The information in this guide is confidential and a proprietary trade secret of J.D. Edwards & Company. It may not be copied, distributed, or disclosed without prior written permission. This guide is subject to change without notice and does not represent a commitment on the part of J.D. Edwards & Company. The software described in this guide is furnished under a license agreement and may be used or copied only in accordance with the terms of the agreement. J.D. Edwards & Company uses an automatic software disabling routine to monitor the license agreement. For more details about this routine, please refer to the Technical Foundation Guide.
Where Do I Look?

Online Help
- Program
- Form
- Field

CD-ROM Guides

Guides

Technical Foundation
System Administration and Environment Fundamentals
- Understanding Your Environment
- Creating and Maintaining Environments
- Setting Up Security
- Upgrading Your System

Common Foundation
Prerequisite
J.D. Edwards Software Fundamentals
- Using Menus
- Getting Help
- Customizing Data
- Reporting
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.
Table of Contents

Human Resources Overview

System Integration ................................................. 1–1
Human Resources Features ........................................ 1–2
    Budget Management ........................................... 1–2
    Requisition Management .................................... 1–3
    Applicant Tracking .......................................... 1–3
    Comprehensive Employee Information .................... 1–4
        Employee Master Information .......................... 1–4
        Employee Profile Information ........................ 1–4
    Integrated Employee History and Turnover Analysis ........ 1–5
Complete Job Information ........................................ 1–5
    Job Descriptions ............................................. 1–5
    Job Evaluations .............................................. 1–5
Wage and Salary Forecasting .................................... 1–6
Safety and Health Reporting .................................... 1–6
Organizational Structure Building ............................. 1–6
Human Resources System Flow .................................. 1–7
Tables Used by Human Resources .............................. 1–7
Menu Overview .................................................. 1–10

Daily

Employee Information

About Employee Information .................................... 2–1
Enter Employee Information ..................................... 2–3
Entering Employee Information ................................ 2–3
Entering Employee Master Information ....................... 2–4
    Processing Options for Employee Master – HR Initial Setup 2–20
Entering Employee Multiple Job Information ................ 2–23
    Processing Options for Employee Multiple Job Entry .... 2–27
Entering Pay and Tax Information .............................. 2–29
    Processing Options for Pay and Tax Information .......... 2–29
Entering Additional Employee Information ................... 2–30
Entering International Employee Information ............... 2–33
Work with Employee Information ............................. 2–39
    Working with Employee Information ........................ 2–39
Changing Employee Master Information ....................... 2–40
Changing Current Employee Master Information ............. 2–40
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing Future Information Using the Payroll Cycle</td>
<td>2-44</td>
</tr>
<tr>
<td>Changing Future Information Without Using the Payroll Cycle</td>
<td>2-47</td>
</tr>
<tr>
<td>Processing Options for Update Future Data to Employee Master</td>
<td>2-47</td>
</tr>
<tr>
<td>Changing Information for a Group of Employees</td>
<td>2-48</td>
</tr>
<tr>
<td>Correcting Employee Master Information</td>
<td>2-52</td>
</tr>
<tr>
<td>Correcting the Employee Tax ID Number</td>
<td>2-53</td>
</tr>
<tr>
<td>Correcting Employee Master History Information</td>
<td>2-53</td>
</tr>
<tr>
<td>Processing Options for Employee History</td>
<td>2-56</td>
</tr>
<tr>
<td>Correcting Employee Turnover Information</td>
<td>2-57</td>
</tr>
<tr>
<td>Correcting Employee Multiple Job History Information</td>
<td>2-59</td>
</tr>
<tr>
<td>Correcting Employee Position Activity</td>
<td>2-62</td>
</tr>
<tr>
<td>Updating Employee Compa–Ratio</td>
<td>2-65</td>
</tr>
<tr>
<td>Processing Options for Compa–Ratio Batch Calculation</td>
<td>2-65</td>
</tr>
<tr>
<td>Purging Employee Multiple Job Records</td>
<td>2-66</td>
</tr>
<tr>
<td>Processing Options for Purge Employee Multiple Job File</td>
<td>2-66</td>
</tr>
<tr>
<td>Entering Leave of Absence Information</td>
<td>2-66</td>
</tr>
<tr>
<td>Work with Profile Data</td>
<td>2-69</td>
</tr>
<tr>
<td>Working with Profile Data</td>
<td>2-69</td>
</tr>
<tr>
<td>Entering Employee Profile Data</td>
<td>2-70</td>
</tr>
<tr>
<td>Processing Options for Profile Data Entry</td>
<td>2-74</td>
</tr>
<tr>
<td>Copying Profile Data</td>
<td>2-74</td>
</tr>
<tr>
<td>Changing Profile Data</td>
<td>2-78</td>
</tr>
<tr>
<td>Reviewing Profile Data</td>
<td>2-79</td>
</tr>
<tr>
<td>Processing Options for Profile Data Inquiry</td>
<td>2-80</td>
</tr>
<tr>
<td>Processing Options for Profile by Data Type</td>
<td>2-82</td>
</tr>
<tr>
<td>Locating Employees Using Multiple Criteria</td>
<td>2-82</td>
</tr>
<tr>
<td>Processing Options for Profile Multiskills Search</td>
<td>2-86</td>
</tr>
<tr>
<td>Purging Profile Data</td>
<td>2-87</td>
</tr>
<tr>
<td>Processing Options for Purge Profile Data</td>
<td>2-87</td>
</tr>
<tr>
<td>Terminate an Employee</td>
<td>2-89</td>
</tr>
<tr>
<td>Terminating an Employee</td>
<td>2-89</td>
</tr>
<tr>
<td>Processing Options for Termination/Rehire</td>
<td>2-93</td>
</tr>
<tr>
<td>Rehire an Employee</td>
<td>2-95</td>
</tr>
<tr>
<td>Rehiring an Employee</td>
<td>2-95</td>
</tr>
<tr>
<td>Work with Canadian Federal Employment Equity</td>
<td>2-99</td>
</tr>
<tr>
<td>Working with Canadian Federal Employment Equity</td>
<td>2-99</td>
</tr>
<tr>
<td>Creating the Canadian Employment Equity Workfile</td>
<td>2-99</td>
</tr>
<tr>
<td>Processing Options for Create FCPCS Workfile</td>
<td>2-100</td>
</tr>
<tr>
<td>Downloading the Workfile to Your Personal Computer</td>
<td>2-101</td>
</tr>
<tr>
<td>Processing Options for Download FCPCS Workfile</td>
<td>2-101</td>
</tr>
<tr>
<td>Run Employee Reports</td>
<td>2-103</td>
</tr>
<tr>
<td>Running Employee Reports</td>
<td>2-103</td>
</tr>
<tr>
<td>Running Employee Master Reports</td>
<td>2-103</td>
</tr>
<tr>
<td>Employee Master Record Changes Report</td>
<td>2-104</td>
</tr>
<tr>
<td>Employee Master Labels</td>
<td>2-104</td>
</tr>
<tr>
<td>Running Employee Profile Reports</td>
<td>2-105</td>
</tr>
<tr>
<td>Employee Profile Data Report</td>
<td>2-105</td>
</tr>
<tr>
<td>Processing Options for Employee Profile Report</td>
<td>2-106</td>
</tr>
<tr>
<td>Employees by Data Type Report</td>
<td>2-106</td>
</tr>
<tr>
<td>Processing Options for Employees by Data Type</td>
<td>2-107</td>
</tr>
</tbody>
</table>
Employee History and Turnover

About Employee History and Turnover ................................. 3–1
What Is Employee Master History? ................................. 3–2
What Is Employee Multiple Job History? ...................... 3–2
What Is Employee Master Turnover? ............................... 3–3
Why Is the Change Reason Code Important? .................... 3–3
Work with History Records ............................................. 3–5
Working with History Records ....................................... 3–5
Reviewing History Records ............................................ 3–6
Reviewing Employee History .......................................... 3–7
Processing Options for Employee History Inquiry .............. 3–9
Reviewing Employee Multiple Job History ....................... 3–10
Correcting History Records ........................................... 3–11
Correcting an Employee Master History Record ................ 3–12
Correcting a Multiple Job History Record ....................... 3–15
Correcting an Invalid Change Reason Code or Effective Date 3–17
Purging History Records .............................................. 3–21
Purging Employee Master History .................................. 3–21
Processing Options for Purge Employee History ................. 3–22
Purging Employee Multiple Job Record ............................ 3–23
Processing Options for Purge Employee Multiple Job Table 3–23
Work with Turnover Records .......................................... 3–25
Working with Turnover Records .................................... 3–25
Reviewing Turnover Records ...................................... 3–26
Correcting Turnover Records ....................................... 3–29
Purging Turnover Records ........................................... 3–30
Run History and Turnover Reports .................................. 3–35
Running History and Turnover Reports ......................... 3–33
Running History Reports ........................................... 3–33
Employee History Log Report ....................................... 3–34
Processing Options for Employee History Log Report ....... 3–35
Salary History Analysis Report ..................................... 3–35
Human Resources

Processing Options for Employee Salary History
  Analysis Report ........................................... 3–36
  Last History Change Report ......................... 3–36
  Processing Options for Last History Change Workfile Build . 3–37
  Running Turnover/Change Reports ..................... 3–38

Jobs

  About Jobs ................................................. 4–1
  Define Jobs .............................................. 4–3
  Defining Jobs ........................................... 4–3
  Entering Initial Job Information ................... 4–4
    Processing Options for Job Data & Evaluation Points ...... 4–9
  Entering Job Profile Data ............................... 4–10
  Entering Evaluation Information .................. 4–12
  Review Jobs .............................................. 4–15
    Reviewing Jobs ......................................... 4–15
    Reviewing Jobs by Profile Data .................. 4–16
    Reviewing Jobs by Employees ....................... 4–19
      Processing Options for Employees by Job Type & Step .... 4–20
    Reviewing Jobs by Evaluation ...................... 4–21
      Processing Options for Job Comparisons by Factor ...... 4–22
    Reviewing Pay Ranges for Jobs ..................... 4–22
    Reviewing Pay Grades for Job Classifications .......... 4–24
  Update Jobs Globally .................................. 4–27
  Updating Jobs Globally ................................ 4–27
    Processing Options for Update Job Information 
      Into Employee Master ................................ 4–28
  Work with Obsolete Job IDs ............................ 4–29
    Working with Obsolete Job IDs .................... 4–29
    Deleting An Obsolete Job ID ...................... 4–29
    Archiving an Obsolete Job ID ..................... 4–32
    Changing Pay Grade/Steps ......................... 4–34
  Run Job Reports ......................................... 4–37
  Running Job Reports .................................... 4–37
  Running Job Profile Reports ........................... 4–38
    Job Profile Information Report .................. 4–38
      Processing Options for Job Profile Information Report ... 4–39
    Jobs by Data Type Report ......................... 4–39
      Reviewing Job Information by Data Type .......... 4–39
      Processing Options for Jobs by Data Type Report .... 4–40
  Running Job Evaluation Reports ...................... 4–40
    Job Evaluation Factor Data Report ................. 4–41
    Job Data and Evaluation Points Report .......... 4–41
    Compensable Factors Table Report .................. 4–44
    Running the Pay Ranges by Job Report ............ 4–46
      Processing Options for Pay Ranges by Job Report .... 4–46
  Running the Pay Grade/Step Progression Reports .......... 4–46
    Pay Grade/Salary Ranges Report ................... 4–47
    Employees Above Pay Grade Maximum Report .......... 4–49

Release A7.3  (June 1996)
Table of Contents

Employees Below Pay Grade Minimum Report .......... 4–51
Grade/Step and Next Grade/Step Values Report .......... 4–53
Pay Grade/Step and Quartile Values Report .......... 4–53

Requisitions

About Requisitions ......................................... 5–1
Enter Requisitions ........................................ 5–3
Entering Requisitions ..................................... 5–3
Entering Requisition Master Information ................. 5–4
    Processing Options for Requisition Entry ............... 5–8
Entering Requisition Profile Data ........................ 5–8
Approve a Requisition .................................... 5–11
Approving a Requisition .................................. 5–11
Work with Requisitions ................................... 5–15
    Working with Requisitions ............................. 5–15
Attaching a Candidate Record to a Requisition ......... 5–16
    Processing Options for Requisition Activity ......... 5–19
Rejecting a Candidate ..................................... 5–20
Closing a Requisition ..................................... 5–21
Reopening a Requisition .................................. 5–21
Review Requisitions ...................................... 5–23
    Reviewing Requisitions ............................... 5–23
Reviewing Requisition Details ............................ 5–24
Reviewing Requisition Activity ........................... 5–25
Reviewing Profile Data by Requisition .................... 5–26
Run Requisition Reports .................................. 5–27
    Running the Requisition Profile Report ............... 5–27
        Data Selection .................................... 5–27
    Running the Requisitions by Data Type Report ......... 5–30
    Running the Requisition Review Report ............... 5–31
    Running the Unfilled Requisitions Report ............. 5–32

Applicant Information

About Applicant Information ............................... 6–1
Enter Applicant Information ................................ 6–3
Entering Applicant Information ............................ 6–3
Entering General Information ............................. 6–4
    Processing Options for Applicant Entry ............... 6–6
Entering Profile Information .............................. 6–8
Attaching an Applicant to a Position ..................... 6–8
Run a Multiskill Search ................................... 6–11
    Running a Multiskill Search ........................... 6–11
Attach an Applicant to a Requisition ..................... 6–15
    Attaching an Applicant to a Requisition ............... 6–15
Review Applicant Information ............................ 6–19
    Reviewing Applicant Information ....................... 6–19
Human Resources

Print Letters of Acknowledgement ........................................... 6–23
Printing Letters of Acknowledgement ....................................... 6–23
Hire an Applicant ................................................................. 6–27
Hiring an Applicant .............................................................. 6–27
Purge Applicant Information ................................................... 6–31
Purging Applicant Information ............................................... 6–31
Purging General Information ................................................. 6–31
Processing Options for Purge Applicants by Date ....................... 6–35
Purging Profile Information ................................................... 6–35
Processing Options for Purge Profile Data ................................. 6–36
Run Applicant and EEO Reports .............................................. 6–37
Running Applicant and EEO Reports ....................................... 6–37
Running Applicant Profile Data Reports .................................... 6–37
Applicant Profile Report ....................................................... 6–38
Applicants by Data Type Report .............................................. 6–38
Running World Writer Reports for Applicants ............................ 6–39
Running EEO/Affirmative Action Reports .................................. 6–40
EEO-1 Employment Data Report ............................................. 6–40
Processing Options for Report – EEO-1 Employee Data ............... 6–41
EEO-4 Analysis Report ......................................................... 6–42
Processing Options for Report – EEO-4 Analysis ....................... 6–42
EEO Staff Utilization Report .................................................. 6–43
Processing Options for EEO Staff Utilization ............................ 6–44
Hired Applicants by EEO Job Report ........................................ 6–44
Processing Options for Hired Applicants by EEO Job Category .... 6–45
Application Flow Analysis Report .......................................... 6–45
Processing Options for Applicant Flow Analysis ...................... 6–46
Adverse Impact Analysis Report ............................................. 6–47
Processing Options for Adverse Impact Analysis ...................... 6–47
Workforce Analysis Report .................................................... 6–48
Processing Options for Workforce Analysis ............................. 6–50
Veterans Employment (VETS-100) Report ............................... 6–50
Processing Options for Veterans Employment (VETS-100) ......... 6–51

Position Control

About Position Control .......................................................... 7–1
Define a Position Budget ....................................................... 7–3
Defining a Position Budget .................................................... 7–3
Example: Budget Processing .................................................. 7–4
Defining Multiple Position Budgets Manually ............................ 7–5
Defining a Single Position Budget Manually ............................... 7–8
Processing Options for Position Master Detail ......................... 7–12
Defining a Position Budget Automatically ............................... 7–12
Processing Options for Start Position Control ......................... 7–14
Defining Position Accounts .................................................. 7–14
Upload a Position Budget to the General Ledger ..................... 7–17
Uploading a Position Budget to the General Ledger ................. 7–17
Updating Position Budgets to the Account Balances Table ......... 7–18

Release A7.3 (June 1996)
Processing Options for Update Position
  Budgets to Account Balances .................................. 7–19
Posting Position Budgets to an Account Ledger .................. 7–20
  Processing Options for Update Position
    Budgets to Account Ledger ................................... 7–20
Assign an Employee to a Position Budget ......................... 7–21
  Assigning an Employee to a Position Budget ................ 7–21
  Review Position Budget Detail .................................. 7–25
    Reviewing Position Budget Detail .............................. 7–25
  Reviewing Position Budget Detail by Business Unit .......... 7–25
    Reviewing Position Budget Detail by Position ............... 7–26
  Processing Options for Positions by Business Unit .......... 7–27
    Reviewing Position Budget Detail by Activity ............... 7–28
    Processing Options for Activity by Position ................. 7–30
    Processing Options for Activity by Employee ............... 7–31
Work with a Position Budget ...................................... 7–33
  Working with a Position Budget ................................. 7–33
  Changing Position Budgets ...................................... 7–33
  Correcting Employee Activity ................................... 7–35
Create Next Year’s Position Budget ................................ 7–37
  Creating Next Year’s Position Budget ......................... 7–37
    Processing Options for Create Next Fiscal Years
      Position Budgets ............................................. 7–38
Purge a Position Budget ........................................... 7–41
  Purging a Position Budget ...................................... 7–41
Run Position Reports ............................................... 7–43
  Running Position Reports ....................................... 7–43
  Running the Open Amounts by Position Report ................ 7–44
  Running the Open Effective Amounts by Position Report .... 7–45
  Running the Cross-Year Budget Comparison Report ........... 7–46
    Processing Options for Cross–Year Budget Comparison .... 7–46
    Running the Cross-Year Effective Budget Comparison Report 7–47
    Processing Options for Cross–Year Effective
      Budget Comparison ........................................... 7–47
    Running the Position Full-Time Equivalents (FTEs) Report .. 7–48
      Processing Options for Position FTE Report ................ 7–50
    Running the Position Headcount Report ...................... 7–50
      Processing Options for Position Headcount Report ........ 7–50
Running the Position Reports World Writers ...................... 7–51
  Position Budgets World Writer .................................. 7–52
  Position Budgets by Job Type and Step World Writer ......... 7–53
  Position Budgets by Business Unit World Writer ............. 7–54
  Position Effective Budgets World Writer ..................... 7–55
  Position Effective Budget by Job Type and Step World Writer 7–56
  Position Effective Budget by Home Business Unit World Writer 7–57
  Employee Activity by Number World Writer .................... 7–58
  Employee Activity by Name World Writer ..................... 7–59
Wage and Salary Administration

About Wage and Salary Administration .................................. 8–1
Enter Individual Employee Pay Changes .................................. 8–5
Entering Individual Employee Pay Changes ............................... 8–5
Defining a Current Pay Change for a Primary Job ....................... 8–6
Defining a Current Pay Change for Multiple Jobs ..................... 8–9
Processing Options for Employee Multiple Job Entry .................. 8–11
Defining a Pay Change for an Individual Employee .................... 8–12
Enter Multiple Employee Pay Changes .................................... 8–15
Entering Multiple Employee Pay Changes ................................. 8–15
Defining Multiple Pay Changes for Primary Jobs ....................... 8–15
Creating a Review Group ..................................................... 8–16
Processing Options for Create Review Group ......................... 8–18
Working with a Review Group .............................................. 8–19
Entering Global Pay Changes for a Review Group ...................... 8–19
Processing Options for Review and Rank Employees ................. 8–22
Entering Pay Changes for One Group Member .......................... 8–23
Entering Pay Changes by Component for One Employee .............. 8–24
Entering a Bonus For an Employee In a Review Group ............... 8–25
Entering Appraisal Information ............................................ 8–26
Updating Salary Actuals ................................................. 8–27
Processing Options for Update Salary Actuals ......................... 8–28
Defining Multiple Pay Changes for Pay Grade/Steps ................. 8–29
Creating a Work Group ..................................................... 8–29
Processing Options for Build Grade ...................................... 8–31
Progression Work Group ................................................... 8–31
Working with Work Groups .............................................. 8–31
Updating Employee Records ............................................. 8–34
Processing Options for Grade Progression .............................. 8–34
Work Group Update ....................................................... 8–34
Delete Obsolete Review Groups ........................................... 8–35
Deleting Obsolete Review Groups ....................................... 8–35
Deleting Wage and Salary Review Groups ............................... 8–35
Processing Options for Delete a Review Group ......................... 8–36
Deleting Pay Grade/Step Progression Review Groups ................. 8–37
Run Employee Salary Analysis ............................................ 8–39
Running Employee Salary Analysis ...................................... 8–39
Processing Options for Employee Salary Analysis ..................... 8–41

Safety and Health Administration

Objectives ............................................................................. 9–1
About Safety and Health Administration ................................ 9–1
Work with Accident or Illness Data ....................................... 9–3
Working With Accident or Illness Data ................................. 9–3
Opening a Case ............................................................... 9–4
Closing a Case ............................................................... 9–9
Reviewing a Case ............................................................ 9–9
Table of Contents

Run Safety and Health Reports .............................................. 9–13
Running Safety and Health Reports .................................... 9–13
Running the OSHA 200 Log ................................................. 9–13
Running the OSHA 200 Summary ........................................ 9–16
Running the Cases by Profile ............................................. 9–16
Running the Cases by Type of Data .................................... 9–17
Running World Writer for Safety and Health Administration ... 9–18

Organizational Structure

About Organizational Structure .......................................... 10–1
Work with an Organizational Structure ................................ 10–5
Working with an Organizational Structure ......................... 10–5
Defining an Organizational Structure ................................. 10–6
Processing Options for Organization Structure Revisions ...... 10–13
Revising an Organizational Structure ................................. 10–14
Reviewing an Organizational Structure ............................... 10–15
Processing Options for Organization Structure Inquiry ......... 10–17
Processing Options for Organization Structure Inquiry –
  Positions ........................................................................... 10–19
Processing Options for Organization Structure Inquiry –
  Employee/Supervisor ..................................................... 10–20
Printing an Organizational Structure .................................. 10–20
Example: Structure by Business Unit ................................. 10–21
Example: Structure by Position .......................................... 10–23
Example: Structure by Employee ........................................ 10–24

Setup

System Setup

About System Setup .......................................................... 11–1
Set Up Profile Data ........................................................... 11–3
Setting Up Profile Data ..................................................... 11–3
Defining Types of Profile Data for Human Resources ........ 11–4
Defining User Defined Codes ............................................ 11–8
Adding User Defined Code Values ..................................... 11–9
Linking User Defined Codes to Profile Data ....................... 11–10
Defining Security for Profile Data ..................................... 11–11
Setting Up the Cross-Reference Table for Profile Data ....... 11–13
Generating the Title Search Table for Human Resources .... 11–14
Transferring Profile Data .................................................. 11–15
Processing Options for Profile Data Copy/Move ................ 11–15
Understand History and Turnover Tracking ....................... 11–17
Understanding History and Turnover Tracking .................... 11–17
What is the Subsystem and Monitor? ................................. 11–18
What Happens When I Start the Subsystem and Monitor? .... 11–19
When Should I Start and Stop the Subsystem and Monitor? ... 11–19

Release A7.3  (June 1996)
Set Up Constants and History/Turnover ........................................ 11–21
  Setting Up Constants .................................................. 11–21
  Defining System-Wide Constants .................................... 11–22
  Selecting Employee Master Fields for Tracking .................... 11–28
  Before You Begin ...................................................... 11–28
  Setting Up Employee Master Change Tracking ..................... 11–30
  Before You Begin ...................................................... 11–30
  Initializing the History and Turnover Monitor .................... 11–32
  Processing Options for Initialize Employee History .............. 11–33
  Activating History and Turnover Tracking ......................... 11–34
  What You Should Know About ....................................... 11–34
  Processing Options for Start HR Subsystem/Monitor .............. 11–34
  Reviewing the HR Monitor Status ................................... 11–34

Set Up Jobs ........................................................................ 11–37
  Setting Up Jobs .......................................................... 11–37
  Defining Pay Information .............................................. 11–38
    Processing Options for Pay Grade/Salary Range Information .. 11–42
  Defining Job Evaluation Factors .................................... 11–47
  Defining User-Defined Codes for Jobs ............................... 11–50
  Setting Up a Cross-Reference Table by Business Unit .......... 11–51
  Working With Job Profile Data ....................................... 11–52
    Creating Job Profile Data .......................................... 11–53
    Defining Security for Job Profile Data ............................ 11–53
    Generating the Title Search Table for Jobs ..................... 11–53
    Moving Job Profile Data .......................................... 11–54

Set Up Employee Information ............................................. 11–55
  Setting Up Employee Information ................................... 11–55
  Defining User Defined Codes for Employees ....................... 11–56
  Defining Category Codes for Human Resources .................... 11–57
  Working With Employee Profile Data ............................... 11–58
    Defining Types of Employee Profile Data ....................... 11–58
    Defining Security for Employee Profile Data ..................... 11–58
    Building the Profile Transfer Table ............................. 11–59
    Generating the Title Search Table ............................... 11–59
  Generating the Profile Copy Table for Employee Information . 11–59
  Selecting Fields for Pending Changes .............................. 11–59

Set Up Safety and Health Administration ............................ 11–61
  Setting Up Safety and Health Administration ..................... 11–61
  Defining User Defined Codes for Safety and Health Administration .......................... 11–62
  Working with Safety and Health Profile Data ..................... 11–62
    Creating Safety and Health Profile Data ....................... 11–62
    Defining Security for Safety and Health Profile Data .......... 11–63
    Building the Profile Transfer Table ............................. 11–63
    Generating the Profile Copy Table for Health and Safety Information .................. 11–63
  Entering Establishments in the Address Book for Human Resources .......................... 11–63

Set Up Requisitions ....................................................... 11–67
  Setting Up Requisitions ............................................. 11–67
  Defining User Defined Codes for Requisitions .................... 11–68
  Defining Profile Data for Requisitions ............................ 11–68
Table of Contents

Set Up Applicant Information ........................................ 11–69
  Setting Up Applicant Information ................................. 11–69
  Defining User Defined Codes for Applicants .................. 11–69
  Working With Applicant Profile Data ......................... 11–70
    Defining Types of Applicant Profile Data .................... 11–71
    Defining Security for Applicant Profile Data ............... 11–71
    Building the Profile Transfer Table ....................... 11–71
    Generating the Word Search Table for Applicants .......... 11–72
    Moving Applicant Profile Data ................................ 11–72
Set Up Wage and Salary Administration .............................. 11–73
  Setting Up Wage and Salary Administration ................... 11–73
  Defining User Defined Codes for Wage and Salary Administration . 11–73
  Defining Pay Grades and Steps for Wage and Salary Information .... 11–74
Set Up International Information .................................... 11–75
  Setting Up International Information ....................... 11–75
  Defining User Defined Codes for Canadian Employment Equity ... 11–75
  Setting Up Canadian Employment Equity ................... 11–76

Glossary

Index

Exercises
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.
<table>
<thead>
<tr>
<th>Job Information (F08001)</th>
<th>Contains information for job ID data and for the job evaluation. The job ID is the combination of the job type and job step.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit/Job ID Cross-Reference (F08005)</td>
<td>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.</td>
</tr>
<tr>
<td>Compensable Factors Table (F08011)</td>
<td>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.</td>
</tr>
<tr>
<td>History Constants (F08040)</td>
<td>Contains the parameters used by the HR Employee Monitor program to create history records and integration updates from the Employee Master table.</td>
</tr>
<tr>
<td>HR History (F08042)</td>
<td>Stores and maintains employee history records.</td>
</tr>
<tr>
<td>Employee Turnover Analysis (F08045)</td>
<td>Contains employee turnover records.</td>
</tr>
<tr>
<td>Turnover Column Consolidation (F08046)</td>
<td>Contains column headings by group code for turnover reports.</td>
</tr>
<tr>
<td>Profile Database Types of Data (F08090)</td>
<td>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.</td>
</tr>
<tr>
<td>Profile Database User Defined Codes (F08092)</td>
<td>Contains multiple values with a specific type of data for individual applicant, employee, job, requisition, dependent/beneficiary, or occupational injury/illness cases.</td>
</tr>
<tr>
<td>Profile Narrative (F08093)</td>
<td>Contains narrative for specific types of data for an individual applicant, employee, job, requisition, dependent/beneficiary, or occupational injury/illness cases.</td>
</tr>
</tbody>
</table>
| **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 Advanced Operations G08J3
Job Specifications Setup G08J4
Pay Grade/Step Administration G08J2
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**

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 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 processing 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 information

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
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>A number that uniquely identifies an entry in the Address Book system. You can use this number to identify employees and applicants.</td>
</tr>
<tr>
<td></td>
<td>This field accepts the identification in one of three forms:</td>
</tr>
<tr>
<td></td>
<td>- A 1- to 8-digit employee (Address Book) number.</td>
</tr>
<tr>
<td></td>
<td>- A 9-digit Social Security (tax ID) number (with leading zeros).</td>
</tr>
<tr>
<td></td>
<td>- A 9- to 8-digit “other” (alternate, old, third employee) number preceded by a slash (/).</td>
</tr>
<tr>
<td>Employee Tax ID</td>
<td>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.</td>
</tr>
<tr>
<td>Company – Home</td>
<td>The number of the company in which the employee generally resides.</td>
</tr>
<tr>
<td>Home Business Unit</td>
<td>The number of the business unit in which the employee generally resides.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Name – First</td>
<td>The individual's first name.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>NOTE: To change a name, you must use the Address Book window.</td>
</tr>
<tr>
<td>Marital Status – Tax</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pay Status</td>
<td>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).</td>
</tr>
<tr>
<td>Additional Employee Number</td>
<td>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 (/).</td>
</tr>
<tr>
<td>Date – Birth</td>
<td>The employee’s date of birth.</td>
</tr>
<tr>
<td>Country Code</td>
<td>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.</td>
</tr>
<tr>
<td>Flag – Language Preference</td>
<td>A flag to identify the language preference of the employee. Codes are: E English, F French.</td>
</tr>
<tr>
<td>Locality</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
</tr>
<tr>
<td></td>
<td>- In the detail section, this field shows the salary locality for a particular pay grade.</td>
</tr>
<tr>
<td>Full Time Equivalents</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 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. |
| 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             | 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 Type/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 Frequency        | A user defined code (system 06, type PF) that indicates how often an employee is paid. Codes are:  

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Bi-weekly</td>
</tr>
<tr>
<td>W</td>
<td>Weekly</td>
</tr>
<tr>
<td>S</td>
<td>Semi-monthly</td>
</tr>
<tr>
<td>M</td>
<td>Monthly</td>
</tr>
<tr>
<td>A</td>
<td>Annually</td>
</tr>
<tr>
<td>C</td>
<td>European Annualized</td>
</tr>
</tbody>
</table>

The system uses the value in the Description–2 field to calculate the amount per pay period. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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 (0802001). |
| 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>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Salary Frequency | 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  

| Hourly Rate      | 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.  

| Shift Code       | 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 timesheet.  

| Check Route      | 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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Area (Residence)</td>
<td>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.</td>
</tr>
<tr>
<td>Tax Area (Work)</td>
<td>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.</td>
</tr>
<tr>
<td>Benefit Group</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

   ![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 effect 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EEO – I9 Status</td>
<td>A code indicating the method used to verify that this employee is eligible to work in the United States. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>Y I9 form on file</td>
</tr>
<tr>
<td></td>
<td>P Passport used for verification</td>
</tr>
<tr>
<td></td>
<td>L Driver’s license and Social Security card</td>
</tr>
<tr>
<td></td>
<td>V Visa (worker’s permit)</td>
</tr>
<tr>
<td></td>
<td>B Birth certificate</td>
</tr>
<tr>
<td></td>
<td>N Waiting for verification</td>
</tr>
<tr>
<td>EEO – Veteran</td>
<td>A code indicating the veteran status of the employee. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>N No, this employee is not a veteran.</td>
</tr>
<tr>
<td></td>
<td>Y Yes, this employee is a veteran.</td>
</tr>
<tr>
<td></td>
<td>V This employee is a Vietnam era veteran.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Pay Grade Steps</td>
<td>Indicates the number of optional pay increments, if any, available within each pay grade.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>This field is informational only.</td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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.  
<pre><code>                     | Some of these codes are hard-coded and should not be changed.                                                                                                                                                                                                                     |
</code></pre>
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Group</td>
<td>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.</td>
</tr>
<tr>
<td>Annual Salary 1 – Life Insurance</td>
<td>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.</td>
</tr>
<tr>
<td>Annual Salary 2 – Life Insurance</td>
<td>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.</td>
</tr>
<tr>
<td>Employee Age</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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
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
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
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><em>Form-specific information</em></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Job Category (EEO)</td>
<td>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.</td>
</tr>
<tr>
<td>Periods per Year</td>
<td>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.</td>
</tr>
<tr>
<td>Standard Hours per Day</td>
<td>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.</td>
</tr>
<tr>
<td>Standard Days per Year</td>
<td>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.</td>
</tr>
</tbody>
</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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Codes 1–20</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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.

3. On User Defined Dates Window, complete the following fields:
   - User Defined Dates 1–10

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Defined Date 01</td>
<td>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.</td>
</tr>
</tbody>
</table>

Entering International Employee Information

G08E1 Employee Information
Choose International Data

G08E13 International Information/Procedures
Choose Employee International Data
If your company has international employees, you can use Employee International Data to record information, such as maiden name, 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maiden Name</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Occupational Classification</td>
<td>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.</td>
</tr>
<tr>
<td>Census Metropolitan Area</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sector Industrial Code</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency Code – From</td>
<td>A code that indicates the currency of a customer’s or a supplier’s transactions.</td>
</tr>
<tr>
<td>Alien Registration Number</td>
<td>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.</td>
</tr>
</tbody>
</table>
## 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

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:

\[ FTE \times \text{Pay Grade Step} \]

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date – Effective On</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Future Value</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>- Future Data Revisions - An employee master value to be updated in the future based upon the effective date of the revision.</td>
</tr>
<tr>
<td></td>
<td>- Year End Processing - A selection value that specifies the records to be processed during the workfile build.</td>
</tr>
<tr>
<td></td>
<td>- History Payroll Reg. - A selection value that specifies the paycheck history record to be processed during the workfile build.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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

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.


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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Item</td>
<td>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 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.</td>
</tr>
</tbody>
</table>

**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.
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

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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover Data</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
Correcting Employee Multiple Job History Information

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 affect 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:
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.

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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date – Effective From</td>
<td>The date on which a requisition, a position, or activity within a position goes into effect.</td>
</tr>
<tr>
<td>Date – Effective Thru</td>
<td>The date on which a requisition, 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.</td>
</tr>
</tbody>
</table>
| 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 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

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

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.


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

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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>And/Or Selection 1</td>
<td>A code to designate whether the test parameters or criteria are based on an AND condition or an OR condition.</td>
</tr>
<tr>
<td></td>
<td><strong>Form-specific information</strong></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Type Data</td>
<td>The Type of Data from the supplemental database that is used in a multiple information search.</td>
</tr>
<tr>
<td>Multiskill Search Data Item</td>
<td>Indicates which data item is to be included in the search.</td>
</tr>
<tr>
<td>Relationship</td>
<td>You can specify any of the following relationships:</td>
</tr>
<tr>
<td></td>
<td>EQ Equal to</td>
</tr>
<tr>
<td></td>
<td>LT Less than</td>
</tr>
<tr>
<td></td>
<td>LE Less than or equal to</td>
</tr>
<tr>
<td></td>
<td>GT Greater than</td>
</tr>
<tr>
<td></td>
<td>GE Greater than or equal to</td>
</tr>
<tr>
<td></td>
<td>NE Not equal to</td>
</tr>
<tr>
<td></td>
<td>NL Not less than</td>
</tr>
<tr>
<td></td>
<td>NG Not greater than</td>
</tr>
<tr>
<td>Multiskill Search Data</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>You can also use the % wildcard character to search for data starting with, ending with, or containing one or more consecutive characters. For example:</td>
</tr>
<tr>
<td></td>
<td>• BA% will display both bamboo and bachelor.</td>
</tr>
<tr>
<td></td>
<td>• %ing will display all words ending with ing.</td>
</tr>
<tr>
<td></td>
<td>• %BA% will display any words containing the letters B and A, such as abate, cabbage, or bachelor.</td>
</tr>
</tbody>
</table>
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

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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date – Employee Recall</td>
<td>The date on which the employee can be recalled for employment.</td>
</tr>
<tr>
<td>Date – Terminated</td>
<td>The date that the employee was terminated, if applicable.</td>
</tr>
<tr>
<td>Yes or No – Move to Applicant Pool</td>
<td>A code indicating whether a terminated employee should be moved, by batch job, into the applicant pool. Valid codes are:</td>
</tr>
</tbody>
</table>
|                                           | 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). |
### 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Item – Secondary</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Employee Pay Status</td>
<td>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).</td>
</tr>
</tbody>
</table>
| 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  | The date that the current status of a Candidate Requisition became active.                                                                                   |
| Date                         | 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

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.
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).

<table>
<thead>
<tr>
<th>Address Number</th>
<th>Alpha Name</th>
<th>Data Item</th>
<th>History Date</th>
<th>Eff On</th>
<th>Date Updated</th>
<th>Chg Run</th>
<th>Description</th>
<th>User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>5127</td>
<td>Ebby, Chester A.</td>
<td>HMCN</td>
<td>00100</td>
<td>01/01/98</td>
<td>07/12/94</td>
<td>098</td>
<td>Automated Conversion AB709431T</td>
<td></td>
</tr>
<tr>
<td>5127</td>
<td>Ebby, Chester A.</td>
<td>HMCU</td>
<td>819</td>
<td>01/01/98</td>
<td>07/12/94</td>
<td>098</td>
<td>Automated Conversion AB709431T</td>
<td></td>
</tr>
<tr>
<td>5127</td>
<td>Ebby, Chester A.</td>
<td>SALV</td>
<td>S</td>
<td>01/01/98</td>
<td>07/12/94</td>
<td>098</td>
<td>Automated Conversion AB709431T</td>
<td>31T</td>
</tr>
</tbody>
</table>

**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.

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

Employee Number: 6002 Abbot, Dominique
Pay Class/Freq: H / B
Pay Class/Freq: H / B
Primary Job/Step: / Pay Grade...
Date Of Birth: 741 Accounting
Date Started: 02/19/96
Pay Grade Step: .
Benefit Group: Annual Salary: 20,800.00
Home Company: 00200 Model Manuf/Distrib Company
Home Bus. Unit: 741 Accounting
Primary Job/Step: / Pay Grade...
Benefit Group: Annual Salary: 20,800.00
Union Code: .
Union Code: .
FLSA Exempt Y/N: Y

Emergency Contacts

Parents: (303) 671-6364

Training

<table>
<thead>
<tr>
<th>Type</th>
<th>Trng Dte</th>
<th>Where Obtained</th>
<th>Certification Earned</th>
<th>Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDRSHIP</td>
<td>02/15/96</td>
<td>Fred Pryor</td>
<td></td>
<td>150.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>She has shown impressive leadership qualities.</td>
<td></td>
</tr>
<tr>
<td>PLTFRM</td>
<td>05/30/97</td>
<td>Local college</td>
<td></td>
<td>150.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total</td>
<td>300.00</td>
</tr>
</tbody>
</table>

Appraisal Details

<table>
<thead>
<tr>
<th>Appraisal</th>
<th>App.Date</th>
<th>Overall Results</th>
<th>Points Earned</th>
<th>Yrs Wrked</th>
</tr>
</thead>
<tbody>
<tr>
<td>MR</td>
<td>03/15/98</td>
<td>Standard performance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

### Professional Licenses/Certif

<table>
<thead>
<tr>
<th>Employee</th>
<th>Name</th>
<th>Updated</th>
<th>State/Province</th>
<th>Status</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>License</td>
<td>CDP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6010</td>
<td>Eason, Walter</td>
<td>09/01/88</td>
<td>Nebraska</td>
<td>Certified Data Processing</td>
<td></td>
</tr>
<tr>
<td>7704</td>
<td>Rivard, Jacques</td>
<td>01/01/92</td>
<td></td>
<td></td>
<td>250.00</td>
</tr>
<tr>
<td>License</td>
<td>CFP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>Kellerman, James</td>
<td>01/01/98</td>
<td></td>
<td>Certified Financial Planner</td>
<td></td>
</tr>
<tr>
<td>License</td>
<td>CMA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2057</td>
<td>D'Angelo, Suzanne</td>
<td>01/01/98</td>
<td></td>
<td>Certified Management Account</td>
<td></td>
</tr>
<tr>
<td>License</td>
<td>CPA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6002</td>
<td>Abbot, Dominique</td>
<td>06/15/98</td>
<td>Colorado</td>
<td>Certified Public Accountant</td>
<td></td>
</tr>
<tr>
<td>6001</td>
<td>Allen, Ray</td>
<td>06/01/80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>Kellerman, James</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>License</td>
<td>CPP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6002</td>
<td>Abbot, Dominique</td>
<td>06/12/95</td>
<td>Colorado</td>
<td>Certified Payroll Professional</td>
<td></td>
</tr>
<tr>
<td>7505</td>
<td>Mastro, Robert</td>
<td>10/15/98</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7500</td>
<td>Mc Dougie, Cathy</td>
<td>01/01/98</td>
<td>Colorado</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Walters, Annette</td>
<td>10/13/93</td>
<td>Colorado</td>
<td></td>
<td></td>
</tr>
<tr>
<td>License</td>
<td>HRM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7500</td>
<td>Mc Dougie, Cathy</td>
<td>01/01/98</td>
<td>Colorado</td>
<td>Certified HR Manager</td>
<td>150.00</td>
</tr>
<tr>
<td>2006</td>
<td>Walters, Annette</td>
<td>10/13/93</td>
<td>Colorado</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 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.

<table>
<thead>
<tr>
<th>Address Number</th>
<th>User Def Code</th>
<th>Effective Date</th>
<th>User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 MR</td>
<td>03/15/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6002 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 PCUSE</td>
<td>01/01/98</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 CDP</td>
<td>09/01/88</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6010 KEYSFC</td>
<td>01/10/91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6010 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 XXXxxxxxxx</td>
<td>02/26/96</td>
<td>SS788627</td>
<td></td>
</tr>
<tr>
<td>6010 ALCOHOL</td>
<td>10/10/91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6010 COCAINE</td>
<td>10/10/91</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**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).
<table>
<thead>
<tr>
<th>Job Categories</th>
<th>Total (thousands)</th>
<th>Male</th>
<th>Female</th>
<th>White</th>
<th>Black</th>
<th>Hisp.</th>
<th>Asian</th>
<th>Indian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officials and Managers</td>
<td>0.0 – 15.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16.0 – 19.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20.0 – 24.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>25.0 – 32.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>33.0 – 42.9</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>43.0 – 54.9</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>55.0 – 69.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>70.0 – PLUS</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Category Total</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Male</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Female</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td>0.0 – 15.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16.0 – 19.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20.0 – 24.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>25.0 – 32.9</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>33.0 – 42.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>43.0 – 54.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>55.0 – 69.9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>70.0 – PLUS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Category Total</td>
<td>2</td>
<td>2</td>
<td></td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Male</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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).

<table>
<thead>
<tr>
<th>EEO Ethnic Description</th>
<th>Total Hours</th>
<th>Male Hours</th>
<th>Female Hours</th>
<th>Total Male</th>
<th>Female Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>White (Not of Hispanic Origin)</td>
<td>178.96</td>
<td>88.52</td>
<td>90.44</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Black</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hispanic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Indian/Alaskan Native</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canadian Indian</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unknown</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 178.96 88.52 90.44 2 1 1

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. ____________

Total Minorities Minority % 000 Total Females 1 Female % 051
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).

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.

<table>
<thead>
<tr>
<th>EEO Job Category</th>
<th>Special Disabled</th>
<th>Vietnam Disabled</th>
<th>Special Vietnam Era</th>
<th>Disability Veterans</th>
<th>Non-Veterans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Company</td>
<td>001</td>
<td>002</td>
<td>003</td>
<td>004</td>
<td>005</td>
</tr>
<tr>
<td>Home Cost Center</td>
<td>001</td>
<td>002</td>
<td>003</td>
<td>004</td>
<td>005</td>
</tr>
<tr>
<td>001 Officials and Managers</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>003 Technicians</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>004 Sales</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>008 Laborers</td>
<td>(Unskilled)</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>17</td>
</tr>
</tbody>
</table>

**Employee Information**
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 affect 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

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 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

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

<table>
<thead>
<tr>
<th>Correcting errors</th>
<th>Errors in an employee's secondary job history record can only be corrected using Employee Multiple Job Entry.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting an incorrect employee multiple job history record</td>
<td>On Employee Multiple Job History Inquiry, you can also delete an incorrect employee multiple job history record.</td>
</tr>
</tbody>
</table>

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

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**

   ![Diagram](image)

   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.
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.

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

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
correct 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
Human Resources

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
All Employees by Home Business Unit
01/01/98 Through 12/31/98

Employee Number | Name | Data Item | Description | History Data | Effectv On | Seq Number | Change Reason | Changed By
--- | --- | --- | --- | --- | --- | --- | --- | ---

Home Business Unit | 419 Administration

| Employee Number | Name | Data Item | Description | History Data | Effectv On | Seq Number | Change Reason | Changed By
--- | --- | --- | --- | --- | --- | --- | --- | ---

| Employee Number | Name | Data Item | Description | History Data | Effectv On | Seq Number | Change Reason | Changed By
--- | --- | --- | --- | --- | --- | --- | --- | ---

Home Business Unit | 451 Accounting Department

| Employee Number | Name | Data Item | Description | History Data | Effectv On | Seq Number | Change Reason | Changed By
--- | --- | --- | --- | --- | --- | --- | --- | ---

Home Business Unit | 701 Corporate Administration

| Employee Number | Name | Data Item | Description | History Data | Effectv On | Seq Number | Change Reason | Changed By
--- | --- | --- | --- | --- | --- | --- | --- | ---

3-34 Release A7.3 (June 1996)
## 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.

<table>
<thead>
<tr>
<th>Employee Number</th>
<th>Name</th>
<th>Pay Status</th>
<th>Empl Stats</th>
<th>Job Type</th>
<th>Pay Grade</th>
<th>Grad Compa– P</th>
<th>C Salary/Hourly Change</th>
<th>Percent</th>
<th>Change Reason</th>
<th>Effectiv On</th>
</tr>
</thead>
<tbody>
<tr>
<td>7500McDougla, Cathy</td>
<td>Active</td>
<td>Human Resource S4</td>
<td>1.05</td>
<td>S</td>
<td>40,000.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7504Meade, Jane</td>
<td>Active</td>
<td>Human Resource S4</td>
<td>0.54</td>
<td>S</td>
<td>35,000.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7506Mayeda, Donald</td>
<td>Active</td>
<td>Clerk</td>
<td>H</td>
<td>7,500</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7510Moraels, Jesus</td>
<td>Active</td>
<td>Financial Ana</td>
<td>0.67</td>
<td>S</td>
<td>6,500</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6001Allen, Ray</td>
<td>Active</td>
<td>President S7</td>
<td>1.05</td>
<td>S</td>
<td>70,000.00</td>
<td>03/17/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5127Ebby, Chester A.</td>
<td>Active</td>
<td>EEO Specialis</td>
<td>0.73</td>
<td>S</td>
<td>48,800.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6000Easter, Melvyn</td>
<td>Active</td>
<td>Full-time Secretary</td>
<td>2.57</td>
<td>H</td>
<td>18,000</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006Walters, Annette</td>
<td>Active</td>
<td>Full-time Foreman</td>
<td>3.71</td>
<td>H</td>
<td>26,000</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2111Ingraham, Paul</td>
<td>Active</td>
<td>Project Leade</td>
<td>0.70</td>
<td>S</td>
<td>40,000.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2129Jackson, John</td>
<td>Active</td>
<td>Laborer H5</td>
<td>S</td>
<td>35,000.00</td>
<td>03/15/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6002Abbott, Dominique</td>
<td>Active</td>
<td>Full-time Financial Ana</td>
<td>1.26</td>
<td>S</td>
<td>50,000.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6010Eason, Walter</td>
<td>Active</td>
<td>Laborer</td>
<td>H</td>
<td>18,000</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7701Anthony Holiday</td>
<td>Active</td>
<td>Fire Fighter</td>
<td>1.34</td>
<td>H</td>
<td>11,250</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7702Derrick, Leslie</td>
<td>Active</td>
<td>Financial Ana</td>
<td>2.54</td>
<td>H</td>
<td>37,500</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7703Belles, Debbie</td>
<td>Active</td>
<td>Financial Ana</td>
<td>1.34</td>
<td>S</td>
<td>53,000.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7704Rivard, Debbie</td>
<td>Active</td>
<td>Payroll Manag</td>
<td>1.04</td>
<td>S</td>
<td>43,620.00</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7508Ma, Tien</td>
<td>Active</td>
<td>Human Resource S4</td>
<td>0.54</td>
<td>H</td>
<td>5,250</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
### Running Turnover/Change Reports

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:

<table>
<thead>
<tr>
<th>Number</th>
<th>Home Business Unit Description</th>
<th>Initial</th>
<th>NEW</th>
<th>Promotions</th>
<th>Terminations</th>
<th>Increas</th>
<th>Changes</th>
<th>Job</th>
<th>Conversion</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General Accounts</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Corporate Administration</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Denver Branch</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Dallas Branch</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>San Francisco Branch</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>MD Model Chart of Accounts</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Initial</th>
<th>NEW</th>
<th>Promotions</th>
<th>Terminations</th>
<th>Increas</th>
<th>Changes</th>
<th>Job</th>
<th>Conversion</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Type (Craft) Code</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.</td>
</tr>
<tr>
<td>Job 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>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</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>
<tr>
<td>Description 01</td>
<td>A user defined name or remark that describes a field.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information. The system displays an error message if the description does not match the job type/step.</td>
</tr>
<tr>
<td>Repeat Data (Y/N)</td>
<td>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.</td>
</tr>
<tr>
<td>Job Evaluation Method</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Group</td>
<td>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.</td>
</tr>
<tr>
<td>Job Status Code</td>
<td>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.</td>
</tr>
<tr>
<td>Status Change Reason</td>
<td>A user defined code (system 08, type JC) that explains why a change in status was made.</td>
</tr>
<tr>
<td>Workers Comp Insurance Code</td>
<td>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.</td>
</tr>
</tbody>
</table>
### 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.
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. Reinsure on the job.

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 %

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade or Degree – 001</td>
<td>For the Compensable Factors Table (P08011), enter the maximum evaluation points allowable within this degree for this factor.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Job Evaluation Points</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Evaluation Memo Code 1</td>
<td>A memo field used to indicate why a certain point value was assigned to job evaluation factor 01.</td>
</tr>
<tr>
<td></td>
<td>For example, this field might contain the row and column numbers from a Hay evaluation chart where the particular point value resides.</td>
</tr>
<tr>
<td>Factor Weight % 1</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 appropriate function key to access the Job Evaluation Window.

Exercises

See the exercises for this chapter.
Review 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

<table>
<thead>
<tr>
<th>Type of Data</th>
<th>Major Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Executive Officer</td>
<td>Better line - make certain the company is successful and continues.</td>
</tr>
<tr>
<td>Vice President</td>
<td>None</td>
</tr>
<tr>
<td>Accounting Manager</td>
<td>Manage general accounting functions.</td>
</tr>
<tr>
<td>Financial Analyst</td>
<td>Oversee all financial reporting and compliance.</td>
</tr>
<tr>
<td>Employment Representative</td>
<td>Meet with employees on a regular basis.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number</th>
<th>Employee</th>
<th>Job Type</th>
<th>Job Step</th>
<th>Pay Grade</th>
<th>Pay Step</th>
<th>Corporatio</th>
</tr>
</thead>
<tbody>
<tr>
<td>7777</td>
<td>Bourke, Richard M.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7776</td>
<td>Devany, Cindy L.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>77081</td>
<td>Gill, A. B.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7776</td>
<td>Guerra, John N.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>663</td>
<td>Hellen, Ray</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3092</td>
<td>Padilla, Alicia C.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3056</td>
<td>Pugh, James R.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3094</td>
<td>Carnich, Bradley D.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3036</td>
<td>Warren, Anne E.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3076</td>
<td>Keillor, James</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20094</td>
<td>Miller, Dennis R.</td>
<td>BUSP</td>
<td>S7</td>
<td>1.13</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 (F080001) 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.
4. Enter the method you wish to use for updating the category codes in the employee master file.

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

'1' = Do NOT default category codes
'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

Complete the following fields:

- Job Evaluation Method
- Factor Number
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Evaluation Factor Number</td>
<td>A sequential number that identifies each job evaluation factor. Job evaluation factors should meet the following criteria:</td>
</tr>
<tr>
<td></td>
<td>• Each factor must distinguish differences between jobs.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• Each factor should be assigned the maximum number of points in each of the 10 levels of degree.</td>
</tr>
<tr>
<td></td>
<td>• No factor should overlap any other factor.</td>
</tr>
<tr>
<td></td>
<td>• The factors chosen must be accepted by employees and managers.</td>
</tr>
<tr>
<td></td>
<td>• The number of factors used should be the minimum needed to insure a balance between completeness and simplicity in rating.</td>
</tr>
<tr>
<td></td>
<td>• The factor definitions should clearly and objectively define what is being rated so that all raters interpret the factor in the same way.</td>
</tr>
</tbody>
</table>

**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.

Messi 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.
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

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.
Update 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
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:
   - '1' = 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)

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.
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:

- Select Delete an obsolete job ID
- Select Archive an obsolete job ID
- Select 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

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.
<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Type</th>
<th>Step Description</th>
<th>Pay</th>
<th>EEO Work</th>
<th>S</th>
<th>Benefit Union</th>
<th>Category Codes</th>
<th>Annual</th>
<th>Hrs/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>3068</td>
<td>Pugh, James R.</td>
<td>BUSDR</td>
<td></td>
<td>P P</td>
<td>Pay</td>
<td>EEO Work</td>
<td>S</td>
<td>Benefit Union</td>
<td>Category Codes</td>
<td>6,149.52</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>F C</td>
<td>Grade</td>
<td>Step Job Comp</td>
<td>C FLSA Group</td>
<td>Code 001 002 003 004 005 006 007 008 009 010</td>
<td>Salary</td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>001</td>
<td>M H</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5651</td>
<td>Y</td>
<td>BUS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Type</th>
<th>Step Description</th>
<th>Pay</th>
<th>EEO Work</th>
<th>S</th>
<th>Benefit Union</th>
<th>Category Codes</th>
<th>Annual</th>
<th>Hrs/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>3076</td>
<td>O'Neil, Thelma P.</td>
<td>COACH</td>
<td></td>
<td>P P</td>
<td>Pay</td>
<td>EEO Work</td>
<td>S</td>
<td>Benefit Union</td>
<td>Category Codes</td>
<td>1,998.88</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>F C</td>
<td>Grade</td>
<td>Step Job Comp</td>
<td>C FLSA Group</td>
<td>Code 001 002 003 004 005 006 007 008 009 010</td>
<td>Salary</td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>001</td>
<td>S</td>
<td>Y FACBEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Type</th>
<th>Step Description</th>
<th>Pay</th>
<th>EEO Work</th>
<th>S</th>
<th>Benefit Union</th>
<th>Category Codes</th>
<th>Annual</th>
<th>Hrs/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>3076</td>
<td>O'Neil, Thelma P.</td>
<td>TEACH</td>
<td>B2 Teacher</td>
<td>P P</td>
<td>Pay</td>
<td>EEO Work</td>
<td>S</td>
<td>Benefit Union</td>
<td>Category Codes</td>
<td>35,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>F C</td>
<td>Grade</td>
<td>Step Job Comp</td>
<td>C FLSA Group</td>
<td>Code 001 002 003 004 005 006 007 008 009 010</td>
<td>Salary</td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>001</td>
<td>8810</td>
<td>Y FACBEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To replace an obsolete job ID with a valid job ID

G08 Human Resources
Choose Employee Information

G08E1 Employee Information
Choose HR Employee Entry
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

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.
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 . .
EEO Job Cat . .  002  Professionals  Evaluation Method . . F
Workers Comp . .  8810 / Administrative  Evaluation Date . . . 03/01/98

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 institutions.
2. Handle the investment recommendations of company income
3. Provide monthly financial statements
4. Provide future financial assessments and projections.

Authority Level
-----------------
<table>
<thead>
<tr>
<th>Level</th>
<th>Updated</th>
<th>PrevUpd</th>
<th>Parallel Jobs</th>
<th>Next level job</th>
<th>#Subordina</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLERK</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SECRETARY</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Background Requirements
------------------------
| BS  | 01/01/98 | Emphasis in Finance |
| MS  | 01/01/98 | Emphasis in Financial Mgmt |

Experience Required
---------------------
<table>
<thead>
<tr>
<th>Position</th>
<th>Updated</th>
<th>PrevUpd</th>
<th>Description of Experience</th>
<th>Additional Comments</th>
<th>Years Req</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNT</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td>5.00</td>
</tr>
<tr>
<td>FIN ANALST</td>
<td>01/01/98</td>
<td></td>
<td></td>
<td></td>
<td>5.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10.00</td>
</tr>
</tbody>
</table>

---

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.
### Authority Level

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

### 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.

<table>
<thead>
<tr>
<th>Job Typ</th>
<th>Step</th>
<th>Description</th>
<th>Eval Method</th>
<th>Description</th>
<th>Job Deg</th>
<th>Job Pts</th>
<th>Table Pts</th>
<th>Memo Code</th>
<th>Weight %</th>
</tr>
</thead>
<tbody>
<tr>
<td>A0</td>
<td>A</td>
<td>Chief Executive Officer</td>
<td>D</td>
<td>Know How</td>
<td>10</td>
<td>500</td>
<td>500</td>
<td>H–H5</td>
<td>60.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Problem Solving</td>
<td>10 350</td>
<td>350</td>
<td>H–H5</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Accountability</td>
<td>10 450</td>
<td>450</td>
<td>H–H5</td>
<td>30.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1</td>
<td>B</td>
<td>President</td>
<td>D</td>
<td>Know How</td>
<td>10</td>
<td>500</td>
<td>500</td>
<td>H–H3</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Problem Solving</td>
<td>9 250</td>
<td>350</td>
<td>H–H5</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Accountability</td>
<td>10 450</td>
<td>450</td>
<td>H–H5</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A2</td>
<td>C</td>
<td>Vice President</td>
<td>D</td>
<td>Know How</td>
<td>9</td>
<td>450</td>
<td>500</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Problem Solving</td>
<td>10 350</td>
<td>350</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Accountability</td>
<td>9 425</td>
<td>450</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-1</td>
<td>D</td>
<td>Accounting Manager</td>
<td>D</td>
<td>Know How</td>
<td>8</td>
<td>400</td>
<td>500</td>
<td>CELLVG</td>
<td>33.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Problem Solving</td>
<td>10 350</td>
<td>350</td>
<td>CELL4A</td>
<td>34.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Accountability</td>
<td>9 425</td>
<td>450</td>
<td>CELL5G</td>
<td>33.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-10</td>
<td>E</td>
<td>Purchasing Agent</td>
<td>F</td>
<td>Profit &amp; Loss Responsibility</td>
<td>125 300</td>
<td>300</td>
<td>60.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Number of Subordinates</td>
<td>125 300</td>
<td>300</td>
<td>10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Education</td>
<td>125 300</td>
<td>300</td>
<td>30.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-2</td>
<td>F</td>
<td>Senior Accountant</td>
<td>F</td>
<td>Profit &amp; Loss Responsibility</td>
<td>150 300</td>
<td>300</td>
<td>10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Number of Subordinates</td>
<td>150 300</td>
<td>300</td>
<td>10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Education</td>
<td>150 300</td>
<td>300</td>
<td>40.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-3</td>
<td>G</td>
<td>Financial Analyst</td>
<td>F</td>
<td>Profit &amp; Loss Responsibility</td>
<td>100 300</td>
<td>300</td>
<td>10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Number of Subordinates</td>
<td>100 300</td>
<td>300</td>
<td>10.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Education</td>
<td>100 300</td>
<td>300</td>
<td>40.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-4</td>
<td>H</td>
<td>Accountant</td>
<td>F</td>
<td>Profit &amp; Loss Responsibility</td>
<td>100 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Number of Subordinates</td>
<td>100 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Technical Skills</td>
<td>100 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Education</td>
<td>100 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OP-0</td>
<td>I</td>
<td>Finance Director</td>
<td>F</td>
<td>Profit &amp; Loss Responsibility</td>
<td>300 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Number of Subordinates</td>
<td>300 300</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Job Data and Evaluation Points Report

You can run the Job Data and Evaluation Points report to review the results of performance reviews.
<table>
<thead>
<tr>
<th>Typ</th>
<th>Step</th>
<th>Description</th>
<th>Job Group</th>
<th>Eval</th>
<th>Description</th>
<th>Eval</th>
<th>Eval</th>
<th>Pts</th>
<th>F</th>
<th>Pay</th>
<th>F</th>
<th>EEO Job</th>
<th>Workers</th>
<th>Bene</th>
<th>Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>A0</td>
<td></td>
<td>Chief Executive Executives</td>
<td>EXEC</td>
<td>D</td>
<td>Degree Method</td>
<td>03/01/98</td>
<td>1300</td>
<td>S</td>
<td>9</td>
<td>Y Officials and Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1</td>
<td></td>
<td>President Executives</td>
<td>EXEC</td>
<td>D</td>
<td>Degree Method</td>
<td>03/01/98</td>
<td>1200</td>
<td>S</td>
<td>7</td>
<td>Y Officials and Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A2</td>
<td></td>
<td>Vice President Executives</td>
<td>EXEC</td>
<td>D</td>
<td>Degree Method</td>
<td>03/01/98</td>
<td>1225</td>
<td>S</td>
<td>9</td>
<td>Y Officials and Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUDR</td>
<td></td>
<td>Bus Driver</td>
<td></td>
<td></td>
<td>No Evaluation Co</td>
<td></td>
<td>H</td>
<td></td>
<td></td>
<td>Y Officials and No Worker's</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COACH</td>
<td></td>
<td>Coach</td>
<td></td>
<td></td>
<td>No Evaluation Co</td>
<td></td>
<td>S</td>
<td></td>
<td></td>
<td>Y Officials and No Worker's</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEACH</td>
<td>M2</td>
<td>Teacher</td>
<td>SERVIC</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Officials and No Worker's</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2</td>
<td></td>
<td>Teacher</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Officials and No Worker's</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B2</td>
<td></td>
<td>Teacher</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Officials and No Worker's</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRNR</td>
<td></td>
<td>Trainer</td>
<td>SERVIC</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OA</td>
<td></td>
<td>Purchasing Agent Executives</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-1</td>
<td></td>
<td>Senior Accountant Executives</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-4</td>
<td></td>
<td>Accountant</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0P</td>
<td></td>
<td>Finance Director Executives</td>
<td>FINAN</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1M-1</td>
<td></td>
<td>MIS Manager</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1M-2</td>
<td></td>
<td>Project Leader</td>
<td>CMPSYS</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2H-1</td>
<td></td>
<td>Human Resource MGR</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2H-2</td>
<td></td>
<td>Employment Repro Professional</td>
<td>PROF</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3F-1</td>
<td></td>
<td>Payroll Manager Executives</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4A-1</td>
<td></td>
<td>Administrative MGR</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Professionals Administrat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5J-4</td>
<td></td>
<td>Fire Fighter</td>
<td>TECH</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Ontario</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5J-5</td>
<td></td>
<td>Electrician</td>
<td>CRAFT</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6S</td>
<td></td>
<td>Purchasing MGR</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65-1</td>
<td></td>
<td>Security Supervise</td>
<td>LABOR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65-2</td>
<td></td>
<td>Security Screen</td>
<td>MGR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>66-1</td>
<td></td>
<td>Foreman</td>
<td>CRAFT</td>
<td>H</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>66-2</td>
<td></td>
<td>Laborer</td>
<td>CRAFT</td>
<td>H</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6A</td>
<td></td>
<td>Operator</td>
<td>LABOR</td>
<td>S</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64-1</td>
<td></td>
<td>Engineer</td>
<td>TECH</td>
<td>H</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64-2</td>
<td></td>
<td>Engineer</td>
<td>TECH</td>
<td>H</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64-3</td>
<td></td>
<td>Engineer</td>
<td>TECH</td>
<td>H</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y Technicians Laborer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Human Resources**

**Date** – 06/25/98

**Typ** – Step

**Description** – Job Group

**Eval** – Degree Method

**Date** – 03/01/98

**Pts** – 1300

**F** – S

**Pay** – 9

**EEO Job** – Y Officials and Administrat

**Workers** – Y Officials and Administrat

**Benefit Plan** – Y Officials and Administrat

**Category** – Y Professionals Administrat
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.
<table>
<thead>
<tr>
<th>Eval Method</th>
<th>Description</th>
<th>Factor Number</th>
<th>Description</th>
<th>Eval Points</th>
<th>Degr</th>
<th>Degr</th>
<th>Degr</th>
<th>Degr</th>
<th>Degr</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Degree Method</td>
<td>1</td>
<td>Know How</td>
<td>500</td>
<td>500</td>
<td>450</td>
<td>400</td>
<td>350</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Problem Solving</td>
<td>350</td>
<td>350</td>
<td>250</td>
<td>175</td>
<td>125</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Accountability</td>
<td>450</td>
<td>450</td>
<td>425</td>
<td>375</td>
<td>350</td>
<td>300</td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td></td>
<td></td>
<td>1300</td>
<td>1300</td>
<td>1125</td>
<td>950</td>
<td>825</td>
<td>700</td>
</tr>
<tr>
<td>E</td>
<td>Evalucomp Method</td>
<td>1</td>
<td>Profit &amp; Loss Responsibility</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Number of Subordinates</td>
<td>250</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Technical Skills</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Working Conditions</td>
<td>150</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5</td>
<td>Education</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td></td>
<td></td>
<td>1000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Factor Comparison Method</td>
<td>1</td>
<td>Profit &amp; Loss Responsibility</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Number of Subordinates</td>
<td>250</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Technical Skills</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Education</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td></td>
<td></td>
<td>850</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Hay Method</td>
<td>1</td>
<td>Know-How</td>
<td>500</td>
<td>500</td>
<td>450</td>
<td>400</td>
<td>350</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Problem Solving</td>
<td>350</td>
<td>350</td>
<td>250</td>
<td>175</td>
<td>125</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Accountability</td>
<td>450</td>
<td>450</td>
<td>425</td>
<td>375</td>
<td>350</td>
<td>300</td>
</tr>
<tr>
<td>Sum</td>
<td></td>
<td></td>
<td></td>
<td>1300</td>
<td>1300</td>
<td>1125</td>
<td>950</td>
<td>825</td>
<td>700</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Locality</th>
<th>Name</th>
<th>Minimum</th>
<th>Midpoint</th>
<th>Maximum</th>
<th>As of Date</th>
<th>Eff Date Multiplr</th>
<th>Based On</th>
<th>Pay/Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headquarters</td>
<td>default</td>
<td>28,600.00</td>
<td>35,700.00</td>
<td>44,600.00</td>
<td>01/01/98</td>
<td>1.00</td>
<td>30,000.00</td>
<td>24,000.00</td>
</tr>
<tr>
<td>EAST</td>
<td>East</td>
<td>29,700.00</td>
<td>37,100.00</td>
<td>46,400.00</td>
<td>01/01/98</td>
<td>1.25</td>
<td>30,000.00</td>
<td>24,000.00</td>
</tr>
<tr>
<td>MIDWEST</td>
<td>Midwest</td>
<td>28,600.00</td>
<td>35,700.00</td>
<td>44,600.00</td>
<td>01/01/98</td>
<td>1.00</td>
<td>30,000.00</td>
<td>24,000.00</td>
</tr>
<tr>
<td>SOUTH</td>
<td>South</td>
<td>28,800.00</td>
<td>36,000.00</td>
<td>45,000.00</td>
<td>01/01/98</td>
<td>1.05</td>
<td>30,000.00</td>
<td>24,000.00</td>
</tr>
<tr>
<td>WEST</td>
<td>West</td>
<td>28,800.00</td>
<td>36,000.00</td>
<td>45,000.00</td>
<td>01/01/98</td>
<td>1.05</td>
<td>30,000.00</td>
<td>24,000.00</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>P</th>
<th>Pay Grade</th>
<th>Minimum Salary</th>
<th>Midpoint Salary</th>
<th>Maximum Salary</th>
<th>Effective Date</th>
<th>Location</th>
<th>Description</th>
<th>Source</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>H</td>
<td>H1</td>
<td>4.100</td>
<td>5.700</td>
<td>7.300</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H2</td>
<td>6.500</td>
<td>8.100</td>
<td>9.700</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H4</td>
<td>11.300</td>
<td>12.900</td>
<td>14.500</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H5</td>
<td>13.700</td>
<td>15.000</td>
<td>16.900</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H6</td>
<td>16.100</td>
<td>17.700</td>
<td>19.300</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H7</td>
<td>18.500</td>
<td>20.300</td>
<td>22.100</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H8</td>
<td>21.200</td>
<td>24.500</td>
<td>25.700</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H9</td>
<td>24.800</td>
<td>26.600</td>
<td>28.400</td>
<td>01/01/98</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H1</td>
<td>4.100</td>
<td>5.700</td>
<td>7.300</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H2</td>
<td>6.500</td>
<td>8.100</td>
<td>9.700</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H4</td>
<td>11.300</td>
<td>12.900</td>
<td>14.500</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H5</td>
<td>13.700</td>
<td>15.000</td>
<td>16.900</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H6</td>
<td>16.100</td>
<td>17.700</td>
<td>19.300</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H7</td>
<td>18.500</td>
<td>20.300</td>
<td>22.100</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H8</td>
<td>21.200</td>
<td>24.500</td>
<td>25.700</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H9</td>
<td>24.800</td>
<td>26.600</td>
<td>28.400</td>
<td>01/01/97</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H1</td>
<td>4.100</td>
<td>5.700</td>
<td>7.300</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H2</td>
<td>6.500</td>
<td>8.100</td>
<td>9.700</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H3</td>
<td>8.900</td>
<td>10.500</td>
<td>12.100</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H4</td>
<td>11.300</td>
<td>12.900</td>
<td>14.500</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H5</td>
<td>13.700</td>
<td>15.000</td>
<td>16.900</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H6</td>
<td>16.100</td>
<td>17.700</td>
<td>19.300</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H7</td>
<td>18.500</td>
<td>20.300</td>
<td>22.100</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H8</td>
<td>21.200</td>
<td>24.500</td>
<td>25.700</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>H9</td>
<td>24.800</td>
<td>26.600</td>
<td>28.400</td>
<td>01/01/96</td>
<td>Headquarters</td>
<td>Company – Actua</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Run Job Reports
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.
<table>
<thead>
<tr>
<th>Address Difference Number</th>
<th>Name</th>
<th>Effective Date</th>
<th>Home Cost Center</th>
<th>Location</th>
<th>Job Title</th>
<th>Grade</th>
<th>Pay</th>
<th>Annual Salary</th>
<th>Maximum Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,000,000</td>
<td>6001 Allen, Ray</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>President</td>
<td>S7</td>
<td>75,000.00</td>
<td>70,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6005 Ellis, Fred</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Operator</td>
<td>H7</td>
<td>39,041.60</td>
<td>22,100</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2129 Jackson, John</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Financial Analyst</td>
<td>S4</td>
<td>50,000.00</td>
<td>45,000.00</td>
<td></td>
</tr>
<tr>
<td>3050,000</td>
<td>Morrisey, Anne E.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>M</td>
<td>34,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34,000,000</td>
<td>Morrisey, Anne E.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>M</td>
<td>34,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34,000,000</td>
<td>Morrisey, Anne E.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>M</td>
<td>34,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3076 O'Neill, Thelma P.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>B</td>
<td>35,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35,000,000</td>
<td>O'Neill, Thelma P.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>B</td>
<td>35,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35,000,000</td>
<td>O'Neill, Thelma P.</td>
<td>01/01/98</td>
<td>General Accounts</td>
<td>Headquarters (default)</td>
<td>Teacher</td>
<td>B</td>
<td>35,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**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.
<table>
<thead>
<tr>
<th>Address Number</th>
<th>Name</th>
<th>Effective Date</th>
<th>Location</th>
<th>Home Cost Center</th>
<th>Pay Grade</th>
<th>Pay Grade Salary</th>
<th>Pay Grade Actual Salary</th>
<th>Pay Grade Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>3050</td>
<td>Morrissey, Anne E.</td>
<td>07/01/96</td>
<td>Headquarters (default)</td>
<td></td>
<td>M</td>
<td>36,000.00</td>
<td>38,000.00</td>
<td>2,000.00</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Union Code</th>
<th>Description</th>
<th>Loc</th>
<th>Description</th>
<th>Src</th>
<th>Pay Grade</th>
<th>Grad Step</th>
<th>Step Rate</th>
<th>Effective Date</th>
<th>Next Pay Grade</th>
<th>Next Pay Grade Step</th>
<th>Hrs</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headquarters</td>
<td>defa H5</td>
<td>H5</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>M</td>
<td>2</td>
<td>8.00</td>
<td>185</td>
</tr>
<tr>
<td>Headquartes</td>
<td>defa M</td>
<td>M</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>M</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>M</td>
<td>3</td>
<td>8.00</td>
<td>185</td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S2</td>
<td>S2</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S2</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S2</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S3</td>
<td>S3</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S3</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S3</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S4</td>
<td>S4</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S4</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S4</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S5</td>
<td>S5</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S5</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S5</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S6</td>
<td>S6</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S6</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S6</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S7</td>
<td>S7</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S7</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S7</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S8</td>
<td>S8</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S8</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S8</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headquarters</td>
<td>defa S9</td>
<td>S9</td>
<td></td>
<td></td>
<td>01/01/98</td>
<td>S9</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td>S9</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Union Code</th>
<th>Locality</th>
<th>Src</th>
<th>Grade</th>
<th>Step</th>
<th>Rate</th>
<th>Minimum</th>
<th>2nd Quartile</th>
<th>Midpoint</th>
<th>4th Quartile</th>
<th>Maximum</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEST</td>
<td>N6</td>
<td></td>
<td>16.600</td>
<td></td>
<td>18.000</td>
<td>20.800</td>
<td>22.600</td>
<td>26.200</td>
<td>29.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>H7</td>
<td></td>
<td>19.000</td>
<td></td>
<td>21.700</td>
<td>24.400</td>
<td>26.200</td>
<td>29.000</td>
<td>31.600</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>H8</td>
<td></td>
<td>25.600</td>
<td></td>
<td>47,100.000</td>
<td>56,350.000</td>
<td>77,850.000</td>
<td>90,600.000</td>
<td>105,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S1</td>
<td></td>
<td>39,100.000</td>
<td></td>
<td>47,600.000</td>
<td>56,100.000</td>
<td>65,600.000</td>
<td>77,850.000</td>
<td>90,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S2</td>
<td></td>
<td>55,600.000</td>
<td></td>
<td>67,080.000</td>
<td>79,100.000</td>
<td>92,600.000</td>
<td>105,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td></td>
</tr>
<tr>
<td>WEST</td>
<td>S3</td>
<td></td>
<td>67,000.000</td>
<td></td>
<td>79,100.000</td>
<td>92,600.000</td>
<td>105,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WEST</td>
<td>S4</td>
<td></td>
<td>47,100.000</td>
<td></td>
<td>56,350.000</td>
<td>65,600.000</td>
<td>77,850.000</td>
<td>90,600.000</td>
<td>105,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S5</td>
<td></td>
<td>39,100.000</td>
<td></td>
<td>47,600.000</td>
<td>56,100.000</td>
<td>65,600.000</td>
<td>77,850.000</td>
<td>90,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S6</td>
<td></td>
<td>20,100.000</td>
<td></td>
<td>25,350.000</td>
<td>29,000.000</td>
<td>37,600.000</td>
<td>47,600.000</td>
<td>56,100.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S7</td>
<td></td>
<td>39,100.000</td>
<td></td>
<td>47,600.000</td>
<td>56,100.000</td>
<td>65,600.000</td>
<td>77,850.000</td>
<td>90,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S8</td>
<td></td>
<td>25,600.000</td>
<td></td>
<td>31,600.000</td>
<td>37,600.000</td>
<td>47,600.000</td>
<td>56,100.000</td>
<td>65,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
<tr>
<td>WEST</td>
<td>S9</td>
<td></td>
<td>14,600.000</td>
<td></td>
<td>18,100.000</td>
<td>21,600.000</td>
<td>29,000.000</td>
<td>37,600.000</td>
<td>47,600.000</td>
<td>01/01/98</td>
<td>01/01/98</td>
</tr>
</tbody>
</table>
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 headcount 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**

![Diagram](G08 Human Resources Choose Requisitions)

![Diagram](G08R1 Requisitions Choose an option)

**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

![Requisition Entry Form]

- **Requisition No**: 1250
- **Status**: New
- **Effective From**: 01/01/96
- **Pay Grade/Step**: 45-1
- **Pay Class**: FLSA Exempt
- **FTE**: 1.00
- **Approved By**: Ann Smith
- **Approval Date**: 07/15/97

Justification of Need/Refusal

- **F5=Cat Codes**
- **F8=Job Entry**
- **F9=Fax/Note**
- **F10=Profile**
- **F11=Req Act**
- **F24=More**

Release A7.3 (June 1996)
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number – Requisition</td>
<td>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.</td>
</tr>
<tr>
<td>Status – Requisition</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>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.</td>
</tr>
<tr>
<td>Business Unit – Home</td>
<td>The number of the business unit in which the employee generally resides.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>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.</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 (P08101).</td>
</tr>
<tr>
<td>Job Type (Craft) Code</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.</td>
</tr>
<tr>
<td>Job 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 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>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pay Class (H/S/P)</td>
<td>The code that indicates how an employee is paid. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>H  Hourly</td>
</tr>
<tr>
<td></td>
<td>S  Salaried</td>
</tr>
<tr>
<td></td>
<td>P  Piecework</td>
</tr>
<tr>
<td>FLSA Exempt Y/N</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, the employee fits the rules and does not have to be paid for working overtime.</td>
</tr>
<tr>
<td></td>
<td>N  No, the employee does not fit the rules and is to be paid for working overtime.</td>
</tr>
<tr>
<td>Amount – Expected Salary</td>
<td>The salary you expect to pay the individual filling the requisition.</td>
</tr>
<tr>
<td>Expected Start</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><em>Form-specific information</em></td>
</tr>
<tr>
<td></td>
<td>This is the expected start for the employee filling the requisition.</td>
</tr>
<tr>
<td>Date – Effective From</td>
<td>The date on which a requisition, a position, or activity within a position goes into effect.</td>
</tr>
<tr>
<td>Date – Effective Thru</td>
<td>The date on which a requisition, 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.</td>
</tr>
<tr>
<td>Full-Time Equivalents –</td>
<td>The number of full-time equivalents (FTEs).</td>
</tr>
<tr>
<td>Budgeted</td>
<td></td>
</tr>
<tr>
<td>Hours – Budgeted Position</td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of employees requested, budgeted, or approved for a position or requisition.</td>
</tr>
</tbody>
</table>
### 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 automatically 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

![Requisition Entry Form]

Complete the following fields:

- Status
- Approved By
- Approval Date

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status – Requisition</td>
<td>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.</td>
</tr>
<tr>
<td>Address Number – Requested By</td>
<td>The Address Book number of the person entering a position requisition. This field is required.</td>
</tr>
<tr>
<td>Date – Approved (Julian)</td>
<td>The date on which a requisition status is effectively changed to Approved.</td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number – Requisition</td>
<td>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.</td>
</tr>
<tr>
<td>Search Type</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>E Employees</td>
</tr>
<tr>
<td></td>
<td>X Ex-employees</td>
</tr>
<tr>
<td></td>
<td>V Suppliers</td>
</tr>
<tr>
<td></td>
<td>C Customers</td>
</tr>
<tr>
<td></td>
<td>P Prospects</td>
</tr>
<tr>
<td></td>
<td>M Mail distribution lists</td>
</tr>
<tr>
<td>Status – Applicant</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Candidate Filled or</td>
<td>This field is used to enter a value that designates what kind of requisition</td>
</tr>
<tr>
<td>Rejected</td>
<td>to display. It will display candidate only requisitions, filled requisitions,</td>
</tr>
<tr>
<td></td>
<td>rejected requisitions or all kinds of requisitions. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>C    Candidate-only requisitions</td>
</tr>
<tr>
<td></td>
<td>F    Filled requisitions</td>
</tr>
<tr>
<td></td>
<td>R    Rejected requisitions</td>
</tr>
<tr>
<td></td>
<td>*    All requisitions</td>
</tr>
<tr>
<td></td>
<td>The codes are further grouped based on the hard-coded Special Handling Code</td>
</tr>
<tr>
<td></td>
<td>values in user defined code table 08/CN. These hard-coded values are:</td>
</tr>
<tr>
<td></td>
<td>C    CAN Candidates code</td>
</tr>
<tr>
<td></td>
<td>F    FIL  Any code indicating that the position has been filled</td>
</tr>
<tr>
<td></td>
<td>R    REJ  Rejected</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number – Requisition</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Address Number</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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
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

<table>
<thead>
<tr>
<th>Description</th>
<th>Sequence</th>
<th>Total Level</th>
<th>Page Skip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Number</td>
<td>001</td>
<td>01</td>
<td>Yes</td>
</tr>
<tr>
<td>Type Data</td>
<td>002</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>User Defined Code</td>
<td>003</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>Effective Date</td>
<td>004</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>Line Number</td>
<td>005</td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Sequence</th>
<th>Total Level</th>
<th>Page Skip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>001</td>
<td>01</td>
<td>Y</td>
</tr>
<tr>
<td>Address Number</td>
<td>002</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Type Data</td>
<td>003</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>User Defined Code</td>
<td>004</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>Effective Date</td>
<td>005</td>
<td>01</td>
<td>No</td>
</tr>
<tr>
<td>Line Number</td>
<td>006</td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

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.
Requisition Profile

Requisition: 080416

In Alphabetical Order

<table>
<thead>
<tr>
<th>Req No.</th>
<th>Status</th>
<th>Position ID</th>
<th>Business Unit</th>
<th>Request No.</th>
<th>Job Type/Step</th>
<th>Expected Salary</th>
<th>Request By</th>
<th>Approval By</th>
<th>Approval Date</th>
<th>Request Date</th>
<th>Headcount</th>
<th>Budgeted FTE</th>
<th>Follow up required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filled and Closed</td>
<td>10</td>
<td>Secretary</td>
<td>1089</td>
<td>4A-2</td>
<td>31,500.00</td>
<td>6001 Allen, Ray</td>
<td></td>
<td></td>
<td>10/21/91</td>
<td>0.75</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approval Steps

<table>
<thead>
<tr>
<th>Levels</th>
<th>Date</th>
<th>Approved by</th>
<th>Follow up required</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONE</td>
<td>01/01/98</td>
<td>Annette Walters</td>
<td></td>
</tr>
<tr>
<td>THREE</td>
<td>01/31/98</td>
<td>Ray Allen</td>
<td></td>
</tr>
<tr>
<td>TWO</td>
<td>01/15/98</td>
<td>Dominique Abbot</td>
<td></td>
</tr>
</tbody>
</table>

Requisition Requirements

<table>
<thead>
<tr>
<th>Test</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXP</td>
<td>01/01/98</td>
<td>Three years previous exper</td>
</tr>
<tr>
<td>EXT</td>
<td>01/01/98</td>
<td>Hire outside after Int</td>
</tr>
<tr>
<td>INT</td>
<td>01/01/98</td>
<td>Post internally for 30 days</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Name</th>
<th>Date</th>
<th>Approved by</th>
<th>Follow up require</th>
</tr>
</thead>
<tbody>
<tr>
<td>Levels . . . ONE</td>
<td>1089 Secretary</td>
<td>01/01/98</td>
<td>Annette Walters</td>
<td></td>
</tr>
<tr>
<td>Levels . . . STEPA</td>
<td>3404 Swim Coach</td>
<td>01/01/98</td>
<td>HR</td>
<td></td>
</tr>
<tr>
<td>Levels . . . STEPB</td>
<td>3404 Swim Coach</td>
<td>01/01/98</td>
<td>HR</td>
<td></td>
</tr>
<tr>
<td>Levels . . . STEPC</td>
<td>3404 Swim Coach</td>
<td>01/01/98</td>
<td>HR</td>
<td></td>
</tr>
<tr>
<td>Levels . . . STEPD</td>
<td>3404 Swim Coach</td>
<td>01/01/98</td>
<td>HR</td>
<td></td>
</tr>
</tbody>
</table>
## 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).

<table>
<thead>
<tr>
<th>FY</th>
<th>Business Unit</th>
<th>Description</th>
<th>Position ID</th>
<th>Position Description</th>
<th>Expected Salary</th>
<th>Req No.</th>
<th>St Description</th>
<th>Request Description</th>
<th>Req Date</th>
<th>Approve By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General Account</td>
<td>Bus Driver</td>
<td>BD01</td>
<td></td>
<td>3391 Filled and Close</td>
<td>7500</td>
<td>Cathy McDougle</td>
<td>12/31/97</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>CH01</td>
<td>Swim Coach</td>
<td>3404</td>
<td>Approved</td>
<td>7500 Cathy McDougle</td>
<td>12/31/97</td>
<td>Ms. Dominique A</td>
<td>03/01/98</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>CH02</td>
<td>Tennis Coach</td>
<td>3439</td>
<td>Approved</td>
<td>7500 Cathy McDougle</td>
<td>03/15/98</td>
<td>Ms. Dominique A</td>
<td>03/15/98</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>TR01</td>
<td>Art Teacher</td>
<td>3421</td>
<td>Approved</td>
<td>7500 Cathy McDougle</td>
<td>12/31/97</td>
<td>Ms. Dominique A</td>
<td>01/15/98</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>TR03</td>
<td>English Teacher</td>
<td>3412</td>
<td>Approved</td>
<td>7500 Cathy McDougle</td>
<td>12/31/97</td>
<td>Ms. Dominique A</td>
<td>01/15/98</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>10B-1</td>
<td>Trainer</td>
<td>25,000.00</td>
<td>1206 WW Waiting Review</td>
<td>7500 Cathy McDougle</td>
<td>03/15/98</td>
<td>Ms. Dominique A</td>
<td>03/15/98</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>10B-1</td>
<td>Trainer</td>
<td>25,000.00</td>
<td>1214 WW Waiting Review</td>
<td>7500 Cathy McDougle</td>
<td>12/31/97</td>
<td>Ms. Dominique A</td>
<td>12/31/97</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
<tr>
<td>1</td>
<td>10B-1</td>
<td>Trainer</td>
<td>25,000.00</td>
<td>1222 WW Waiting Review</td>
<td>7500 Cathy McDougle</td>
<td>10/14/97</td>
<td>Ms. Dominique A</td>
<td>10/14/97</td>
<td></td>
<td>Ms. Dominique A</td>
</tr>
</tbody>
</table>
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).

<table>
<thead>
<tr>
<th>Req Number</th>
<th>Home Business Unit</th>
<th>Position ID</th>
<th>Position Description</th>
<th>FY</th>
<th>Effect From</th>
<th>Effect Thru</th>
<th>Approval Req</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1142</td>
<td>Corporate Administration</td>
<td>6</td>
<td>Foreman</td>
<td>98</td>
<td></td>
<td></td>
<td>WW Waiting Review/Approval</td>
<td></td>
</tr>
<tr>
<td>1151</td>
<td>Corporate Administration</td>
<td>7</td>
<td>Laborer</td>
<td>98</td>
<td></td>
<td></td>
<td>WW Waiting Review/Approval</td>
<td></td>
</tr>
<tr>
<td>1231</td>
<td>General Accounts</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>98</td>
<td>10/14/97</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1249</td>
<td>General Accounts</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>98</td>
<td>10/14/97</td>
<td></td>
<td>WW Waiting Review/Approval</td>
<td></td>
</tr>
<tr>
<td>2330</td>
<td>General Accounts</td>
<td>63</td>
<td>Operator</td>
<td>98</td>
<td></td>
<td></td>
<td>WW Waiting Review/Approval</td>
<td></td>
</tr>
<tr>
<td>1134</td>
<td>Corporate Administration</td>
<td>4</td>
<td>Project Leader</td>
<td>98</td>
<td>01/01/98</td>
<td>01/01/99</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1177</td>
<td>Accounting Department</td>
<td>4510P-2</td>
<td>Accountant</td>
<td>98</td>
<td>12/13/98</td>
<td>12/15/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1185</td>
<td>Balance Sheet</td>
<td>1000A-4</td>
<td>Accountant</td>
<td>98</td>
<td>12/13/98</td>
<td>12/15/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1193</td>
<td>Balance Sheet</td>
<td>1004A-1</td>
<td>Administrative Assistant</td>
<td>98</td>
<td>12/31/98</td>
<td>12/15/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1257 ** NOT FOUND **</td>
<td>488P</td>
<td>Lathe Operator</td>
<td>98</td>
<td>01/01/98</td>
<td>12/31/98</td>
<td>AA Approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1290</td>
<td>Balance Sheet</td>
<td>1004A-1</td>
<td>Administrative Assistant</td>
<td>98</td>
<td>12/31/98</td>
<td>12/15/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1302</td>
<td>Administrative Department</td>
<td>5J-8</td>
<td>Teacher</td>
<td>98</td>
<td>12/14/97</td>
<td>12/14/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1337</td>
<td>Administrative Department</td>
<td>5J-8</td>
<td>Teacher</td>
<td>98</td>
<td>12/14/97</td>
<td>12/14/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>3044</td>
<td>School</td>
<td>CH01</td>
<td>Swim Coach</td>
<td>98</td>
<td>01/15/98</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1126</td>
<td>Corporate Administration</td>
<td>2</td>
<td>Senior Accountant</td>
<td>98</td>
<td>12/31/98</td>
<td>12/14/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1311</td>
<td>Administrative Department</td>
<td>5J-8</td>
<td>Teacher</td>
<td>98</td>
<td>12/14/97</td>
<td>12/14/97</td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1206</td>
<td>Administrative Department</td>
<td>10B-1</td>
<td>Trainer</td>
<td>98</td>
<td>03/15/98</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1214</td>
<td>Administrative Department</td>
<td>10B-1</td>
<td>Trainer</td>
<td>98</td>
<td>03/15/98</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1222</td>
<td>Administrative Department</td>
<td>10B-1</td>
<td>Trainer</td>
<td>98</td>
<td>03/15/98</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1265</td>
<td>Administrative Department</td>
<td>2H-2</td>
<td>Employment Specialist</td>
<td>98</td>
<td>10/14/97</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
<tr>
<td>1329</td>
<td>Administrative Department</td>
<td></td>
<td>Trainer</td>
<td>98</td>
<td>12/14/97</td>
<td></td>
<td>AA Approved</td>
<td></td>
</tr>
</tbody>
</table>
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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
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 Additional Individual Tax ID Number in the Address Book window. Default of blank will NOT display the Additional Individual Tax Id Number.

----------------------------------------
DELETION OF APPLICANT:

----------------------------------------
4. Enter a '1' to automatically delete the Profile Data when an applicant is deleted. Default of blank will not delete this data.

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:
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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

![Multiskill Search Window](image)

Complete the following fields:

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee/Applicant/Both</td>
<td>A field that controls the database from which the screen displays information. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>E    Employee database</td>
</tr>
<tr>
<td></td>
<td>A    Applicant database</td>
</tr>
<tr>
<td></td>
<td>B    Both the employee and the applicant databases</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Data Type</td>
<td>This rate, in cost per hour, is the rate used to calculate the future machine cost as of the last simulation and update.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>Form-specific information</em></td>
</tr>
<tr>
<td></td>
<td>The type of information from the Profile Data Entry form that you want the search to find.</td>
</tr>
<tr>
<td>Field</td>
<td>Indicates which data item is to be included in the search.</td>
</tr>
<tr>
<td>Options</td>
<td>You can specify any of the following relationships:</td>
</tr>
<tr>
<td></td>
<td>EQ  Equal to</td>
</tr>
<tr>
<td></td>
<td>LT  Less than</td>
</tr>
<tr>
<td></td>
<td>LE  Less than or equal to</td>
</tr>
<tr>
<td></td>
<td>GT  Greater than</td>
</tr>
<tr>
<td></td>
<td>GE  Greater than or equal to</td>
</tr>
<tr>
<td></td>
<td>NE  Not equal to</td>
</tr>
<tr>
<td></td>
<td>NL  Not less than</td>
</tr>
<tr>
<td></td>
<td>NG  Not greater than</td>
</tr>
<tr>
<td>Search Value</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>You can also use the % wildcard character to search for data starting with, ending with, or containing one or more consecutive characters. For example:</td>
</tr>
<tr>
<td></td>
<td>•  BA% will display both bamboo and bachelor.</td>
</tr>
<tr>
<td></td>
<td>•  %ing will display all words ending with ing.</td>
</tr>
<tr>
<td></td>
<td>•  %BA% will display any words containing the letters B and A, such as abate, cabbage, or bachelor.</td>
</tr>
</tbody>
</table>
## 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.
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document</td>
<td>This field is for the name of a document in a folder.</td>
</tr>
<tr>
<td>Folder Name</td>
<td>The name of a folder used by OfficeVision/400.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Start Date</td>
<td>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.</td>
</tr>
<tr>
<td>Candidate Requisition Status</td>
<td>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.</td>
</tr>
</tbody>
</table>
### What You Should Know About

**Applicant Information program (P08401) processing options**
You can set a processing option to use the following fields in the Applicant 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 Information*

### 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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purge Date</td>
<td>Dependent upon the values found within the Applicant Master (F08401), this date will be used in two ways.</td>
</tr>
<tr>
<td></td>
<td>1 If the Applicant Master Application Date is present, the purge date will be tested against the Application Date. If the Application date is</td>
</tr>
<tr>
<td></td>
<td>equal to or older than the purge date, the applicant record will be purged.</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>the Date Last Update is equal to or older than the purge date, the applicant record will be purged.</td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Status</td>
<td>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.</td>
</tr>
<tr>
<td>Yes or No Entry</td>
<td>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.</td>
</tr>
<tr>
<td>Save Instruction</td>
<td>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.</td>
</tr>
<tr>
<td>Save Library</td>
<td>The Data File Library Name field designates the library location of the data base files.</td>
</tr>
<tr>
<td>Save Device</td>
<td>The name of the tape device to which magnetic media is to be sent.</td>
</tr>
</tbody>
</table>
### 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.

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.

---

**Prior Employment**

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Name</th>
<th>St.Date</th>
<th>End Date</th>
<th>Company Name</th>
<th>Years in Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>8000 Bates, Richard T.</td>
<td>01/05/87</td>
<td>Coopers &amp; Lybrand</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8007 Tucker, Steve</td>
<td>06/21/93</td>
<td>Alexander Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8001 Hogan, Betsy</td>
<td>02/01/94</td>
<td>Kelly Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8500 Thomas, Suzanne</td>
<td>01/14/90 10/15/93 Davidson Electronics</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8000 Bates, Richard T.</td>
<td>06/01/90</td>
<td>Cypress Minerals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8500 Thomas, Suzanne</td>
<td>10/25/93</td>
<td>Career Track</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8001 Hogan, Betsy</td>
<td>03/15/94 01/04/95 Lear Siegler</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8004 Torres, Elizabeth M.</td>
<td>08/15/93 06/01/95 Ben Lomond High</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8004 Torres, Elizabeth M.</td>
<td>08/01/96</td>
<td>George Washington High</td>
<td>current</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**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

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**

<table>
<thead>
<tr>
<th>Address Number</th>
<th>Applicant Name</th>
<th>Ap St</th>
<th>Description</th>
<th>EEO Description</th>
<th>EEO Description</th>
<th>19 Vet Dis Hand Sex</th>
<th>Vet</th>
</tr>
</thead>
<tbody>
<tr>
<td>8000</td>
<td>Bates, Richard T.</td>
<td>01</td>
<td>Initial Contact</td>
<td>001 Officials and Managers</td>
<td>01 White (Not of Hispanic)</td>
<td>Y N N M</td>
<td></td>
</tr>
<tr>
<td>5127</td>
<td>Ebby, Chester A.</td>
<td>95</td>
<td>Terminated Employee</td>
<td>002 Professionals</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N F</td>
<td></td>
</tr>
<tr>
<td>8001</td>
<td>Hogan, Betsy</td>
<td>02</td>
<td>Called for Interview</td>
<td>005 Office and Clerical</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N F</td>
<td></td>
</tr>
<tr>
<td>2049</td>
<td>McLind, Rod</td>
<td>95</td>
<td>Terminated Employee</td>
<td>002 Professionals</td>
<td>04 Asian or Pacific Island</td>
<td>N N M</td>
<td></td>
</tr>
<tr>
<td>8300</td>
<td>Smith, Mary</td>
<td>01</td>
<td>Initial Contact</td>
<td>001 Officials and Managers</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N F</td>
<td></td>
</tr>
<tr>
<td>8015</td>
<td>Temple, Martin</td>
<td>01</td>
<td>Initial Contact</td>
<td>006 Craft Workers (Skilled)</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N M</td>
<td></td>
</tr>
<tr>
<td>8500</td>
<td>Thomas, Suzanne</td>
<td>01</td>
<td>Initial Contact</td>
<td>002 Professionals</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N M</td>
<td></td>
</tr>
<tr>
<td>8004</td>
<td>Torres, Elizabeth M.</td>
<td>01</td>
<td>Initial Contact</td>
<td>001 Officials and Managers</td>
<td>01 White (Not of Hispanic)</td>
<td>Y N N F</td>
<td></td>
</tr>
<tr>
<td>8007</td>
<td>Tucker, Steve</td>
<td>01</td>
<td>Initial Contact</td>
<td>002 Professionals</td>
<td>01 White (Not of Hispanic)</td>
<td>N N N M</td>
<td></td>
</tr>
<tr>
<td>20005</td>
<td>Wheaton, Monica B.</td>
<td>95</td>
<td>Terminated Employee</td>
<td>002 Professionals</td>
<td>02 Black</td>
<td>N N N F</td>
<td></td>
</tr>
</tbody>
</table>

---

**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.

---

**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**
Applicant Information

"                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
### EEO Staff Utilization Report

**Beginning** - 03/01/98  
**Ending** - 03/30/98

<table>
<thead>
<tr>
<th>EEO Ethnic Description</th>
<th>Total Hours</th>
<th>Male Hours</th>
<th>Female Hours</th>
<th>Total Employees</th>
<th>Male Employees</th>
<th>Female Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>White (Not of Hispanic Origin)</td>
<td>178.96</td>
<td>88.52</td>
<td>90.44</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Black</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hispanic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Indian/Alaskan Native</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canadian Indian</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canadian Indian</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unknown</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>178.96</strong></td>
<td><strong>88.52</strong></td>
<td><strong>90.44</strong></td>
<td><strong>2</strong></td>
<td><strong>1</strong></td>
<td><strong>1</strong></td>
</tr>
</tbody>
</table>

**Total Minorities**  

<table>
<thead>
<tr>
<th>Minority %</th>
<th>Total Females</th>
<th>Female %</th>
</tr>
</thead>
<tbody>
<tr>
<td>000</td>
<td>1</td>
<td>051</td>
</tr>
</tbody>
</table>

---

**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.
### Processing Options for Hired Applicants by EEO Job Category

Enter the Beginning and Ending Date for the Reporting period.

<table>
<thead>
<tr>
<th>Job Category</th>
<th>Appld</th>
<th>Hired</th>
<th>%</th>
<th>Appld Hire</th>
<th>%</th>
<th>Appld Hire</th>
<th>%</th>
<th>Appld Hire</th>
<th>%</th>
<th>Appld Hire</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officials and Managers</td>
<td>Male</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td>Male</td>
<td>3</td>
<td>1</td>
<td>33.3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office and Clerical</td>
<td>Male</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Craft Workers (Skilled)</td>
<td>Male</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>Male</td>
<td>5</td>
<td>1</td>
<td>20.0</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>8</td>
<td>1</td>
<td>12.5</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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.
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.

<table>
<thead>
<tr>
<th>EEO Job Category</th>
<th>Hired</th>
<th>Male</th>
<th>Applied</th>
<th>% Hired</th>
<th>% Ratio</th>
<th>Hired</th>
<th>Applied</th>
<th>% Hired</th>
<th>% Ratio</th>
<th>Hired</th>
<th>Applied</th>
<th>% Hired</th>
<th>% Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officials and Managers</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td></td>
<td>2</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Home Business Unit</td>
<td></td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Officials and Managers</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Department</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Business Unit</td>
<td></td>
<td>90</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professions</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Business Unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Officials and Managers</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting Department</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Business Unit</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office and Clerical</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Administration</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>6</td>
<td>4</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Job Type</th>
<th>Description</th>
<th>Step Job Grade</th>
<th>Empl Minor</th>
<th>Male</th>
<th>Female</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>----------</td>
<td>--------------</td>
<td>----------------</td>
<td>------------</td>
<td>------</td>
<td>--------</td>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>Home Company</td>
<td>001</td>
<td>A Model Accounting Company</td>
<td>701 Corporate Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Cost Center</td>
<td></td>
<td>Corporate Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A1</td>
<td>President 001 S7</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0A-3</td>
<td>Financial Analyst 002 S4</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2H-1</td>
<td>Human Resource Mana 001 S4</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2H-5</td>
<td>EEO Specialist 002</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5J-5</td>
<td>Electrician 003</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61</td>
<td>Foreman 006 H8</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>63</td>
<td>Laborer 008 H5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>67</td>
<td>Laborer 008 H5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% Total: 100.0 30.0 90.0 70.0 10.0 10.0 10.0

A Model Accounting Company

% Total: 100.0 30.0 90.0 70.0 10.0 10.0 10.0

Grand Total:

% Grand Total: 100.0 27.3 90.9 72.7 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.
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.
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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year</td>
<td>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.</td>
</tr>
<tr>
<td>Business Unit – Home</td>
<td>The number of the business unit in which the employee generally resides.</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>Date – Effective From</td>
<td>The date on which a requisition, a position, or activity within a position goes into effect.</td>
</tr>
<tr>
<td>Date – Effective Thru</td>
<td>The date on which a requisition, 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.</td>
</tr>
<tr>
<td>Amount – Position Budget</td>
<td>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.</td>
</tr>
<tr>
<td>Full-Time Equivalents –</td>
<td>The number of full-time equivalents (FTEs).</td>
</tr>
<tr>
<td>Budgeted</td>
<td></td>
</tr>
<tr>
<td>Hours – Budgeted Position</td>
<td>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.</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of employees requested, budgeted, or approved for a position or requisition.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Job Type (Craft) Code</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.</td>
</tr>
<tr>
<td>Budget Status</td>
<td>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).</td>
</tr>
<tr>
<td>Budget Status Date</td>
<td>The date the current budget status became active.</td>
</tr>
<tr>
<td>Position Status</td>
<td>The current activity level of the position.</td>
</tr>
<tr>
<td>Position Status Date</td>
<td>The date the current status of the position became active.</td>
</tr>
<tr>
<td>Full Time Equivalents</td>
<td>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.</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of employees requested, budgeted, or approved for a position or requisition.</td>
</tr>
</tbody>
</table>
| 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. If 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 Information File (F08001) to edit Job Type and Step. Default of blank will edit against user defined codes.

2. Enter a ’1’ to force entry of Job Type. Blank will issue a warning if Job Type is left blank. If Position Control Criteria in the Constants is not set to 1, the program will ignore this processing option.

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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Method of Calculation</td>
<td>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.</td>
</tr>
<tr>
<td>Subledger – G/L</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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

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.

### 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

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

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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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

![Activity by Employee](image)

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

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

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 exception 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.

### 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

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
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.

<table>
<thead>
<tr>
<th>ID/Desc</th>
<th>Pos. Budget</th>
<th>Projected</th>
<th>Open</th>
<th>Budgeted</th>
<th>Projected</th>
<th>Open</th>
<th>Budgeted</th>
<th>Projected</th>
<th>Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>53–9 Draftsperson</td>
<td>75,000</td>
<td>62,702</td>
<td>12,298</td>
<td>2.00</td>
<td>2.00</td>
<td>2</td>
<td>2–</td>
<td>4,160</td>
<td>4,160</td>
</tr>
<tr>
<td>5067 Laborer Level I</td>
<td>53,111</td>
<td>53,111</td>
<td>1.00</td>
<td>1.00</td>
<td>2,080</td>
<td>2,080</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>62 Foreman</td>
<td>47,840</td>
<td>47,840</td>
<td>1.00</td>
<td>1.00</td>
<td>1</td>
<td>1–</td>
<td>2,080</td>
<td>2,080</td>
<td></td>
</tr>
<tr>
<td>63 Operator</td>
<td>76,440</td>
<td>75,296</td>
<td>1,144</td>
<td>2.00</td>
<td>1.97</td>
<td>.03</td>
<td>2</td>
<td>2–</td>
<td>4,160</td>
</tr>
<tr>
<td>66 Electrician</td>
<td>52,832</td>
<td>52,832</td>
<td>1.00</td>
<td>1.00</td>
<td>1</td>
<td>1–</td>
<td>2,080</td>
<td>2,080</td>
<td></td>
</tr>
<tr>
<td>67 Laborer98</td>
<td>75,712</td>
<td>174,712</td>
<td>99,000–</td>
<td>2.00</td>
<td>4.00</td>
<td>2.00–</td>
<td>4</td>
<td>4–</td>
<td>4,160</td>
</tr>
<tr>
<td>9S–2 Sales Rep</td>
<td>25,480</td>
<td>25,480</td>
<td>1.00</td>
<td>1.00</td>
<td>1</td>
<td>1–</td>
<td>2,080</td>
<td>2,080</td>
<td></td>
</tr>
</tbody>
</table>

Home BU: 50 General Accounts

All Business Units - Fiscal Year 1998

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>98</th>
</tr>
</thead>
</table>
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.
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.

<table>
<thead>
<tr>
<th>ID /Desc</th>
<th>Salary</th>
<th>FTE</th>
<th>Hdcont</th>
<th>Hours</th>
<th>Salary</th>
<th>FTE</th>
<th>Hdcont</th>
<th>Hours</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>53-9 Draftsperson</td>
<td>75,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>5067 Laborer Level I</td>
<td>53,111</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>62 Foreman</td>
<td>47,840</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>63 Operator</td>
<td>76,440</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>66 Electrician</td>
<td>52,832</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>67 Laborer98</td>
<td>75,712</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>95-2 Sales Rep</td>
<td>25,480</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
<tr>
<td>HBU: 50</td>
<td>486,415</td>
<td>10.00</td>
<td>20,800</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
<td></td>
<td>100.00–</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>ID /Desc</th>
<th>Salary 98</th>
<th>FTE 98</th>
<th>Hdcnt 98</th>
<th>Hours 98</th>
<th>Salary 99</th>
<th>FTE 99</th>
<th>Hdcnt 99</th>
<th>Hours 99</th>
<th>% Change 98-99</th>
</tr>
</thead>
<tbody>
<tr>
<td>5J–9 Draftsperson</td>
<td>75,000</td>
<td>2.00</td>
<td></td>
<td>4,160</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>5067 Laborer Level I</td>
<td>53,111</td>
<td>1.00</td>
<td></td>
<td>2,080</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>62 Foreman</td>
<td>47,840</td>
<td>1.00</td>
<td></td>
<td>2,080</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>63 Operator</td>
<td>76,440</td>
<td>2.00</td>
<td></td>
<td>4,160</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>66 Electrician</td>
<td>52,832</td>
<td>1.00</td>
<td></td>
<td>2,080</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>67 Laborer98</td>
<td>75,712</td>
<td>2.00</td>
<td></td>
<td>4,160</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>95-2 Sales Rep</td>
<td>25,480</td>
<td>1.00</td>
<td></td>
<td>2,080</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
<tr>
<td>HBU:</td>
<td>406,415</td>
<td>10.00</td>
<td></td>
<td>20,800</td>
<td>100.00</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>ID</th>
<th>Description</th>
<th>ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5J-9</td>
<td>Draftsperson</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>62</td>
<td>Foreman</td>
</tr>
<tr>
<td>63</td>
<td>Operator</td>
<td>66</td>
<td>Electrician</td>
<td>67</td>
<td>Laborer 98</td>
</tr>
<tr>
<td>9S-2</td>
<td>Sales Representative</td>
<td>50</td>
<td>General Accounts</td>
<td>TRNER</td>
<td>Trainer</td>
</tr>
<tr>
<td>10B-1</td>
<td>Trainer</td>
<td>0A-10</td>
<td>Purchasing Agent</td>
<td>2K-1</td>
<td>Human Resource Manager</td>
</tr>
<tr>
<td>3K-2</td>
<td>Employment Specialist</td>
<td>3P-1</td>
<td>Payroll Manager</td>
<td>4A-1</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>5J-8</td>
<td>Teacher</td>
<td>8M-3</td>
<td>Clerk</td>
<td>902H-2</td>
<td>Employment Specialist</td>
</tr>
<tr>
<td>100</td>
<td>Balance Sheet</td>
<td>100A-4</td>
<td>Accountant</td>
<td>100A-1</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>110A-1</td>
<td>President</td>
<td>110A-2</td>
<td>Senior Accountant</td>
<td>110A-1</td>
<td>Senior Accountant</td>
</tr>
<tr>
<td>110A-2</td>
<td>Accountant</td>
<td>110</td>
<td>Headquarters</td>
<td>140A-3</td>
<td>Financial Analyst</td>
</tr>
<tr>
<td>140A-0</td>
<td>Finance Director</td>
<td>140A-1</td>
<td>Payroll Administrator</td>
<td>142</td>
<td>Information Systems</td>
</tr>
<tr>
<td>1400P-1</td>
<td>Assistant Finance Director</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>1423A-1</td>
<td>Payroll Administrator</td>
</tr>
<tr>
<td>1421H-2</td>
<td>Project Leader</td>
<td>1424A-2</td>
<td>Secretary</td>
<td>143</td>
<td>Payroll Department</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>Administrative Dept</td>
<td>140</td>
<td>Finance Department</td>
</tr>
<tr>
<td>142</td>
<td>Information Systems</td>
<td>1400P-1</td>
<td>Assistant Finance Director</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Current Headcount</th>
<th>New Positions</th>
<th>Total Planned</th>
<th>Percent Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>488P</td>
<td>Setup Person</td>
<td>2</td>
<td>2</td>
<td></td>
<td>100.00%</td>
</tr>
<tr>
<td>8P-5</td>
<td>Production Worker</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Distrib/Manuf Balanc</td>
<td>3</td>
<td>3</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>4192H-5</td>
<td>EEO Specialist</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>4194A-1</td>
<td>Administrative Assistant</td>
<td>2</td>
<td>2</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>4195J-7</td>
<td>Nurse</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>419</td>
<td>Administration</td>
<td>3</td>
<td>3</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>4500P-32</td>
<td>Accounting Clerk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4510A-1</td>
<td>Accounting Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4510A-2</td>
<td>Senior Accountant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4510P-2</td>
<td>Accountant</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>451</td>
<td>Accounting Department</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Financial Analyst</td>
<td>2</td>
<td>2</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Project Leader</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Human Resource Manager</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5J-4</td>
<td>Fire Fighter</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5J-5</td>
<td>Electrician</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5J-9</td>
<td>Journeyman</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>62</td>
<td>Foreman</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>63</td>
<td>Operator</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Laborer</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>7H-1</td>
<td>Waiter/Waitress</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7H-1</td>
<td>Waiter/Waitress</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>3P-1</td>
<td>Payroll Manager</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5J-4</td>
<td>Firefighter</td>
<td>5</td>
<td>5</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>10C-2</td>
<td>Waiter/Waitress</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5G-1</td>
<td>Corporate Administra</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>700</td>
<td>Corporate Administra</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>5G-1</td>
<td>Corporate Administra</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>800</td>
<td>Rockies Bar &amp; Grill</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Bus Driver</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Swim Coach</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Tennis Coach</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Football Coach</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Art Teacher</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Music Teacher</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>English Teacher</td>
<td>3</td>
<td>2</td>
<td>100.00%</td>
<td></td>
</tr>
</tbody>
</table>

**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
## Human Resources

### 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.

<table>
<thead>
<tr>
<th>FY</th>
<th>Home Business Unit</th>
<th>Description</th>
<th>Position ID</th>
<th>Description</th>
<th>Position</th>
<th>Budgeted</th>
<th>Budgeted Hours</th>
<th>Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>50-9</td>
<td>Draftsperson</td>
<td>75,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>50-6</td>
<td>Laborer Level I</td>
<td>53,111</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>62</td>
<td>Foreman</td>
<td>47,840</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>63</td>
<td>Operator</td>
<td>76,440</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>66</td>
<td>Electrician</td>
<td>52,852</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>67</td>
<td>Laborer98</td>
<td>75,712</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>92-2</td>
<td>Sales Representative</td>
<td>25,480</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>TRNER</td>
<td>Trainer</td>
<td>45,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>OA-10</td>
<td>Purchasing Agent</td>
<td>30,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>2H-1</td>
<td>Human Resource Manager</td>
<td>52,500</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>2H-2</td>
<td>Employment Specialist</td>
<td>41,500</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>4A-1</td>
<td>Administrative Assist</td>
<td>25,000</td>
<td>3.00</td>
<td>6,240</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>5J-8</td>
<td>Teacher</td>
<td>90,000</td>
<td>3.00</td>
<td>6,240</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>8M-3</td>
<td>Clerk</td>
<td>15,600</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>90 Administrative Department</td>
<td>902H-2</td>
<td>Employment Specialist</td>
<td>32,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>100A-4</td>
<td>Accountant</td>
<td>40,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>100A-1</td>
<td>Administrative Assistant</td>
<td>50,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>4A-2</td>
<td>Secretary</td>
<td>100,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>1104A-1</td>
<td>President</td>
<td>100,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>1104A-2</td>
<td>Vice President</td>
<td>80,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>1100A-1</td>
<td>Senior Accountant</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>100 Balance Sheet</td>
<td>1100A-2</td>
<td>Accountant</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1400A-3</td>
<td>Financial Analyst</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1400P-0</td>
<td>Finance Director</td>
<td>60,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1400P-1</td>
<td>Assistant Finance Director</td>
<td>40,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>55,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1421M-2</td>
<td>Project Leader</td>
<td>40,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1424A-2</td>
<td>Secretary</td>
<td>18,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>140 Finance Department</td>
<td>1433P-1</td>
<td>Payroll Manager</td>
<td>50,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>143 Payroll Department</td>
<td>1433A-1</td>
<td>Payroll Administrator</td>
<td>17,500</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>200 Distrib/Manuf Balance Sheet</td>
<td>489P</td>
<td>Setup Person</td>
<td>25,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>200 Distrib/Manuf Balance Sheet</td>
<td>89-5</td>
<td>Production Worker</td>
<td>25,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>419 Administration</td>
<td>4192R-5</td>
<td>EEO Specialist</td>
<td>60,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>419 Administration</td>
<td>4194A-1</td>
<td>Administrative Assistant</td>
<td>25,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>419 Administration</td>
<td>4194A-2</td>
<td>Secretary</td>
<td>30,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>419 Administration</td>
<td>41950-7</td>
<td>Nurse</td>
<td>50,000</td>
<td>2.00</td>
<td>4,160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>451 Accounting Department</td>
<td>4500P-32</td>
<td>Accounting Clerk</td>
<td>40,000</td>
<td>2.00</td>
<td>6,240</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>451 Accounting Department</td>
<td>4510A-1</td>
<td>Accounting Manager</td>
<td>45,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>451 Accounting Department</td>
<td>4510A-2</td>
<td>Senior Accountant</td>
<td>42,500</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>451 Accounting Department</td>
<td>4510P-2</td>
<td>Accountant</td>
<td>125,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>701 Corporate Administration</td>
<td>OA-3</td>
<td>Financial Analyst</td>
<td>38,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>701 Corporate Administration</td>
<td>3P-1</td>
<td>Payroll Manager</td>
<td>65,000</td>
<td>1.00</td>
<td>2,080</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Job Type</th>
<th>Business Unit</th>
<th>Position Description</th>
<th>Position ID</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 BUSDR</td>
<td>2435 School</td>
<td>Bus Driver</td>
<td>BD01</td>
<td>2.00</td>
</tr>
<tr>
<td>COACH</td>
<td>2435 School</td>
<td>Coach</td>
<td>CH01</td>
<td>2.00</td>
</tr>
<tr>
<td>B1 Teacher</td>
<td>2435 School</td>
<td>Art Teacher</td>
<td>TR01</td>
<td>1.00</td>
</tr>
<tr>
<td>M1 Coach</td>
<td>2435 School</td>
<td>English Teacher</td>
<td>TR03</td>
<td>2.00</td>
</tr>
</tbody>
</table>

Fiscal Year . . . 97

Sun 150,000 7.00 1

9 BUSDR 2435 School BD01 Bus Driver 30,000 2.00 2
COACH 2435 School CH01 Swim Coach 25,000 2.00 2
B1 Teacher 2435 School TR01 Art Teacher 35,000 1.00 1
M1 Coach 2435 School TR03 English Teacher 60,000 2.00 2

Sum 643,352 19.00

Fiscal Year . . . 96

Sun 231,000 10.00 9

96 701 Corporate Administra HELEN 10,000 1.00

Fiscal Year . . . 95

Sun 10,000 1.00

96 57-4 A.2 Journeyman 63 Operator 76,440 2.00

Fiscal Year . . . 94

Sun 380,935 9.00

97 2H-1 Human Resource Mang 90 Administrative Depar 2H-1 42,500 1.00

Fiscal Year . . . 93

Sun 643,352 19.00

98 110 Headquarters 110A2 Vice President 80,000 1.00

Release A7.3 (June 1996)

7-49
## 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.

<table>
<thead>
<tr>
<th>FY</th>
<th>Description</th>
<th>Home Business Unit</th>
<th>Position ID</th>
<th>Home Description</th>
<th>Budgeted Amount</th>
<th>Budgeted FTE</th>
<th>Budgeted Hours</th>
<th>Headcount</th>
<th>Job</th>
<th>Job Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>98</td>
<td>General Accounts</td>
<td>50</td>
<td>5J-9</td>
<td>Draftsperson</td>
<td>75,000</td>
<td>2.00</td>
<td>4,160</td>
<td>5J-9</td>
<td>A.2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>53,111</td>
<td>1.00</td>
<td>2,080</td>
<td>67</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>62</td>
<td>Foreman</td>
<td>47,840</td>
<td>1.00</td>
<td>2,080</td>
<td>62</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>63</td>
<td>Operator</td>
<td>76,440</td>
<td>2.00</td>
<td>4,160</td>
<td>63</td>
<td>J</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>66</td>
<td>Electrician</td>
<td>52,832</td>
<td>1.00</td>
<td>2,080</td>
<td>66</td>
<td>FORE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>75,712</td>
<td>2.00</td>
<td>4,160</td>
<td>67</td>
<td>A.2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>9S-2</td>
<td>Sales Representative</td>
<td>25,480</td>
<td>1.00</td>
<td>2,080</td>
<td>9S-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Administrative Depar</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>45,000</td>
<td>1.00</td>
<td>2,080</td>
<td>TRNER</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>0A–10</td>
<td>Purchasing Agent</td>
<td>90,000</td>
<td>4.00</td>
<td>8,320</td>
<td>0A–10</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>2H–1</td>
<td>Human Resource Manager</td>
<td>52,500</td>
<td>1.00</td>
<td>2,080</td>
<td>2H–1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>2H–2</td>
<td>Employment Specialist</td>
<td>30,000</td>
<td>1.00</td>
<td>2,080</td>
<td>2H–2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>3P–1</td>
<td>Payroll Manager</td>
<td>42,000</td>
<td>1.00</td>
<td>2,080</td>
<td>3P–1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>4A–1</td>
<td>Administrative Assis</td>
<td>25,000</td>
<td>3.00</td>
<td>6,240</td>
<td>4A–1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>5J–8</td>
<td>Teacher</td>
<td>90,000</td>
<td>3.00</td>
<td>6,240</td>
<td>5J–8</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>8M–3</td>
<td>Clerk</td>
<td>15,600</td>
<td>1.00</td>
<td>2,080</td>
<td>8M–3</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Balance Sheet</td>
<td>100</td>
<td>1000A-4</td>
<td>Accountant</td>
<td>100,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1000A-4</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>100</td>
<td>1004A-1</td>
<td>Administrative Assis</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td>1004A-1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>100</td>
<td>4A-2</td>
<td>Secretary</td>
<td>80,000</td>
<td>1.00</td>
<td>2,080</td>
<td>4A-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Headquarters</td>
<td>110</td>
<td>110A1</td>
<td>President</td>
<td>100,000</td>
<td>1.00</td>
<td>2,080</td>
<td>A1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>110</td>
<td>110A2</td>
<td>Vice President</td>
<td>80,000</td>
<td>1.00</td>
<td>2,080</td>
<td>110A2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>110</td>
<td>1100A-2</td>
<td>Senior Accountant</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td>1100A-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finance Department</td>
<td>140</td>
<td>1400A-3</td>
<td>Financial Analyst</td>
<td>100,000</td>
<td>2.00</td>
<td>4,160</td>
<td>1400A-3</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>140</td>
<td>1400P-0</td>
<td>Finance Director</td>
<td>60,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1400P-0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>140</td>
<td>1400P-1</td>
<td>Assistant Finance Director</td>
<td>40,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1400P-1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Information Systems</td>
<td>142</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>55,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1421M-1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>142</td>
<td>1421M-2</td>
<td>Project Leader</td>
<td>40,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1421M-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>142</td>
<td>1424A-2</td>
<td>Secretary</td>
<td>18,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1424A-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Payroll Department</td>
<td>143</td>
<td>1433P-1</td>
<td>Payroll Manager</td>
<td>50,000</td>
<td>1.00</td>
<td>2,080</td>
<td>1433P-1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sum</td>
<td>7-50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 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.

<table>
<thead>
<tr>
<th>FY</th>
<th>Home Business Unit</th>
<th>Description</th>
<th>Position ID</th>
<th>Description</th>
<th>Effective Budget</th>
<th>Effective Hours</th>
<th>Effective FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>98</td>
<td>50 General Accounts</td>
<td>5J-9</td>
<td>Draftsperson</td>
<td>75,000</td>
<td>4,160</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>53,111</td>
<td>2,040</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>62</td>
<td>Foreman</td>
<td>47,840</td>
<td>2,040</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>63</td>
<td>Operator</td>
<td>76,440</td>
<td>4,160</td>
<td>2.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>66</td>
<td>Electrician</td>
<td>52,832</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>75,712</td>
<td>4,160</td>
<td>2.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>90</td>
<td>Administrative Department</td>
<td>T3N3ER</td>
<td>Trainer</td>
<td>25,480</td>
<td>2,080</td>
<td>1.00</td>
</tr>
<tr>
<td>90</td>
<td>0A-10</td>
<td>Purchasing Agent</td>
<td>45,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>10B-1</td>
<td>Trainer</td>
<td>90,000</td>
<td>8,320</td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1434A-1</td>
<td>Payroll Administrator</td>
<td>17,500</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1433P-1</td>
<td>Payroll Manager</td>
<td>50,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1421M-2</td>
<td>Project Leader</td>
<td>40,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>55,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1433P-1</td>
<td>Payroll Manager</td>
<td>50,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>1434A-1</td>
<td>Payroll Administrator</td>
<td>17,500</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90</td>
<td>902H-2</td>
<td>Employment Specialis</td>
<td>7,715</td>
<td>239</td>
<td>.11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>Balance Sheet</td>
<td>1000A-4</td>
<td>Accountant</td>
<td>125,000</td>
<td>8,320</td>
<td>4.00</td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>100A-1</td>
<td>Administrative Assistant</td>
<td>42,500</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>100A-2</td>
<td>Secretary</td>
<td>19,999</td>
<td>415</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>Headquarters</td>
<td>110A1</td>
<td>President</td>
<td>19,999</td>
<td>415</td>
<td>.19</td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>110A1</td>
<td>Vice President</td>
<td>19,999</td>
<td>415</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>110A-1</td>
<td>Senior Accountant</td>
<td>19,999</td>
<td>831</td>
<td>.40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>110A-2</td>
<td>Accountant</td>
<td>100,000</td>
<td>5,200</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>140</td>
<td>Finance Department</td>
<td>140OA-3</td>
<td>Financial Analyst</td>
<td>19,999</td>
<td>831</td>
<td>.40</td>
<td></td>
</tr>
<tr>
<td>140</td>
<td>140P-0</td>
<td>Finance Director</td>
<td>11,999</td>
<td>415</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>140</td>
<td>140P-1</td>
<td>Assistant Finance Di</td>
<td>7,999</td>
<td>415</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142</td>
<td>Information Systems</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>55,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>142</td>
<td>1421M-2</td>
<td>Project Leader</td>
<td>40,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142</td>
<td>1421M-1</td>
<td>MIS Manager</td>
<td>55,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142</td>
<td>1433P-1</td>
<td>Payroll Manager</td>
<td>50,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>143</td>
<td>Payroll Department</td>
<td>1434A-1</td>
<td>Payroll Administrator</td>
<td>17,500</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Distrib/Manuf Balance</td>
<td>240A-1</td>
<td>Production Worker</td>
<td>25,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>240A-1</td>
<td>Administrative Assistant</td>
<td>3,999</td>
<td>415</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>240A-1</td>
<td>Secretary</td>
<td>5,999</td>
<td>831</td>
<td>.40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>240A-1</td>
<td>Nurse</td>
<td>9,999</td>
<td>831</td>
<td>.40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>Accounting Department</td>
<td>450P-3</td>
<td>Accounting Clerk</td>
<td>45,000</td>
<td>6,240</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>450A-1</td>
<td>Accounting Manager</td>
<td>45,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>450A-1</td>
<td>Accountant</td>
<td>42,400</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>450A-1</td>
<td>Accountant</td>
<td>125,000</td>
<td>8,320</td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>Corporate Administra</td>
<td>2A-3</td>
<td>Financial Analyst</td>
<td>38,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>2A-3</td>
<td>Financial Analyst</td>
<td>50,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>4</td>
<td>Project Leader</td>
<td>50,000</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>5</td>
<td>Human Resource Manag</td>
<td>26,065</td>
<td>1,204</td>
<td>.57</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>53-4</td>
<td>Fire Fighter</td>
<td>29,484</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>53-9</td>
<td>Journeyman</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>62</td>
<td>Foreman</td>
<td>39,041</td>
<td>2,080</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>63</td>
<td>Operator</td>
<td>83,400</td>
<td>4,160</td>
<td>2.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>7H-1</td>
<td>Waiter/Waitress</td>
<td>110,000</td>
<td>1,950</td>
<td>2.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>210</td>
<td>Corporate Administra</td>
<td>2A-3</td>
<td>Payroll Manager</td>
<td>65,000</td>
<td>1,950</td>
<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>FY</th>
<th>Job Typ</th>
<th>Job Step</th>
<th>Description</th>
<th>Home Position Eff.</th>
<th>Budget</th>
<th>Effective</th>
<th>FTE</th>
<th>Headcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>BUSDR</td>
<td>Bus Driver</td>
<td>2435 School</td>
<td>B001 Bus Driver</td>
<td>30,000</td>
<td>2.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>COACH</td>
<td>Coach</td>
<td>2435 School</td>
<td>CH01 Swim Coach</td>
<td>25,000</td>
<td>2.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TEACH</td>
<td>Teacher</td>
<td>2435 School</td>
<td>TH01 Art Teacher</td>
<td>35,000</td>
<td>1.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>M1</td>
<td>Teacher</td>
<td>2435 School</td>
<td>TH03 English Teacher</td>
<td>60,000</td>
<td>2.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>BUSDR</td>
<td>Bus Driver</td>
<td>2435 School</td>
<td>B001 Bus Driver</td>
<td>30,000</td>
<td>2.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>COACH</td>
<td>Coach</td>
<td>2435 School</td>
<td>CH01 Swim Coach</td>
<td>25,000</td>
<td>2.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>95</td>
<td>701</td>
<td>Corporate Admin</td>
<td>HELEN helen</td>
<td></td>
<td>10,000</td>
<td>1.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>96</td>
<td>5J-9</td>
<td>Journeyman</td>
<td>50 General Account</td>
<td>5J-9 Draftsperson</td>
<td>75,000</td>
<td>2.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>62</td>
<td>Foreman</td>
<td>50 General Account</td>
<td>62 Foreman</td>
<td>47,840</td>
<td>1.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>63</td>
<td>J</td>
<td>Operator</td>
<td>50 General Account</td>
<td>63 Operator</td>
<td>34,043</td>
<td>.89</td>
<td></td>
<td></td>
</tr>
<tr>
<td>66</td>
<td>FORE</td>
<td>Electrician</td>
<td>50 General Account</td>
<td>66 Electrician</td>
<td>34,043</td>
<td>.89</td>
<td></td>
<td></td>
</tr>
<tr>
<td>67</td>
<td>A.2</td>
<td>Laborer</td>
<td>50 General Account</td>
<td>67 Laborer96</td>
<td>75,712</td>
<td>2.00</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>Laborer</td>
<td>50 General Account</td>
<td>5067 Laborer Level I</td>
<td>53,111</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>97</td>
<td>0A-3</td>
<td>Financial Analyst</td>
<td>707 Corporate Admin</td>
<td>0A-3 Financial Analyst</td>
<td>285,706</td>
<td>6.89</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2H-1</td>
<td>Human Resource</td>
<td>90 Administrative</td>
<td>2H-1 Human Resource</td>
<td>4,890</td>
<td>.11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3P-1</td>
<td>Payroll Manager</td>
<td>90 Administrative</td>
<td>3P-1 Payroll Manager</td>
<td>40,000</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4A-1</td>
<td>Administrative</td>
<td>90 Administrative</td>
<td>4A-1 Administrative</td>
<td>4,510</td>
<td>.19</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5J-4</td>
<td>Firefighter</td>
<td>707 Corporate Admin</td>
<td>5J-4 Firefighter</td>
<td>65,000</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5J-8</td>
<td>Trainer</td>
<td>90 Administrative</td>
<td>5J-8 Trainer</td>
<td>65,000</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>67</td>
<td>A.2</td>
<td>Laborer</td>
<td>50 General Account</td>
<td>67 Laborer97</td>
<td>75,712</td>
<td>2.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>8M-1</td>
<td>Manufacturing M</td>
<td>M00 Memphis Mfg. P. 1</td>
<td>8M-1 Manufacturing M</td>
<td>65,000</td>
<td>1.00</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8M-3</td>
<td>Clerk</td>
<td>90 Administrative</td>
<td>8M-3 Clerk</td>
<td>1,795</td>
<td>.11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>110</td>
<td>Headquarters</td>
<td>110A2 Vice President</td>
<td>110A2 Vice President</td>
<td>15,999</td>
<td>.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>110</td>
<td>Headquarters</td>
<td>110A1 Senior Accounta</td>
<td>110A1 Senior Accounta</td>
<td>15,999</td>
<td>.40</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>142</td>
<td>Information Sys</td>
<td>1421M-2 Project Leader</td>
<td>1421M-2 Project Leader</td>
<td>40,000</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2435</td>
<td>School</td>
<td>CH02 Tennis Coach</td>
<td>2435 School</td>
<td>12,500</td>
<td>1.00</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Position Effective Budget by Home Business Unit

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.

<table>
<thead>
<tr>
<th>FY</th>
<th>Home Business Unit</th>
<th>Description</th>
<th>Position</th>
<th>Description</th>
<th>Effective Budget</th>
<th>Effective Hrs</th>
<th>Effective FTE</th>
<th>Headcount</th>
<th>Job Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>98</td>
<td>50 General Account</td>
<td>5J-9 Draftsperson</td>
<td>75,000</td>
<td>4,160</td>
<td>2.00</td>
<td>5J-9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>5067</td>
<td>Laborer Level I</td>
<td>53,112</td>
<td>3,800</td>
<td>1.00</td>
<td>67</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>62</td>
<td>Foreman</td>
<td>47,840</td>
<td>2,080</td>
<td>1.00</td>
<td>62</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>63</td>
<td>Operator</td>
<td>76,440</td>
<td>4,160</td>
<td>2.00</td>
<td>63</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>66</td>
<td>Electrician</td>
<td>52,832</td>
<td>2,080</td>
<td>1.00</td>
<td>66</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>75,712</td>
<td>4,160</td>
<td>2.00</td>
<td>67</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>95-2</td>
<td>Sales Represent</td>
<td>25,480</td>
<td>2,080</td>
<td>1.00</td>
<td>95-2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Position Control**
### 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.

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Home Business Unit</th>
<th>Description ID</th>
<th>Position Description</th>
<th>Annual Salary</th>
<th>Em Description</th>
<th>Eff Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>Walters, Annette</td>
<td>701</td>
<td>General Account 5</td>
<td>Human Resource</td>
<td>45,000.00</td>
<td>Active</td>
<td>06/03/96</td>
</tr>
<tr>
<td>2202</td>
<td>Kellerman, James</td>
<td>451</td>
<td>** NOT FOUND **</td>
<td>4510A-1</td>
<td>30,000.00 X</td>
<td>Terminate</td>
<td>02/05/95</td>
</tr>
<tr>
<td>2111</td>
<td>Ingraham, Paul</td>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>52,000.00</td>
<td>Active</td>
<td>05/21/96</td>
</tr>
<tr>
<td>2111</td>
<td>Ingraham, Paul</td>
<td>50</td>
<td>67</td>
<td>Laborer97</td>
<td>52,000.00</td>
<td>Active</td>
<td>05/21/96</td>
</tr>
<tr>
<td>2111</td>
<td>Ingraham, Paul</td>
<td>701</td>
<td>General Account 7</td>
<td>Laborer</td>
<td>52,000.00 X</td>
<td>Terminate</td>
<td>03/15/95</td>
</tr>
<tr>
<td>2129</td>
<td>Jackson, John</td>
<td>701</td>
<td>General Account 3</td>
<td>Financial Analyst</td>
<td>50,000.00</td>
<td>Active</td>
<td>03/15/98</td>
</tr>
<tr>
<td>3050</td>
<td>Morrissey, Anne E.</td>
<td>2435</td>
<td>C002</td>
<td>Tennis Coach</td>
<td>3,000.00</td>
<td>Active</td>
<td>04/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2435</td>
<td>TR03</td>
<td>English Teacher</td>
<td>44,000.00</td>
<td>Active</td>
<td>03/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2435</td>
<td>TR03</td>
<td>English Teacher</td>
<td>34,000.00</td>
<td>Active</td>
<td>06/01/97</td>
</tr>
<tr>
<td>3068</td>
<td>Pugh, James R.</td>
<td>2435</td>
<td>B001</td>
<td>Bus Driver</td>
<td>6,419.52</td>
<td>Active</td>
<td>06/01/07</td>
</tr>
<tr>
<td>3076</td>
<td>O'Neill, Thelma P.</td>
<td>2435</td>
<td>T001</td>
<td>Art Teacher</td>
<td>36,000.00 A</td>
<td>Adjust Status</td>
<td>06/01/07</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2435</td>
<td>T001</td>
<td>Art Teacher</td>
<td>35,000.00</td>
<td>Active</td>
<td>03/23/96</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2435</td>
<td>T001</td>
<td>Art Teacher</td>
<td>30,000.00 A</td>
<td>Adjust Status</td>
<td>03/23/96</td>
</tr>
<tr>
<td>3084</td>
<td>Carmichael, Bradley</td>
<td>2435</td>
<td>C003</td>
<td>Football Coach</td>
<td>38,000.00</td>
<td>Active</td>
<td>06/01/70</td>
</tr>
<tr>
<td>3092</td>
<td>Padilla, Alicia C.</td>
<td>2435</td>
<td>B001</td>
<td>Bus Driver</td>
<td>12,499.08</td>
<td>Active</td>
<td>06/01/07</td>
</tr>
<tr>
<td>4520</td>
<td>wow, wow</td>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>47,000.00</td>
<td>Active</td>
<td>12/31/97</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer97</td>
<td>47,000.00</td>
<td>Active</td>
<td>12/31/97</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer96</td>
<td>47,000.00</td>
<td>Active</td>
<td>12/31/97</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer98</td>
<td>35,000.00 A</td>
<td>Adjust Status</td>
<td>05/24/96</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer97</td>
<td>35,000.00 A</td>
<td>Adjust Status</td>
<td>05/24/96</td>
</tr>
<tr>
<td></td>
<td></td>
<td>50</td>
<td>67</td>
<td>Laborer96</td>
<td>35,000.00 A</td>
<td>Adjust Status</td>
<td>05/24/96</td>
</tr>
<tr>
<td>5127</td>
<td>Ebby, Chester A.</td>
<td>419</td>
<td>General Account 4A-3</td>
<td>EEO Specialist</td>
<td>25,000.00</td>
<td>Active</td>
<td>03/15/98</td>
</tr>
<tr>
<td>5651</td>
<td>Rothchild, Abigail</td>
<td>701</td>
<td>General Account 4</td>
<td>Project Leader</td>
<td>50,000.00</td>
<td>Active</td>
<td>11/15/90</td>
</tr>
<tr>
<td>6000</td>
<td>Easter, Melvyn</td>
<td>419</td>
<td>4194A-2</td>
<td>Secretary</td>
<td>57,131.36</td>
<td>Active</td>
<td>01/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>419</td>
<td>4194A-2</td>
<td>Secretary</td>
<td>57,131.36 T</td>
<td>Transfer</td>
<td>04/04/95</td>
</tr>
<tr>
<td>6002</td>
<td>Abbot, Dominique</td>
<td>701</td>
<td>General Account 4A-4</td>
<td>Financial Analyst</td>
<td>38,000.00</td>
<td>Active</td>
<td>04/02/99</td>
</tr>
<tr>
<td>6003</td>
<td>Akin, Dwight</td>
<td>701</td>
<td>General Account 5-5</td>
<td>Secretary</td>
<td>29,848.00</td>
<td>Active</td>
<td>02/01/90</td>
</tr>
<tr>
<td>6005</td>
<td>Ellis, Fred</td>
<td>701</td>
<td>General Account 63</td>
<td>Operator</td>
<td>39,841.60</td>
<td>Active</td>
<td>03/22/94</td>
</tr>
<tr>
<td>6010</td>
<td>Eason, Walter</td>
<td>701</td>
<td>General Account 63</td>
<td>Laborer</td>
<td>31,200.00</td>
<td>Active</td>
<td>03/22/94</td>
</tr>
<tr>
<td>7500</td>
<td>McDougle, Cathy</td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>50,000.00</td>
<td>Active</td>
<td>07/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>50,000.00</td>
<td>Active</td>
<td>07/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>44,000.00 A</td>
<td>Adjust Status</td>
<td>02/15/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>44,000.00 A</td>
<td>Adjust Status</td>
<td>02/15/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>42,500.00 T</td>
<td>Transfer</td>
<td>01/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Human Resource</td>
<td>37,500.00 T</td>
<td>Transfer</td>
<td>01/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Employment Spec</td>
<td>37,500.00 T</td>
<td>Transfer</td>
<td>01/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Employment Spec</td>
<td>37,500.00 T</td>
<td>Transfer</td>
<td>01/01/98</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Employment Spec</td>
<td>35,000.00</td>
<td>Active</td>
<td>03/03/97</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90</td>
<td>28-1</td>
<td>Employment Spec</td>
<td>35,000.00</td>
<td>Active</td>
<td>03/03/97</td>
</tr>
<tr>
<td>7503</td>
<td>Kraton, Ralph</td>
<td>90</td>
<td>28-13</td>
<td>Employment Spec</td>
<td>35,000.00</td>
<td>Active</td>
<td>03/03/97</td>
</tr>
<tr>
<td>7504</td>
<td>Meade, Jane</td>
<td>90</td>
<td>General Account 10B-1</td>
<td>Trainer</td>
<td>35,000.00</td>
<td>Active</td>
<td>08/03/96</td>
</tr>
<tr>
<td>7505</td>
<td>Mastro, Robert</td>
<td>90</td>
<td>General Account 10B-1</td>
<td>Trainer</td>
<td>35,000.00</td>
<td>Active</td>
<td>08/03/96</td>
</tr>
<tr>
<td>7506</td>
<td>Mayeda, Donald</td>
<td>90</td>
<td>General Account 8M-3</td>
<td>Clerk</td>
<td>15,600.00</td>
<td>Active</td>
<td>03/03/97</td>
</tr>
<tr>
<td>7508</td>
<td>Mai, Tien</td>
<td>800</td>
<td>General Account 10C-2</td>
<td>Waiter/Waitress</td>
<td>4,888.00</td>
<td>Active</td>
<td>06/03/96</td>
</tr>
<tr>
<td>7510</td>
<td>Morales, Jesus</td>
<td>90</td>
<td>4A-1</td>
<td>Administrative</td>
<td>20,000.00</td>
<td>Active</td>
<td>01/01/97</td>
</tr>
<tr>
<td>7540</td>
<td>Milenski, Douglas</td>
<td>200</td>
<td>General Account 488P</td>
<td>Setup Person</td>
<td>18,928.00</td>
<td>Active</td>
<td>07/14/33</td>
</tr>
</tbody>
</table>

---

**Release A7.3 (June 1996)**
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.

<table>
<thead>
<tr>
<th>Employee Number</th>
<th>Home Business Unit</th>
<th>Position ID</th>
<th>Position Description</th>
<th>Annual Salary</th>
<th>Date From</th>
<th>Hours</th>
<th>Date From</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
<tr>
<td>8889</td>
<td>90</td>
<td>TRNER</td>
<td>Trainer</td>
<td>9.00</td>
<td>11/25/21</td>
<td>2080.00</td>
<td>11/25/21</td>
<td>2080.00</td>
</tr>
</tbody>
</table>
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:

Employee D
25,000 + 2,500

Worktable
27,500

Update Record
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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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 (F070101). Default of blank will exit to US Payroll Employee Setup program (F060101).

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Method for Pay Increase</td>
<td>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.</td>
</tr>
<tr>
<td>Rate – Salary at Next Raise</td>
<td>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).</td>
</tr>
</tbody>
</table>

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/step

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)
- SAIC (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)
- HRIC (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 following categories by amount or percent (%10 = ten percent). Any increases will be applied to the group but can be changed upon review (see helps):
   - Base Rate or Salary
   - Cost of Living
   - Local Cost of Living
   - Merit Increase
   - Promotion

3. Enter an Amount Approved code for all employees. Default of blank will add employees to the work file with a blank Amount Approved code.

4. If employee exists in review group:
   a) Enter ‘1’ to replace data with employee master values.
   b) Enter ‘2’ to replace some fields with employee master values. Fields NOT replaced are: Pay Grade, Raise Effective Date, Date of Next Review, Job Type, Job Step, and Employment Status.
   c) Blank for no changes.

5. If processing option 4 is not blank, enter a ‘1’ to NOT replace recommended salary, % and amount increase, and other calculated fields. (See helps for complete list.)

6. Enter the Effective Date for all raises given to this Review Group as it is created. Default of blank will use today’s date.

7. Enter a Date of Next Review for the group to represent the next time each member will be reviewed.

8. Enter a Change Reason to be applied to every member in the Review Group being created. For example, Change Reason = 009 would be for Annual Raises. A default of blank will give every member in the Review Group a blank Change Reason.

9. Enter a ‘1’ to CLEAR the work file prior to building this Review Group. Default of blank will NOT Clear the work file.
   **CAUTION**: A ‘1’ CLEARS THE ENTIRE WORK FILE.
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

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Group</td>
<td>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.</td>
</tr>
<tr>
<td>From Approval Code</td>
<td>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.</td>
</tr>
<tr>
<td>Business Unit - Home</td>
<td>The number of the business unit in which the employee generally resides.</td>
</tr>
</tbody>
</table>

.............. 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

G08 Human Resources
Choose Wage and Salary Administration

G08W2 Wage & Salary Admin
Choose Review Groups Inquiry

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

<table>
<thead>
<tr>
<th>Pay Class</th>
<th>Description</th>
<th>No. of</th>
<th>Current</th>
<th>Recommended</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>All Hourly Employees</td>
<td>33</td>
<td>1,084,527.46</td>
<td>1,177,870.52</td>
<td>5.86</td>
</tr>
<tr>
<td>110</td>
<td>All Salaried Employees</td>
<td>7</td>
<td>888,758.00</td>
<td>947,287.56</td>
<td>5.86</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>40</td>
<td>1,973,285.46</td>
<td>2,125,158.08</td>
<td>5.86</td>
</tr>
</tbody>
</table>

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.
The following employee data have been updated to the Employee Master file:

<table>
<thead>
<tr>
<th>Review Group</th>
<th>Number</th>
<th>Name</th>
<th>Job Type</th>
<th>Step</th>
<th>New Rates</th>
<th>Raise</th>
<th>Pay</th>
<th>Grade</th>
<th>Next Review</th>
<th>Change Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAG</td>
<td>6010</td>
<td>Eason, Walter</td>
<td>67</td>
<td>1</td>
<td>15.240</td>
<td></td>
<td>31,700.00</td>
<td></td>
<td>07/17/96</td>
<td>03/15/98</td>
<td>009 Annual Raise</td>
</tr>
<tr>
<td>AAG</td>
<td>7578</td>
<td>Griffin, Patri</td>
<td>5J-5</td>
<td></td>
<td>27.690</td>
<td></td>
<td>57,596.00</td>
<td></td>
<td>06/03/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7508</td>
<td>Mai, Tien</td>
<td>7H-1</td>
<td>2</td>
<td>2.590</td>
<td></td>
<td>5,388.00</td>
<td></td>
<td>07/17/96</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7570</td>
<td>Manderfield, J</td>
<td>64-1</td>
<td>26</td>
<td>26.240</td>
<td></td>
<td>54,580.00</td>
<td></td>
<td>12/15/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7574</td>
<td>Mckenna, Marti</td>
<td>5J-9</td>
<td>A.2</td>
<td>24.990</td>
<td></td>
<td>51,980.00</td>
<td></td>
<td>12/15/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7568</td>
<td>McGrew, Nancy</td>
<td>64</td>
<td>JR</td>
<td>22.540</td>
<td></td>
<td>46,884.00</td>
<td></td>
<td>12/15/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7576</td>
<td>McMurray, Mich</td>
<td>5J-9</td>
<td>A.1</td>
<td>21.740</td>
<td></td>
<td>45,220.00</td>
<td></td>
<td>12/15/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
<tr>
<td>AAG</td>
<td>7572</td>
<td>Miller, Michael</td>
<td>65</td>
<td></td>
<td>23.840</td>
<td></td>
<td>49,588.00</td>
<td></td>
<td>12/15/98</td>
<td>009 Annual Raise</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Alpha Name</th>
<th>Address Number</th>
<th>Home Business Uni</th>
<th>Job Type/Step</th>
<th>P</th>
<th>Pay Grade</th>
<th>Step</th>
<th>Current Hourly Rate</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>McLind, Rod</td>
<td>2049</td>
<td>9 OA-10</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>14,903</td>
<td>31,000,000</td>
</tr>
<tr>
<td>D'Angelo, Suzanne</td>
<td>2057</td>
<td>9 OA-2</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>15,385</td>
<td>32,000,000</td>
</tr>
<tr>
<td>Escalante, Jorge</td>
<td>2428</td>
<td>9 OA-3</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>15,865</td>
<td>33,000,000</td>
</tr>
<tr>
<td>Ellis, Jody</td>
<td>2479</td>
<td>9 OA-4</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>16,346</td>
<td>34,000,000</td>
</tr>
<tr>
<td>Connie Ato</td>
<td>6832</td>
<td>9 OA-4</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>16,134</td>
<td>33,560,000</td>
</tr>
<tr>
<td>Moore, James H.</td>
<td>7011</td>
<td>9 OA-4</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>17,307</td>
<td>36,000,000</td>
</tr>
<tr>
<td>Marshall, Rodney O.</td>
<td>7020</td>
<td>9 OA-4</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>13,942</td>
<td>29,000,000</td>
</tr>
<tr>
<td>Green, Greg</td>
<td>55222</td>
<td>9 8M-1</td>
<td>P</td>
<td></td>
<td></td>
<td></td>
<td>24,471</td>
<td>50,900,000</td>
</tr>
</tbody>
</table>
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

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

G08  Human Resources  Choose Wage and Salary Administration

G08W2  Wage and Salary Administration  Choose Delete a Review Group

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 that you have changed in the pay grade/step table and need to recreate.

To delete pay grade/step progression groups

On Review Work Group Summary

1. Locate the work group.
2. Use a function key to delete the work group.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Review Group ID       | 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. |
| 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.                                                                                                                                |
Run Employee Salary Analysis

Running Employee Salary Analysis

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:
<table>
<thead>
<tr>
<th>Employee</th>
<th>Name</th>
<th>Bus. Unit</th>
<th>Description</th>
<th>Hire Date</th>
<th>Pay Grade</th>
<th>Step Ratio</th>
<th>Grad Compa-User</th>
<th>Description</th>
<th>Annual Salary</th>
<th>Expected Income</th>
<th>Bonus/Comm</th>
<th>Income Yr</th>
<th>Salary Yr</th>
<th>Comm</th>
<th>Total</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>7500</td>
<td>McDougle, Cathy</td>
<td>90 Administrative Depa</td>
<td>03/03/97</td>
<td>S6 0.90</td>
<td>50,000</td>
<td>50,000 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7503</td>
<td>Kraton, Ralph</td>
<td>90 Administrative Depa</td>
<td>07/27/97</td>
<td></td>
<td>56,000</td>
<td>56,000 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7504</td>
<td>Meade, Jane</td>
<td>90 Administrative Depa</td>
<td>08/03/96</td>
<td>S4 0.92</td>
<td>35,000</td>
<td>35,000 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7505</td>
<td>Mastro, Robert</td>
<td>90 Administrative Depa</td>
<td>01/03/96</td>
<td>S4 0.99</td>
<td>37,750</td>
<td>37,750 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7506</td>
<td>Mayeda, Donald</td>
<td>90 Administrative Depa</td>
<td>03/03/97</td>
<td></td>
<td>15,600</td>
<td>15,600 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7510</td>
<td>Moralez, Jesus</td>
<td>90 Administrative Depa</td>
<td>12/01/97</td>
<td></td>
<td>13,520</td>
<td>13,520 95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description – Injury or Illness</td>
<td>A brief description of the injury or illness, including the part or parts of body affected.</td>
</tr>
<tr>
<td>Day of Week</td>
<td>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.</td>
</tr>
<tr>
<td>Injury/Illness Related (IN/IL)</td>
<td>A code that indicates whether the case is an injury or an illness. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>II: 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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Number – Establishment of Business Activity</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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 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 perform 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 perform 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.
**OSHA 200 Injury and Illness Report**

**Calendar Year – 1998**

**Establishment:** 00001001 Edwards, J.D. & Company
8055 E. Tufts Ave. Suite 1300 Denver CO 80237

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Date of Inj/Ill</th>
<th>Employee Name</th>
<th>Job ID</th>
<th>Business Unit</th>
<th>Date of Death</th>
<th>Away or Away From Work</th>
<th>Days Lost</th>
<th>Days Away From Work</th>
<th>Wk W/O</th>
<th>Date of (A)</th>
<th>Days Lost</th>
<th>Days Away From Work</th>
<th>Wk W/O</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>03/27/98</td>
<td>Mai, Tien</td>
<td>Foreman</td>
<td>Corporate Admin</td>
<td></td>
<td>X</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Deep cut in right ring finger</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>101</td>
<td>04/03/98</td>
<td>Mastro, Robert</td>
<td>Financial Analyst</td>
<td>Corporate Admin</td>
<td></td>
<td>X       X</td>
<td>1     5</td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Crushed foot</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>102</td>
<td>05/18/98</td>
<td>Morrell, Jason</td>
<td>Laborer</td>
<td>Level I Corporate Admin</td>
<td></td>
<td>X       X</td>
<td>1     5</td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Object blown into eye</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>103</td>
<td>01/27/98</td>
<td>Jackson, John</td>
<td>Financial Analyst</td>
<td>Corporate Admin</td>
<td></td>
<td>X</td>
<td>Description of Inj/Ill</td>
<td>Caught hand in elevator door</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>104</td>
<td>04/07/98</td>
<td>McDougle, Cathy</td>
<td>Human Resource Manager</td>
<td>Administrative</td>
<td></td>
<td>X       X</td>
<td>14</td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Sat on broken chair, chair collapsed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>105</td>
<td>06/16/98</td>
<td>Easter, Melvyn</td>
<td>Secretary</td>
<td>Administration</td>
<td></td>
<td>X       X</td>
<td>7</td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Strained back while lifting boxes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>106</td>
<td>01/27/98</td>
<td>Jackson, John</td>
<td>Financial Analyst</td>
<td>Corporate Admin</td>
<td></td>
<td>X</td>
<td>Description of Inj/Ill</td>
<td>Ear infection from headsets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>107</td>
<td>02/24/98</td>
<td>D’Angelo, Suzanne</td>
<td>Senior Accountant</td>
<td>Corporate Admin</td>
<td></td>
<td>X</td>
<td>X</td>
<td>5</td>
<td>Description of Inj/Ill</td>
<td>Ear infection from headsets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>108</td>
<td>12/22/98</td>
<td>Ebby, Chester A.</td>
<td>EEO Specialist</td>
<td>Administration</td>
<td></td>
<td>X       X</td>
<td>3     5</td>
<td></td>
<td>Description of Inj/Ill</td>
<td>Fell down the stairs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>109</td>
<td>06/16/98</td>
<td>Ellis, Fred</td>
<td>Operator</td>
<td>Corporate Admin</td>
<td></td>
<td>X</td>
<td>Description of Inj/Ill</td>
<td>Forklift knocked him over, hurt head</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>110</td>
<td>02/05/98</td>
<td>Ellis, Fred</td>
<td>Operator</td>
<td>Corporate Admin</td>
<td></td>
<td>X       X</td>
<td>1</td>
<td>Description of Inj/Ill</td>
<td>Hearing problem from drill</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Total | 0 | 6 | 5 | 26 | 18 | 2 | 0 | 0 | 0 | 1 | 1 | 1 | 0 | 0 | 1 | 1 | 1 | 5 | 1 |

**Safety & Health Administration**
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.

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.
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.
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 injuring 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.
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:

![Organizational Structure Diagram]

- **Business Unit**: Executive -> Human Resources, Finance, Operations
- **Position**: President -> Director of HR, Corporate Controller, Operations Manager
- **Employee**: Ray Allen -> Jill Davis, Joseph Clark
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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Business Unit</td>
<td>The primary level in a business unit hierarchy. A parent in one hierarchy can be a child in a different hierarchy.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Parent/Child Business Unit</td>
<td>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.</td>
</tr>
<tr>
<td>Organization Type Structure</td>
<td>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).</td>
</tr>
<tr>
<td>Display Parent or Child</td>
<td>A code that determines whether the system displays child business units for a parent or parent business units for a child. Valid codes are:</td>
</tr>
<tr>
<td>Business Units</td>
<td>0 Displays children for selected parent</td>
</tr>
<tr>
<td></td>
<td>1 Displays parents for selected child</td>
</tr>
<tr>
<td></td>
<td>The system will interpret a blank as 0.</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Parent or Child</td>
<td>A code that determines whether the system displays child business units for</td>
</tr>
<tr>
<td>Business Units</td>
<td>a parent or parent business units for a child. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>0 Displays children for selected parent</td>
</tr>
<tr>
<td></td>
<td>1 Displays parents for selected child</td>
</tr>
<tr>
<td></td>
<td>The system will interpret a blank as 0.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Supervisor/Employees</td>
<td>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.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>The address book number of the supervisor.</td>
</tr>
<tr>
<td>Date – Effective On</td>
<td>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.</td>
</tr>
</tbody>
</table>
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:
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 unit in an indented format
On Structure Inquiry

1. Complete the following fields:
   - Mode
   - Parent Business Unit
   - Type Structure
### 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:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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.                                                                                                                                                                                                                                                                                                                                                   |
To review a structure by position

G08O2 Organizational Structure
Choose Position

G08O21 Organizational Structure by Position
Choose Structure Inquiry

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.
**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.

<table>
<thead>
<tr>
<th>Child</th>
<th>Parent Position ID</th>
<th>Parent Position</th>
<th>Level</th>
<th>Position S</th>
<th>Name</th>
<th>Position Title</th>
<th>Cost Center</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>HR Director</td>
<td>2</td>
<td>Stone, Russel</td>
<td>Compensation Manager</td>
<td>141</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>3</td>
<td>Smith, Sandy</td>
<td>3</td>
<td>Smith, Sandy</td>
<td>Recruitment Manager</td>
<td>141</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>Jones, Larry</td>
<td></td>
<td>Jones, Larry</td>
<td>HR Specialist</td>
<td>141</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td>Vacant</td>
<td></td>
<td>Vacant</td>
<td>HR Specialist</td>
<td>141</td>
<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>
What You Should Know About

Printing the entire structure

If you print 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 structure, 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.
### Supervisor/Employee

<table>
<thead>
<tr>
<th>Level</th>
<th>Employee Number</th>
<th>Name</th>
<th>Job Title</th>
<th>2nd Job Title</th>
<th>Category Code 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>6002 Abbot, Dominique</td>
<td>Financial Analyst</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>7562 Mannon, Howard</td>
<td>Purchasing Manager</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Data Base</td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>A Applicant Resume</td>
</tr>
<tr>
<td></td>
<td>E Employee Resume</td>
</tr>
<tr>
<td></td>
<td>J Job Description</td>
</tr>
<tr>
<td></td>
<td>H Injury/Illness Case Number</td>
</tr>
<tr>
<td></td>
<td>P Dependent/Beneficiary Information</td>
</tr>
<tr>
<td></td>
<td>R Requisition Information You can define this code using user defined code system 08, type RC.</td>
</tr>
</tbody>
</table>

<p>| Description      | A user defined name or remark that describes a field. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Mode – Code or Narrative</td>
<td>The format of a data type. This code determines the display mode for supplemental data. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>C Code format, which displays the form for entering code-specific information. The system edits these codes against the User Defined Codes table (F0005).</td>
</tr>
<tr>
<td></td>
<td>N Narrative format, which displays the form for entering narrative text.</td>
</tr>
<tr>
<td></td>
<td>P Program exit, which instructs the system to exit to the program you specified in the Pgm ID field.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Code Title</td>
<td>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.</td>
</tr>
<tr>
<td>Date #1 Column Title</td>
<td>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.</td>
</tr>
<tr>
<td>Amount Title</td>
<td>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.</td>
</tr>
<tr>
<td>System Code</td>
<td>A user defined code (98/SY) that identifies a J.D. Edwards system.</td>
</tr>
<tr>
<td>User Defined Codes</td>
<td>Identifies the table which contains user defined codes. The table is also referred to as a code type.</td>
</tr>
<tr>
<td>Remark 1 Title</td>
<td>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.</td>
</tr>
<tr>
<td>Remark 2 Title</td>
<td>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.</td>
</tr>
</tbody>
</table>
### 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.

![User Defined Codes Table](image)

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

![Image of the Define Types of Data form]

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The IBM-defined user profile.</td>
</tr>
</tbody>
</table>

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.
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Data</td>
<td>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.</td>
</tr>
</tbody>
</table>
Complete the following fields:

- Hire/Termination
- Delete (Yes)
- Type Data

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cross Reference Type</td>
<td>The type of cross-reference table to be used for transferring profile data between the employee and applicant supplemental databases.</td>
</tr>
<tr>
<td></td>
<td>Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>H  When you hire an applicant, transfer applicant profile data to the employee supplemental database.</td>
</tr>
<tr>
<td></td>
<td>T  When you terminate an employee, transfer employee profile data to the applicant supplemental database.</td>
</tr>
<tr>
<td>Delete (Y)</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, move the applicant supplemental data to the employee database and delete the data from the applicant database.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>blank  The same as N.</td>
</tr>
<tr>
<td>Type Data – Employee</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>You define these codes using the Define Types of Data screen.</td>
</tr>
</tbody>
</table>

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.

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 following steps outline the process you must follow to track history and turnover:

1. Set Constants Information
2. Select Data for Tracking
3. Initialize History and Turnover
4. Start HR Subsystem and Monitor
5. Review HR Monitor and Status
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)
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Subsystem Name</td>
<td>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.</td>
</tr>
<tr>
<td>Employee History (Y/N)</td>
<td>This code determines whether you want to track employee history. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, track history and write employee history records.</td>
</tr>
<tr>
<td></td>
<td>N  No, do not track history or write employee history records.</td>
</tr>
<tr>
<td></td>
<td>For information to be current, you must start the HR subsystem and monitor.</td>
</tr>
<tr>
<td>Prompt – Employee History 05</td>
<td>This code defines whether you want Employee Master table (F060116) changes interpreted into changes in the Position Activity table (F08111). Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, interpret the changes and write position activity records.</td>
</tr>
<tr>
<td></td>
<td>N  No, ignore the changes and do not write records.</td>
</tr>
<tr>
<td>Employee Turnover (Y/N)</td>
<td>This code defines whether you want the system to write employee turnover records when you change an Employee Master field. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, write employee turnover analysis records.</td>
</tr>
<tr>
<td></td>
<td>N  No, do not write employee turnover analysis records.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Prompt – Track by Effective Date</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>Y  Yes, use the effective date of change (data item EFTO) to track employee history and turnover.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>NOTE: If you enter a Y in this field you must also choose to track employee history, employee turnover, or both.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Use Assignment Window</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt – Position Control</td>
<td>This code determines if position control (ID) is being used throughout the HR system, and if so, how editing will function. Valid codes are:</td>
</tr>
<tr>
<td>Edit Method</td>
<td>1 P10: Position ID is required</td>
</tr>
<tr>
<td></td>
<td>2 P10: Position ID is NOT required but still display the field</td>
</tr>
<tr>
<td></td>
<td>3 P10: Position ID is NOT required and do NOT display the field</td>
</tr>
<tr>
<td></td>
<td>If you leave this field blank, the system assumes Position ID is optional (code 2).</td>
</tr>
<tr>
<td>Pay Rate Source</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Pay Rate Source</td>
</tr>
<tr>
<td></td>
<td>1 Pay Rate Tables</td>
</tr>
<tr>
<td></td>
<td>2 Grade Step Table</td>
</tr>
<tr>
<td></td>
<td>3 None</td>
</tr>
<tr>
<td></td>
<td>The system will multiply the employee’s standard hours per year times the table’s hourly rate to calculate a salary.</td>
</tr>
<tr>
<td>Step Progression Rate Source</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Step Progression Rate :</td>
</tr>
<tr>
<td></td>
<td>1 Same Grade Step</td>
</tr>
<tr>
<td></td>
<td>2 Next Grade Step</td>
</tr>
<tr>
<td>Salary Default Source</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank None</td>
</tr>
<tr>
<td></td>
<td>1 Pay Grade Minimum</td>
</tr>
<tr>
<td></td>
<td>2 Pay Grade Midpoint</td>
</tr>
<tr>
<td></td>
<td>3 Pay Grade Maximum</td>
</tr>
<tr>
<td></td>
<td>4 Pay Grade Step Amount</td>
</tr>
<tr>
<td></td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Home Company Standard Hours Per Year</td>
</tr>
<tr>
<td></td>
<td>• Default Company Standard Hours Per Year</td>
</tr>
<tr>
<td></td>
<td>• Data Dictionay</td>
</tr>
<tr>
<td></td>
<td>• 2080</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rate Change in Projections</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Valid values are:</td>
</tr>
<tr>
<td>Y</td>
<td>Yes</td>
</tr>
<tr>
<td>N</td>
<td>No</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt – Automatically Add Requisition</td>
<td>This code determines if a requisition is automatically added for the position when an employee is terminated.</td>
</tr>
<tr>
<td></td>
<td>Valid codes are:</td>
</tr>
<tr>
<td>blank</td>
<td>No, do not automatically add a requisition</td>
</tr>
<tr>
<td>1</td>
<td>Yes, automatically add and display the new requisition</td>
</tr>
</tbody>
</table>

**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
### Pay Range/Step Edit

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Range/Step Edit</td>
<td>This field specifies pay range minimum and maximum, or pay grade step amount editing. Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank No Edit</td>
</tr>
<tr>
<td></td>
<td>1 Warning message if out of range for pay grade or not the pay grade step amount, processing allowed to continue.</td>
</tr>
<tr>
<td></td>
<td>2 Hard error if out of range for pay grade or not the pay grade step amount, processing stops, no file updates.</td>
</tr>
</tbody>
</table>

#### 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Budget Edit – Salary</td>
<td>This field specifies editing of position budget effective salary data. Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank No Edit</td>
</tr>
<tr>
<td></td>
<td>1 Warning message if over budget, but allowed to continue.</td>
</tr>
<tr>
<td></td>
<td>2 Hard error if over budget, processing stops, no file updates.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Position Budget Edit – FTE</strong></td>
<td>This field specifies editing of position budget effective FTE.</td>
</tr>
<tr>
<td></td>
<td>Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank  No Edit</td>
</tr>
<tr>
<td></td>
<td>1 Warning message if over budget, but allowed to continue.</td>
</tr>
<tr>
<td></td>
<td>2 Hard error if over budget, processing stops, no file updates.</td>
</tr>
<tr>
<td><strong>Position Budget Edit – Hours</strong></td>
<td>This field specifies editing of position budget effective hours data.</td>
</tr>
<tr>
<td></td>
<td>Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank  No Edit</td>
</tr>
<tr>
<td></td>
<td>1 Warning message if over budget, but allowed to continue.</td>
</tr>
<tr>
<td></td>
<td>2 Hard error if over budget, processing stops, no file updates.</td>
</tr>
<tr>
<td><strong>Position Budget Edit – Headcount</strong></td>
<td>This field specifies editing of position budget headcount data.</td>
</tr>
<tr>
<td></td>
<td>Allowed values are:</td>
</tr>
<tr>
<td></td>
<td>blank  No Edit</td>
</tr>
<tr>
<td></td>
<td>1 Warning message if over budget, but allowed to continue.</td>
</tr>
<tr>
<td></td>
<td>2 Hard error if over budget, processing stops, no file updates.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data File</td>
<td>The identification (such as program number, table number, and report number) that is assigned to an element of software.</td>
</tr>
<tr>
<td></td>
<td>............. <strong>Form-specific information</strong> .............</td>
</tr>
<tr>
<td></td>
<td>This is the Employee Master table that contains the data items that can be tracked in history.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Number – Turnover</td>
<td>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.</td>
</tr>
<tr>
<td>Column Heading 01 –</td>
<td>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.</td>
</tr>
<tr>
<td>Turnover</td>
<td></td>
</tr>
<tr>
<td>Column Heading 02 –</td>
<td>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.</td>
</tr>
<tr>
<td>Turnover</td>
<td></td>
</tr>
</tbody>
</table>
### Field

**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 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

<table>
<thead>
<tr>
<th>The number of monitors</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting and stopping the subsystem</td>
<td>When you have multiple environments, you only need to control the start and stop subsystem in one of them.</td>
</tr>
<tr>
<td>Starting and stopping the monitor</td>
<td>When you have multiple environments, you need to control the start and stop the monitor in each environment</td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source – Salary Data</td>
<td>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.</td>
</tr>
<tr>
<td>Union Code</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Locality</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>This field appears in following two sections of this form:</td>
</tr>
<tr>
<td></td>
<td>- 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.</td>
</tr>
<tr>
<td></td>
<td>- In the detail section, this field shows the salary locality for a particular pay grade.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>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.</td>
</tr>
<tr>
<td>Pay Class (H/S/P)</td>
<td>The code that indicates the method by which an employee is paid. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>H  Hourly</td>
</tr>
<tr>
<td></td>
<td>S  Salaried</td>
</tr>
<tr>
<td></td>
<td>P  Piecework</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.</td>
</tr>
<tr>
<td>Amount – Minimum Salary</td>
<td>The minimum salary or hourly rate allowed within a pay grade.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Amount – Midpoint Salary</td>
<td>The midpoint salary or hourly rate within a pay grade or pay range.</td>
</tr>
<tr>
<td></td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td>The compa-ratio figure (data item #CRA) is calculated by dividing an employee's salary or rate by the appropriate midpoint.</td>
</tr>
</tbody>
</table>
### 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Class (H/S/P)</td>
<td>The code that indicates the method by which an employee is paid. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>H Hourly</td>
</tr>
<tr>
<td></td>
<td>S Salaried</td>
</tr>
<tr>
<td></td>
<td>P Piecework</td>
</tr>
<tr>
<td>Union Code</td>
<td>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.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Salary Data Locality</td>
<td>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.</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.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>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.</td>
</tr>
<tr>
<td>Standard Hours per Day</td>
<td>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.</td>
</tr>
<tr>
<td>Standard Days per Year</td>
<td>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.</td>
</tr>
</tbody>
</table>

➤ 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Class (H/S/P)</td>
<td>The code that indicates how an employee is paid. Valid codes are:</td>
</tr>
<tr>
<td>H</td>
<td>Hourly</td>
</tr>
<tr>
<td>S</td>
<td>Salaried</td>
</tr>
<tr>
<td>P</td>
<td>Piecework</td>
</tr>
</tbody>
</table>
### 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.

### Exercises

See the exercises for this chapter.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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. |
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Evaluation Method</td>
<td>A user defined method or grouping (system 08, type EM) used for the evaluating this job.</td>
</tr>
</tbody>
</table>

Suggested values are:
- blank  Simple Subjective Point System
- E  Evalucomp Method
- F  Factor Comparison Method
- P  Point Factor Method
- H  Hay Method
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| 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. |
### 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.

---

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Evaluation Factor–Points in Degr 010</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

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 active.
Defining Category Codes for Human Resources

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

**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 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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Number</td>
<td>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.</td>
</tr>
<tr>
<td>Long Address Number</td>
<td>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 &amp; Bradstreet number, a lease number, or other reference.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Responsible Business Unit</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Exercises**

See the exercises for this chapter.
Set 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

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 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 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 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

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

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 consists of the following 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

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.
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.
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).

**AAL.** Automatic accounting instruction. A code that points to an account in the chart of accounts. AALs 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 AALs. For example, AALs 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 output 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.
**Glossary**

**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.


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 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.
**Human Resources**

**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.
**justified**. 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 accounting 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 *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.
**Glossary**

**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.

**TL 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.
Index
Index

A

About applicant information, 6–1
About organizational structure, 10–1
About position control, 7–1
About system setup, 11–1
About user defined codes, 11–8
Accident and illness data, working with, 9–3
Account balances table, uploading position budgets to, 7–18
Activating history and turnover tracking, 11–34
Activity by Employee, processing options, 7–31
Activity by Position, processing options, 7–30
Activity by Position form, 7–28
Actual salary information, 8–27
Adding user defined code values, 11–9
Additional Employee Number, defined, 2–9
Additional Name, defined, 2–37
Address Number, defined, 5–21, 11–65
Address Number – Requested By, defined, 5–8, 5–12
Adverse Impact Analysis, processing options, 6–47
Alien Registration Number, defined, 2–36
Amount – Expected Salary, defined, 2–93, 5–7
Amount – Maximum Salary, defined, 4–26, 11–42
Amount – Midpoint Salary, defined, 4–26, 11–41
Amount – Minimum Salary, defined, 4–26, 11–41
Amount – Position Budget, defined, 7–10, 7–16
Amount 2 Title, defined, 11–8
Amount Title, defined, 11–7
And/Or Selection 1, defined, 2–85, 6–14
Annual Salary 1 – Life Insurance, defined, 2–20
Annual Salary 2 – Life Insurance, defined, 2–20
Applicant, defined, 6–5
Applicant and EEO reports, 6–37
Applicant Entry, processing options, 6–6
Applicant Entry form, 6–4, 6–9, 6–16, 6–20, 6–28
Applicant Entry forms, 6–24
Applicant Flow Analysis, processing options, 6–46
Applicant information
  entering, 6–3
  purging, 6–31
Applicant letters, printing, 6–23
Applicant profile data, entering, 6–8
Applicant Status, defined, 6–34
Applicants
  about applicant information, 6–1
  and applicant tracking, 1–3
  attaching to requisitions, 6–8
  entering information about, 6–3
  hiring, 6–27
  reviewing information about, 6–19
Appraisals, entering information for, 8–26
Approving a requisition, 5–11
Archiving an obsolete job ID, 4–32
Assigning an employee to a position budget, 7–21
Attaching a candidate record to a requisition, 5–16
Attaching an applicant to a position, 6–8
Attaching an applicant to a requisition, 6–15

B

Based On Amount, defined, 11–47
Benefit Group, defined, 2–13, 2–20, 4–9
Benefit Status, defined, 2–19, 2–32
Bonuses, entering for one employee in a group, 8–25
Budget Status, defined, 7–11
Budget Status Date, defined, 7–11
Human Resources

Build Grade Progression Work Group, processing options, 8–31
Business Unit, defined, 2–8, 5–6
Business Unit – Home, defined, 5–6, 7–10, 8–21
Business Unit/Job ID Cross-Reference table, 11–52

C

Canadian Federal Employment Equity, 2–99
Candidate Filled or Rejected, defined, 5–18
Candidate Requisition Status, defined, 2–98, 6–29
Candidate Requisition Status Date, defined, 2–98
Candidates, rejecting, 5–20
Case Entry form, 9–5
Case Review form, 9–10
Cases by Profile, 9–16
Category codes
and employee information, 2–30
setting up for employees, 11–57
Category Codes 1–20, defined, 2–31
Category Codes and Geographic Data form, 2–31
Census Metropolitan Area, defined, 2–35
Change Reason, defined, 2–16
Change Reason – Turnover, defined, 10–13
Change reason codes, about, 3–3
Changing future information
using the payroll cycle, 2–44
without using the payroll cycle, 2–47
Changing information, for a group of employees, 2–48
Changing position budgets, 7–33
Check Route, defined, 2–12
Closing a case, 9–9
Code Title, defined, 11–7
Column Heading 01 – Turnover, defined, 11–31
Column Heading 02 – Turnover, defined, 11–31
Column Number – Turnover, defined, 11–31
Compa-Ratio Batch Calculation, processing options, 2–65
Company – Home, defined, 2–7
Compa-ratio, updating, 2–65
Compensable Factors Tables form, 11–48
Constants
defined, 11–21
setting up, 11–21
Correcting employee activity, 7–35
Correcting history records, 3–11
Country Code, defined, 2–9
Create FCPCS Workfile, processing options, 2–100
Create job profile data, 11–53, 11–58, 11–71
Create Next Fiscal Years Position Budgets, processing options, 7–38
Create Review Group, processing options, 8–18
Creating a review group, 8–16
Creating a work group, 8–29
Creating employee profile data, 11–58
Creating next year’s position budget, 7–37
Cross Reference Type, defined, 11–14
Cross-Year Budget Comparison, processing options, 7–46
Cross-Year Effective Budget Comparison, processing options, 7–47
Cross-reference table, setting up for a business unit, 11–51
Currency Code – From, defined, 2–36
Current pay changes
defining for primary job, 8–6
for primary jobs, 8–6

D

Data access and security, defining for job profile data, 11–53, 11–58
Data File, defined, 11–29
Data Item, defined, 2–51
Data Item – Secondary, defined, 2–97
Data Item – Turnover Analysis, defined, 3–28
Data Type, defined, 6–13
Data Type Security form, 11–12
Date, defined, 6–6
Date #1 Column Title, defined, 11–7
Date #2 Column Title, defined, 11–8
Date – Approved (Julian), defined, 5–12
Date – As of, defined, 3–8
Date – Birth, defined, 2–9
Index

Date – Effective From, defined, 2–64, 5–7, 7–10
Date – Effective On, defined, 2–45, 10–12
Date – Effective Thru, defined, 2–64, 5–7, 7–10
Date – Employee Recall, defined, 2–92
Date – Original Employment, defined, 2–98
Date – Terminated, defined, 2–92
Day of Week, defined, 9–6
Days Away from Work Y/N, defined, 9–7
Default Date, defined, 11–8
Define Pay Range Formulas form, 11–46
Define Turnover Columns form, 11–30
Define Types of Data form, 11–5, 11–10
Defining a position budget, 7–3
Defining a position budget automatically, 7–12
Defining a single position budget manually, 7–8
Defining an organizational structure, 10–6
Defining jobs, 4–3
Defining multiple employee pay changes for pay grade/steps, 8–29
Defining pay changes for an individual employee, 8–12
Defining pay information, 11–38
Defining security for profile data, 11–11
Defining user defined codes, 11–8
Defining user defined codes for jobs, 11–50
Definitions of terms, g–1
Delete (Y), defined, 11–14
Delete a Review Group, processing options, 8–36
Deleting a review group, 8–37
Deleting obsolete jobs, 4–29
Deleting obsolete review groups, 8–35
Description, defined, 11–6, 11–49
Description – Injury or Illness, defined, 9–6
Description 01, defined, 4–6
Display Mode – Code or Narrative, defined, 11–7
Display Parent or Child Business Units, defined, 10–8, 10–10
Display Supervisor/Employees, defined, 10–12
Document, defined, 6–24
Download FCP/PCS Workfile, processing options, 2–101
Downloading workfiles to a PC, 2–101
dummy, 6–51

E

EEO – I9 Status , defined, 2–17
EEO – Veteran , defined, 2–17
EEO Staff Utilization, processing options, 6–44
EEO Staff Utilization Report, Build Workfile T068901, processing options, 2–113
Effective Date, defined, 2–26, 11–41, 11–44
Effective On, defined, 2–16
Eligibility Codes 1–10, defined, 2–32
Employee, assigning to a position budget, 7–21
Employee Action, defined, 2–64, 7–29
Employee activity, correcting, 7–35
Employee Age, defined, 2–20
Employee History, processing options, 2–56
Employee history, reviewing, 3–7
Employee History (Y/N), defined, 11–23
Employee History form, 2–55
Employee History Inquiry form, 3–7
Employee History Log Report, processing options, 3–35
Employee Information, key concepts, 2–1
Employee information
  setting up, 11–55
  working with, 2–39
Employee information, entering, 2–3
Employee Information, features, 1–4
Employee International Data form, 2–34
Employee Master – HR Initial Setup, processing options, 2–20
Employee master fields, selecting for tracking, 11–28
Employee master history
  correcting, 2–53
  defined, 3–2
Employee Master History Inquiry, processing options, 3–9
Employee master information, 11–28
  changing, 2–40
  correcting mass changes, 2–52
Employee Master Information, defined, 1–4
Employee Master Mass Changes form, 2–48
Employee Master table (F060116), 2–1
  and employee information, 2–3
  and personnel records, 2–4
Employee master turnover, defined, 3–3
Employee Multiple Job Entry, 3–19
   processing options, 2–27, 8–11
Employee Multiple Job Entry form, 2–24,
   2–60, 8–10
Employee multiple job history
   correcting, 2–59
   defined, 3–2
Employee Multiple Job History form, 3–10
Employee Multiple Job table (F060118), and
   employee information, 2–3
Employee No., defined, 8–8
Employee Number, defined, 2–7
Employee Pay Status, defined, 2–93, 2–98
Employee profile data, creating, 11–58
Employee Profile Information, defined, 1–4
Employee Profile Report, processing
   options, 2–106
Employee Salary Analysis, processing
   options, 8–41
Employee Salary History Analysis Report,
   processing options, 3–36
Employee Tax ID, defined, 2–7
Employee tax ID numbers, correcting, 2–53
Employee Turnover (Y/N), defined, 11–23
Employee Turnover form, 3–27, 3–29
Employee/Applicant/Both, defined, 6–12
Employees by Data Type, processing
   options, 2–107
Employees by Job Type & Step, processing
   options, 4–20
Employees by Job Type and Step, 4–19
Employment Start Date, defined, 6–29
Employment Status, defined, 2–93, 2–98
Entering applicant information, 6–3
Entering applicant profile data, 6–8
Entering appraisal information, 8–26
Entering bonuses for one employee in a
   review group, 8–25
Entering employee information, 2–4
Entering employee multiple job
   information, 2–23
Entering individual employee pay changes,
   8–5
Entering initial applicant information, 6–4
Entering initial job information, 4–4
Entering international employee
   information, 2–33
Entering multiple pay changes, 8–15
Entering pay changes by component, for
   one employee, 8–24
Entering pay changes for one group
   member, 8–23
Entering requisition master information, 5–4
Entering requisition profile data, 5–8
Entering requisitions, 5–3
Ethnic Code, defined, 2–8
Expected Start, defined, 5–7
Extended Alpha Name, defined, 2–37

F

Factor Evaluation Code 1, defined, 4–13
Factor Weight _ 1, defined, 4–13
Features of Human Resource system, 1–2
Federal Contractors Program Computer
   Software, downloading to the PC, 2–101
Field, defined, 6–13
Fields
   Additional Employee Number , 2–9
   Additional Name, 2–37
   Address Number, 5–21, 11–65
   Address Number – Requested By, 5–8, 5–12
   Alien Registration Number , 2–36
   Amount – Expected Salary, 2–93, 5–7
   Amount – Maximum Salary, 4–26, 11–42
   Amount – Midpoint Salary, 4–26, 11–41
   Amount – Minimum Salary, 4–26, 11–41
   Amount – Position Budget, 7–10, 7–16
   Amount 2 Title, 11–8
   Amount Title, 11–7
   And/Or Selection 1, 2–85, 6–14
   Annual Salary 1 – Life Insurance, 2–20
   Annual Salary 2 – Life Insurance, 2–20
   Applicant, 6–5
   Applicant Status, 6–34
   Based On Amount, 11–47
   Benefit Group, 2–13, 2–20, 4–9
   Benefit Status, 2–19, 2–32
   Budget Status, 7–11
   Budget Status Date, 7–11
   Business Unit, 2–8, 5–6
   Business Unit – Home, 5–6, 7–10, 8–21
   Candidate Filled or Rejected, 5–18
   Candidate Requisition Status, 2–98, 6–29
   Candidate Requisition Status Date, 2–98
   Category Codes 1–20, 2–31
   Census Metropolitan Area, 2–35
Index

Change Reason, 2–16
Change Reason – Turnover, 10–13
Check Route, 2–12
Code Title, 11–7
Column Heading 01 – Turnover, 11–31
Column Heading 02 – Turnover, 11–31
Column Number – Turnover, 11–31
Company – Home, 2–7
Country Code, 2–9
Cross Reference Type, 11–14
Currency Code – From, 2–36
Data File, 11–29
Data Item, 2–51
Data Item – Secondary, 2–97
Data Item – Turnover Analysis, 3–28
Data Type, 6–13
Date, 6–6
Date #1 Column Title, 11–7
Date #2 Column Title, 11–8
Date – Approved (Julian), 5–12
Date – As of, 3–8
Date – Birth, 2–9
Date – Effective From, 2–64, 5–7, 7–10
Date – Effective On, 2–45, 10–12
Date – Effective Thru, 2–64, 5–7, 7–10
Date – Employee Recall, 2–92
Date – Original Employment, 2–98
Date – Terminated, 2–92
Day of Week, 9–6
Days Away from Work Y/N, 9–7
Default Date, 11–8
Delete (Y), 11–14
Description, 11–6, 11–49
Description – Injury or Illness, 9–6
Description 01, 4–6
Display Mode – Code or Narrative, 11–7
Display Parent or Child Business Units, 10–8, 10–10
Display Supervisor/Employees, 10–12
Document, 6–24
EEO – I9 Status , 2–17
EEO – Veteran , 2–17
Effective Date, 2–26, 11–41, 11–44
Effective On, 2–16
Eligibility Codes 1–10, 2–32
Employee Action, 2–64, 7–29
Employee Age, 2–20
Employee History (Y/N), 11–23
Employee No., 8–8
Employee Number, 2–7
Employee Pay Status, 2–93, 2–98
Employee Tax ID, 2–7
Employee Turnover (Y/N), 11–23
Employee/Applicant/Both, 6–12
Employment Start Date, 6–29
Employment Status, 2–93, 2–98
Ethnic Code, 2–8
Expected Start, 5–7
Extended Alpha Name, 2–37
Factor Evaluation Code 1, 4–13
Factor Weight _ 1, 4–13
Field, 6–13
Fiscal Year, 5–6, 7–10
Flag – Language Preference, 2–9
FILA Exempt Y/N, 5–7
Folder Name, 6–24
From Approval Code, 8–21
Full Time Equivalents, 2–9, 7–11
Full–Time Equivalents – Budgeted, 5–7, 7–10
Future Value, 2–46
Grade or Degree – 001, 4–13
Headcount, 5–8, 7–11
Health & Safety Category Codes 06, 9–7
Home Business Unit, 2–7, 6–9
Hourly Rate, 2–12
Hours – Budgeted Position, 5–7, 7–10
HR Data Base, 11–6
HR Subsystem Name, 11–23
Initial – Middle Name (Govt Rpts), 2–8
Injury/Illness Related (IN/IL), 9–6
Job Category (EEO), 2–11, 2–26
Job Evaluation Factor Number, 4–22, 11–49
Job Evaluation Factor–Points in Degr 010, 11–50
Job Evaluation Method, 4–6, 11–48
Job Evaluation Points, 4–13, 11–49
Job Evaluation Type, 11–49
Job Group, 4–7
Job Status Code, 4–7
Job Step, 4–5, 5–6
Job Type, 2–10
Job Type (Craft) Code, 4–5, 5–6, 7–11
Job Type/Step, 2–10
Language, 2–35
Locality, 2–9, 11–41
Long Address Number, 11–65
Maiden Name, 2–35
Mailing Address, 6–6
### Human Resources

<table>
<thead>
<tr>
<th>Index</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status – Tax</td>
<td>2–8</td>
</tr>
<tr>
<td>Medical Plan ID</td>
<td>2–35</td>
</tr>
<tr>
<td>Method for Pay Increase</td>
<td>8–13</td>
</tr>
<tr>
<td>Method of Calculation</td>
<td>7–16</td>
</tr>
<tr>
<td>Mode – Structure Display</td>
<td>10–17</td>
</tr>
<tr>
<td>Multiskill Search Data</td>
<td>2–85</td>
</tr>
<tr>
<td>Multiskill Search Data Item</td>
<td>2–85</td>
</tr>
<tr>
<td>Name – First</td>
<td>2–8</td>
</tr>
<tr>
<td>Name – Last</td>
<td>2–8</td>
</tr>
<tr>
<td>Name – Remark</td>
<td>11–42</td>
</tr>
<tr>
<td>National Occupational Classification</td>
<td>2–35</td>
</tr>
<tr>
<td>Number – Requisition</td>
<td>2–98, 5–5, 5–17, 5–20</td>
</tr>
<tr>
<td>Number of Pay Grade Steps</td>
<td>2–18</td>
</tr>
<tr>
<td>Options</td>
<td>6–13</td>
</tr>
<tr>
<td>Organization Type Structure</td>
<td>10–8</td>
</tr>
<tr>
<td>Parent Business Unit</td>
<td>10–7, 10–17</td>
</tr>
<tr>
<td>Parent/Child Business Unit</td>
<td>10–8</td>
</tr>
<tr>
<td>Pay Class (H/S/P)</td>
<td>2–11, 5–7, 8–23, 11–41, 11–43, 11–46</td>
</tr>
<tr>
<td>Pay Frequency</td>
<td>2–10, 4–6</td>
</tr>
<tr>
<td>Pay Grade</td>
<td>2–11, 4–8, 5–6, 8–8, 8–38, 11–41, 11–44</td>
</tr>
<tr>
<td>Pay Grade Step</td>
<td>2–11, 5–7, 8–8, 8–38</td>
</tr>
<tr>
<td>Pay Per Point</td>
<td>11–47</td>
</tr>
<tr>
<td>Pay Range/Step Edit</td>
<td>11–27</td>
</tr>
<tr>
<td>Pay Rate Source</td>
<td>11–25</td>
</tr>
<tr>
<td>Pay Status</td>
<td>2–9</td>
</tr>
<tr>
<td>Percentage – Position Account</td>
<td>7–16</td>
</tr>
<tr>
<td>Periods per Year</td>
<td>2–26</td>
</tr>
<tr>
<td>Position Budget Edit – FTE</td>
<td>11–28</td>
</tr>
<tr>
<td>Position Budget Edit – Headcount</td>
<td>11–28</td>
</tr>
<tr>
<td>Position Budget Edit – Hours</td>
<td>11–28</td>
</tr>
<tr>
<td>Position Budget Edit – Salary</td>
<td>11–27</td>
</tr>
<tr>
<td>Position ID</td>
<td>2–10, 5–6, 6–9, 7–10</td>
</tr>
<tr>
<td>Position Status</td>
<td>7–11</td>
</tr>
<tr>
<td>Position Status Date</td>
<td>7–11</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>7–11</td>
</tr>
<tr>
<td>Program ID</td>
<td>11–8</td>
</tr>
<tr>
<td>Prompt – Automatically Add Requisition</td>
<td>11–26</td>
</tr>
<tr>
<td>Prompt – Employee History</td>
<td>11–23</td>
</tr>
<tr>
<td>Prompt – Position Control Edit Method</td>
<td>11–25</td>
</tr>
<tr>
<td>Prompt – Track by Effective Date</td>
<td>11–23</td>
</tr>
<tr>
<td>Purge Date</td>
<td>6–33</td>
</tr>
<tr>
<td>Rate – Hourly</td>
<td>8–8</td>
</tr>
<tr>
<td>Rate – Salary at Next Raise</td>
<td>8–13</td>
</tr>
<tr>
<td>Rate – Salary, Annual</td>
<td>8–8</td>
</tr>
<tr>
<td>Rate Change in Projections</td>
<td>11–26</td>
</tr>
<tr>
<td>Relationship</td>
<td>2–85</td>
</tr>
<tr>
<td>Remark 1 Title</td>
<td>11–7</td>
</tr>
<tr>
<td>Remark 2 Title</td>
<td>11–7</td>
</tr>
<tr>
<td>Reorganize option</td>
<td>6–35</td>
</tr>
<tr>
<td>Repeat Data (Y/N)</td>
<td>4–6</td>
</tr>
<tr>
<td>Responsible Business Unit</td>
<td>11–66</td>
</tr>
<tr>
<td>Restricted Work Activity Y/N</td>
<td>9–7</td>
</tr>
<tr>
<td>Review Group</td>
<td>8–21</td>
</tr>
<tr>
<td>Review Group ID</td>
<td>8–38</td>
</tr>
<tr>
<td>Salary</td>
<td>2–11</td>
</tr>
<tr>
<td>Salary Data Locality</td>
<td>11–44</td>
</tr>
<tr>
<td>Salary Default Source</td>
<td>11–25</td>
</tr>
<tr>
<td>Salary Frequency</td>
<td>2–12</td>
</tr>
<tr>
<td>Salutation</td>
<td>2–37</td>
</tr>
<tr>
<td>Save Device</td>
<td>6–34</td>
</tr>
<tr>
<td>Save Instruction</td>
<td>6–34</td>
</tr>
<tr>
<td>Save Library</td>
<td>6–34</td>
</tr>
<tr>
<td>Search Type</td>
<td>5–17</td>
</tr>
<tr>
<td>Search Value</td>
<td>6–13</td>
</tr>
<tr>
<td>Sector Industrial Code</td>
<td>2–36</td>
</tr>
<tr>
<td>Shift Code</td>
<td>2–12</td>
</tr>
<tr>
<td>Source – Salary Data</td>
<td>4–26, 11–40</td>
</tr>
<tr>
<td>Standard Days per Year</td>
<td>2–26, 11–44</td>
</tr>
<tr>
<td>Standard Hours per Day</td>
<td>2–26, 11–44</td>
</tr>
<tr>
<td>Standard Hours per Year</td>
<td>2–10, 2–27</td>
</tr>
<tr>
<td>Status</td>
<td>6–6</td>
</tr>
<tr>
<td>Status – Applicant</td>
<td>5–17</td>
</tr>
<tr>
<td>Status – Requisition</td>
<td>5–5, 5–12</td>
</tr>
<tr>
<td>Status Change Reason</td>
<td>4–7</td>
</tr>
<tr>
<td>Step Progression Rate Source</td>
<td>11–25</td>
</tr>
<tr>
<td>Sub Class – Workers Comp</td>
<td>4–8</td>
</tr>
<tr>
<td>Subledger – G/L</td>
<td>7–16</td>
</tr>
<tr>
<td>Subledger Type</td>
<td>7–16</td>
</tr>
<tr>
<td>Suffix</td>
<td>2–37</td>
</tr>
<tr>
<td>Supervisor</td>
<td>10–12</td>
</tr>
<tr>
<td>System Code</td>
<td>11–7</td>
</tr>
<tr>
<td>Tax Area (Residence)</td>
<td>2–13</td>
</tr>
<tr>
<td>Tax Area (Work)</td>
<td>2–13</td>
</tr>
<tr>
<td>Turnover Column Group</td>
<td>11–32</td>
</tr>
<tr>
<td>Turnover Data, 2–58, 3–28</td>
<td></td>
</tr>
<tr>
<td>Type Data</td>
<td>2–85</td>
</tr>
<tr>
<td>Type Data – Employee</td>
<td>11–14</td>
</tr>
<tr>
<td>Type of Data</td>
<td>11–13</td>
</tr>
<tr>
<td>Union Code</td>
<td>2–11, 4–9, 11–40, 11–43</td>
</tr>
<tr>
<td>Use Assignment Window</td>
<td>11–24</td>
</tr>
<tr>
<td>User Codes 01–05</td>
<td>7–11</td>
</tr>
<tr>
<td>User Defined Codes</td>
<td>11–7</td>
</tr>
<tr>
<td>User Defined Date</td>
<td>01, 2–35</td>
</tr>
<tr>
<td>User ID</td>
<td>11–12</td>
</tr>
</tbody>
</table>
Index

Workers Comp Insurance Code, 4–7
Yes or No – Move to Applicant Pool, 2–92
Yes or No Entry, 3–8, 6–34
Files used, 1–7
Fiscal Year, defined, 5–6, 7–10
Flag – Language Preference, defined, 2–9
FLSA Exempt Y/N, defined, 5–7
Folder Name, defined, 6–24
Forms
Activity by Position, 7–28
Applicant Entry, 6–4, 6–9, 6–16, 6–20, 6–24, 6–28
Business Unit/Job ID Cross-Reference, 11–52
Case Entry, 9–5
Case Review, 9–10
Category Codes 06/01, 11–57
Category Codes and Geographic Data, 2–11
Compensable Factors Tables, 11–48
Data Type Security, 11–12
Dates, Eligibility, and EEO, 2–67
Define Turnover Columns, 11–30
Define Types of Data, 11–5
Defined Types of Data, 11–10
Employee History, 2–55
Employee History Inquiry, 3–7
Employee International Data, 2–34
Employee Master Mass Changes, 2–48
Employee Master Revisions, 2–44
Employee Multiple Job, 8–10
Employee Multiple Job Entry, 2–24, 2–60, 3–19
Employee Multiple Job History, 3–10
Employee Turnover, 3–27, 3–29
Employees by Job Type and Step, 4–19
HR Employee Entry, 2–5, 2–41, 4–32, 8–6
Job Comparisons by Factor, 4–21
Job Entry and Evaluation, 4–33
P08210, 10–11
P08290, 11–46
Pay and Tax Information, 2–29
Pay Grade Step, 4–34
Pay Grade Step Table, 11–42
Pay Grades by Class, 4–25, 11–39
Pay Ranges by Job, 4–23
Pay Rate Information, 8–12
Position Master Detail, 7–9
Positions by Business Unit, 7–27
Profile by Job, 4–17
Profile Data Entry, for requisitions, 5–9
Profile Multiskill Search, 6–12
Purge Applicants by Date, 6–32
Requisition Activity, 5–16, 5–20, 5–25
Requisition Entry, 5–4, 5–12
Requisition Review, 5–24, 6–16
Review and Rank Employees, 8–20
Review Groups Inquiry, 8–23
Review Work Group Detail, 8–37
Revise Employee Activity, 2–63, 7–35
Select Data for Tracking, 11–29
Structure Inquiry, 10–16, 10–18
Structure Revisions, 10–7
Termination/Rehire, 2–90, 2–95
Transfer of Data on Hire/Termination, 11–13
From Approval Code, defined, 8–21
Full-Time Equivalents, defined, 2–9, 7–11
Full-Time Equivalents – Budgeted, defined, 5–7, 7–10
Future Value, defined, 2–46

G

General ledger, uploading a position budget to, 7–17
Grade or Degree – 001, defined, 4–13
Grade Progression Work Group Update, processing options, 8–34

H

Headcount, defined, 5–8, 7–11
Health & Safety Category Codes 06, defined, 9–7
Hired Applicants by EEO Job Category, processing options, 6–45
Hiring an applicant, 6–27
History and turnover
activating tracking for, 11–34
and employee master history, 3–2
defined, 3–1
initializing the history and turnover monitor, 11–32
History and Turnover Monitor, initializing the, 11–32
Human Resources

History and turnover tracking, activating, 11–34
History and Turnover, features, 1–5
History monitor, reviewing the status of, 11–34
History records
  correcting, 3–11
  deleting, 3–11
  purging, 3–21
  reviewing, 3–6
  system flow diagram, 3–5
  working with, 3–5
Home Business Unit, defined, 2–7, 6–9
Hourly Rate, defined, 2–12
Hours – Budgeted Position, defined, 5–7, 7–10
HR Data Base, defined, 11–6
HR Employee Entry form, 2–5, 2–41, 4–32, 8–6
  History Information Only window, 2–15
HR Subsystem Name, defined, 11–23

I

Individual employee pay changes
  defining, 8–12
  entering, 8–5
Initial – Middle Name (Govt Rpts), defined, 2–8
Initial applicant information, entering, 6–4
Initialize Employee History, processing options, 11–33
Injury or illness case, closing an, 9–9
Injury or illness cases, reviewing, 9–9
Injury/Illness Related (IN/IL), defined, 9–6
Integration with other systems, 1–1
International data
  and Canadian Federal Employment Equity, 2–99
  and employee information, 2–3

J

Job Category (EEO), defined, 2–11, 2–26
Job Comparisons by Factor, 4–21
  processing options, 4–22
Job Data & Evaluation Points, processing options, 4–9
Job Entry and Evaluation form, 4–33
Job Evaluation Factor Number, defined, 4–22, 11–49
Job Evaluation Factor–Points in Degr 010, defined, 11–50
Job evaluation factors, defining, 11–47
Job Evaluation Method, defined, 4–6, 11–48
Job Evaluation Points, defined, 4–13, 11–49
Job Evaluation Type, defined, 11–49
Job Group, defined, 4–7
Job Information, features, 1–5
Job profile data
  create types for jobs, 11–53, 11–58, 11–71
  entering, 4–10
  working with, 11–52
Job Profile Information Report, processing options, 4–39
Job Status Code, defined, 4–7
Job Step, defined, 4–5, 5–6
Job Type, defined, 2–10
Job Type (Craft) Code, defined, 4–5, 5–6, 7–11
Job Type/Step, defined, 2–10
Job types, cross-reference table for, 11–51
Jobs
  and job types and steps, 4–1
  concepts, 4–15
  defining, 4–3
  defining user defined codes for, 11–50
  described, 4–1
  entering initial job information, 4–4
  global update, 4–27
  reports, 4–37
  reviewing, 4–15
  reviewing by profile data, 4–16
  system setup, 11–37
Jobs by Data Type Report, processing options, 4–40

L

Language, defined, 2–35
Last History Change Workfile Build, processing options, 3–37
Leave of absence information, entering, 2–66
Letters, printing, 6–23
Linking user defined codes to profile data, 11–10
Locality, defined, 2–9, 11–41
Long Address Number, defined, 11–65

M

Maiden Name, defined, 2–35
Mailing Address, defined, 6–6
Making individual pay changes for multiple jobs, 8–9
Marital Status – Tax, defined, 2–8
Matching skills with jobs, 6–11
Medical Plan ID, defined, 2–35
Members of a review group, entering pay changes for, 8–23
Menu structure, 1–10
Method for Pay Increase, defined, 8–13
Method of Calculation, defined, 7–16
Mode – Structure Display, defined, 10–17
Multiple job history, reviewing, 3–10
Multiple job information, 2–1
Multiple job records, purging, 2–66
Multiple jobs, making individual pay changes for, 8–9
Multiple position budgets, 7–5
Multiskill search, running a, 6–11
Multiskill Search Data, defined, 2–85
Multiskill Search Data Item, defined, 2–85

N

Name – First, defined, 2–8
Name – Last, defined, 2–8
Name – Remark, defined, 11–42
National Occupational Classification, defined, 2–35
Number – Requisition, defined, 2–98, 5–5, 5–17, 5–20
Number of Pay Grade Steps, defined, 2–18

O

Obsolete jobs
archiving, 4–32
deleting, 4–29
working with, 4–29
Opening an injury or illness case, 9–4
Opening injury or illness case, 9–4
Options, defined, 6–13
Organization Structure Inquiry, processing options, 10–17
Organization Structure Inquiry – Employee/Supervisor, processing options, 10–20
Organization Structure Inquiry – Positions, processing options, 10–19
Organization Structure Revisions, processing options, 10–13
Organization Structure, features, 1–6
Organization Type Structure, defined, 10–8
Organizational structure
about, 10–1
defining an, 10–6
working with, 10–5

P

Parent Business Unit, defined, 10–7, 10–17
Parent/Child Business Unit, defined, 10–8
Pay and Tax Information, processing options, 2–29
Pay and Tax Revisions form, 2–29
Pay and taxation, 2–3
Pay changes
for multiple employees, 8–15
individual, 8–5
Pay Class (H/S/P), defined, 2–11, 5–7, 8–23, 11–41, 11–43, 11–46
Pay Frequency, defined, 2–10, 4–6
Pay Grade, defined, 2–11, 4–8, 5–6, 8–8, 8–38, 11–41, 11–44
Pay Grade Step, defined, 2–11, 5–7, 8–8, 8–38
Pay Grade Step form, 4–34
Pay Grade Step Table form, 11–42
Pay Grade/Salary Range Information, processing options, 11–42
Pay Grades by Class form, 11–39
Human Resources

Pay grades for job classifications, reviewing, 4–24
Pay information, defining, 11–38
Pay Per Point, defined, 11–47
Pay Range/Step Edit, defined, 11–27
Pay Ranges by Job form, 4–23
Pay Ranges by Job Report, processing options, 4–46
Pay ranges for jobs, reviewing, 4–22
Pay Rate Information, 8–12
Pay Rate Source, defined, 11–25
Pay Status, defined, 2–9
Percentage – Position Account, defined, 7–16
Periods per Year, defined, 2–26
Position, reports, 7–43
Position activity, correcting, 2–62
Position budget
  assigning an employee to, 7–21
  creating next year’s, 7–37
  defining, 7–3
  defining a single position budget, 7–8
  purging, 7–41
  purpose of, 7–3
  working with, 7–33
Position budget detail, 7–25
  reviewing by business unit, 7–25
  reviewing by position, 7–26
Position Budget Edit – FTE, defined, 11–28
Position Budget Edit – Headcount, defined, 11–28
Position Budget Edit – Hours, defined, 11–28
Position Budget Edit – Salary, defined, 11–27
Position budgets
  changing, 7–33
  defining automatically, 7–12
  multiple, 7–5
Position Control, and budget management, 1–2
Position control, about, 7–1
position control, defined, 7–1
Position FTE Report, processing options, 7–50
Position Headcount Report, processing options, 7–50
Position ID, defined, 2–10, 5–6, 6–9, 7–10
Position Master Detail, processing options, 7–12
Position Master Detail form, 7–9
Position Status, defined, 7–11
Position Status Date, defined, 7–11
Positions, reviewing budgets by, 7–26
Positions by Business Unit, processing options, 7–27
Posting position budgets to account ledger, 7–20
Preferred Name, defined, 2–37
Primary jobs, pay changes for multiple employees, 8–15
Printing applicant letters, 6–23
Processing options
  Activity by Employee, 7–31
  Activity by Position, 7–30
  Adverse Impact Analysis, 6–47
  Applicant Entry, 6–6
  Applicant Flow Analysis, 6–46
  Build Grade Progression Work Group, 8–31
  Compa-Ratio Batch Calculation, 2–65
  Create FCPCS Workfile, 2–100
  Create Next Fiscal Years Position
    Budgets, 7–38
  Create Review Group, 8–18
  Cross-Year Budget Comparison, 7–46
  Cross-Year Effective Budget Comparison, 7–47
  Delete a Review Group, 8–36
  Download FCPCS Workfile, 2–101
  EEO Staff Utilization, 6–44
  EEO Staff Utilization Report, Build Workfile T068901, 2–113
  Employee History, 2–56
  Employee History Log Report, 3–35
  Employee Master – HR Initial Setup, 2–20
  Employee Master History Inquiry, 3–9
  Employee Multiple Job Entry, 2–27, 8–11
  Employee Profile Report, 2–106
  Employee Salary Analysis, 8–41
  Employee Salary History Analysis Report, 3–36
  Employees by Data Type, 2–107
  Employees by Job Type & Step, 4–20
  Grade Progression Work Group Update, 8–34
  Hired Applicants by EEO Job Category, 6–45
  Initialize Employee History, 11–33
  Job Comparisons by Factor, 4–22
Job Data & Evaluation Points, 4–9
Job Profile Information Report, 4–39
Jobs by Data Type Report, 4–40
Last History Change Workfile Build, 3–37
Organization Structure Inquiry, 10–17
Organization Structure Inquiry – Employee/Supervisor, 10–20
Organization Structure Inquiry – Positions, 10–19
Organization Structure Revisions, 10–13
Pay and Tax Information, 2–29
Pay Grade/Salary Range Information, 11–42
Pay Ranges by Job Report, 4–46
Position FTE Report, 7–50
Position Headcount Report, 7–50
Position Master Detail, 7–12
Positions by Business Unit, 7–27
Profile by Data Type, 2–82
Profile Data Copy/Move, 11–15
Profile Data Entry, 2–74
Profile Data Inquiry, 2–80
Profile Multiskills Search, 2–86
Purge Applicants by Date, 6–35
Purge Employee History, 3–22
Purge Employee Multiple Job File, 2–66
Purge Employee Multiple Job Table, 3–23
Purge Profile Data, 2–87, 6–36
Report – EEO–1 Employee Data, 2–110, 6–41
Report – EEO–4 Analysis, 2–112, 6–42
Requisition Activity, 5–19
Requisition Entry, 5–8
Review and Rank Employees, 8–22
Start HR Subsystem/Monitor, 11–34
Start Position Control, 7–14
Termination/Rehire, 2–93
Update Future Data to Employee Master, 2–47
Update Job Information Into Employee Master, 4–28
Update Position Budgets to Account Balances, 7–19
Update Position Budgets to Account Ledger, 7–20
Update Salary Actuals, 8–28
Veterans’ Employment Report, 2–116
Workforce Analysis, 2–114, 6–50
Profile by Data Type, processing options, 2–82
Profile by Data Type form, 4–18
Profile by Job form, 4–17
Profile data
create data types for jobs, 11–53, 11–58, 11–71
creating for employees, 11–58
cross reference table for, 11–13, 11–59, 11–63
defined, 2–69
defining for different databases, 11–4
defining security for, 11–11
defining security for job profiles, 11–53, 11–58
for applicants, 6–8
for job profiles, 4–10, 11–52
for requisitions, 5–8
linking user defined codes to, 11–10
purging, 6–35
reviewing jobs by, 4–16
setting up word search, 11–14
setup, 11–3
defining types of profile data, 11–4
transferring from one data type to another, 11–15
working with, for employees, 2–69
Profile Data Copy/Move, processing options, 11–15
Profile Data Entry, processing options, 2–74
Profile Data Entry form
code format, 2–72
for requisitions, 5–9
Profile Data Inquiry, processing options, 2–80
Profile Multiskill Search form, 6–12
Profile Multiskills Search, processing options, 2–86
Profiles, using in a multiskill search, 6–12
Program ID, 3–7
defined, 11–8
P00051, 11–57
P00250, 10–16
P0050, 10–7
P0080, 11–12
P060113, 8–12
P060118, 2–24, 2–60, 3–19, 8–10
P060119, 3–10
P060121, 2–29
P060161, 2–90, 2–95
P060190, 2–67
P060193, 2–31
Human Resources

P06020, 2–34
P06042, 2–44
P06045V, 2–48
P08005, 11–52
P0801, 2–5, 4–32, 4–33, 7–22, 8–6
P08011, 11–48
P08012, 4–21
P080200, 4–17
P080210, 4–18
P080250, 6–12
P08041, 11–29
P080420, 2–55
P080451, 2–58, 3–27, 3–29
P08046, 11–30
P080842, 6–32
P08090, 11–5, 11–10
P08091, 5–9
P08094, 11–13
P08101, 7–6
P081011, 7–9
P08102, 5–24, 6–16
P081021, 5–4, 5–12
P08105, 5–16, 5–20, 5–25
P08111, 7–28
P081112, 2–63, 7–35
P081810, 4–19
P082001, 4–25, 11–39
P082002, 4–23
P082003, 4–34, 11–42
P082007, 8–37
P08201, 8–20
P08210, 10–11
P082210, 8–23
P08230, 10–18
P08290, 11–46
P08401, 6–4, 6–9, 6–16, 6–20, 6–24, 6–28
P08601, 9–5
P086200, 9–10

Programs, P081210, 7–27
Prompt – Automatically Add Requisition, defined, 11–26
Prompt – Employee History 03, defined, 11–23
Prompt – Position Control Edit Method, defined, 11–25
Prompt – Track by Effective Date, defined, 11–23
Purge Applicant by Date form, 6–32
Purge Applicants by Date, processing options, 6–35
Purge Date, defined, 6–33
Purge Employee History, processing options, 3–22
Purge Employee Multiple Job File, processing options, 2–66
Purge Employee Multiple Job Table, processing options, 3–23
Purge Profile Data, processing options, 2–87, 6–36
Purging a position budget, 7–41
Purging applicant information, 6–31
Purging Applicant Profile Information, 6–35
Purging application information, by application date, 6–31
Purging history records, 3–21
Purging turnover records, 3–30

R

Rate – Hourly, defined, 8–8
Rate – Salary at Next Raise, defined, 8–13
Rate – Salary, Annual, defined, 8–8
Rate Change in Projections, defined, 11–26
Rehiring an employee, 2–95
Rejecting a candidate, 5–20
Relationship, defined, 2–85
Remark 1 Title, defined, 11–7
Remark 2 Title, defined, 11–7
Reopening a requisition, 5–21
Reorganize option, defined, 6–35
Repeat Data (Y/N), defined, 4–6
Report, Cases by Data Type, 9–17
Report – EEO–1 Employee Data, processing options, 2–110, 6–41
Report – EEO–4 Analysis, processing options, 2–112, 6–42
Reports
- Adverse Impact Analysis, 6–47
- Applicant Profile report, 6–38
- Applicants by Data Type, 6–38
- Application Flow Analysis, 6–45
- Compensable Factors Table, 4–44
- Cross-Year Budget Comparison, 7–46
- Cross-Year Effective Budget Comparison, 7–47
- EEO Staff Utilization, 6–43
- EEO–1 Employment Data, 6–40
- EEO–4 Analysis, 6–42
Employee Activity by Number, 7–58
Employee Salary Analysis, 8–39
Employees Above Pay Grade Minimum, 4–51
for employees, 2–103
Grade/Step and Next Grade/Step, 4–53
Hired Applicants by EEO Job, 6–44
history, 3–33
Job Data and Evaluation Points, 4–41
Job Evaluation, 4–41
Job Profile Information, 4–38
Jobs by Data Type, 4–39
Open Amounts by Position, 7–44
Open Effective Amounts by Position, 7–45
OSHA 200, 9–16
OSHA 200 Log, 9–13
Pay Grade/Salary Ranges, 4–47
Pay Grade/Step Progression, 4–46
Pay Ranges by Job, 4–46
Position Budgets by Business Unit, 7–54
Position Budgets by Job Type and Step, 7–53
Position Effective Budgets, 7–55
Position Full-Time Equivalents (FTEs), 7–48
Position Headcount, 7–50
Requisition Profile, 5–27
Requisition Review, 5–31
Requisitions by Data Type, 5–30
Safety and health, 9–13
turnover, 3–33
Unfilled Requisitions, 5–32
Veteran Employment (VETS-100), 6–50
Workforce Analysis, 6–48
Requisition Activity, processing options, 5–19
Requisition activity, reviewing, 5–25
Requisition Activity form, 5–16, 5–20, 5–25
Requisition details, 5–24
Requisition Entry, processing options, 5–8
Requisition Entry form, 5–4, 5–12
Requisition master information, entering, 5–4
Requisition profile data, 5–8
entering, 5–8
Requisition Review form, 5–24, 6–16
Requisitions about, 5–1
activity, 5–25
approving, 5–11
as part of recruiting, 1–3
attaching a candidate to, 5–16
attaching applicants to, 6–15
details, 5–24
entering, 5–3
reopening, 5–21
reviewing, 5–23
working with, 5–15
Responsible Business Unit, defined, 11–66
Restricted Work Activity Y/N, defined, 9–7
Review and Rank Employees, 8–20
processing options, 8–22
Review Group, defined, 8–21
Review group
deleting a, 8–37
making global pay changes, 8–19
working with, 8–19
Review Group ID, defined, 8–38
Review groups
creating, 8–16
deleting obsolete groups, 8–35
Review Groups Inquiry form, 8–23
Review Work Group Detail form, 8–31, 8–37
Reviewing applicant information, 6–19
Reviewing employee history, 3–7
Reviewing history records, 3–6
Reviewing injury or illness case information, 9–9
Reviewing jobs, 4–15
Reviewing jobs by employees, 4–19
Reviewing jobs by evaluation, 4–21
Reviewing multiple job history, 3–10
Reviewing pay grades by classifications, 4–24
Reviewing pay ranges for jobs, 4–22
Reviewing position budget detail, by position activity, 7–28
Reviewing position budget detail by business unit, 7–25
Reviewing requisition activity, 5–25
Reviewing requisitions, 5–23
Reviewing turnover records, 3–26
Revise Employee Activity form, 2–63, 7–35
Running a multiskill search, 6–11
Human Resources

S

Safety and health administration, 9–1 and OSHA requirements, 9–1
Safety and Health, features, 1–6
Salary, defined, 2–11
Salary Data Locality, defined, 11–44
Salary Default Source, defined, 11–25
Salary Frequency, defined, 2–12
Salutation, defined, 2–37
Save Device, defined, 6–34
Save Instruction, defined, 6–34
Save Library, defined, 6–34
Search Type, defined, 5–17
Search Value, defined, 6–13
Sector Industrial Code, defined, 2–36
Select Data for Tracking form, 11–29
Setting up constants, 11–21
Setting up employee information, 11–55
Setting up employee master change tracking, 11–30
Setting up system-wide constants, 11–22
Setting up the Human Resources system, 11–1
Shift Code, defined, 2–12
Source – Salary Data, defined, 4–26, 11–40
Standard Days per Year, defined, 2–26, 11–44
Standard Hours per Day, defined, 2–26, 11–44
Standard Hours per Year, defined, 2–10, 2–27
Start HR Subsystem/Monitor, processing options, 11–34
Start Position Control, processing options, 7–14
Status, defined, 6–6
Status – Applicant, defined, 5–17
Status – Requisition, defined, 5–5, 5–12
Status Change Reason, defined, 4–7
Step Progression Rate Source, defined, 11–25
Structure Inquiry form, 10–16, 10–18
Structure Revisions form, 10–7, 10–11
Sub Class – Workers Comp, defined, 4–8
Subledger – G/L, defined, 7–16
Subledger Type, defined, 7–16
Suffix, defined, 2–37
Supervisor, defined, 10–12
System Code, defined, 11–7
System Flow, 1–7
System setup, 11–21
for employees, 11–55
for jobs, 11–37
profile data, 11–3
Setting up a cross reference table, 11–13, 11–59, 11–63
System-wide constants, 11–22

T

Tax Area (Residence), defined, 2–13
Tax Area (Work), defined, 2–13
Terminating an employee, 2–89
Termination/Rehire, processing options, 2–93
Termination/Rehire form, 2–90
Tracking changes in employee master information, setting up, 11–30
Transfer of Data on Hire/Termination, 11–13
Turnover Column Group, defined, 11–32
Turnover Data, defined, 2–58, 3–28
Turnover information, correcting, 2–57
Turnover records
  purging, 3–30
  reviewing, 3–26
  working with, 3–25
Type Data, defined, 2–85
Type Data – Employee, defined, 11–14
Type of Data, defined, 11–13

U

Union Code, defined, 2–11, 4–9, 11–40, 11–43
Update Future Data to Employee Master, processing options, 2–47
Update Job Information Into Employee Master, processing options, 4–28
Update Position Budgets to Account Balances, processing options, 7–19
Update Position Budgets to Account Ledger, processing options, 7–20
Update Salary Actuals, processing options, 8–28
Index

Updating employee records, within a work group, 8–34
Updating jobs globally, 4–27
Updating salary actuals, 8–27
Updating work groups, 8–34
Uploading a position budget to general ledger, 7–17
Uploading position budgets to the account balances table, 7–18
Use Assignment Window, defined, 11–24
User Codes 01–05, defined, 7–11
User Defined Codes, defined, 11–7
User defined codes
  adding a value, 11–9
  and system setup, 11–8
User Defined Date 01, defined, 2–33
User ID, defined, 11–12
User-defined codes, defining for employees, 11–56
User-defined codes for employees, 11–56

Y

Yes or No – Move to Applicant Pool, defined, 2–92
Yes or No Entry, defined, 3–8, 6–34

V

Veterans’ Employment Report, processing options, 2–116

W

Wage and Salary Administration, about, 8–1
Wage and salary review groups, 8–35
Wage and Salary, features, 1–6
Work group, defined, 8–29
Work groups, working with, 8–31
Workers Comp Insurance Code, defined, 4–7
Workforce Analysis, processing options, 2–114, 6–50
Working with accident or illness data, 9–3
Working with history records, 3–5
Working with job profile data, 11–52
Working with organizational structures, 10–5
Working with requisitions, 5–15
Working with turnover records, 3–25
Working with work groups, 8–31
World Writer reports, for applicants, 6–39
Exercises