurance)

See Also

- *User Defined Codes* in the *Technical Foundation Guide*

Working With Job Profile Data

Job profile data is any auxiliary information that you want to maintain in the jobs profile database. The exact types of data will vary with your own unique requirements.

Perform the following tasks:

- ❑ Create profile data for jobs
- ❑ Define security for job profile data
- ❑ Generate the title search
- ❑ Move job profile data

Creating Job Profile Data

You can create the types of data that you want to track for jobs. Depending on your how much detail you desire, you can choose the following formats for profile data:

- Narrative format enables you to enter information in your own words, such as the job description
- Code format enables you to enter codes in specific fields

See Also

- *Creating Profile Data (P08090)*

Defining Security for Job Profile Data

You can restrict access to certain types of data only to specific personnel. For example, you can restrict access to job information only to the immediate supervisor managing the job.

See Also

- *Defining Security for Profile Data (P0080)*

Generating the Title Search Table for Jobs

After you have defined the types of job profile data you will use, you build the Supplemental Types of Data table to perform searches for the data types. You need to run this batch program each time you change types of profile data.

See Also

- *Generating the Title Search Table (P08BDWRD)*

Moving Job Profile Data

After you have defined the types of profile data that you will use, you can copy the information from one type of data to another. For example you can copy the data types from employee information (database E) to applicant information (database A). You must have the same types of data for an applicant that you need for employees.

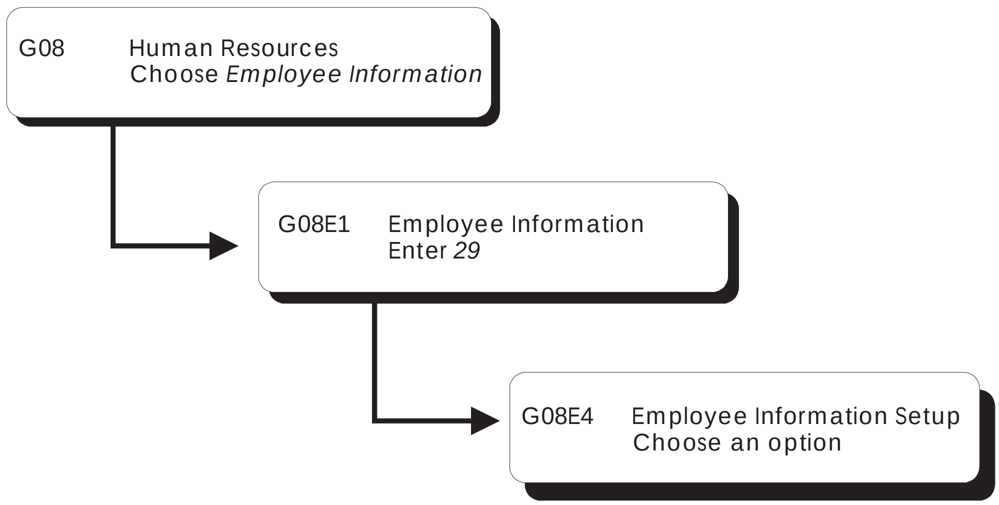
See Also

- *Moving Profile Data (P080840)*

Exercises

See the exercises for this chapter.

Set Up Employee Information



Setting Up Employee Information

You use employee information to set up the types of information that you want to track about each employee. The information includes such essential data as the tax identification number, as well as information unique to your business as professional certifications for each employee.

Complete the following tasks:

- ❑ Define user-defined codes for employees
- ❑ Define category codes for Human Resources
- ❑ Working with employee profile data
- ❑ Select fields for pending changes

Defining User Defined Codes for Employees

Set up user-defined codes for employees to track general information about their jobs or movement within the business. For example, you can set up all the physical locations where employees work or the job titles associated with their jobs.

You can set up the following user defined codes as part of identifying employee information.

Employment status (06/ES)	Use these codes to identify the employee's status within the company.
Pay status (06/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 localities (06/SL)	Use these codes to define different salary localities within the organization.
Ethnic codes (06/M)	Use these codes to designate minority classifications. You should not change any of the codes provided by J.D. Edwards, but you can add to them as necessary.
Change reasons (06/T)	Use these codes to indicate the reason that an active employee's record was changed. This 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 acvtive.

Defining Category Codes for Human Resources

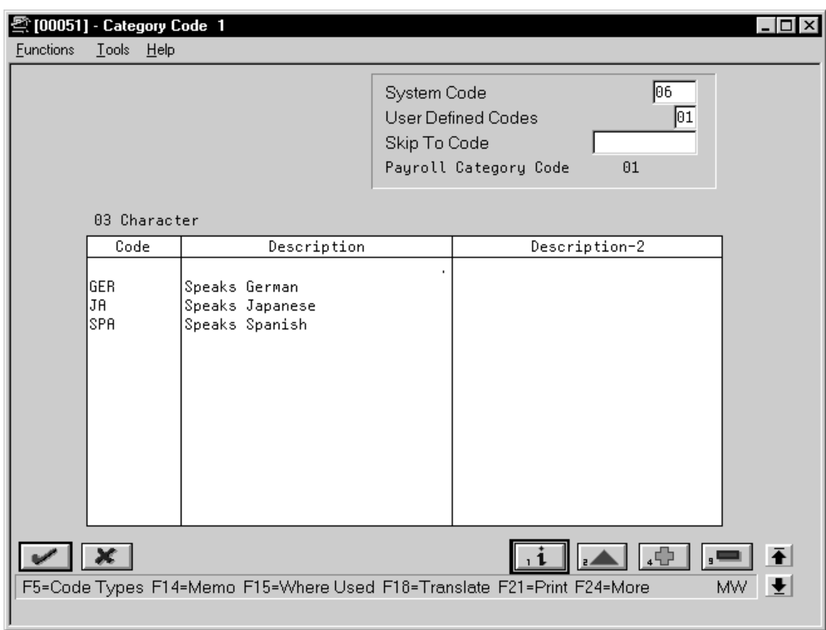
G08E1 Employee Information
Choose *Employee Category Codes*

G08E41 Employee Category Code Setup
Choose an option

Category codes for Human Resources are a type of user defined code that you use to classify employees for tracking, reporting, and DREAM Writer data selection. 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

Working With Employee Profile Data

Profile data includes any type of data that you want to track for employees, including their skills, educational level, and emergency contacts. Perform the following tasks:

- ❑ Define types of employee profile data
- ❑ Define security for employee profile data
- ❑ Build the profile transfer table
- ❑ Generate the title search table
- ❑ Generate the profile copy table for employee information

Defining Types of Employee Profile Data

You can create the types of data you want to track for jobs. Depending on your how much detail you desire, you can choose the following formats for profile data:

- Narrative format enables you to enter information in your own words.
- Code format enables you to enter codes in specific fields

See Also

- *Creating Profile Data (P08090)*

Defining Security for Employee Profile Data

You can restrict access to certain types of data only to specific personnel. For example, you can restrict access to employee information only to the immediate supervisor managing the job.

See Also

- *Defining Security for Profile Data (P0080)*

Building the Profile Transfer Table

You can set up the cross reference table to transfer profile data at hire and termination. For example, if you decide to hire an applicant, you can transfer profile data from the applicant database to the employee database.

The cross reference table enables you to maintain consistent data tracking throughout the process of hiring applicants and terminating employees.

Generating the Title Search Table

After you have defined the types of profile data you will use, you build the Supplemental Types of Data table to perform searches for the data types. You need to run this batch program each time you change types of profile data.

See Also

- *Generating the Title Search Table (P08BDWRD)*

Generating the Profile Copy Table for Employee Information

After you have defined the types of profile data you will use, you can copy the information from one type of data to another. For example you can copy the data types from employee information (database E) to applicant information (database B). You do to have the same types of data for an applicant that you need for employees.

See Also

- *Moving Profile Data (P080840)*

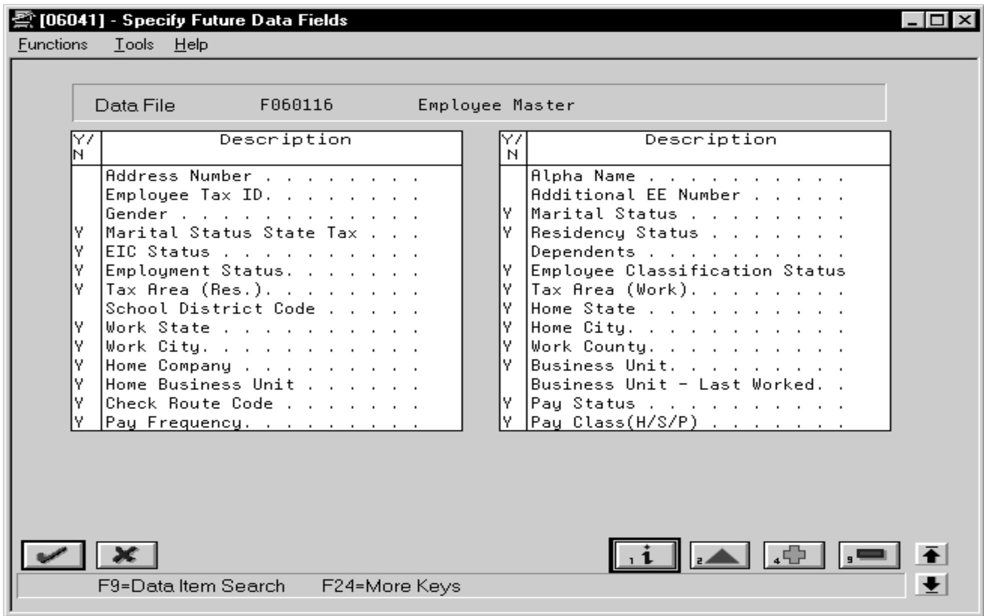
Exercises
See the exercises for this chapter.

Selecting Fields for Pending Changes

You can activate certain fields or data items in the employee master in order to permit future data revisions. After you have activated the fields, you can make changes to the employee's master record.

▶ To select fields for pending changes

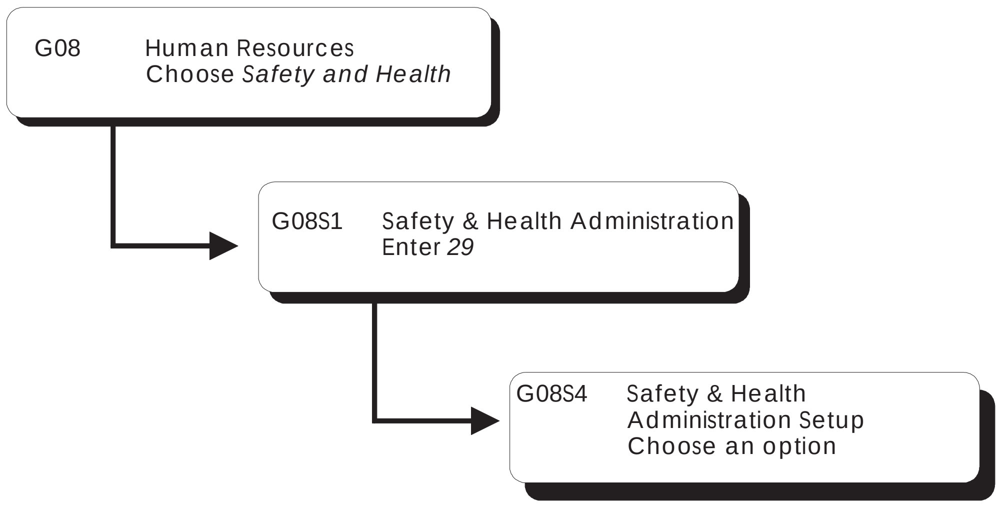
On Specify Future Data Fields



Complete the following fields as needed to select fields:

- Yes/No

Set Up Safety and Health Administration



Setting Up Safety and Health Administration

You need to set up user defined codes to track work-related accidents or illness. You must track work-related accidents or illness to satisfy requirements for OSHA reporting. You can also set up codes to track accidents or illness specific to your business.

You need to set up in the Address Book system the establishments that you have in your business. Establishments are the places where your employees report for work or perform their duties, or are the business units from which they are paid. After an occupational injury has occurred, OSHA 200 reporting requires that you document in which establishment the incident occurred.

Setting up Safety and Health Administration consists of the following:

- ❑ Defining user defined codes for safety and health administration
- ❑ Working with safety and health profile data
- ❑ Entering establishments in the Address Book

Defining User Defined Codes for Safety and Health Administration

J.D. Edwards has defined certain user–defined codes required for OSHA 200 reporting. The user defined codes for OSHA 200 reporting are predefined in the system and should not be changed. You can define additional user defined codes to track data that is specific to your business.

Define the following user-defined codes for Safety and Health Administration:

Case status (08/CS)	Use these codes to identify the current status of the occupational injury or illness case.
Parts of body (08/H4)	Use these codes to identify the body part affected by the occupational injury or illness.

Working with Safety and Health Profile Data

Profile data includes any types of data you want to track for safety and health, such as how the accident occurred or the medical expenses incurred. Depending on your specific requirements, you can choose the following levels of detail for profile data:

Perform the following tasks:

- ❑ Create safety and health profile data
- ❑ Define security for safety and health profile data
- ❑ Build the profile transfer table
- ❑ Generate the profile copy table for health and safety information

Creating Safety and Health Profile Data

You can create the types of data you want to track for safety and health. Depending on your how much detail you desire, you can choose the following formats for profile data:

- Narrative format enables you to enter information in your own words, such as the job description
- Code format enables you to enter codes in specific fields

See Also

- *Creating Profile Data (P08090)*

Defining Security for Safety and Health Profile Data

You can restrict access to certain types of data only to specific personnel. For example, you can restrict access to job information only to the immediate supervisor handling safety and health cases.

Building the Profile Transfer Table

You can set up the cross reference table to transfer profile data at hire and termination. For example, if you decide to hire an applicant, you can transfer profile data from the applicant database to the employee database.

The cross reference table enables you to maintain consistent data tracking.

Generating the Profile Copy Table for Health and Safety Information

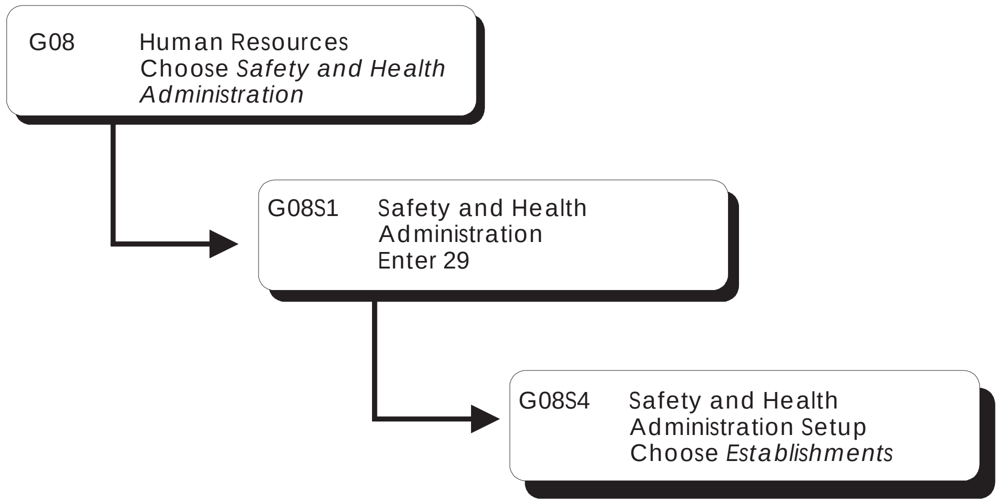
After you have defined the types of profile data you will use, you can copy the information from one type of data to another. For example you can copy the data types from employee information (database E) to applicant information (database B). You do to have the same types of data for an applicant that you need for employees.

See Also

- *Moving Profile Data (P080840)*

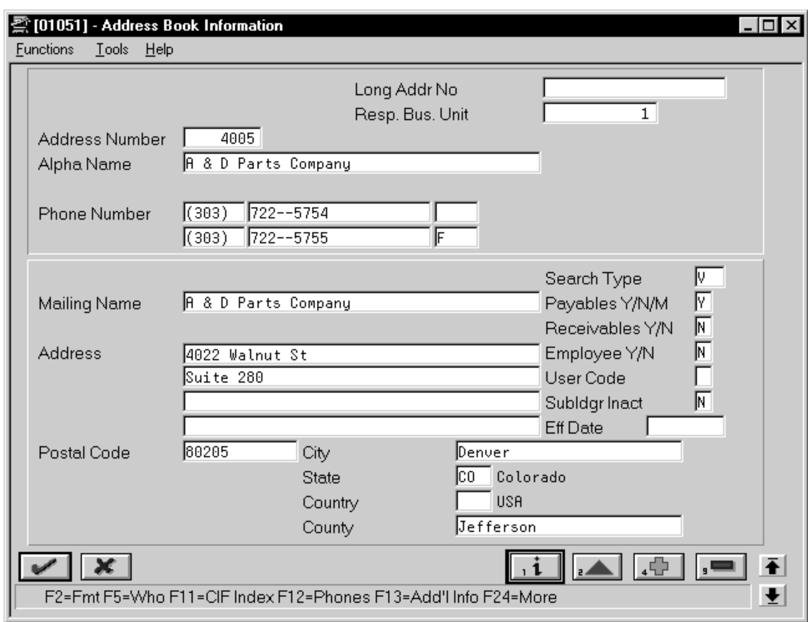
Entering Establishments in the Address Book for Human Resources

You need to set up in the Address Book system the types of establishments that you have in your business. Establishments are the places where your employees report for work or perform their duties, or are the business units from which they are paid. After an occupational injury has occurred, OSHA 200 reporting requires that you report the establishment in which the incident occurred.



To enter establishments in the address book

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
   - County
   - Country

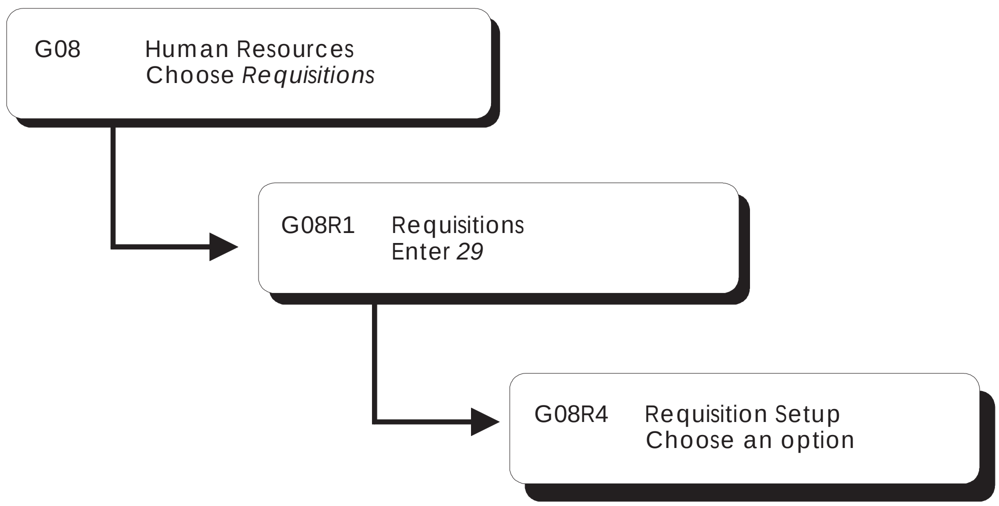
Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on.
Long Address Number	A user defined name or number that is unique to the address book number. This field can be used 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.

Field	Explanation
Responsible Business Unit	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. The Business Unit field is alphanumeric. 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 A/P and A/R by business units, to track equipment by responsible department. Business unit security can prevent you from locating business units for which you have no authority. NOTE: The system uses this value for Journal Entries if a value is not entered in the AAI table.

Exercises

See the exercises for this chapter.

Set Up Requisitions



Setting Up Requisitions

Requisitions provide an easily accessible source for information on vacancies in your company. You create a requisition for a vacancy with a proposed pay grade and step, as well as category codes for your specific requirements. For example, if you need a senior consultant who speaks fluent Spanish, you can add Spanish fluency on your requisition. You can track the status of requisition from initial creation to approval and employee assignment.

You can set up user defined codes to define the types of qualifications you want to use on job requisitions.

You set up requisitions by:

- ❑ Defining user defined codes for requisitions
- ❑ Defining profile data for requisitions

Defining User Defined Codes for Requisitions

You can set up the following user defined codes to identify requisition information:

Requisition status (08/RS)	Use these codes to identify the status of a requested position. J.D. Edwards recommends that you do not change codes Approved (AA) and Filled and Closed (99). The system is designed to use these codes for processing requisitions.

Defining Profile Data for Requisitions

Profile data includes any types of data that you want to track for requisitions, including the types of activity recorded on a requisition, and the approval steps. Depending on your specific requirements, you can choose the following levels of detail for profile data:

- Narrative format enables you to enter information in your own words, such as specific requirements for a requisition
- Code format enables you to enter codes in specific fields

The exact types of data will vary with your own unique requirements.

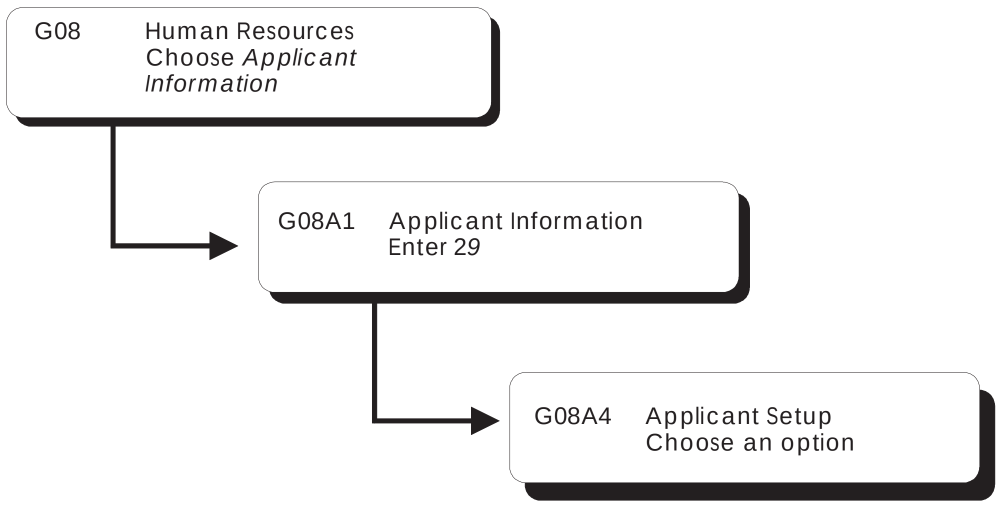
See Also

- *Setting Up Profile Data (P08090)*

Exercises

See the exercises for this chapter.

Set Up Applicant Information



Setting Up Applicant Information

You need to set up user defined codes and profile data that you want to use to evaluate and process applicants.

Setting up applicant information consists of the following:

- ❑ Defining user defined codes for applicants
- ❑ Work with applicant profile data

Defining User Defined Codes for Applicants

Define user defined codes that you want to use to track applicants. The Human Resources system uses user defined codes for applicants to:

- Classify the status of the applicant through the process of applying for a job
- Track the method of contact between the applicant and the company

> **!** The Applicant Status user-defined codes 08/AS classify the current status of the applicant. When you change the status of an applicant, the system adds a record to supplemental data with within the applicant resume information. This is the edit for the profile data type applicant status that supports entries in the Applicant Information table (F08401). It is essential that these codes be set up correctly.

Applicant status (08/AS) Use these codes to classify the current status of the applicant. Whenever you change the status of an applicant, the system adds a record to supplemental data within the applicant resume information.

This is the edit for the profile data type applicant status that needs to be set up to support entries in Applicant Information table (F08401)

Working With Applicant Profile Data

Profile data includes any types of data you want to track for applicants, including their skills, educational level, and emergency contacts. Depending on your specific requirements, you can choose the following formats to define profile data:

- Narrative enables you to enter information in your own words, such as a report on the an applicant's interview
- Code format enables you to enter codes in specific fields

Perform the following tasks:

- ❑ Define types of applicant profile data
- ❑ Define security for applicant profile data
- ❑ Build the profile transfer table
- ❑ Generate the word search table for applicants
- ❑ Move applicant profile data

Defining Types of Applicant Profile Data

You can create the types of data you want to track for jobs. Depending on your how much detail you desire, you can choose the following formats for profile data:

- Narrative format enables you to enter information in your own words
- Code format enables you to enter codes in specific fields

See Also

- *Creating Profile Data (P08090)*

Defining Security for Applicant Profile Data

You might need to regulate access to certain types of data, such as pay information, only to specific personnel.

See Also

- *Defining Security for Profile Data (P0080)*

Building the Profile Transfer Table

You can set up the types of profile data you want to transfer to other parts of the Human Resources system. This includes the following parts of the Human Resources system:

- Employee profile
- Applicant profile
- Job description
- Case profile
- Participant profile
- Requisition profile

This enables you to maintain consistent data tracking throughout the process of creating jobs and requisitions, processing applicants, and hiring employees.

See Also

- *Setting Up the Profile Transfer Table (P08094)*

Generating the Word Search Table for Applicants

After you have defined the types of profile data you will use, you build the Word Search table to perform searches for the profile data. You need to run this batch program each time you change types of profile data.

See Also

- *Generating the Title Search Table (P08BDWRD)*

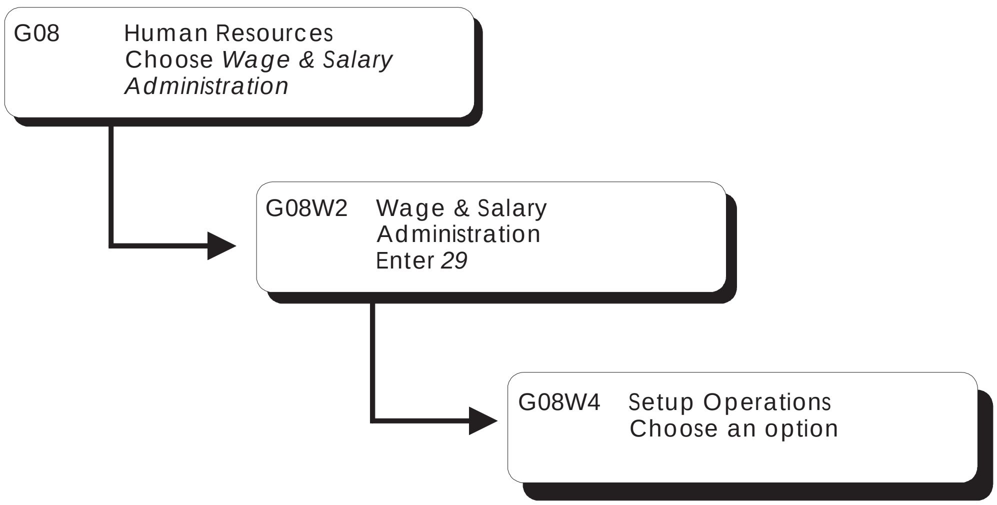
Moving Applicant Profile Data

After you have defined the types of profile data that you will use, you can copy the information from one database to another. For example, you can copy the data types from employee information (database E) to applicant information (database B). You do this in order to have the same types of data for an applicant that you need for employees.

Exercises

See the exercises for this chapter.

Set Up Wage and Salary Administration



Setting Up Wage and Salary Administration

You need to set up several user defined codes that are unique to your pay structure.

Setting up wage and salary administration consists of the following:

- ❑ Defining user defined codes for wage and salary administration
- ❑ Defining pay grades and steps for wage and salary administration

Defining User Defined Codes for Wage and Salary Administration

You set up user defined codes to track information about wages and salaries. For example, you can define standards for defining performance or valid reasons for awarding bonuses.

You can set up the following user defined codes as part of identifying wage and salary administration information.

Performance appraisals (08/AP)
Use these codes to identify the employee's status within the company.

Appraisal types (08/TY)
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.

Bonus reasons (08/BN)
Use these codes to designate minority classifications according to Equal Employment Opportunity Commission (EEOC) standards.

Do not change any of the EEOC codes provided by J.D. Edwards. They are used by the system to generate EEOC reports. You may, however, add to them if necessary.

Salary comparison sources (08/SS)
Use these codes to indicate why an active employee's record was changed, an employee was terminated, or why you are recommend 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 inactive.

Defining Pay Grades and Steps for Wage and Salary Information

Pay grades/steps provide a standard for determining pay rates. The procedures for setting up pay grades/steps for wage and salary information are the same as setting up pay grades/steps for jobs.

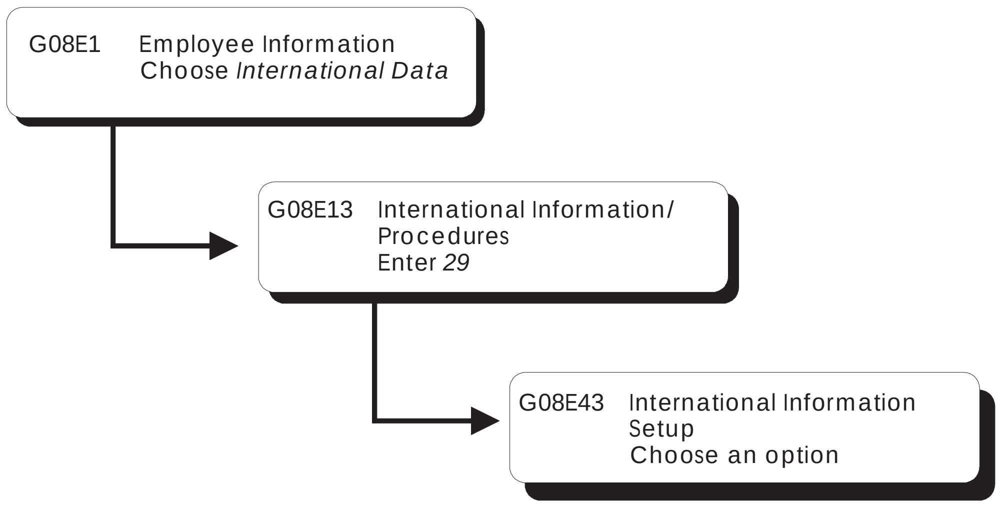
See Also

- Defining Pay Information *(P082001)*

Exercises

See the exercises for this chapter.

Set Up International Information



Setting Up International Information

You must set up international data unique to your country and language, such as salutations. If you are setting up information for a Canadian company, you also must set up information to assist you with the requirements for Canadian Employment Equity.

Setting up international information cosists of the followng tasks:

- ❑ Define user defined codes for Canadian Employment Equity
- ❑ Set up Canadian employment equity

Defining User Defined Codes for Canadian Employment Equity

You can set up the following user defined codes as part of identifying Canadian employment equity information:

NOC codes (05/NC)	Use these national occupation codes to specify occupations. These are provided by J.D. Edwards.

CMA code (05/CM)	Use these census metropolitan area codes to indicate where the employee resides. These are provided by J.D. Edwards.
Employment status (06/ES)	Use these codes to identify the employee's status within the company. These are provided by J.D. Edwards.
Ethnic codes (06/M)	Use these codes to designate minority classifications. You may add to these codes if necessary. These are provided by J.D. Edwards.
SIC codes (05/SI)	Use these sector industrial codes to identify the specific industry in which the employee works. These are provided by J.D. Edwards.
Province of work (06/SC)	Use these codes to identify the employee's province of employment. These are provided by J.D. Edwards.
Province of work cross-reference (08/PX)	Use these codes to define different salary localities within the organization. These codes can then be used for comparison purposes. These are provided by J.D. Edwards.

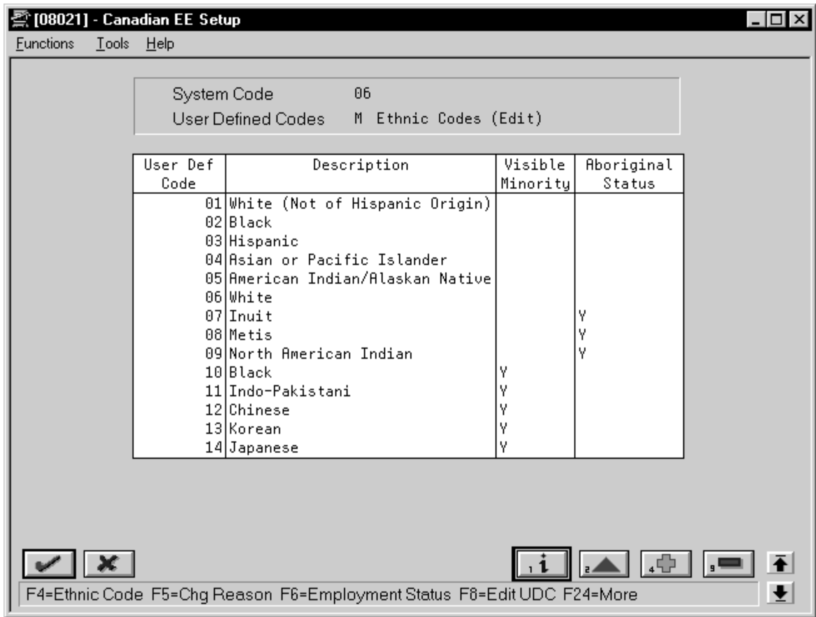
Setting Up Canadian Employment Equity

These are cross-reference tables that allow compatibility with the FCPCS software. You indicate that the information is compatible by entering a code next to each type of data.

These codes are set up and provided by J.D. Edwards. Follow these procedures only if the codes need to be updated or changed.

To set up Canadian employment equity

On Canadian Employee Setup


[08021] - Canadian EE Setup

Functions Tools Help

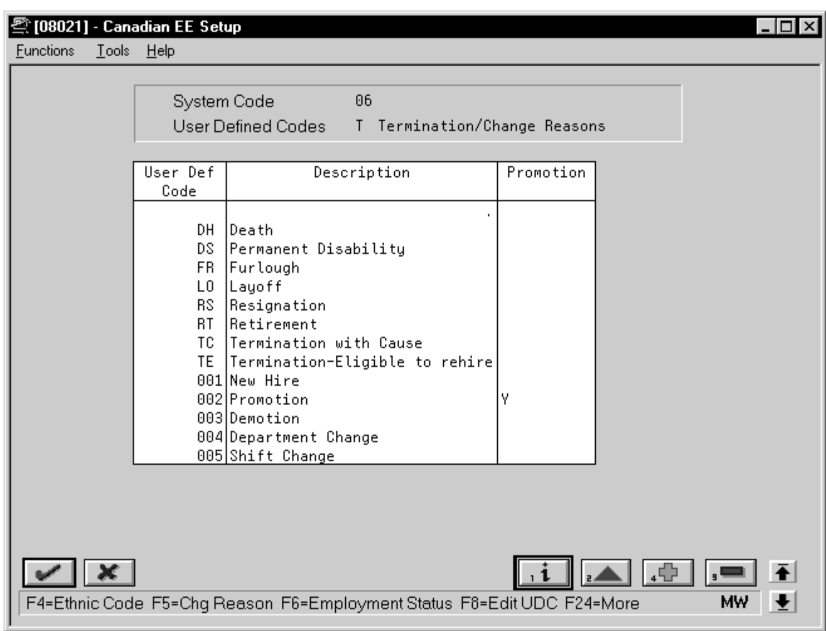
System Code 06

User Defined Codes M Ethnic Codes (Edit)

User Def Code	Description	Visible Minority	Aboriginal Status
01	White (Not of Hispanic Origin)		
02	Black		
03	Hispanic		
04	Asian or Pacific Islander		
05	American Indian/Alaskan Native		
06	White		
07	Inuit		Y
08	Metis		Y
09	North American Indian		Y
10	Black	Y	
11	Indo-Pakistani	Y	
12	Chinese	Y	
13	Korean	Y	
14	Japanese	Y	

F4=Ethnic Code F5=Chg Reason F6=Employment Status F8=Edit UDC F24=More

1. For each appropriate listing, enter a 'Y' in either of the following fields:
   - Visible Minority
   - Aboriginal Status
2. To identify a promotion cross-reference, use the Change Reason function.


[08021] - Canadian EE Setup

Functions Tools Help

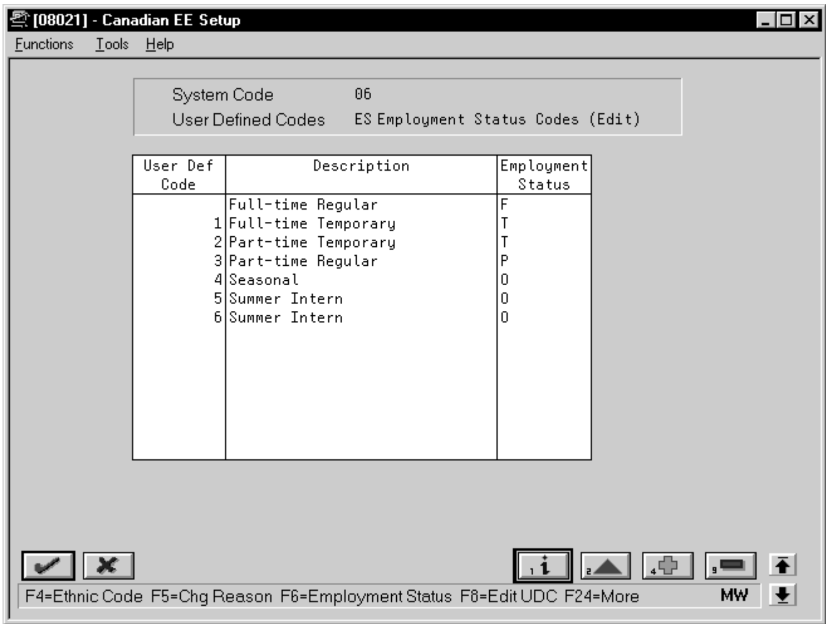
System Code 06

User Defined Codes T Termination/Change Reasons

User Def Code	Description	Promotion
DH	Death	
DS	Permanent Disability	
FR	Furlough	
LO	Layoff	
RS	Resignation	
RT	Retirement	
TC	Termination with Cause	
TE	Termination-Eligible to rehire	
001	New Hire	
002	Promotion	Y
003	Demotion	
004	Department Change	
005	Shift Change	

F4=Ethnic Code F5=Chg Reason F6=Employment Status F8=Edit UDC F24=More MW

3. Complete the following field:
   - Promotion
4. To set up employment status cross-reference, use the Employment Status function.



5. For each appropriate listing, complete the following field:
   - Employment Status

Exercises

See the exercises for this chapter.

Glossary

This glossary defines terms in the context of your use of J.D. Edwards systems and the accompanying user guide.

1099 form. An income tax reporting form required by the U.S. government for many types of payments made to persons and non-corporate entities.

AA ledger. The ledger type used for transactions in domestic amounts (actual amounts).

AAI. Automatic accounting instruction. A code that points to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries. This includes interfaces between Accounts Payable, Accounts Receivable, and Financial Reporting and the General Accounting system. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the Post to General Ledger program to post a debit to a certain expense account and an automatic credit to a certain accounts payable account.

A/P Ledger method. One of the two methods J.D. Edwards provides to process 1099 tax reporting forms. Using this method, you produce 1099s from data stored in the A/P Ledger table (F0411). Also called the *expedient method* and the *fast path method.*

AZ ledger. The ledger type used for cash basis accounting.

access. A way to get to information or functions provided by the system through menus, forms, and reports.

account status. The state or condition of a customer's accounts receivable transaction account.

accounting period. One of the divisions of a fiscal year. A fiscal year can contain 12 to 14 accounting periods, or more rarely, 52 periods. There can also be an additional period for year-end adjustments, and another additional period for audit adjustments.

adjustment. A payment and receipt application method used to modify an amount such as a minor write-off or outstanding freight charges and disputed taxes.

alphabetic character. A letter or other symbol from the keyboard (such as *&#) that represents data. Contrast with *numeric character*.

alphanumeric character. A combination of letters, numbers, and other symbols (such as *&#) that represents data.

approver number. The user ID of the person who approves vouchers for payment.

"as of" report. A report used to view the A/R Ledger and A/P Ledger tables in summary or detail for a specific point in time.

audit adjustments. The adjustments you make to G/L accounts following an audit. You generally enter these adjustments annually, following the close of the fiscal year.

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records, and usually concludes with a report.

backup copy. A copy of original data preserved on a magnetic tape or diskette as protection against destruction or loss.

BACS. Bank Automated Clearing System. An electronic process used in the United Kingdom.

balance forward. A receipt application method in which the receipt is applied to the oldest invoices in chronological order according to the net due date.

bank tape (lock box) processing. The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.

batch. A group of like records or transactions that the computer treats as a single unit during processing. For identification purposes, the system usually assigns each batch a unique identifier, known as a "batch number."

batch control. The verification of the number of transactions and the total amount in each batch entered into the system.

batch header. The information the computer uses as identification and control for a group of transactions or records in a batch.

batch input. A group of transactions loaded from an external source.

batch input table. An external table that holds data being loaded into the system.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging tables. The computer performs these tasks with little or no user interaction.

batch processing. A method by which the computer selects jobs from the job queue, processes them, and writes output to the out queue. Contrast with *interactive processing.*

batch receipts entry. An alternative method (such as an optical reader or magnetic scanner) to load receipts into the J.D. Edwards Accounts Receivable system.

batch status. A code that indicates the posting status of a batch. For example, A indicates approved for posting, P indicates posting in-process, and D indicates posted.

batch type. A code that designates which J.D. Edwards system the associated transactions pertain to, thus controlling what records are selected for processing. For example, in the Post General Journal process, only unposted transaction batches with a batch type of G for General Accounting are selected for posting.

Boolean logic operand. In J.D. Edwards DREAM Writer, the parameter of the Relationship field. The Boolean logic operand tells the system to perform a comparison between certain records or parameters. Available operands are:

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

broadcast message. An electronic mail message that you can send to a number of recipients.

business unit. A division of your business organization that requires a balance sheet or P&L. Also called a *cost center*.

calculation method. When you restate currency, you can choose among three calculation methods: (1) period calculations, used for P&L accounts, (2) balance calculations, used for balance accounts, and (3) historical rate, used for fixed assets.

cash basis accounting. A method of accounting that recognizes revenue and expenses when monies are received and paid.

category code. In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could change *category code 4* to *Sales Region*, and define E (East), W (West), N (North), and S (South) as the valid codes. Category codes were formerly known as *reporting codes*.

character. Any letter, number, or other symbol that a computer can read, write, and store.

chargeback. A receipt application method used to generate an invoice for a disputed amount or for the difference of an unpaid receipt.

check. See *payment.*

command. A character, word, phrase, or combination of keys you use to tell the computer to perform a defined activity.

consolidations. A method of grouping or combining information for several companies or business units. Used for reports or inquiries.

consolidation reporting. The process of combining financial statements for companies or business units so that the different entities can be represented by a single balance sheet or income statement. If the different entities operate in different currencies, consolidation reporting may be complicated by the need for currency restatement. See also *currency restatement.*

constants. Parameters or codes that rarely change. The computer uses constants to standardize information processing by an associated system. Some examples of constants are allowing or disallowing out-of-balance postings and having the system perform currency conversions on all amounts. After you set constants such as these, the system follows these rules until you change the constants.

contra/clearing account. A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.

cost allocations. A procedure used to allocate or distribute expenses, budgets, adjustments, and so on among business units, based on actual numbers.

cost center. See *business unit.*

credit message. A code used to display information about a customer's account status, such as "Over Credit Limit".

credit note reimbursement. A system generated form to reclassify a credit memo or unapplied cash record from the Accounts Receivable system to an open voucher in the Accounts Payable system.

cursor. The blinking underscore or rectangle on your form that indicates where the next keystroke will appear.

currency code. A code used to assign a currency to a customer, supplier, bank account, company, or ledger type.

currency restatement. The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.

cursor sensitive help. J.D. Edwards online help function, which allows you to view a description of a field, an explanation of its purpose, and, when applicable, a list of the valid codes you can enter. To access this information, move the cursor to the field and press F1.

customer. An individual or organization that purchases goods and services.

customer ledger. The record of transactions between your company and a particular customer.

customer payment. The payment your company receives from a customer.

data. Numbers, letters, or symbols representing facts, definitions, conditions, and situations, that a computer can read, write, and store.

database. A continuously updated collection of all information a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

data dictionary. A database table consisting of the definitions, structures, and guidelines for the usage of fields, messages, and help text. The data dictionary table does not contain the actual data itself. Also known as a *glossary.*

data types. Supplemental information, attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.

date pattern. A period of time set for each period in standard and 52-period accounting.

debit statement. A list of debit balances.

default. A code, number, or parameter the system supplies when you do not enter one. For example, if an input field's default is N and you do not enter something in that field, the system supplies an N.

descriptive title. See *user defined code*.

detail. The individual pieces of information and data that make up a record or transaction. Contrast with *summary*.

display. (1) To cause the computer to show information on a terminal's form. (2) A specific set of fields and information that a J.D. Edwards system might show on a form. Some forms can show more than one display when you press a specified function key.

display field. A field of information on a form that contains a system-provided code or parameter that you cannot change. Contrast with *input field.*

display sequence. A number that the system uses to reorder a group of records on the form.

document number. A number that identifies the original document, such as voucher, invoice, unapplied cash, journal entry, and so on.

draft. A promise to pay a debt. Drafts are legal payment instruments in certain European countries.

DREAM Writer. Data Record Extraction And Management Writer. A flexible data manipulator and cataloging tool. You use this tool to select and sequence the data that is to appear on a programmed report.

EDI. Electronic data interchange. A method of transferring business documents, such as purchase orders, invoices, and shipping notices, between computers of independent organizations electronically.

edit. (1) To make changes to a table by adding, changing, or removing information. (2) The program function of highlighting fields into which you have entered inadequate or incorrect data.

EFT. Electronic funds transfer. A method of transferring funds from one company's bank account to that of another company.

effective date. The date upon which an address, item, transaction, or table becomes effective. Examples include the date a change in address becomes effective or the date a tax rate becomes effective. In the Address Book system, effective dates allow you to track past and future addresses for suppliers and customers.

execute. See *run*.

exit. (1) To interrupt or leave a computer program by pressing a specific key or a sequence of keys. (2) An option or function key displayed on a form that allows you to access another form.

expedient method. See *A/P Ledger method.*

facility. A collection of computer language statements or programs that provides a specialized function throughout a system or throughout all integrated systems. Examples include DREAM Writer and FASTR.

fast path method. See *A/P Ledger method.*

FASTR. Financial Analysis Spreadsheet Tool and Report Writer. A report writer that allows you to design your own report specifications using the general ledger database.

field. (1) An area on a form that represents a particular type of information, such as name, document type, or amount. Fields that you can enter data into are designated with underscores. See *input field* and *display field.* (2) A defined area within a record that contains a specific piece of information. For example, a supplier record consists of the fields Supplier Name, Address, and Telephone Number. The Supplier Name field contains just the name of the supplier.

52 period accounting. A method of accounting that uses each week as a separate accounting period.

finance charge. An amount charged to a customer based on a percentage assessed on an unpaid invoice exceeding the grace period.

financial reporting date. The user defined date used by the system when you run financial reports.

fiscal year. A company's tax reporting year. Retained earnings are generally calculated at the end of a fiscal year. It is often different than a calendar year. For example, a fiscal year may be the period October 1 through September 30.

flash message. A code that you define to describe the credit status of a customer. Examples include over credit limit, COD only, bad credit risk, and requires a purchase order.

fold area. An area of a form, accessed by pressing F4, that displays additional information associated with the records or data items displayed on the form.

function. A separate feature within a facility that allows you to perform a specific task, for example, the field help function.

function key. A key you press to perform a system operation or action. For example, you press F4 to have the system display the fold area of a form.

functional server. A central system location for standard business rules about entering documents such as vouchers, invoices, and journal entries. Functional servers ensure uniform processing according to guidelines you establish.

general ledger receipt. A receipt that is directly applied to a G/L account without being applied to a specific invoice. These are typically non-A/R receipts.

glossary. See *data dictionary.*

G/L method. One of the two methods J.D. Edwards provides to process 1099 tax reporting forms. Using this method, you produce 1099s from data stored in the Account Ledger table (F0911). Also called the *tough/right method.*

G/L offset. An account used by the post program to create automatic offset entries.

G/L posted code. A system code that indicates the status of individual documents. For example, P indicates that a voucher or invoice has been posted.

GST. Goods and services tax. A tax assessed in Canada.

hard copy. A presentation of computer information printed on paper. Synonymous with *printout*.

hash total. A sum produced by numbers with different meanings. For example, adding amounts in different currencies.

header. Information at the beginning of a table. This information is used to identify or provide control information for the group of records that follows.

help instructions. Online documentation or explanations of fields that you access by pressing the Help key or by pressing F1 with your cursor in a particular field.

helps. See *help instructions*.

hidden selections. Menu selections you cannot see until you enter HS in a menu's Selection field. Although you cannot see these selections, they are available from any menu. They include such items as Display Submitted Jobs (33), Display User Job Queue (42), and Display User Print Queue (43). The Hidden Selections window displays three categories of selections: user tools, operator tools, and programmer tools.

indexed allocations. A procedure used to allocate or distribute expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.

input. Information you enter in the input fields on a form or that the computer enters from other programs, then edits and stores in tables.

input field. An area on a form, distinguished by underscores (_ _), where you type data, values, or characters. A field represents a specific type of information, such as name, document type, or amount. Contrast with *display field*.

install system code. The code that identifies a J.D. Edwards system. Examples are 01 for the Address Book system, 04 for the Accounts Payable system, and 09 for the General Accounting system.

integrity test. A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interactive processing. A job the computer performs in response to commands you enter from a terminal. During interactive processing, you are in direct communication with the computer, and it might prompt you for additional information during the processing of your request. See *online*. Contrast with *batch processing*.

interest invoice. An invoice calculated on paid invoices whose payment was received after the specified due dates.

interest rate computation code. A code used to define the rates and effective dates used for calculating interest charges.

interface. A link between two or more J.D. Edwards systems that allows these systems to send information to and receive information from one another.

invalid account. A G/L account that has not been set up in the Account Master table (F0901).

invoice match. A receipt application method where the receipt is applied to specific invoices. A discount can be allowed or disallowed using invoice match.

jargon. A J.D. Edwards term for system-specific help text. You base your help text on a specific reporting code you designate in the Data Dictionary Glossary. You can display this text as part of online help.

job. A single identifiable set of processing actions you tell the computer to perform. You start jobs by choosing menu selections, entering commands, or pressing designated function keys. An example of a computer job is payment printing in the Accounts Payable system.

job queue. A form that lists the batch jobs you and others have told the computer to process. When the computer completes a job, the system removes the job's identifier from the list.

justify. To shift information you enter in an input field to the right or left side of the field. Many of the facilities within J.D. Edwards systems justify information. The system does this only after you press Enter.

key field. A field common to each record in a table. The system uses the key field designated by the program to organize and retrieve information from the table.

language preference. An address book code used to specify a language to use when displaying information.

leading zeros. A series of zeros that certain facilities in J.D. Edwards systems place in front of a value you enter. This normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers you enter. The result appears as 00004567.

ledger type. A ledger used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions may also be stored in the CA (foreign currency) ledger type. Also known as a *ledger*.

level of detail. (1) The degree of difficulty of a menu in J.D. Edwards software. The levels of detail for menus are as follows:

A=Major Product Directories
B=Product Groups
1=Basic Operations
2=Intermediate Operations
3=Advanced Operations
4=Computer Operations
5=Programmers
6=Advanced Programmers

Also known as *menu levels.* (2) The degree to which account information in the General Accounting system is summarized. The highest level of detail is 1 (least detailed) and the lowest level of detail is 9 (most detailed).

logged vouchers. See *voucher logging.*

mail distribution list. A list of people to whom you send electronic mail messages. This list enables you to quickly send notices, instructions, or requests to a predefined group of people.

master table. A computer table that a system uses to store data and information which is permanent and necessary to the system's operation. Master tables might contain data or information such as paid tax amounts and supplier names and addresses.

matching document. A document associated with an original document to complete or change a transaction.

menu. A form that displays numbered selections. Each of these selections represents a program. To access a selection from a menu, type the selection number and then press Enter.

menu levels. See *level of detail.*

menu masking. A security feature of J.D. Edwards systems that lets you prevent individual users from accessing specified menus or menu selections. The system does not display the menus or menu selections to unauthorized users.

menu message. Text that appears on a form after you make a menu selection. It displays a warning, caution, or information about the requested selection.

mode. A code that specifies whether amounts are in the domestic currency of the company the invoices or vouchers are associated with or in the foreign currency of the transaction.

monetary account. (1) In common usage, any funds account. (2) In J.D. Edwards more specific usage, a bank account limited to transactions in a single currency.

multiple AAI revisions. The process of revising several automatic accounting instructions at one time.

next number facility. A J.D. Edwards software facility you use to control the automatic numbering of such items as new G/L accounts, vouchers, and addresses. It lets you specify your desired numbering system and provides a method to increment numbers to reduce transposition and typing errors.

next status. The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).

numeric character. Represents data using the numbers 0 through 9. Contrast with *alphabetic character* and *alphanumeric character*.

offline. Computer functions that are not under the continuous control of the system. For example, if you run a certain job on a personal computer and then transfer the results to a host computer, that job is considered an offline function. Contrast with *online*.

online. Computer functions over which the system has continuous control. Each time you work with a J.D. Edwards system-provided form, you are online with the system. Contrast with *offline*. See *interactive processing*.

online information. Information the system retrieves, usually at your request, and immediately displays on the form. This information includes items such as database information, documentation, and messages.

operand. See *Boolean logic operand.*

option. A numbered selection from a J.D. Edwards form that performs a particular function or task. To select an option, you enter its number in the Option field next to the item you want the function performed on. When available, for example, option 4 allows you to return to a prior form with a value from the current form.

original document. The document that initiates a transaction in the system.

output. Information the computer transfers from internal storage to an external device, such as a printer or a computer form.

output queue. A form that lists the spooled tables (reports) you have told the computer to write to an output device, such as a printer. After the computer writes a table, the system removes that table's identifier from the online list.

override. The process of entering a code or parameter other than the one provided by the system. Many J.D. Edwards systems offer forms that provide default field values when they appear. By typing a new value over the default code, you can *override* the default. See *default*.

P&L. Profit and loss statement.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

parent/child relationship. A hierarchical relationship among your addresses (suppliers, customers, or prospects). One address is the parent and one or more subordinate addresses are children for that parent. This relationship is helpful, for example, when you want to send billing for field offices (subsidiary companies) to the corporate headquarters.

password. A unique group of characters that you enter when you sign on to the system that the computer uses to identify you as a valid user.

pay item. A line item in a voucher.

pay status. The current condition of the payment, such as paid or payment-in-process.

payment. The system creates payments when you use the Create Payment Groups program. It is important to understand that payments can exist before you write them.

payment control group. A system-generated group of payments with similar information (such as bank account). The system processes all payments in a payment control group at the same time. Also known as a *payment group.*

payment group. See *payment control group.*

payment instrument. The method of payment, such as check, draft, EFT, and so on.

payment stub. The printed record of a payment.

payment terms. The amount of time allowed to pay a voucher or invoice, with or without a discount.

posted code. A code that indicates whether a transaction or batch has been posted.

pre-note code. A code that indicates whether a supplier is set up or in the process of being set up for electronic funds transfer (EFT).

printout. A presentation of computer information printed on paper. Synonymous with *hard copy*.

print queue. An online list (form) of written tables that you have told the computer to print. Once the computer prints the table, the system removes the table's identifier from the online list. See *output queue*.

processing options. A feature of the J.D. Edwards DREAM Writer that allows you to supply parameters to direct the functions of a program. For example, processing options allow you to specify defaults for certain form displays, control the format in which information gets printed on reports, change the way a form displays information, and enter "as of" dates.

program. A collection of computer statements that tells the computer to perform a specific task or group of tasks.

program specific help text. Glossary text that describes the function of a field within the context of the program.

prompt. (1) A reminder or request for information displayed by the system. When a prompt appears, you must respond in order to proceed. (2) A list of codes or parameters or a request for information provided by the system as a reminder of the type of information you should enter or action you should take.

pseudo company. A fictitious company used in consolidations.

PST. Provincial sales tax. A tax assessed by individual provinces in Canada.

purge. The process of removing records or data from a system table.

rate type. For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you may use both period average and period-end rates, distinguishing them by rate type.

realized gain/loss. Currency gains and losses are incurred due to fluctuating currency exchange rates. A gain/loss is realized when you pay the invoice or voucher. See also *unrealized gain/loss.*

record. A collection of related, consecutive fields of data the system treats as a single unit of information. For example, a supplier record consists of information such as the supplier's name, address, and telephone number.

recurring frequency. The cycle in which a recurring voucher becomes due for payment, for example, monthly or quarterly.

recurring invoice. An invoice that becomes due for payment on a regular cycle, such as a lease payment.

recurring voucher. A voucher that comes due for payment on a regular cycle, such as a lease payment.

recycle. A process used to create the next cycle (for example, next month's) of recurring invoices or vouchers.

refresh. A process used to update a customer's credit and collection information, such as Credit Analysis Refresh.

reporting code. See *category code.*

reset. The process of changing a payment from a completed status to a next status of WRT (write). This allows you to correct or reprint payments.

reverse. A method used to automatically create an opposite entry at the time the original transaction is posted to the general ledger.

reverse image. Form text that displays in the opposite color combination of characters and background from what the form typically displays (for example, black on green instead of green on black).

routing/transit number. A number that uniquely identifies U.S. banks. This number is assigned by the Federal Reserve Board and consists of two parts: a routing number and a transit number.

run. To cause the computer to perform a routine, process a batch of transactions, or carry out computer program instructions.

scroll. To use the roll keys to move form information up or down a form at a time. When you press the Rollup key, for instance, the system replaces the currently displayed text with the next form of text if more text is available.

selection. Found on J.D. Edwards menus, selections represent functions that you can access from a given menu. To make a selection, you type its associated number in the Selection field and press Enter.

self-reconciling item. An item that does not require reconciliation.

sequence review ID. Defines the order in which payments print in a payment group. Each sequence review ID has its own data sequence and a code that indicates whether the system sorts each data item in ascending or descending order.

single AAI revision. The process of revising one automatic accounting instruction at a time.

soft coding. A J.D. Edwards term that describes an entire family of features that allows you to customize and adapt J.D. Edwards software to your business environment. These features lessen the need for you to use computer programmers when your data processing needs change.

software. The operating system and application programs that tell the computer how and what tasks to perform.

special character. Representation of data in symbols that are neither letters nor numbers. Some examples are * & # /.

special period/year. The date used to determine the *source* balances for an allocation.

speed code. A user defined code that represents a G/L account number. Speed codes can be used to simplify data entry by making G/L accounts easier to remember

spool. The function by which the system puts generated output into a storage area to await printing and processing.

spooled table. A holding table for output data waiting to be printed or input data waiting to be processed.

spread. A payables and receipt application method used to distribute and apply an unapplied voucher, receipt, debit memo, or credit memo to open vouchers or invoices.

Standard Industry Code (SIC). A code the U.S. government developed to classify U.S. companies as to their economic activity. Examples include agricultural services (0100), wholesale trade (5000), and services (7000).

stop date. The date an allocation becomes inactive.

structure type. A code that identifies a type of organization structure with its own hierarchy in the Address Book system. Examples include accounts receivable or electronic mail.

subtable. An area on the form where the system displays detailed information related to the header information at the top of the form. Subtables might contain more information than the form can display in the subtable area. If so, use the roll keys to display the next form of information. See *scroll*.

submit. See *run*.

supplemental data. Additional information about a business unit not contained in the master tables.

supplier. An individual or organization that provides goods and services. Also called a *vendor*.

supplier ledger. The record of transactions between your company and a particular supplier.

supplier payment. The payment your company makes to a supplier.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many of the J.D. Edwards systems offer forms and reports that are summaries of the information stored in certain tables.

system. A collection of computer programs that allows you to perform specific business tasks. Some examples of applications are Accounts Payable, Inventory, and Order Processing. Synonymous with *application.*

table. A collection of related data records organized for a specific use and electronically stored by the computer.

three-tier processing. The task of entering, approving, and posting batches of transactions.

third party software. Programs provided to J.D. Edwards clients by companies other than J.D. Edwards.

TI code. A code that identifies the type of receipt application, which directly affects the way the receipt is processed.

time log. An electronic mail method for tracking employees' time in the office. The time log lists when employees sign in, sign out, and employee remarks about their whereabouts and activities.

tolerance range. The amount by which taxes entered manually can vary from the system-calculated tax.

tough/right method. See *G/L method.*

transaction code. A code that distinguishes the type of transaction on a bank statement.

transit account. A G/L account used to hold funds until they can be allocated to the correct account.

translation adjustment account. An optional G/L account used in currency restatement to record the total adjustments at a company level.

undo. To remove the payments from the payment run so that they no longer appear on any A/P payment review form. The system clears them from the worktable and moves vouchers from a pay status of # (payment in-process) to pay status A (approved).

unrealized gain/loss. Currency gains and losses are incurred due to fluctuating currency exchange rates. A gain/loss is unrealized until you pay the invoice or voucher. See also *realized gain/loss.*

update. Add new payments and void payments to the A/P Ledger (F0411), Accounts Payable Matching Document (F0413), and Accounts Payable Matching Document Detail (F0414) tables. The system updates these tables during payment processing and prints the payment register.

user defined code. The individual codes you create and define within a user defined code type. Code types are used by programs to edit data and allow only defined codes. These codes might consist of a single character or a set of characters that represents a word, phrase, or definition. These characters can be alphabetic, alphanumeric, or numeric. For example, in the user defined code type list ST (Search Type), a few codes are C for Customers, E for Employees, and V for Suppliers.

user defined code (type). The identifier for a list of codes with a meaning you define for the system (for example, ST for the Search Type codes list in Address Book). J.D. Edwards systems provide a number of these lists and allow you to create and define lists of your own. User defined codes were formerly known as *descriptive titles.*

user identification (user ID). The unique name you enter when you sign on to a J.D. Edwards system to identify yourself to the system. This ID can be up to 10 characters long and can consist of alphabetic, alphanumeric, and numeric characters.

valid codes. The allowed codes, amounts, or types of data that you can enter in a specific input field. The system checks, or edits, user defined code fields for accuracy against the list of valid codes.

variable numerator allocations. A procedure used to allocate or distribute expenses, budgets, adjustments, and so on, among business units, based on a variable.

VAT. Value-added tax. A recoverable tax assessed in some countries.

vendor. See *supplier.*

video. The display of information on your monitor form. Normally referred to as the *form*.

vocabulary overrides. A J.D. Edwards facility that lets you to override field, row, or column title text on a form-by-form or report-by-report basis.

void. A method used to create a reversing entry of the original transaction. Voiding a transaction leaves an audit trail.

voucher logging. The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account or accounts.

voucher match. A payment application method where the payment is applied to specific vouchers.

who's who. A term that J.D. Edwards uses to identify contacts at a particular company. Examples include billing, collections, and sales personnel.

window. A software feature that allows a part of your form to function as if it were a form in itself. Windows serve a dedicated purpose within a facility, such as searching for a specific valid code for a field.

word search stop word. A common word that the query search in the Address Book system ignores. Examples include street, avenue, or building.

worked. A code used to indicate whether a customer's account has been reviewed and updated. For example, you "work" an account by changing a customer's credit limit or customers who are eligible for a credit review.

write-off. A receipt application method where the receipt is applied to the invoice and the difference is written off. You can "write-off" both overpayments and underpayments.

write payment. A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.

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